Today’s Work Session

3.1 Policy name change
4.1 Creation of School Impact Areas
4.2 Annual School Test – guidelines
4.3 Annual School Test – individual school level
4.4 Annual School Test – adequacy standards
4.5 Annual School Test – length of test results
4.6 Utilization Report – countywide reporting
4.7 Utilization Report – individual school reporting
4.8 Moratorium applicability
4.9 Moratorium exceptions – no student impacts
4.10 Moratorium exceptions – affordable housing and condemned structures
CHAPTER 3. POLICY RECOMMENDATION

County Growth Policy
3.1 Policy name change

CHAPTER 4. SCHOOLS ELEMENT RECOMMENDATIONS

School Impact Areas
4.1 Creation of School Impact Areas

Annual School Test and Utilization Report
4.2 Annual School Test – guidelines
4.3 Annual School Test – individual school level
4.4 Annual School Test – adequacy standards
4.5 Annual School Test – length of test results
4.6 Utilization Report – countywide reporting
4.7 Utilization Report – individual school reporting

Residential Development Moratorium
4.8 Moratorium applicability
4.9 Moratorium exceptions – no student impacts
4.10 Moratorium exceptions – affordable housing and condemned structures

Student Generation Rate Calculation
4.11 Calculation of student generation rates

Development Application Review
4.12 Planning Board review of school adequacy
4.13 APF extension requests – retesting for school adequacy
4.14 APF extension requests – set validity period limits
4.15 MCPS representation on the Development Review Committee

Utilization Premium Payments
4.16 Establishing and requiring Utilization Premium Payments

CHAPTER 6. TAX RECOMMENDATIONS

School Impact Taxes
6.1 Calculating multifamily school impact taxes
6.2 School impact tax calculation factors
6.3 School impact tax credits
6.4 School impact tax surcharge on large units

Impact Tax Exemptions on Residential Uses
6.5 Enterprise Zone impact tax exemption
6.6 25% affordable impact tax exemption
6.7 Applying impact taxes on a net impact basis

Recordation Tax
6.8 Modifications to the Recordation Tax
Chapter 3. Policy Recommendation

County Growth Policy
Change the name of the Subdivision Staging Policy to the County Growth Policy.

- With a changing growth context more focused on infill and redevelopment, and a recognized need to grow the economy and provide more attainable housing, this policy must be more than a tool for ensuring infrastructure keeps pace with development.

- It must be a growth management tool that helps ensure growth comes in the form, amount and locations we need and desire.
County Growth Policy

- General support for changing the name as it makes it clearer and more accessible to stakeholders.

- Incorrectly biases the conversation towards growth. Name should reflect the balance between desire for growth and need of adequate public facilities.

- MCCPTA supported the change but expressed concern that the policy should not veer too far into housing and growth priorities that are addressed elsewhere in county policies and zoning. It should remain focused on making sure infrastructure can support our growing population.
Chapter 4. Schools Element Recommendations

School Impact Areas
School Impact Areas

Classify county neighborhoods into School Impact Areas based on their recent and anticipated growth contexts. Update the classifications with each quadrennial update to the County Growth Policy.

Classifications are based on the:

- Amount of new housing
- Type of new housing (single-family vs. multifamily)
- Amount of enrollment growth
School Impact Areas

Infill Impact Areas
- Areas with high housing growth that is predominantly multifamily, which generates few students on a per unit basis

Turnover Impact Areas
- Areas with low housing growth where any enrollment growth is largely due to turnover of existing single-family units

Greenfield Impact Areas
- Areas with high enrollment growth due largely to high housing growth that is predominantly single-family
School Impact Areas

Identified 35 planning areas corresponding to aggregations of census tracts

- Started with Planning Areas currently used for certain housing policies and the Housing Needs Assessment
- Modified the Planning Areas to pull out Downtown Bethesda, Downtown Silver Spring, Wheaton CBD, Friendship Heights and White Flint, and other census tracts exhibiting different growth contexts

The planning areas were grouped into three School Impact Areas, which have implications on how the schools element of the County Growth Policy and related funding mechanisms are applied.
School Impact Areas

2015 Students Residing in Units Built 2011-15, by Cluster

Total Units Built 2011-2015
New Development vs. Turnover

• A review of new dwelling units built (excluding replacement homes) between 2011 and 2015 revealed:

<table>
<thead>
<tr>
<th>Unit Type</th>
<th>Units Built</th>
<th>Share of 2010-15 Enrollment Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Family Detached</td>
<td>2,606 (16.1%)</td>
<td>10.9%</td>
</tr>
<tr>
<td>Single Family Attached</td>
<td>3,403 (21.0%)</td>
<td>8.2%</td>
</tr>
<tr>
<td>Multifamily Low-rise</td>
<td>3,498 (21.6%)</td>
<td>2.6%</td>
</tr>
<tr>
<td>Multifamily High-rise</td>
<td>6,660 (41.2%)</td>
<td>1.7%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>16,167</strong></td>
<td><strong>23.3%</strong></td>
</tr>
</tbody>
</table>
Chapter 4. Schools Element Recommendations

Land Area Shares

- Greenfield: 23,474 acres
- Infill: 12,420 acres
- Turnover: 288,504 acres

Legend:
- Greenfield
- Infill
- Turnover
Population Growth Shares 2013-2018

School Impact Areas
- 30.9%
- 15.4%
- 53.7%

Infill +15,634 people
Turnover +27,213 people
Greenfield +7,812 people

Legend
- Greenfield
- Infill
- Turnover

2013-2018 Population Growth Shares

2020 County Growth Policy Work Session #1
06/18/2020 18
Housing Unit Growth Shares 2013-2018

- Greenfield: +2,880 units
- Infill: +15,826 units
- Turnover: +7,224 units

Legend:
- Greenfield
- Infill
- Turnover

School Impact Areas:
- Greenfield
- Infill
- Turnover

2020 County Growth Policy Work Session #1
06/18/2020
Housing Unit Growth Shares 2013-2018

- Infill: 11.1%
- Greenfield: 27.9%
- Turnover: 61.0%

<table>
<thead>
<tr>
<th>Type</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greenfield</td>
<td>+2,880 units</td>
</tr>
<tr>
<td>Infill</td>
<td>+15,826 units</td>
</tr>
<tr>
<td>Turnover</td>
<td>+7,224 units</td>
</tr>
</tbody>
</table>

Change in Units, by Type:

- Infill: Multifamily 93.1%, Single-Family 4.5%
- Turnover: Multifamily 50.7%
- Greenfield: Multifamily 4.5%
Enrollment Growth Shares 2013-2018

- Greenfield: +2,237 students
- Infill: +2,010 students
- Turnover: +6,263 students

Legend
- Greenfield
- Infill
- Turnover

2020 County Growth Policy Work Session #1
06/18/2020
School Impact Area Growth Rates, 2013-2018

**POPULATION**

- Infill Areas: 12.5%
- Turnover Areas: 3.2%
- Greenfield Areas: 5.1%
- Countywide: 37.8%

**HOUSING UNITS**

- Infill Areas: 27.7%
- Turnover Areas: 2.4%
- Greenfield Areas: 7.1%
- Countywide: 40.1%

**STUDENT ENROLLMENT**

- Infill Areas: 15.3%
- Turnover Areas: 4.8%
- Greenfield Areas: 7.1%
- Countywide: 50.7%
School Impact Area Student Generation Rates

Average Number of Students/Unit

- Infill: 0.231 (2013), 0.208 (2018)
- Turnover: 0.431, 0.442
- Greenfield: 0.614, 0.661
- Countywide: 0.404, 0.404
School Impact Areas

• Generally, people have been supportive of taking a context-sensitive approach to the Policy.

• ULI was supportive of this approach, advocating that the county move “from a ‘one size fits all’ approach to a more context-based, context sensitive approach.”

• Suggestion that all activity centers need to be included in the infill category and that the Planning Board should have the authority to add or delete activity centers based upon approved master plans.

• Consideration of a fourth hybrid category that encompasses a combination of both turnover and infill. Such areas behave differently from the other three and have unique challenges and needs.

• Some concern that the designations are primarily used to discount the impact taxes, and in areas where meeting the demands of our schools is getting increasingly more difficult and expensive.
School Impact Areas

- We did receive a question pertaining to categorization of Census tract 7012.14.
- The tract includes the recently adopted Grosvenor-Strathmore Metro Area Minor Master Plan’s area in its entirety.
- The tract is currently part of the North Bethesda Planning Area, which is identified as Turnover. If it were moved into the White Flint Planning Area, it would change to Infill and have no impact on the classification of any other area.
- Historically, the tract is reliably a Turnover Impact Area, with little housing growth. But the pipeline is more in consistent with Infill Impact Areas, with a large number of approved multifamily units.
- Options to consider:
  1. Leave as part of North Bethesda Policy Area and therefore it remains in the Turnover Impact Area.
  2. Move to the White Flint Policy Area and therefore it changes to the Infill Impact Area.
  3. Consider a broader policy decision to designate all Red Policy Areas as Infill Impact Areas.
Chapter 4. Schools Element Recommendations

Annual School Test and Utilization Report
Annual School Test and Utilization Report
Recommendations

4.2 By January 1, 2021, the Planning Board must adopt a set of Annual School Test Guidelines, which outline the methodologies used to conduct the Annual School Test and to evaluate the enrollment impacts of development applications and master plans.

4.3 The Annual School Test will be conducted at the individual school level only, for each and every elementary, middle and high school, for the purposes of determining school utilization adequacy.

4.4 The Annual School Test will evaluate projected school utilization three years in the future using the following school utilization adequacy standards:
• ES: Seat Deficit < 100 seats or Percent Utilization ≤ 120%
• MS: Seat Deficit < 180 seats or Percent Utilization ≤ 120%
• HS: Percent Utilization ≤ 120%
Annual School Test and Utilization Report Recommendations

4.5 The Annual School Test will establish each school service area’s adequacy status for the entirety of the applicable fiscal year.

4.6 The Annual School Test will include a Utilization Report that will provide a countywide analysis of utilization at each school level.

4.7 The Utilization Report will also provide additional utilization and facility condition information for each school, as available.
This is all about transparency.

By January 1, 2021, the Planning Board must adopt a set of Annual School Test Guidelines, which outline the methodologies used to conduct the Annual School Test and to evaluate the enrollment impacts of development applications and master plans.

- This is all about transparency.
- The guidelines will explain how the test is conducted, including the calculation of any modifications to the planned capacities or projected enrollments published by MCPS resulting from placeholder projects or approved CIP projects at other schools.
Some people have questioned whether these procedures should be subject to Council approval and not determined solely by the Planning Board.

ULI supported this recommendation and attempts to simplify the school test in general. They indicated that “The existing Annual School Test is perceived as a complicated process, with timing aspects that can be confusing to the public as well as the development community.”
R4.3

The Annual School Test will be conducted at the individual school level only, for each and every elementary, middle and high school, for the purposes of determining school utilization adequacy.

- The cluster test is a holdover from a foregone approach to the policy. This is more in line with how other jurisdictions conduct their adequate public facilities review.
- There will no longer be a cluster-level test, which masks both overcrowded and adequate school facilities.
- Eliminates confusing and complicated cluster calculations when there are split articulations.
- This simplifies the identification of areas requiring Utilization Premium Payments or Planning Board review of school adequacy.
Annual School Test and Utilization Report

R4.3 Comment Summary

- Some concern expressed that badly over-utilized clusters might be overlooked without a cluster test for elementary and middle schools.
Annual School Test and Utilization Report

The Annual School Test will evaluate projected school utilization three years in the future using the following school utilization adequacy standards:

**ES:** Seat Deficit < 100 seats or Percent Utilization ≤ 120%
**MS:** Seat Deficit < 180 seats or Percent Utilization ≤ 120%
**HS:** Percent Utilization ≤ 120%

1. Changes the test time frame from 5 to 3 years.
   - Many factors determine how long it will take an approved project to start adding students to the public schools.
   - Projects programmed in the out years of the budget are frequently delayed.
   - The 5-year projections are the least reliably accurate.

2. Maintains current adequacy standards.
From the time an application receives its adequate public facilities approval, how long does it take a project to start generating students?

- Of the data we have, for 56 projects approved between 2010 and 2015 (total of more than 15,000 approved units), for which we have at least one final inspection date:

  0 to 3 years from APF approval to first final inspection  
  4 to 5 years from APF approval to first final inspection  
  6 or more years from APF approval to first final inspection
Projects programmed in the out years of the budget are frequently delayed or removed from the CIP altogether.

- Over the last ten years, approximately 15% of capacity projects, all of which were originally scheduled in the out years, have been removed from the CIP.
- An equal number of projects were delayed by at least one year.
The 5-year projections are the least reliably accurate.

- The further out you go, the greater the margin of error because there are more unpredictable factors that influence enrollment that come into play.

- There is less speculation in the shorter term – on both the impact of new (and potentially phased development) and even on the kindergarten enrollment.

- In general we are trying to place less of an emphasis on a specific number, in part because the numbers are not a guarantee – they’re estimates that we know are imperfect.
Support

- Three-year timeframe will greatly improve public confidence in the forecast and the school test.
- The five-year forecasts are “notoriously bad.”
- The shorter forecasts involve less speculation on MCPS’s part regarding the likelihood or expected completion of a residential development.
- Programmed capacity projects in the shorter term are relatively reliable. Whereas assuming projects in the out years will actually be funding is “wishful thinking.”
- ULI: Five-years is a relatively long time horizon that results in greater uncertainty because the accuracy of the projection may decline significantly in the out-years. Shortening the projection horizon to three years can add predictability for the development community.

Opposed

- Five-year timeframe more reliably reflects when students from new development will actually enroll.
- Five-year window is more consistent with the county’s CIP process.
### Consistency with the CIP?
- The recently adopted CIP is for FY21 through FY26.
- The CIP is only adopted every two years, but amended on the off years.
- So next year, we will still be functioning under the FY21-26 CIP, though which will technically only include funding for projects through FY26 still.

<table>
<thead>
<tr>
<th>FY21 School Test</th>
<th>FY22 School Test</th>
<th>FY23 School Test</th>
<th>FY24 School Test</th>
<th>FY25 School Test</th>
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<td>3-year test projections</td>
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<th>FY26</th>
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<td>3-year test projections</td>
<td>5-year test projections</td>
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</tbody>
</table>
Annual School Test and Utilization Report

R4.4

The Annual School Test will evaluate projected school utilization three years in the future using the following school utilization adequacy standards:

- **ES**: Seat Deficit < 100 seats or Percent Utilization ≤ 120%
- **MS**: Seat Deficit < 180 seats or Percent Utilization ≤ 120%
- **HS**: Percent Utilization ≤ 120%

1. Changes the test time frame from 5 to 3 years.
   - Many factors determine how long it will take an approved project to start adding students to the public schools.
   - Projects programmed in the out years of the budget are frequently delayed.
   - The 5-year projections are the least reliably accurate.

2. Maintains current adequacy standards.
The adequacy standards are unchanged from the current SSP, to identify areas for residential development moratoria (in Greenfield Impact Areas) and areas requiring detail Planning Board review and Utilization Premium Payments (in Turnover and Infill Impact Areas).

<table>
<thead>
<tr>
<th>School Level</th>
<th>Projected Utilization Adequacy Standards</th>
<th>Greenfield Impact Areas</th>
<th>Turnover and Infill Impact Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elementary</td>
<td>Seat Deficit ≥ 110 seats and Utilization &gt; 120%</td>
<td>Moratorium</td>
<td>Board Review and Utilization Premium Payments</td>
</tr>
<tr>
<td>Middle</td>
<td>Seat Deficit ≥ 180 seats and Utilization &gt; 120%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>High</td>
<td>Utilization &gt; 120%</td>
<td></td>
<td></td>
</tr>
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</table>
**PROPOSED County Growth Policy FY 2021 Annual School Test Summary**

**Reflects the Adopted FY 2021 Capital Budget and FY 2021-2026 Capital Improvements Program**

**Conducted May 15, 2020**

<table>
<thead>
<tr>
<th>Applicable Adequacy Standard</th>
<th>Elementary School</th>
<th>Middle School</th>
<th>High School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seat Deficit &lt; 110 seats or Percent Utilization ≤ 120% in 2023-2024</td>
<td></td>
<td>Seat Deficit &lt; 180 seats or Percent Utilization ≤ 120% in 2023-24</td>
<td>Percent Utilization ≤ 120% in 2023-24</td>
</tr>
<tr>
<td><strong>AUTOMATIC MORATORIUM</strong> Residential development moratorium required in inadequate school service areas within Greenfield Impact Areas.</td>
<td></td>
<td></td>
<td>Clarksburg HS</td>
</tr>
<tr>
<td><strong>PLANNING BOARD REVIEW and UTILIZATION PREMIUM PAYMENTS</strong> Planning Board review required to evaluate school service area adequacy and Utilization Premium Payments required within Turnover and Infill Impact Areas.</td>
<td>Ashburton ES</td>
<td>Highland View ES</td>
<td>Argyle MS</td>
</tr>
<tr>
<td></td>
<td>Bannockburn ES</td>
<td>Mill Creek Towne ES</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Bethesda ES</td>
<td>William T. Page ES</td>
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<tr>
<td></td>
<td>Burning Tree ES</td>
<td>Judith A. Resnik ES</td>
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<td></td>
<td>Burtons ville ES</td>
<td>South Lake ES</td>
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<tr>
<td></td>
<td>Diamond ES</td>
<td>Watkins Mill ES</td>
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</tr>
<tr>
<td></td>
<td>Greencastle ES</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**FY2021 ANNUAL SCHOOL TEST NOTES**

The test outcome for any school service area not identified on the results summary table is adequate.
<table>
<thead>
<tr>
<th>Elementary School Area</th>
<th>Enrollment</th>
<th>Program Capacity</th>
<th>Seat Deficit/ Surplus</th>
<th>Utilization</th>
<th>Greenfield Impact Area</th>
<th>Turnover Impact Area</th>
<th>Infill Impact Area</th>
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</thead>
<tbody>
<tr>
<td>Arcola</td>
<td>748</td>
<td>651</td>
<td>-97</td>
<td>114.9%</td>
<td>Adequate</td>
<td>N/A</td>
<td>Adequate</td>
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<tr>
<td>Ashburton</td>
<td>967</td>
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<td>BR/UPP Req.</td>
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<td>Bannockburn</td>
<td>500</td>
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<tr>
<td>Lucy V. Barnsley</td>
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<td>652</td>
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<tr>
<td>Beall</td>
<td>542</td>
<td>639</td>
<td>+97</td>
<td>84.8%</td>
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<tr>
<td>Bel Pre</td>
<td>1,061</td>
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<td>+18</td>
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<tr>
<td>Bells Mill</td>
<td>650</td>
<td>626</td>
<td>-24</td>
<td>103.8%</td>
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<td>Belmont</td>
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<td>735</td>
<td>560</td>
<td>-175</td>
<td>131.3%</td>
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<td>BR/UPP Req.</td>
<td>BR/UPP Req.</td>
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<td>Beverly Farms</td>
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<td>689</td>
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<td>Bradley Hills</td>
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<tr>
<td>Brooke Grove</td>
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<td>470</td>
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<td>97.5%</td>
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<td>N/A</td>
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<td>Burning Tree</td>
<td>490</td>
<td>378</td>
<td>-112</td>
<td>129.6%</td>
<td>N/A</td>
<td>BR/UPP Req.</td>
<td>N/A</td>
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<td>Burnt Mills</td>
<td>575</td>
<td>740</td>
<td>+165</td>
<td>77.7%</td>
<td>N/A</td>
<td>Adequate</td>
<td>N/A</td>
</tr>
<tr>
<td>Burtonsville</td>
<td>636</td>
<td>493</td>
<td>-143</td>
<td>129.0%</td>
<td>N/A</td>
<td>BR/UPP Req.</td>
<td>N/A</td>
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<td>Candlewood</td>
<td>397</td>
<td>515</td>
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<td>77.1%</td>
<td>N/A</td>
<td>Adequate</td>
<td>Adequate</td>
</tr>
<tr>
<td>Cannon Road</td>
<td>420</td>
<td>518</td>
<td>+98</td>
<td>81.1%</td>
<td>N/A</td>
<td>Adequate</td>
<td>N/A</td>
</tr>
<tr>
<td>Carderock Springs</td>
<td>375</td>
<td>406</td>
<td>+31</td>
<td>92.4%</td>
<td>N/A</td>
<td>Adequate</td>
<td>N/A</td>
</tr>
<tr>
<td>Rachel Carson</td>
<td>570</td>
<td>692</td>
<td>+122</td>
<td>82.4%</td>
<td>N/A</td>
<td>Adequate</td>
<td>Adequate</td>
</tr>
<tr>
<td>Cashell</td>
<td>335</td>
<td>339</td>
<td>+4</td>
<td>98.8%</td>
<td>N/A</td>
<td>Adequate</td>
<td>N/A</td>
</tr>
<tr>
<td>Cedar Grove</td>
<td>341</td>
<td>402</td>
<td>+61</td>
<td>84.8%</td>
<td>Adequate</td>
<td>Adequate</td>
<td>N/A</td>
</tr>
<tr>
<td>Chevy Chase</td>
<td>1,199</td>
<td>1,459</td>
<td>+260</td>
<td>82.2%</td>
<td>N/A</td>
<td>Adequate</td>
<td>Adequate</td>
</tr>
<tr>
<td>Clarksburg</td>
<td>264</td>
<td>311</td>
<td>+47</td>
<td>84.9%</td>
<td>Adequate</td>
<td>Adequate</td>
<td>Adequate</td>
</tr>
<tr>
<td>Clearspring</td>
<td>634</td>
<td>642</td>
<td>+8</td>
<td>98.8%</td>
<td>N/A</td>
<td>Adequate</td>
<td>N/A</td>
</tr>
<tr>
<td>Clopper Mill</td>
<td>572</td>
<td>496</td>
<td>-76</td>
<td>115.3%</td>
<td>N/A</td>
<td>Adequate</td>
<td>Adequate</td>
</tr>
<tr>
<td>Cloverly</td>
<td>517</td>
<td>461</td>
<td>-56</td>
<td>112.1%</td>
<td>N/A</td>
<td>Adequate</td>
<td>N/A</td>
</tr>
</tbody>
</table>

BR/UPP Req. = Board Review and Utilization Premium Payments required.
• Some people are concerned about completely eliminating moratoria in 93% of the county and have asked the Planning Board to consider setting a super-threshold standard that provides moratoria in the infill and turnover areas.

• Some have noted that the most reliable utilization data are the current year actual and have suggested that we used those to determine a school’s status.

• Another suggestion was to consider increasing the utilization standard to 125% in light of the shorter 3-year timeframe.
Annual School Test and Utilization Report

The Annual School Test will establish each school service area’s adequacy status for the entirety of the applicable fiscal year.

- There will be no staging ceiling or threshold against which a development application’s enrollment impact is measured.
- The staging ceiling creates and places the fate of development applications on a false sense of precision.
- A school service area’s status will not be changed during a fiscal year to reflect the impacts of prior approvals in the development pipeline.
## Annual School Test and Utilization Report

<table>
<thead>
<tr>
<th>School Status*</th>
<th>Application Implication</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>The school’s capacity is deemed adequate for new residential development in that given School Impact Area, meaning that an application can be approved.</td>
</tr>
<tr>
<td>In Moratorium</td>
<td>The school’s capacity is deemed inadequate for new development in Greenfield Impact Areas, meaning that an application cannot be approved unless it meets the requirements of a moratorium exception.</td>
</tr>
<tr>
<td>Planning Board Review and Utilization Premium Payments Required</td>
<td>The school’s capacity adequacy requires detailed review by the Planning Board. Per Recommendation 4.12, the Planning Board will be provided with information pertaining to the subject school facility, nearby schools at the same school level (elementary, middle or high) and the estimated enrollment impacts of the proposed development. The Planning Board would then make the school facility adequacy determination. The development is also subject to a Utilization Premium Payment (discussed in Recommendation 4.16).</td>
</tr>
</tbody>
</table>

* Note that a school’s status can vary by School Impact Area. In other words, a school service area that includes both Greenfield and Turnover Impact Areas can be in moratorium in the Greenfield Impact Area portion and require Planning Board review and Utilization Premium Payments in the Turnover Impact Area.
R4.5 Comment Summary

- MCCPTA “adamantly opposes” this recommendation believing that the original intent of the staging ceiling was to measure the cumulative impact of approved development against available capacity.

- This will abandon efforts to track the cumulative impact of approved development. Cumulative impact should be tracked for purposes of funding the entirety of the capacity that will be needed.

- The recommendation proposes a red-light/green-light approach for all development in a given year, without regard for remaining capacity, eliminating the Planning Board’s responsibility to meet APFO requirements.
Annual School Test and Utilization Report

The Annual School Test will include a Utilization Report that will provide a countywide analysis of utilization at each school level.

- This would provide a countywide context for an individual school’s condition.

- The data reported should include historical and projected:

  - countywide utilization rates by level

  - share and number of schools at each level that fall into the following utilization categories: Up to 80%; 80-100%; 100-120%; Over 120%
Annual School Test and Utilization Report

Examples of Countywide Utilization Reporting

Countywide School Facilities Utilization Trend - ES
## Annual School Test and Utilization Report

### Examples of Countywide Utilization Reporting

<table>
<thead>
<tr>
<th>Year</th>
<th>&lt;80% Utilization</th>
<th>80-100% Utilization</th>
<th>100-120% Utilization</th>
<th>&gt;120% Utilization</th>
</tr>
</thead>
<tbody>
<tr>
<td>SY 2015</td>
<td>10%</td>
<td>32%</td>
<td>35%</td>
<td>24%</td>
</tr>
<tr>
<td>SY 2016</td>
<td>10%</td>
<td>25%</td>
<td>40%</td>
<td>26%</td>
</tr>
<tr>
<td>SY 2017</td>
<td>11%</td>
<td>31%</td>
<td>38%</td>
<td>20%</td>
</tr>
<tr>
<td>SY 2018</td>
<td>10%</td>
<td>36%</td>
<td>38%</td>
<td>16%</td>
</tr>
<tr>
<td>SY 2019 (Prelim)</td>
<td>12%</td>
<td>34%</td>
<td>38%</td>
<td>16%</td>
</tr>
<tr>
<td>SY 2020 (Projected)</td>
<td>13%</td>
<td>39%</td>
<td>32%</td>
<td>16%</td>
</tr>
<tr>
<td>SY 2021 (Projected)</td>
<td>13%</td>
<td>39%</td>
<td>32%</td>
<td>16%</td>
</tr>
<tr>
<td>SY 2022 (Projected)</td>
<td>11%</td>
<td>43%</td>
<td>31%</td>
<td>15%</td>
</tr>
<tr>
<td>SY 2023 (Projected)</td>
<td>12%</td>
<td>43%</td>
<td>32%</td>
<td>12%</td>
</tr>
<tr>
<td>SY 2024 (Projected)</td>
<td>12%</td>
<td>46%</td>
<td>33%</td>
<td>9%</td>
</tr>
<tr>
<td>SY 2025 (Projected)</td>
<td>13%</td>
<td>49%</td>
<td>33%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Annual School Test and Utilization Report

The Utilization Report will also provide additional utilization and facility condition information for each school, as available.

- Will include data related to the facility conditions and infrastructure adequacy for each individual school:
  - historical and projected enrollment, program capacity, core capacity and utilization
  - the current number of relocatable (portable) classrooms at the school
  - the most current MCPS Key Facility Indicator data and
  - a list of the three nearest schools at the same school level along with the distance to the schools
- Could help facilitate discussions between developers and MCPS about potential ways the developers can make improvements to school facility conditions (roof replacements, HVAC system upgrades, etc.).
## Example of Individual School Facility Reporting

### South Lake ES
(Watkins Mill Cluster)

<table>
<thead>
<tr>
<th>Year</th>
<th>Capacity</th>
<th>Enrollment</th>
<th>Space</th>
<th>Utilization</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014-15</td>
<td>716</td>
<td>862</td>
<td>-146</td>
<td>120.4%</td>
</tr>
<tr>
<td>2015-16</td>
<td>716</td>
<td>818</td>
<td>-102</td>
<td>114.2%</td>
</tr>
<tr>
<td>2016-17</td>
<td>716</td>
<td>858</td>
<td>-142</td>
<td>119.8%</td>
</tr>
<tr>
<td>2017-18</td>
<td>716</td>
<td>845</td>
<td>-129</td>
<td>118.0%</td>
</tr>
<tr>
<td>2018-19</td>
<td>701</td>
<td>831</td>
<td>-130</td>
<td>118.5%</td>
</tr>
<tr>
<td>2019-20</td>
<td>694</td>
<td>897</td>
<td>-203</td>
<td>129.3%</td>
</tr>
<tr>
<td>2020-21</td>
<td>694</td>
<td>910</td>
<td>-216</td>
<td>131.1%</td>
</tr>
<tr>
<td>2021-22</td>
<td>694</td>
<td>934</td>
<td>-240</td>
<td>134.6%</td>
</tr>
<tr>
<td>2022-23</td>
<td>694</td>
<td>918</td>
<td>-224</td>
<td>132.3%</td>
</tr>
<tr>
<td>2023-24</td>
<td>763</td>
<td>909</td>
<td>-146</td>
<td>119.1%</td>
</tr>
<tr>
<td>2024-25</td>
<td>763</td>
<td>874</td>
<td>-111</td>
<td>114.5%</td>
</tr>
<tr>
<td>2025-26</td>
<td>763</td>
<td>839</td>
<td>-76</td>
<td>110.0%</td>
</tr>
</tbody>
</table>

### Distance to Nearest Elementary Schools
- Gaithersburg ES: 1.2 miles
- Strawbery Knoll ES: 1.7 miles
- Watkins Mill ES: 1.9 miles

### Year Facility Opened
- 2019-20

### Site Size (acres)
- 10.2

### Relocatable Classrooms
- No

### Watson Mill ES Facility Characteristics
- Year Facility Opened: 1972
- Total Square Footage: 83,038
- Site Size (acres): 10.2
- Adjacent Park: No
- Relocatable Classrooms: 10

### 2018 MCPS Key Facility Indicator Data

[Data Source: Montgomery County Public Schools]
Chapter 4. Schools Element Recommendations

Residential Development

Moratorium
Residential Development Moratorium Recommendations

4.8 Automatic moratoria will only apply in Greenfield Impact Areas. The Planning Board cannot approve any preliminary plan of subdivision for residential uses in an area under a moratorium, unless it meets certain exceptions.

4.9 Exceptions to residential development moratoria will include projects estimated to generate fewer than one full student at a school in moratorium, and projects where the residential component consists entirely of senior living units.

4.10 Eliminate the moratorium exception adopted in 2019 pertaining to projects providing high quantities of deeply affordable housing or projects removing condemned buildings.
Residential Development Moratorium

R4.8

Automatic moratoria will only apply in Greenfield Impact Areas. The Planning Board cannot approve any preliminary plan of subdivision for residential uses in an area under a moratorium, unless it meets certain exceptions.

- The current moratorium policy:
  - Slows the county’s ability to fill its housing supply gap
  - Impacts housing affordability
  - Hinders economic development
  - Prevents sustainable growth patterns
  - Raises equity concerns
  - Does not solve over-crowding
Residential Development Moratorium

R4.8
Comment Summary

Support

• Older neighborhoods turning over causes school enrollments to surge in many areas and turnover has nothing to do with new development.

• We need development to give us the tax base to afford to build new schools and other things.

• The very idea of a moratorium is contrary to comprehensive planning, zoning, and budgeting—i.e., to responsible government.

• Automatic housing moratorium encourages disproportionate investment in schools under moratorium, typically in wealthier neighborhoods, while overlooking other schools with inadequate and substandard facilities, typically in lower income communities.

• Studies in other areas found moratoriums to accelerate, or frontload, development as threshold numbers are approached.

• Just because we can't forbid families moving into existing older homes doesn't mean we should take it out on apartment development.

• ULI supported this recommendation, believing it is prudent to limit automatic moratoriums to only Greenfield Impact Areas unless a project meets certain identified exceptions.
Residential Development Moratorium

Oppose

- It’s outrageous that the recommendation to eliminate automatic moratoria in most of the county was not accompanied by any new mechanisms to ensure adequate school infrastructure.
- Our schools are severely overcrowded. Until new schools are built and the overcrowding is addressed, more housing should not be added in clusters that are already stretched to the limit.
- When our schools are already struggling to meet demand, any increase hampers the school system.
- An attempt to end the moratorium is a prioritization of financial interests for the real estate sector, builders, agents, etc.
- A moratorium is a bad policy outcome, but the law itself is not bad policy. The problem is that planners have no interest in making sure that facilities come online to meet anticipated demand.
- Consider an emergency moratorium threshold for extreme situations. Options include:
  - 150% utilization (maybe even limit to only one year)
  - 120% actual (not projected) utilization for three years in a row
- Keeping moratorium in Greenfield Impact Areas is unfair. That area is important for meeting the county’s housing goals.
Residential Development Moratorium

- Greenfield Impact Areas are still experiencing the type of development that originally led to the creation of the Adequate Public Facilities Ordinance, where the construction of new schools cannot keep pace with rapidly increasing enrollment caused by new development.
Residential Development Moratorium

- Greenfield Impact Areas are still experiencing the type of development that originally led to the creation of the Adequate Public Facilities Ordinance, where the construction of new schools cannot keep pace with rapidly increasing enrollment caused by new development.

Clarksburg Cluster Elementary Schools
Enrollment Growth and Major Capacity Increases, 2008-2018