



Montgomery Planning | Functional Planning and Policy Division

# Schools Technical Advisory Team

Meeting #6

February 18, 2020



# Welcome!

# Meeting Agenda

## I. Welcome | *10 minutes*

- a. Overview of Agenda
- b. Introductions
- c. Review Discussion Ground Rules
- d. Upcoming Roundtables

## II. Circle Back | *10 minutes*

- a. Growth Management in Other Jurisdictions

## III. School Policy Areas | *20 minutes*

## IV. SSP Policy Discussion | *70 minutes*

- a. Overview of Existing Policy
- b. Annual School Test
- c. Maintaining a Development Queue

## V. Final Thoughts | *10 minutes*

# Introductions

Please share...

- Your name
- Your organization/employer, if applicable
- What you have found to be most surprising, interesting or concerning about this SSP update.

# STAT Participant Ground Rules

1. Lean in. Lean out.
2. Listen to understand. Suspend your beliefs to hear someone else's experience.
3. Speak for yourself, not a group, and use "I" statements.
4. Disagree with people without being disagreeable.
  - It's okay to disagree. We are not aiming to agree. You do not have to persuade each other.
5. We have a lot to cover every meeting, therefore:
  - Try not to repeat things that others have said, simply indicate your agreement with another person's comments.
  - Stay on topic and be concise while still being a thoughtful, provocative and active participant.
- 6. You must have a microphone to talk.**

# STAT Observer Ground Rules

1. To stay on track with such a large group we ask that you do not participate directly in the STAT conversation, but rather observe and take notes.
2. Preferably, please submit comments or questions on the comment cards.
  - We will respond to you sometime after tonight's meeting.
  - If applicable, we will share your comments with the STAT membership at the next meeting or share our responses to your questions.
3. Otherwise, feel free to catch us after the meeting to share your comments or ask your questions.

# Upcoming Roundtables

- **Community Roundtable**

Thursday, February 20, 7:00 to 9:00 pm

Upcounty Regional Services Center (Germantown)

- **Community Roundtable**

Monday, February 24, 7:00 to 9:00 pm

East County Community Rec Center (Fairland area)



# Circle Back: Growth Management in Other Jurisdictions

# Overview

- Moratorium
  - Generally not a popular tool used to access growth outside of Maryland
- Impact Fees
  - Montgomery and Howard County are both now the highest in the state
  - Incentivizing impact fees with lower/higher rates are becoming more popular
- Housing Turnover
  - Generally, not addressed in growth management policy yet
- Assessing needs ➡ Queue/Pipeline

# Assessing Housing/School Needs

## Frederick County

- publishes a monthly report which includes...
  - the total number of approved residential dwelling units per project
  - the number of units remaining in the traditional pipeline \*as determined by the County
- a school pipeline analysis was completed (by request) to examine the approved residential housing development pipeline as of a certain date and the potential impact that pipeline will have on future school capacities in Frederick County
  - Calculates the total capital funding needed to provide school seats for the students expected to be generated from the approved residential pipeline

# Assessing Housing/School Needs

## Howard County Housing Allocation Chart /School Capacity Chart

- The housing unit allocation chart is a chart indicating the projected number of housing unit allocations available to be granted in the County each year for a ten-year period.
  - Updated weekly reflecting all new plan submission and approvals.
- The school capacity chart is designed to work in conjunction with the housing unit allocation chart in order to provide consistency and predictability in the planning process for schools.
  - The "school test" for APFO
  - Whenever the County Council adopts, amends, or updates the housing unit allocation chart, it shall concurrently adopt the school capacity chart.

# Impact Fees

Jurisdiction	School Impact Fee Range	What is the range based on?
Montgomery County, MD	\$6,791-\$24,227	Per dwelling unit type
Howard County, MD	\$1.35 per square ft (\$675-\$6,750 per unit) <b>\$7.50 per square ft</b> <b>(\$3,750 – \$37,500 per unit)</b>	Per square foot

- Montgomery County will no longer have the highest impact fees by 2023
- Howard County will charge impact fees for senior housing, non-senior grandfathered housing, and all affordable non-senior housing built at lower rates.
- Will increase gradually in 2020, 2021, and 2022 (by more than 500%)
- Subject to change in 2023 to be even higher
- Will be used for school construction renovation and maintenance costs

# Impact Fees: Howard County contd.

Fee item	Effective Jan 6, 2020	Effective Jan 1, 2020	Effective Jan 1, 2022
Regular	\$4.75 per square foot	\$6.25 per square foot	\$7.50 per square foot
Non-Senior Grandfathered Housing	\$1.32 per square foot	\$1.32 per square foot	Grandfathered rate effective through January 6, 2022
Senior Housing (Non-Affordable)	\$1.32 per square foot	\$1.32 per square foot	\$1.32 per square foot
Additional On-site MIHU located outside The Downtown Columbia Development District	\$1.58 per square foot	\$2.08 per square foot	\$2.50 per square foot
Affordable Units within The Downtown Columbia Development District	\$3.04 per square foot	\$3.79 per square foot	\$4.41 per square foot
Affordable Non-Senior Housing Project with State or County funding received after December 31, 2020	\$1.58 per square foot	\$2.08 per square foot	\$2.50 per square foot
Affordable Non-Senior Housing Project with State or County Funding received before December 31, 2020	\$1.32 per square foot	\$1.32 per square foot	\$1.32 per square foot

# P3 Partnership – Prince George's County

- Uses a public-private partnership to build its public schools
  - Benefits: speeds needed construction and decrease backlog
  - 4 to be rebuilt, 2 will be constructed
- Construction costs expected to decrease by removing bureaucratic hurdles
- The private company selected will design/finance the building
  - County and state funding will kick in once students are in the building.
- Used to build the Purple Line
  - May also be used to build toll lanes on the beltway/Interstate 270

# Research Efforts

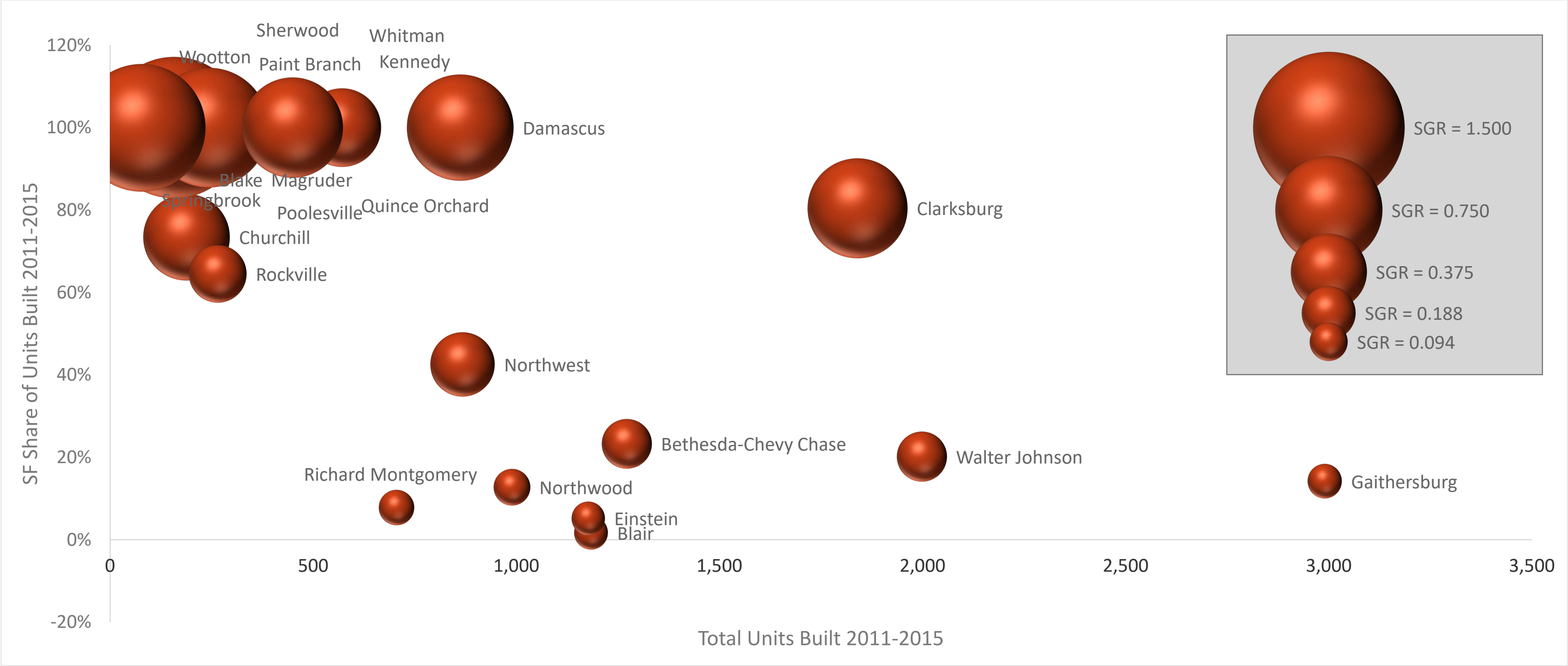
- We are performing a holistic review of growth management to include..
  - A look into academic papers/journals
  - Case studies in other jurisdictions
  - Outreach to APA Schools Interest Group, other planners and scholars
  - Suggestions from the STAT

Any suggestions for models we should be looking at?

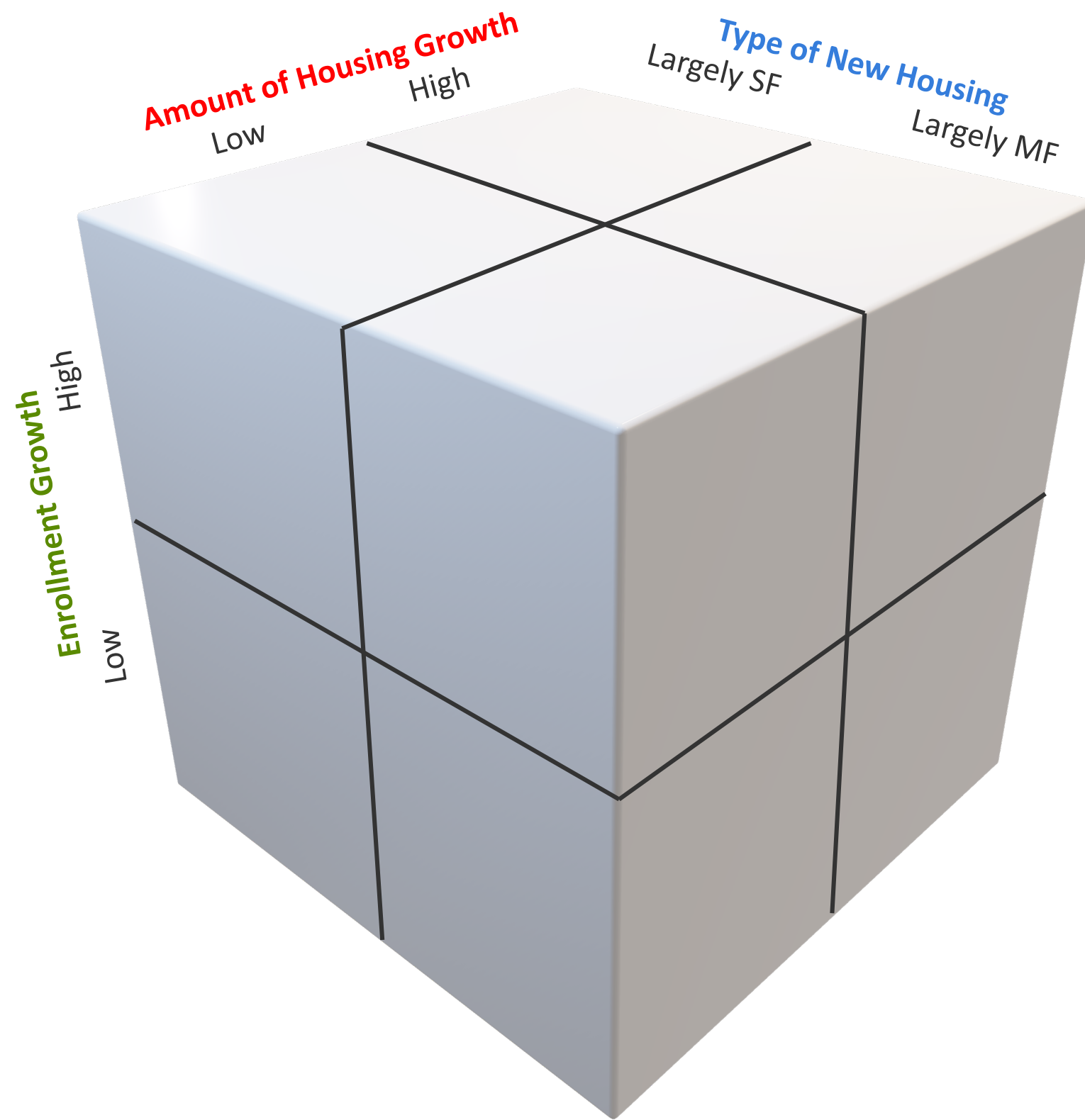
Or specific jurisdictions/case studies?

# School Policy Areas

# 2018 SGRs for Units Built 2011-15



# Potential Approach to Creating School Policy Areas



- **Amount of Housing Growth**
  - **Housing Unit Growth (PRIMARY)**
  - # of Units in the Pipeline
  - Zoning Potential (capacity minus unlikely)
- **Type of New Housing**
  - **% of New Units that are MF (PRIMARY)**
  - % of Pipeline Units that are MF
  - % of Census Tract Zoned for Single Family Detached Zones
  - % of Census Tract Zoned for CR Zones
- **Enrollment Growth**
  - **K-12 Enrollment Growth Rate / Population Growth Rate (PRIMARY)**
  - Length of Time Since Last Sold (SF units)

# Potential Groupings

Enrollment Growth		Amount of Housing Growth	
High		Low	High
Type of New Housing	Largely SF	1 EG → TURNOVER	2 EG → NEW DEVELOPMENT
	Largely MF	3 EG → TURNOVER	4 EG → MIX

Enrollment Growth		Amount of Housing Growth	
Low		Low	High
Type of New Housing	Largely SF	5	6
	Largely MF	7	8

**School Policy Areas:**

RED: #2 and #6

BLUE: #4 and #3?

YELLOW: #1 and #3?

ORANGE: #8 and #7?

GREEN: #5 and #7?

# Overview of Annual School Test and Current Treatment of the Development Queue

# Annual School Test Timeline

October	November	December	January	February
<b>Superintendent Recommendation</b> <i>MCPS releases the Superintendent's recommended Capital Budget and CIP (or CIP Amendments), along with updated <b>enrollment projections</b> for each school. These projections will be used in the next Annual School Test's calculations.</i>	<b>Public Hearings</b> <i>The Board of Education receives written and oral testimony from residents, students and other stakeholders. The Board then holds work sessions to prepare its request.</i>	<b>BOE Request</b> <i>The Board of Education submits its Capital Budget and CIP request to the County Executive and County Council.</i>	<b>CE Proposal</b> <i>The County Executive combines all County agency budget and CIP requests and submits his/her proposed Capital Budget and CIP to the County Council.</i>	<b>Committee Work Sessions</b> <i>The County Council begins committee work sessions to review affordability issues, request non-recommended reductions, and make recommendations to the full Council.</i>

# Annual School Test Timeline

May	June		July	
<b>Budget Reconciliation and Adoption</b>  <i>The County Council adopts a budget and 6-year CIP, which may include funding for “placeholder” solutions. This finalizes the planned capacity component for the Annual School Test.</i>	<b>MCPS Publishes Master Plan</b>  <i>The Master Plan reflects the final capital budget and CIP adopted by the County Council. It includes Project Description Forms for each project.</i>	<b>Annual School Test Approved</b>  <i>The Planning Board approves the Annual School Test results for the following fiscal year, identifying which areas of the county (if any) will be in a residential development moratorium.</i>	<b>School Adequacy Reviews for new Fiscal Year</b>  <i>New school test results are used to evaluate school adequacy for development applications during preliminary plan review.</i>	

# School Planning Issue Descriptions

## DOWNCOUNTY CONSORTIUM

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### **Montgomery Blair High School**

**Capital Project:** To address the urgent space needs in the Downcounty Consortium high schools, an FY 2019 appropriation was approved to begin planning to provide the instructional support spaces needed for 2,700 students at Northwood High School. With respect to Northwood High School, an internal analysis has been completed that evaluated a) the possibility of doing a phased construction of Northwood High School, with students on site and b) an approach where a newly constructed and reopened Woodward High School be used as a holding school, starting in September 2023, for Northwood High School for two years. The evaluation compared the costs for each option, impact to students, impact on the building design, and the timeline of the project. This evaluation will be presented to the Board of Education during the CIP process in November 2018, for consideration and action on the approach for Northwood High School.

### **Sargent Shriver Elementary School**

**Planning Issues:** Projections indicate that enrollment will exceed capacity by 92 seats or more by the end of the six-year planning period. Given that a new forecast methodology has been implemented this year, enrollment will be monitored to determine if a capacity solution is needed in a future CIP.

### **Woodlin Elementary School**

**Capital Project:** As a result of the capacity study described earlier, the Board of Education approved an addition project at Woodlin Elementary School. Furthermore, building systems need to be addressed in the facility. Therefore, as part of the approved addition project, facility upgrades will be designed to address the building systems. An FY 2019 appropriation was approved to begin the architectural design and planning for this project with a scheduled completion date of September 2022. In order for this project to be completed on this schedule, county and state funding must be provided at the levels recommended in this CIP.

# CIP Project Description Form

- Identifies the timing and phasing of the project and its funding
- Identifies the source of the funds
- Describes the project, including the number of classrooms/seats to be added

Col. E. Brooke Lee MS Addition/Facility Upgrade (P651910)												
Category	Montgomery County Public Schools				Date Last Modified				05/17/18			
SubCategory	Individual Schools				Administering Agency				Public Schools			
Planning Area	Kemp Mill-Four Corners and Vicinity				Status				Preliminary Design Stage			

	Total	Thru FY17	Est FY18	Total 6 Years	FY 19	FY 20	FY 21	FY 22	FY 23	FY 24	Beyond 6 Years	
EXPENDITURE SCHEDULE (\$000s)												
Planning, Design and Supervision	3,921	-	-	3,921	1,568	1,177	764	392	-	-	-	
Site Improvements and Utilities	8,927	-	-	8,927	-	6,005	2,232	-	-	-	-	
Construction	43,296	-	-	43,296	-	8,653	20,286	14,327	-	-	-	
Other	1,750	-	-	1,750	-	-	525	1,225	-	-	-	
TOTAL EXPENDITURES	57,894	-	-	57,894	1,568	16,525	23,827	15,944	-	-	-	

FUNDING SCHEDULE (\$000s)												
G.O. Bonds	57,894	-	-	57,894	1,568	16,525	23,827	15,944	-	-	-	
TOTAL FUNDING SOURCES	57,894	-	-	57,894	1,568	16,525	23,827	15,944	-	-	-	

OPERATING BUDGET IMPACT (\$000s)												
Maintenance				306	-	-	-	102	102	102		
Energy				114	-	-	-	38	38	38		
NET IMPACT				420	-	-	-	140	140	140		

APPROPRIATION AND EXPENDITURE DATA (\$000s)												
Appropriation FY 19 Request	3,921											
Appropriation FY 20 Request	52,198											
Cumulative Appropriation	-											
Expenditure / Encumbrances	-											
Unencumbered Balance	-											

**PROJECT DESCRIPTION**

Projections indicate that enrollment at Col. E. Brooke Lee Middle School will exceed capacity by 246 seats by the end of the six-year planning period. The approved CIP included an addition for this school, as well as future expenditures for a revitalization/expansion project. The addition project also will require reconfiguration of existing spaces and building systems upgrades to accommodate the larger numbers of students. Therefore, the Board of Education's requested FY 2019-2024 CIP included that the scope of the addition project be expanded to include these infrastructure and system upgrades while construction is on-site to make better use of fiscal resources. An FY 2019 appropriation was approved to begin planning this addition and facility upgrades project. This project is scheduled to be completed September 2021.

**COORDINATION**

Mandatory Referral - M-NCPPC, Department of Environmental Protection, Building Permits, Code Review, Fire Marshall, Department of Transportation, Inspections, Sediment Control, Stormwater Management, WSSC Permits

Project Description Forms • 6-25

# Projected Enrollment & Space Availability Tables

			Prelimin.	Projections							
Schools			19-20	20-21	21-22	22-23	23-24	24-25	25-26	2029	2034
Montgomery Blair HS		Program Capacity	2889	2889	2889	2889	2889	2889	2889	2889	2889
		<b>Enrollment</b>	<b>3227</b>	<b>3315</b>	<b>3386</b>	<b>3466</b>	<b>3554</b>	<b>3543</b>	<b>3562</b>	<b>3764</b>	<b>4074</b>
		Available Space	(338)	(426)	(497)	(577)	(665)	(654)	(673)	(875)	(1185)
		Comments									
Parkland MS		Program Capacity	948	948	948	948	1203	1203	1203	1203	1203
		<b>Enrollment</b>	<b>1142</b>	<b>1157</b>	<b>1118</b>	<b>1102</b>	<b>1106</b>	<b>1151</b>	<b>1142</b>	<b>1142</b>	<b>1129</b>
		Available Space	(194)	(209)	(170)	(154)	97	52	61	61	74
		Comments		Planning for Addition			Addition Complete				

# Utilization Data Adjustments in School Test

Adjustments to projections are made for purposes of the school test when:

- Schools have **split articulations**, we calculate cluster totals using the split shares
- Planned school capacity projects will require **future boundary changes**, we estimate the impacts of that boundary change to adjust the projected enrollments at the applicable schools
- **Placeholder projects** are funded in the Capital Budget, we make “on paper” adjustments to capacity to the school’s capacity

# Example of Adjustments – CIP Project

- If reassignments are required, the Board of Education will not select a boundary option until the year before the CIP project is complete.
- Until that time, the MCPS projections will not reflect the enrollment relief provided by a capacity project at another school.
- For purposes of the annual school test, if the CIP project's description does not specifically indicate the number of students to be relieved, we assume that the selected boundary option will balance utilization across the applicable schools.
- As applicable, we identify the school service areas as “open conditionally.”

# Example of Adjustments – CIP Project

School	2025-26 Enrollment	2025-26 Capacity	Modified Enrollment	Modified Capacity
Rachel Carson ES	879	692	568	692
	127.0% utilization, 187 seat deficit		82.1% utilization, 124 seat surplus	
DuFief ES	308	753	619	753
	40.9% utilization, 445 seat surplus		82.2% utilization, 134 seat surplus	

Rachel Carson ES service area is open conditionally due to an approved CIP project that will reassign students to DuFief ES in September 2022.

The actual boundary change won't be decided by the Board of Education until fall 2021.

We estimate that the impact will be to relieve Rachel Carson of 311 students, modifying the projected enrollment from 879 to 568 students.

# Example of Adjustments – Placeholder

- Historically, the Council will consider including “placeholder” funding in the CIP if all of the following conditions exist:
  - A school or cluster is projected to enter moratorium (or very close)
  - MCPS is actively studying potential solutions to the enrollment burden at the school or cluster
  - The Council is confident the ultimate solution will be implemented within the timeframe of the annual school test
  - There is development pressure in the applicable school or cluster service area
- Placeholders appear in the CIP as classroom additions that are just enough to bring the school service area out of moratorium.
- We identify the school service areas as “open conditionally.”

Somerset ES Solution  
(P651914)

Category	Montgomery County Public Schools	Date Last Modified	12/03/18
SubCategory	Individual Schools	Administering Agency	Public Schools
Planning Area	Bethesda-Chevy Chase and Vicinity	Status	Planning Stage

Total	Thru FY18	Rem FY18	Total 6 Years	FY 19	FY 20	FY 21	FY 22	FY 23	FY 24	Beyond 6 Years
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EXPENDITURE SCHEDULE (\$000s)

Planning, Design and Supervision	440	-	-	440	-	-	176	132	88	44	-
Site Improvements and Utilities	382	-	-	382	-	-	-	277	105	-	-
Construction	1,619	-	-	1,619	-	-	-	375	987	257	-
Other	250	-	-	250	-	-	-	-	105	145	-
TOTAL EXPENDITURES	2,691	-	-	2,691	-	-	176	784	1,285	446	-

FUNDING SCHEDULE (\$000s)

G.O. Bonds	2,691	-	-	2,691	-	-	176	784	1,285	446	-
TOTAL FUNDING SOURCES	2,691	-	-	2,691	-	-	176	784	1,285	446	-

APPROPRIATION AND EXPENDITURE DATA (\$000s)

Appropriation FY 20 Request	-	Year First Appropriation	
Cumulative Appropriation	-	Last FY's Cost Estimate	2,691
Expenditure / Encumbrances	-		
Unencumbered Balance	-		

PROJECT DESCRIPTION

Due to increasing enrollment growth, this project includes fund to design and construct four permanent elementary school classrooms serving the Somerset Elementary School service area in the Bethesda-Chevy Chase High School Cluster. These additional classrooms would meet capacity requirements under the Subdivision Staging Policy, avoiding a residential moratorium in the Somerset ES service area. The County Council anticipates that ultimately the Board of Education will request a specific project that will add at least these classrooms by the start of the 2023-2024 school year at the latest, and that these funds would be used towards that purpose.

CAPACITY

Teaching Stations Added: 4

# Example of Adjustments – Placeholder

School	2024-25 Enrollment	2024-25 Capacity	Modified Enrollment	Modified Capacity
Somerset ES	656	515	656	607
	127.4% utilization, 141 seat deficit		108.1% utilization, 49 seat deficit	

The Council has included a 4-classroom placeholder project in the adopted CIP for Somerset ES, which has kept the school’s service area open conditionally.

23 seats per classroom x 4 classrooms = 92 additional seats

Somerset ES projected capacity is modified to reflect the additional 92 seats, increasing from 515 to 607 seats.

# FY2020 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
<b>CLUSTER TEST</b>  Inadequate if cluster is over 120% utilization, by level  Test year 2024-25	<u><b>MORATORIUM</b></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><b>OPEN CONDITIONALLY - Placeholder</b></u> Placeholder projects prevent these cluster service areas from entering moratoria. <i>See notes.</i>			
	<u><b>OPEN CONDITIONALLY - CIP</b></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%) <sup>1</sup> Richard Montgomery (122.7%) <sup>2</sup> Northwest (130.4%) <sup>1</sup> Northwood (138.7%) <sup>3</sup> Quince Orchard (125.8%) <sup>2</sup>
<b>INDIVIDUAL SCHOOL TEST</b>  Inadequate if school is over 120% utilization and at or above seat deficit thresholds  Elementary: 110 seats Middle: 180 seats  Test year 2024-25	<u><b>MORATORIUM</b></u> Moratorium required in school service areas that are inadequate.	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%)		
	<u><b>OPEN CONDITIONALLY - Placeholder</b></u> Placeholder projects prevent these school service areas from entering moratoria. <i>See notes.</i>	Bethesda ES (-171, 130.5%) <sup>a</sup> Somerset ES (-141, 127.4%) <sup>b</sup>	Francis Scott Key MS (-209, 121.8%) <sup>c</sup>	
	<u><b>OPEN CONDITIONALLY - CIP</b></u> Planned projects in other schools and/or future reassignments prevent these school service areas from entering moratoria. <i>See notes.</i>	Rachel Carson ES (-355, 151.4%) <sup>4</sup> Clarksburg ES (-321, 203.2%) <sup>5</sup> Forest Knolls ES (-246, 146.5%) <sup>6</sup> JoAnn Leleck ES (-282, 139.4%) <sup>7</sup> Strawberry Knoll ES (-247, 154.4%) <sup>8</sup> Summit Hall ES (-276, 163.4%) <sup>8</sup>		

# Preliminary FY2021 School Test Results Summary

Reflects the MCPS Superintendent's Recommended FY 2021 Capital Budget and Recommended FY 2021-2026 Capital Improvements Program (CIP)  
Conducted November 1, 2019

**IMPORTANT:** These are preliminary results of the FY2021 Annual School Test that would take effect on July 1, 2020. These results are based on the MCPS Superintendent's recommended FY2021 Capital Budget and recommended FY21-26 CIP. The preliminary results will be updated throughout the budget cycle as future decisions are made by the Board of Education, County Executive and County Council. The official and final test will be conducted in June 2020 after the County Council has adopted the FY2021 budget and FY21-26 CIP.

School Test Description and Details	School Test Outcome	Elementary School Inadequate	Middle School Inadequate	High School Inadequate
<b>CLUSTER TEST</b>  Inadequate if cluster is over 120% utilization, by level  Test year 2025-26	<u><b>MORATORIUM</b></u> Moratorium required in cluster service areas that are inadequate.			
	<u><b>OPEN CONDITIONALLY - Placeholder</b></u> Placeholder projects prevent these cluster service areas from entering moratoria. <i>See notes.</i>			
	<u><b>OPEN CONDITIONALLY - CIP</b></u> Planned projects in other clusters and/or future reassignments prevent these cluster service areas from entering moratoria. <i>See notes.</i>			Montgomery Blair <sup>1</sup> Albert Einstein <sup>1</sup> Walter Johnson <sup>2</sup> Richard Montgomery <sup>3</sup> Quince Orchard <sup>3</sup>
<b>INDIVIDUAL SCHOOL TEST</b>  Inadequate if school is over 120% utilization and at or above seat deficit thresholds  Elementary: 110 seats Middle: 180 seats  Test year 2025-26	<u><b>MORATORIUM</b></u> Moratorium required in school service areas that are inadequate.	Highland View ES (Northwood) Mill Creek Towne ES (Magruder) Judith A. Resnik ES (Magruder)	Argyle MS (Kennedy)	
	<u><b>OPEN CONDITIONALLY - Placeholder</b></u> Placeholder projects prevent these school service areas from entering moratoria. <i>See notes.</i>			
	<u><b>OPEN CONDITIONALLY - CIP</b></u> Planned projects in other schools and/or future reassignments prevent these school service areas from entering moratoria. <i>See notes.</i>	Rachel Carson ES <sup>4</sup> (Quince Orchard) Clarksburg ES <sup>5</sup> (Clarksburg/Seneca Valley) JoAnn Leleck ES <sup>6</sup> (Springbrook) Strawberry Knoll ES <sup>7</sup> (Gaithersburg) Summit Hall ES <sup>7</sup> (Gaithersburg)		

# Estimating Enrollment Impacts for a Development Application

- Project Location
  - Cluster & School-level Projected Utilization
  - Relevant Capacity Projects Affecting Projected Utilization
  - Placeholder Projects Affecting Projected Utilization
- Project Impact
  - Number of Expected Students = SGR x **NET** Dwelling Units by Housing Type
- Expected Planning Board Date

# How Many Students Live There?!

Student Generation Rates (SGRs) are an average of the number of students per type of dwelling unit.

## 2018 MCPS Student Generation Rates by Region and Housing Type

COUNTYWIDE STUDENT GENERATION RATES		ES	MS	HS	K-12
Countywide	Single Family Detached	0.199	0.110	0.154	0.462
	Single Family Attached	0.227	0.113	0.150	0.490
	Multi-Family Low to Med Rise	0.197	0.086	0.109	0.393
	Multi-Family High Rise	0.055	0.023	0.031	0.110

REGIONAL STUDENT GENERATION RATES		ES	MS	HS	K-12
<b>East</b>  Blair, Einstein, Kennedy, Northwood, Wheaton, Blake, Paint Branch and Springbrook clusters	Single Family Detached	0.203	0.103	0.144	0.450
	Single Family Attached	0.219	0.115	0.160	0.494
	Multi-Family Low to Med Rise	0.253	0.112	0.148	0.512
	Multi-Family High Rise	0.088	0.036	0.047	0.171
<b>Southwest</b>  Bethesda-Chevy Chase, Churchill, Walter Johnson, Richard Montgomery, Rockville, Whitman, and Wootton clusters	Single Family Detached	0.186	0.109	0.151	0.446
	Single Family Attached	0.167	0.085	0.111	0.363
	Multi-Family Low to Med Rise	0.150	0.068	0.085	0.303
	Multi-Family High Rise	0.041	0.018	0.025	0.084
<b>Upcounty</b>  Clarksburg, Damascus, Gaithersburg, Magruder, Northwest, Poolesville, Quince Orchard, Seneca Valley, Sherwood, and Watkins Mill clusters	Single Family Detached	0.210	0.120	0.169	0.499
	Single Family Attached	0.248	0.121	0.157	0.526
	Multi-Family Low to Med Rise	0.183	0.077	0.093	0.352
	Multi-Family High Rise	0.020	0.008	0.010	0.038

Rates are calculated using Fall 2018 enrollment data from Montgomery County Public Schools. Of the nearly 163,000 students enrolled in MCPS schools in Fall 2018, Planning Staff were able to match 99.4% of the students to a housing type.

# Test Result Example

Subdivision with a net of 20 townhouse units and 150 multifamily (high rise) units in the Gaithersburg Cluster:

	Net Number of Units	ES Generation Rates	ES Students Generated	MS Generation Rates	MS Students Generated	HS Generation Rates	HS Students Generated
Single Family Attached	20	0.248	4.960	0.121	2.420	0.157	3.140
Multi-Family High Rise	150	0.020	3.000	0.008	1.200	0.010	1.500
<b>TOTALS</b>	<b>170</b>		<b>7</b>		<b>3</b>		<b>4</b>

# Annual School Test Detail

## Subdivision Staging Policy FY 2020 School Test: Cluster Utilization in 2024-2025

Reflects Approved FY 2020 Capital Budget  
and Amendments to the FY 2019-2024 Capital Improvements Program (CIP)

CLUSTER Test: Percent Utilization > 120% = Moratorium

Cluster Area	Level	Projected Enrollment September 2024	Projected MCPS Program Capacity September 2024	Projected Cluster Utilization in September 2024	School Test Results Cluster Area Cluster Capacity is: Status is:	Moratorium Threshold*
Bethesda-Chevy Chase <sup>a</sup>	ES	3,714	4,020	92.4%	Adequate	1,111
	MS	1,917	2,024	94.7%	Adequate	511
	HS	2,410	2,457	98.1%	Adequate	538
Montgomery Blair <sup>1</sup>	ES	4,920	4,927	99.9%	Adequate	N/A
	MS	2,687	2,772	96.9%	Adequate	
	HS	3,619	2,912	124.3%	Inadequate	
James Hubert Blake <sup>2,b</sup>	ES	3,448	2,763	124.8%	Inadequate	N/A
	MS	1,624	1,588	102.3%	Adequate	
	HS	1,763	1,743	101.1%	Adequate	
Winston Churchill	ES	2,662	2,859	93.1%	Adequate	769
	MS	1,588	1,785	89.0%	Adequate	553
	HS	2,181	1,986	109.8%	Adequate	202
Clarksburg <sup>3,4</sup>	ES	4,796	5,107	93.9%	Adequate	1,333
	MS	2,224	2,185	101.8%	Adequate	397
	HS	2,848	2,034	140.0%	Inadequate	119
Damascus <sup>3</sup>	ES	2,209	2,313	95.5%	Adequate	567
	MS	1,222	1,040	117.5%	Adequate	25
	HS	1,371	1,556	88.1%	Adequate	496
Albert Einstein	ES	2,941	3,079	95.5%	Adequate	N/A
	MS	1,345	1,481	90.8%	Adequate	
	HS	2,119	1,629	130.1%	Inadequate	
Gaithersburg	ES	4,694	4,668	100.6%	Adequate	908
	MS	1,882	1,958	96.1%	Adequate	467
	HS	2,764	2,429	113.8%	Adequate	150
Walter Johnson	ES	4,660	4,542	102.6%	Adequate	N/A
	MS	2,398	2,433	98.6%	Adequate	
	HS	3,001	2,321	129.3%	Inadequate	
John F. Kennedy	ES	3,254	3,164	102.8%	Adequate	543
	MS	1,875	1,778	105.5%	Adequate	258
	HS	2,062	2,221	92.8%	Adequate	603
Col. Zadok Magruder	ES	2,739	2,667	102.7%	Adequate	462
	MS	1,301	1,619	80.4%	Adequate	641
	HS	1,725	1,941	88.9%	Adequate	604
Richard Montgomery <sup>5</sup>	ES	2,853	3,008	94.8%	Adequate	757
	MS	1,467	1,432	102.4%	Adequate	251
	HS	2,722	2,218	122.7%	Inadequate	59
Northwest <sup>4</sup>	ES	4,191	3,851	108.8%	Adequate	431
	MS	2,363	2,300	102.7%	Adequate	396
	HS	2,981	2,286	130.4%	Inadequate	135
Northwood <sup>1,6</sup>	ES	3,142	3,020	104.0%	Adequate	483
	MS	1,634	1,720	95.0%	Adequate	429
	HS	2,092	1,508	138.7%	Inadequate	1,147
Paint Branch	ES	2,752	2,455	112.1%	Adequate	195
	MS	1,390	1,297	107.2%	Adequate	166
	HS	2,142	2,020	106.0%	Adequate	281

## Subdivision Staging Policy FY 2020 School Test: School Utilization in 2024-2025

Reflects Approved FY 2020 Capital Budget

INDIVIDUAL Elementary School Test: Seat Deficit ≥ 110 seats and Percent Utilization > 120% = Moratorium

Elementary School Area	Projected Enrollment September 2024	Projected MCPS Program Capacity September 2024	Projected School Seat Deficit/Surplus in September 2024	Projected School Utilization in September 2024	School Capacity is:	School Test Results Elementary School Area Status is:	Moratorium Threshold*
Arcola	691	651	-40	106.1%	Adequate	Open	91
Ashburton	865	770	-95	112.3%	Adequate	Open	60
Bannockburn	475	366	-109	129.8%	Adequate	Open	1
Lucy V. Barnsley	729	652	-77	111.8%	Adequate	Open	54
Beall	589	639	+50	92.2%	Adequate	Open	178
Bel Pre <sup>1</sup>	1,041	1,079	+38	96.5%	Adequate	Open	254
Bells Mill	627	626	-1	100.2%	Adequate	Open	125
Belmont	331	424	+93	78.1%	Adequate	Open	203
Bethesda <sup>a</sup>	731	560	-171	130.5%	Inadequate	Open Conditionally	107
Beverly Farms	594	689	+95	86.2%	Adequate	Open	233
Bradley Hills	661	664	+3	99.5%	Adequate	Open	136
Brooke Grove	443	517	+74	85.7%	Adequate	Open	184
Brookhaven	477	475	-2	100.4%	Adequate	Open	108
Brown Station	570	761	+191	74.9%	Adequate	Open	344
Burning Tree	505	378	-127	133.6%	Inadequate	Moratorium	N/A
Burnt Mills	669	392	-277	170.7%	Inadequate	Moratorium	N/A
Burtonsville	571	513	-58	111.3%	Adequate	Open	52
Candlewood	402	515	+113	78.1%	Adequate	Open	223
Cannon Road	437	481	+44	90.9%	Adequate	Open	154
Carderock Springs	413	407	-6	101.5%	Adequate	Open	104
Rachel Carson <sup>1</sup>	1,045	690	-355	151.4%	Inadequate	Open Conditionally	173
Cashell	424	340	-84	124.7%	Adequate	Open	26
Cedar Grove <sup>2</sup>	394	418	+24	94.3%	Adequate	Open	187
Chevy Chase <sup>3</sup>	1,197	1,459	+262	82.0%	Adequate	Open	554
Clarksburg <sup>1</sup>	632	311	-321	203.2%	Inadequate	Open Conditionally	167
Clearspring	696	642	-54	108.4%	Adequate	Open	75
Clopper Mill	618	470	-148	131.5%	Inadequate	Moratorium	N/A
Cloverly	604	461	-143	131.0%	Inadequate	Moratorium	N/A
Gold Spring	306	458	+152	66.8%	Adequate	Open	262
College Gardens	673	678	+5	99.3%	Adequate	Open	141
Cresthaven <sup>3,6</sup>	1,080	1,480	+400	73.0%	Adequate	Open	377
Capt. James E. Dally	611	528	-83	115.7%	Adequate	Open	27
Damascus	374	351	-23	106.6%	Adequate	Open	87
Darnestown	306	419	+113	73.0%	Adequate	Open	223
Diamond	782	679	-103	115.2%	Adequate	Open	33
Dr. Charles R. Drew	480	501	+21	95.8%	Adequate	Open	131
DuFief <sup>6</sup>	314	740	+426	42.4%	Adequate	Open	186
East Silver Spring	527	560	+33	94.1%	Adequate	Open	146
Fairland	668	653	-15	102.3%	Adequate	Open	116
Fallsmead	542	551	+9	98.4%	Adequate	Open	120
Farmland	898	715	-183	125.6%	Inadequate	Moratorium	N/A
Fields Road	489	457	-32	107.0%	Adequate	Open	78
Flower Hill	477	470	-7	101.5%	Adequate	Open	103
Flower Valley	488	416	-72	117.3%	Adequate	Open	38
Forest Knolls <sup>4</sup>	775	529	-246	146.5%	Inadequate	Open Conditionally	141
Fox Chapel	606	683	+77	88.7%	Adequate	Open	214
Gaithersburg <sup>5</sup>	931	788	-143	118.1%	Adequate	Open	142
Galway	780	764	-16	102.1%	Adequate	Open	137
Garrett Park	842	776	-66	108.5%	Adequate	Open	90
Georgian Forest	684	649	-35	105.4%	Adequate	Open	95
Germantown	339	309	-30	109.7%	Adequate	Open	80
William B. Gibbs Jr.	671	714	+43	94.0%	Adequate	Open	186
Glen Haven	494	561	+67	88.1%	Adequate	Open	180
Glenallan	838	762	-76	110.0%	Adequate	Open	77
Goshen	637	594	-43	107.2%	Adequate	Open	76
Great Seneca Creek	573	561	-12	102.1%	Adequate	Open	101

# Test Result Example

## Cluster Level Test:

School Level	Projected Gaithersburg Cluster Totals, September 2024			Moratorium Threshold	Estimated Application Impact
	Enrollment	Program Capacity	% Utilization		
Elementary	4,694	4,668	100.6%	908	7
Middle	1,882	1,958	96.1%	467	3
High	2,764	2,429	113.8%	150	4

## School Level Test:

School	Enrollment	Projected School Totals, September 2024			Moratorium Threshold	Estimated Application Impact
		Program Capacity	% Utilization	Surplus/ Deficit		
Gaithersburg ES	804	788	102.0%	-16	142	7
Gaithersburg MS	942	1,009	93.4%	+67	269	3

Each project that submits a preliminary plan application in this cluster/school service area is tested against these numbers

# Text of the SSP re: the Development Queue

The Planning Board must allocate available staging ceiling capacity in a high school cluster, and elementary or middle school serviced area, based on the queue date of an application for preliminary plan of subdivision approval.

## **S7.1 Assignment of queue date**

The queue date of a preliminary plan of subdivision is the date a complete application is filed with the Planning Board.

## **S7.2 Calculation of available staging ceiling capacity**

The Planning Board must determine whether adequate staging ceiling capacity is available for a project by subtracting the capacity required by projects with earlier queue dates from the remaining capacity on Tables 3 and 4 as updated periodically. Based on this calculation, the Planning Board may:

- approve a project for which there is sufficient capacity;
- approve part of a project for which there is sufficient capacity, leaving the remainder of the project in the queue until additional capacity becomes available;
- deny an application for a project for which there is insufficient capacity; or
- defer approval of a project and leave the project in the queue until sufficient capacity becomes available for all or part of the project. If insufficient capacity is available, the Board must not schedule a hearing on the application unless the applicant requests one.

If sufficient capacity is available for a project based on the queue date, the Planning Board must not deny an application based on pipeline (but not staging ceiling) changes while the queue date is in effect.

# Current Process: No Running Count

- Each preliminary plan application is tested against the moratorium threshold (staging ceiling, remaining capacity) in place on July 1
- Approved projects do not remove capacity available for future projects
- Why?
  - Confusion over current text of the SSP
  - Timing
    - October 2019 – projections
    - November 2019 – approval
    - July 2020 – new test effective using October 2019 projections
  - Test is conducted annually, so new development will be caught when they are accounted for in MCPS projections

# Final Thoughts

# What's Next

- Upcoming Planning Board Briefings
  - Transportation – February 27
  - Schools – March 5
  - Growth Trends – March 26
- SSP Working Draft – by June 15
- SSP Planning Board Draft – by August 1
- SSP Adoption – by November 15