



Montgomery Planning | Countywide Planning and Policy

06/17/2021
Agenda Item 12

FY22 Annual School Test

And School Utilization Report

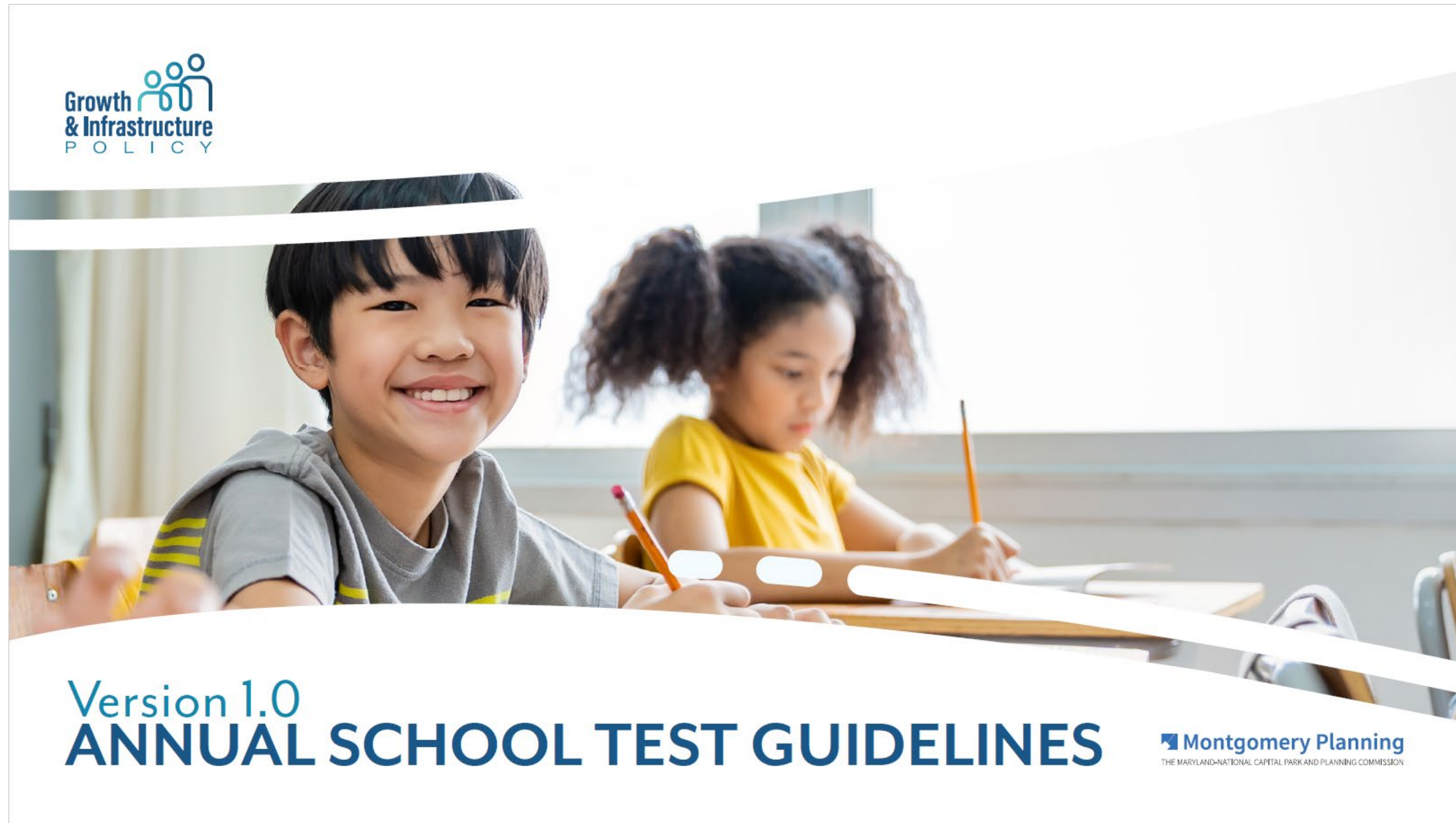


Agenda

- FY22 Annual School Test Results
- FY22 School Utilization Report
- FY22-23 Impact Tax and Utilization Premium Payment Updates

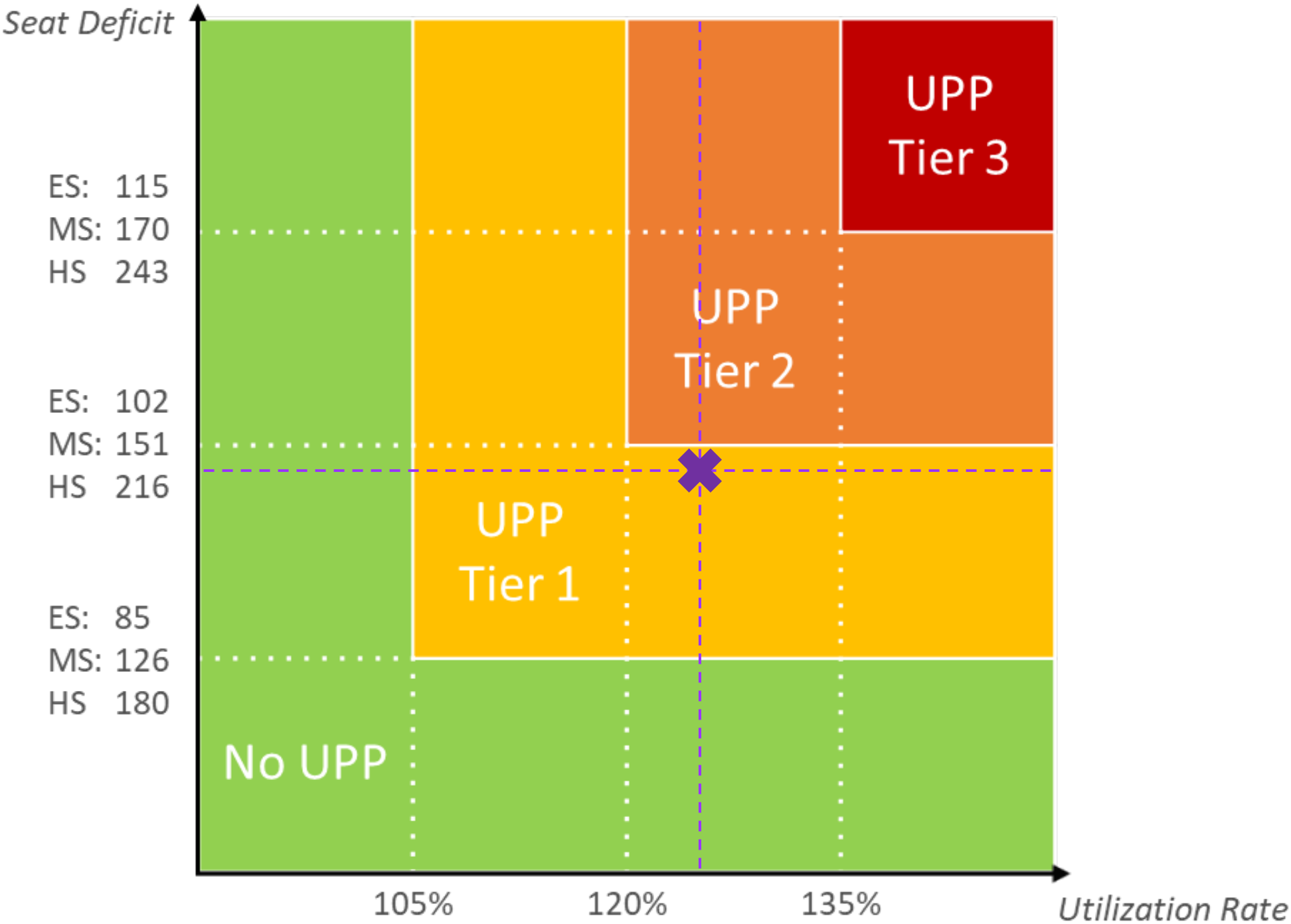
FY22 Annual School Test Results

Annual School Test Guidelines (v1.0)



Annual School Test Guidelines (v1.0)

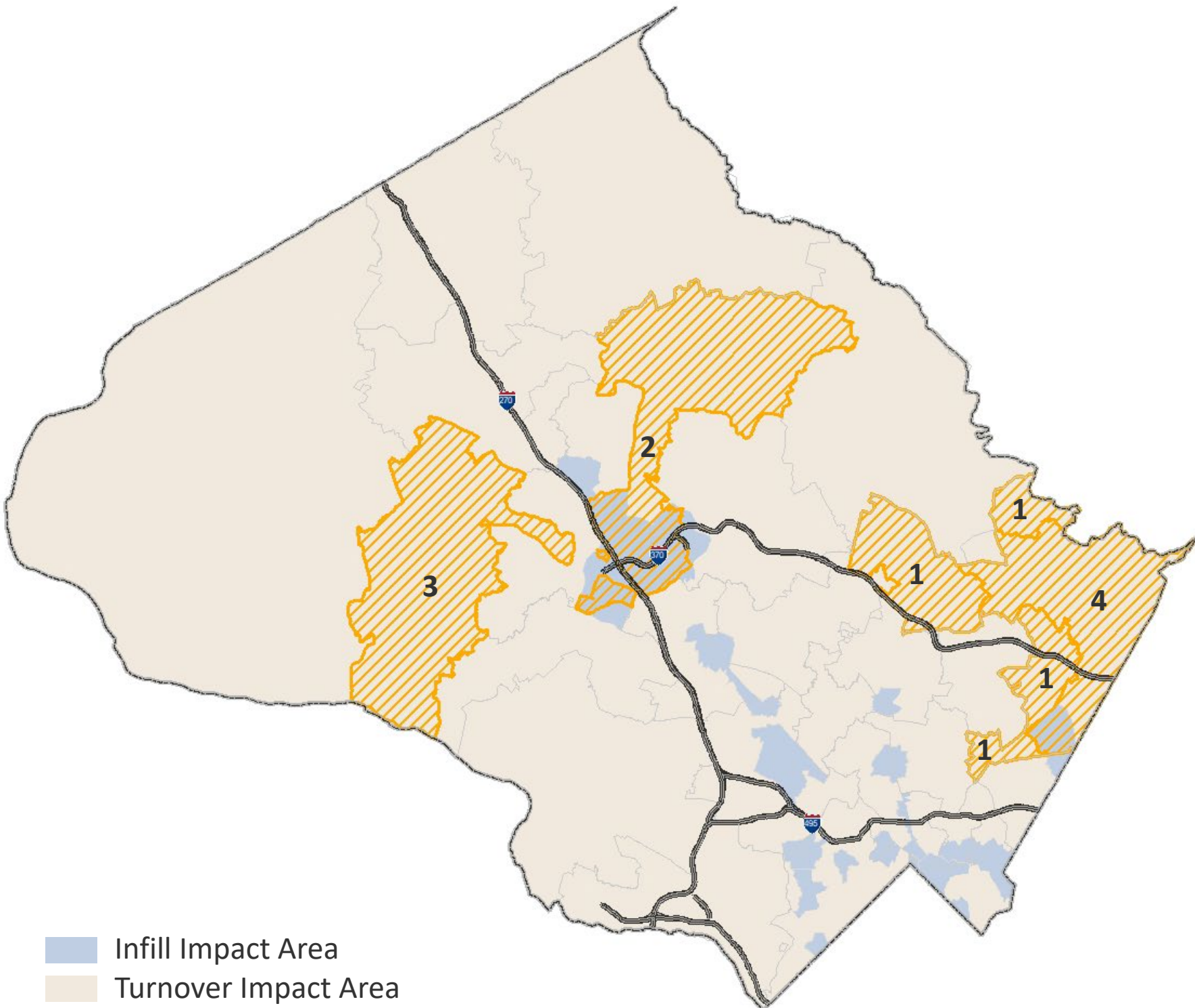
Utilization Premium Payment Tier Thresholds



FY 2022 Annual School Test Results

High School Service Areas

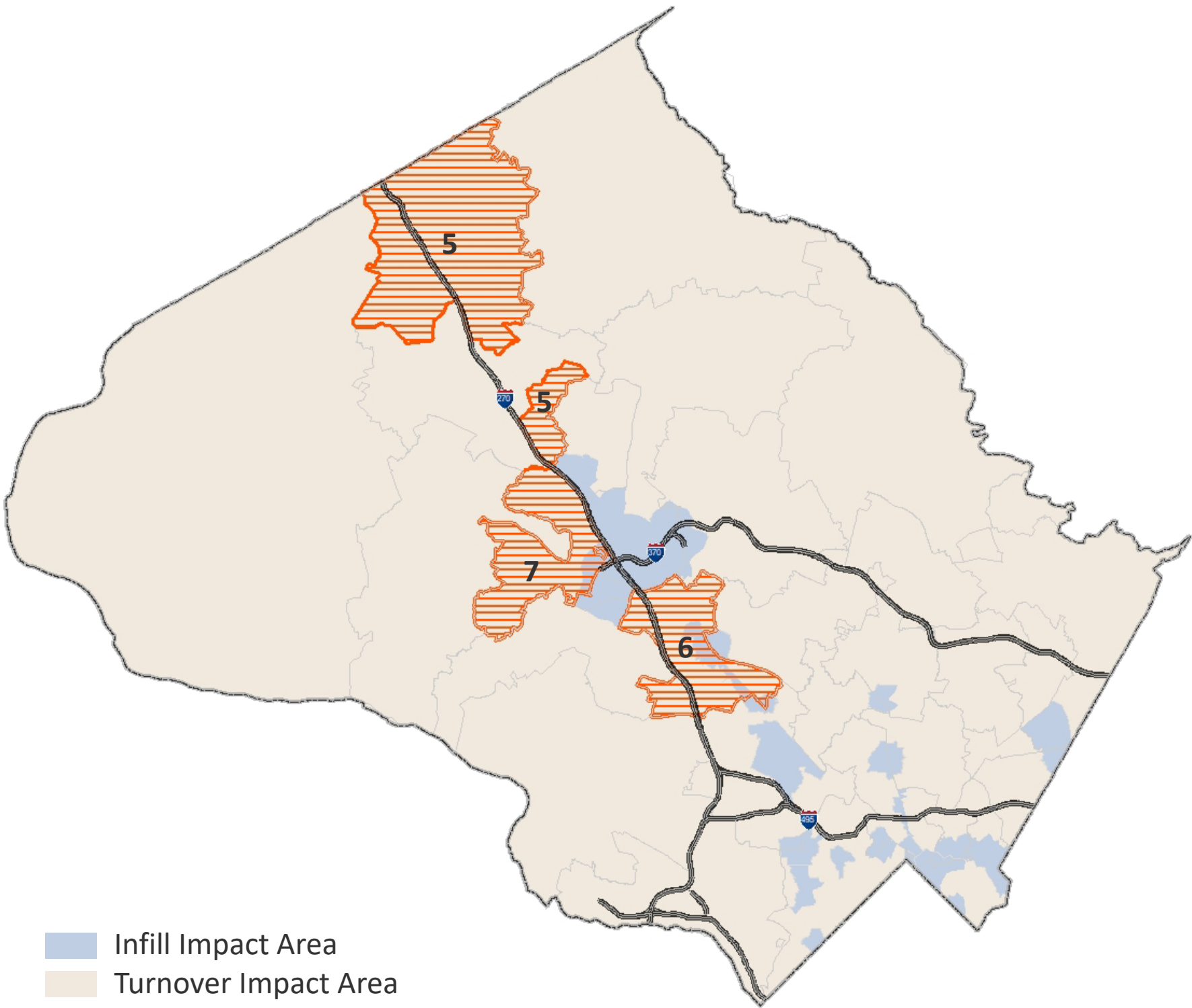
UPP Tier	High School
TIER 1 UPP	13⅓% of Impact Tax
Utilization: ≥105%	1. James Hubert Blake HS
Seat Deficit: ≥ 180 for HS	2. Gaithersburg HS
Payment Level: 40% total	3. Northwest HS
	4. Paint Branch HS
TIER 2 UPP	26⅔% of Impact Tax
Utilization: ≥ 120%	5. Clarksburg HS
Seat Deficit: ≥ 216 for HS	6. Richard Montgomery HS
Payment Level: 80% total	7. Quince Orchard HS
TIER 3 UPP	40% of Impact Tax
Utilization: ≥135%	
Seat Deficit: ≥ 243 for HS	
Payment Level: 120% total	



FY 2022 Annual School Test Results

High School Service Areas

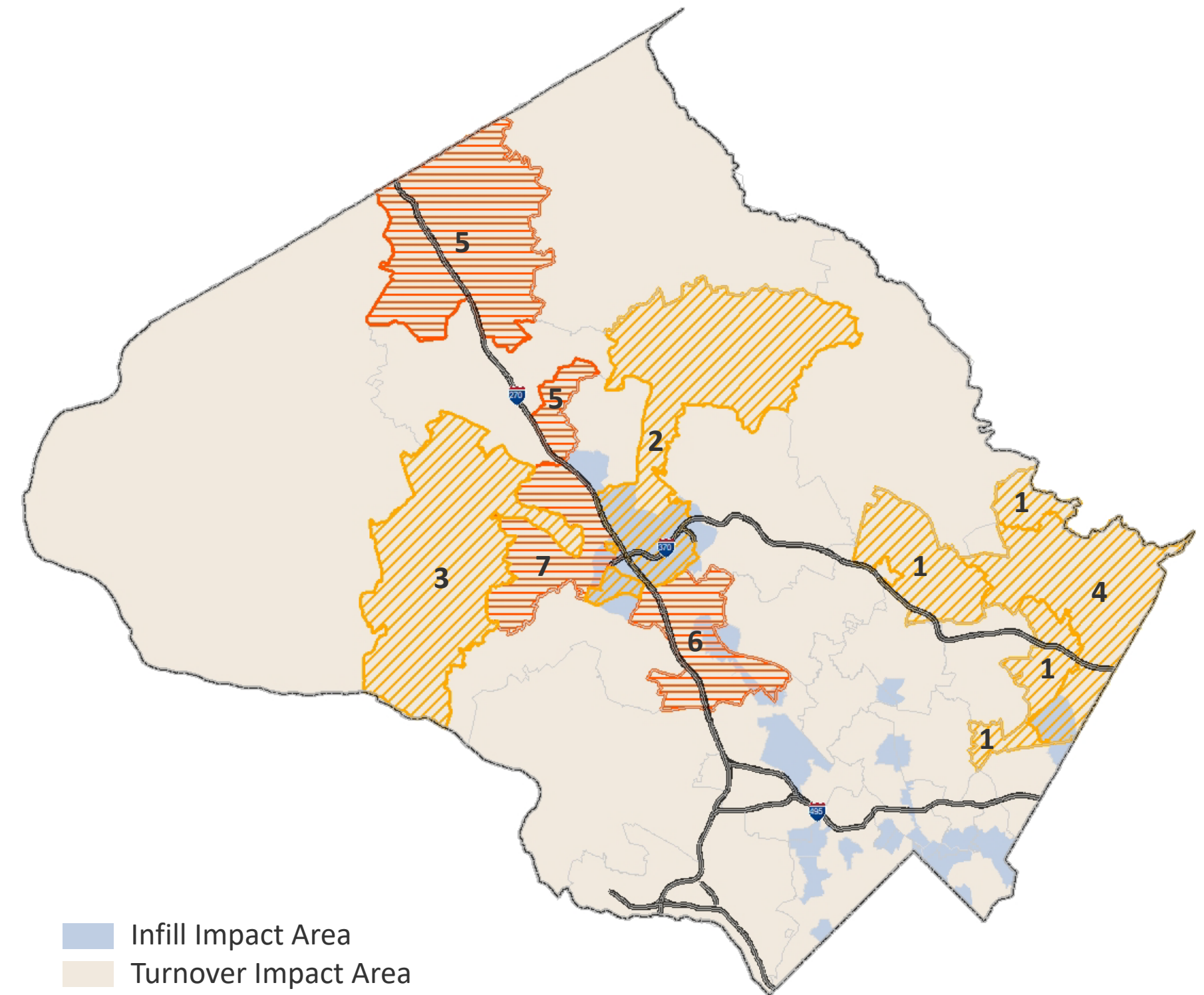
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FY 2022 Annual School Test Results

High School Service Areas

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FY 2022 Annual School Test Results

High School Service Areas

Growth and Infrastructure Policy FY 2022 School Test

Reflects Approved FY 2022 Capital Budget and Amendments to the FY 2021-2026 Capital Improvements Program

High School Test

Tier 1 UPP: $\geq 105\%$ utilization and ≥ 180 seat deficit

Tier 2 UPP: $\geq 120\%$ utilization and ≥ 216 seat deficit

Tier 3 UPP: $\geq 135\%$ utilization and ≥ 243 seat deficit

Effective: July 1, 2021

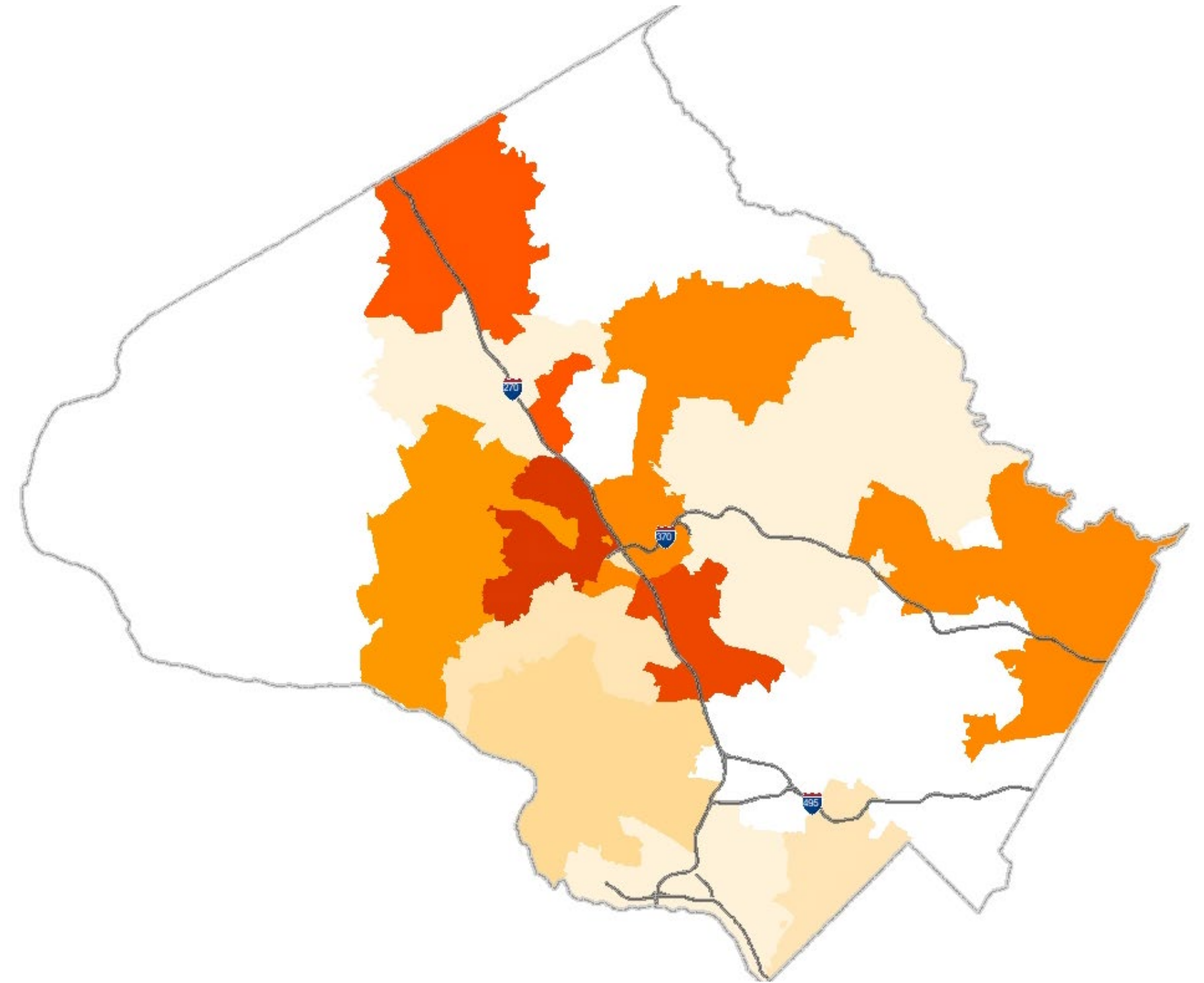
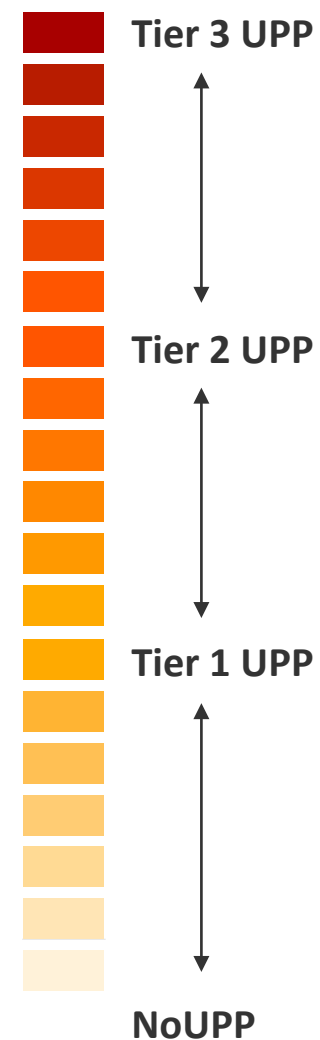
High School	Projected 2025-26				UPP Status	UPP Adequacy Ceilings		
	Capacity	Enrollment	Utilization	Deficit/Surplus		Tier 1	Tier 2	Tier 3
Bethesda-Chevy Chase	2,457	2,532	103.1%	-75		105	417	785
Montgomery Blair ¹	2,889	2,693	93.2%	196		376	774	1,208
James Hubert Blake	1,743	2,025	116.2%	-282	Tier 1 UPP		67	329
Winston Churchill	1,969	2,096	106.4%	-127		53	267	563
Clarksburg	2,034	2,468	121.3%	-434	Tier 2 UPP			278
Damascus	1,560	1,474	94.5%	86		266	398	632
Albert Einstein ¹	1,616	1,506	93.2%	110		290	434	676
Gaithersburg	2,412	2,830	117.3%	-418	Tier 1 UPP		65	427

¹ Projected enrollment reflects the estimated impact of CIP P651908, which will reassign students between the Downcounty Consortium, Walter Johnson HS and Woodward HS in 2025.

FY 2022 AST - Adequacy Ceilings

High School Service Areas

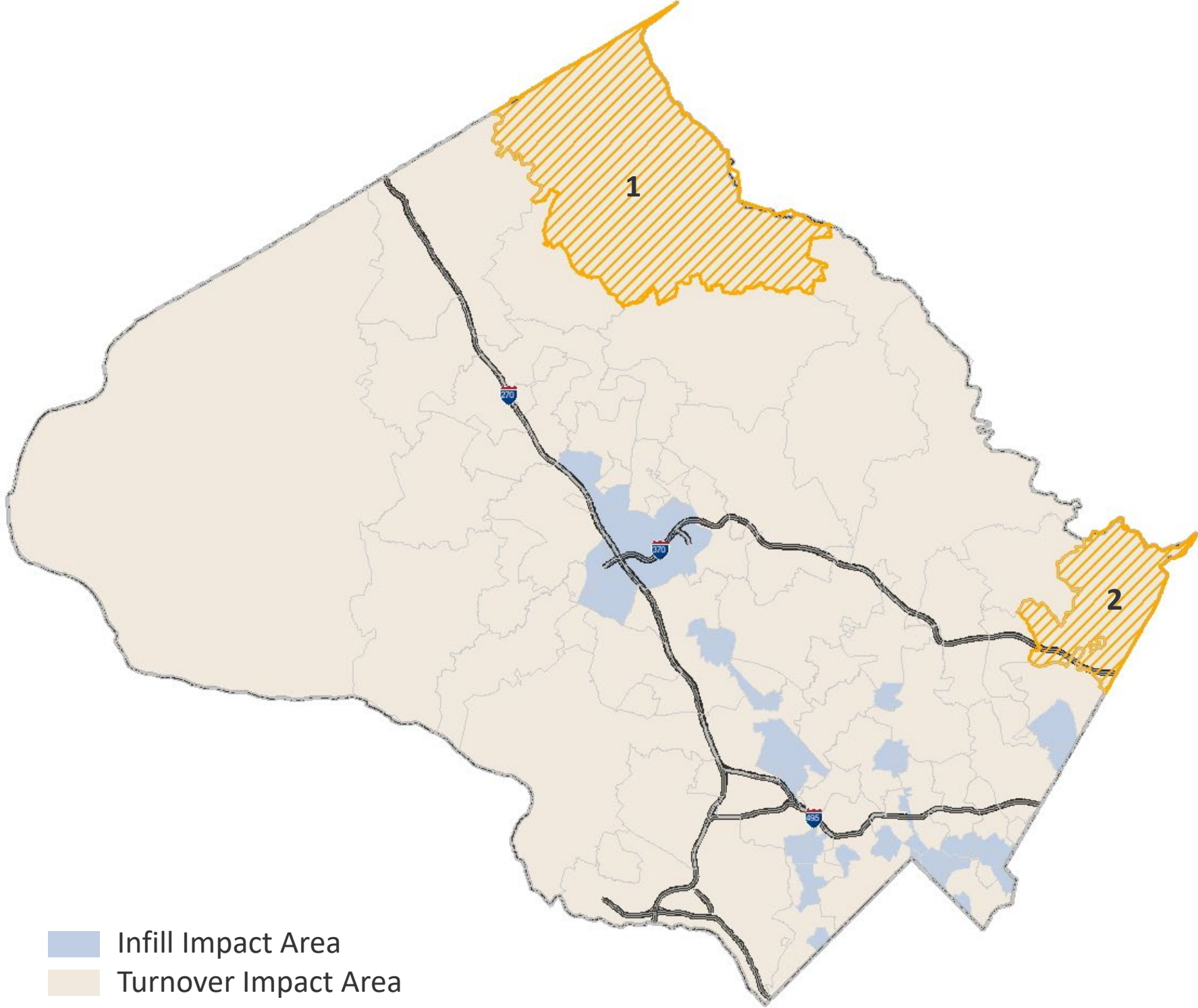
- ❖ No high school service area has an adequacy ceiling with 15 or less seats to the next tier.



FY 2022 Annual School Test Results

Middle School Service Areas

UPP Tier	Middle Schools
TIER 1 UPP	10% of Impact Tax
Utilization: $\geq 105\%$ Seat Deficit: ≥ 126 for MS	1. John T. Baker MS 2. Benjamin Banneker MS
Payment Level: 40% total	
TIER 2 UPP	20% of Impact Tax
Utilization: $\geq 120\%$ Seat Deficit: ≥ 151 for MS	
Payment Level: 80% total	
TIER 3 UPP	30% of Impact Tax
Utilization: $\geq 135\%$ Seat Deficit: ≥ 170 for MS	
Payment Level: 120% total	

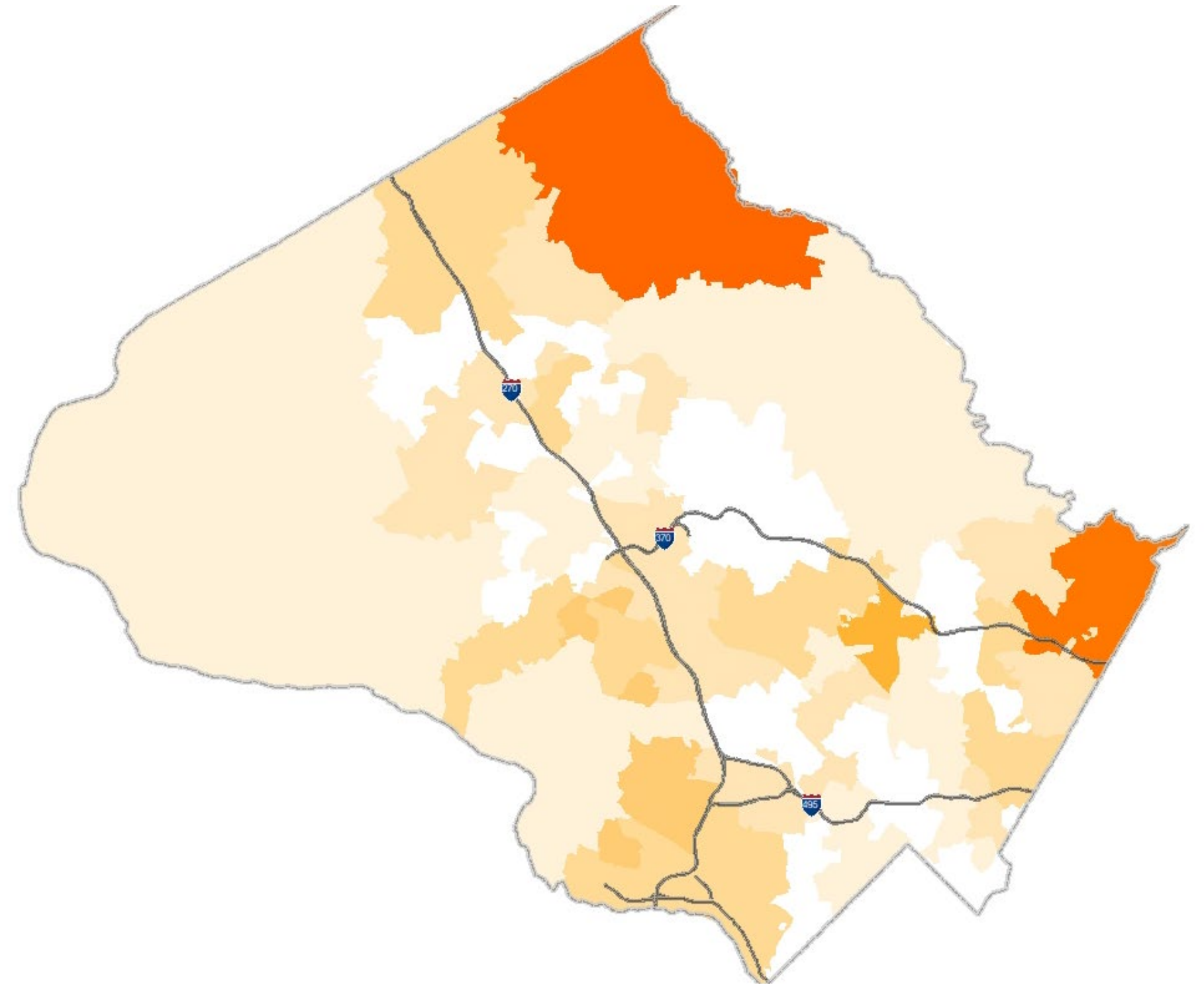
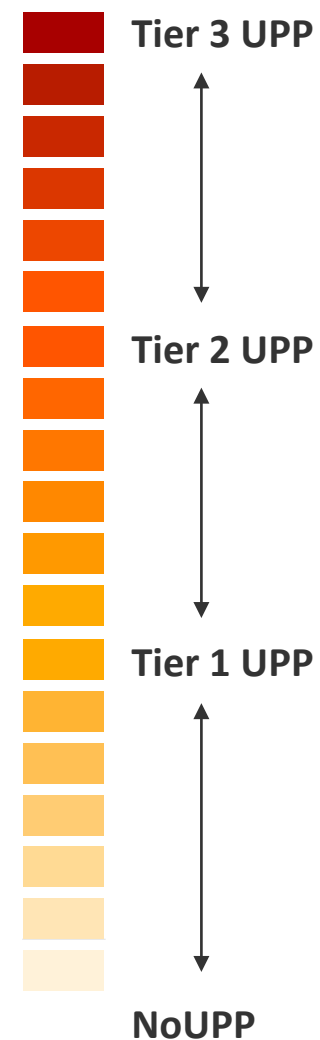


FY 2022 AST - Adequacy Ceilings

Middle School Service Areas

❖ Adequacy ceilings with less than 15 seats:

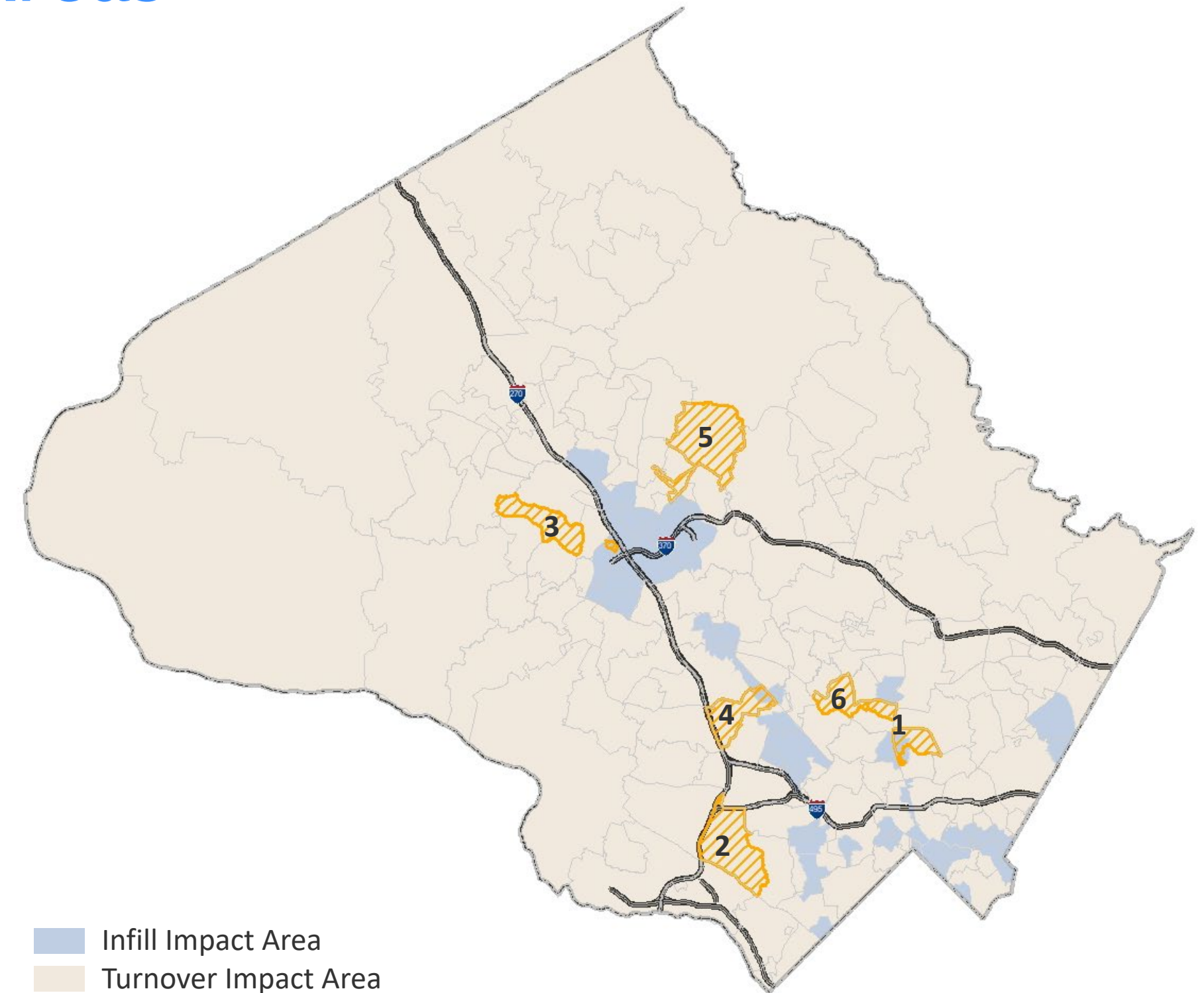
- **Argyle MS**
7 students from Tier 1
- **John T. Baker MS**
10 students from Tier 2



FY 2022 Annual School Test Results

Elementary School Service Areas

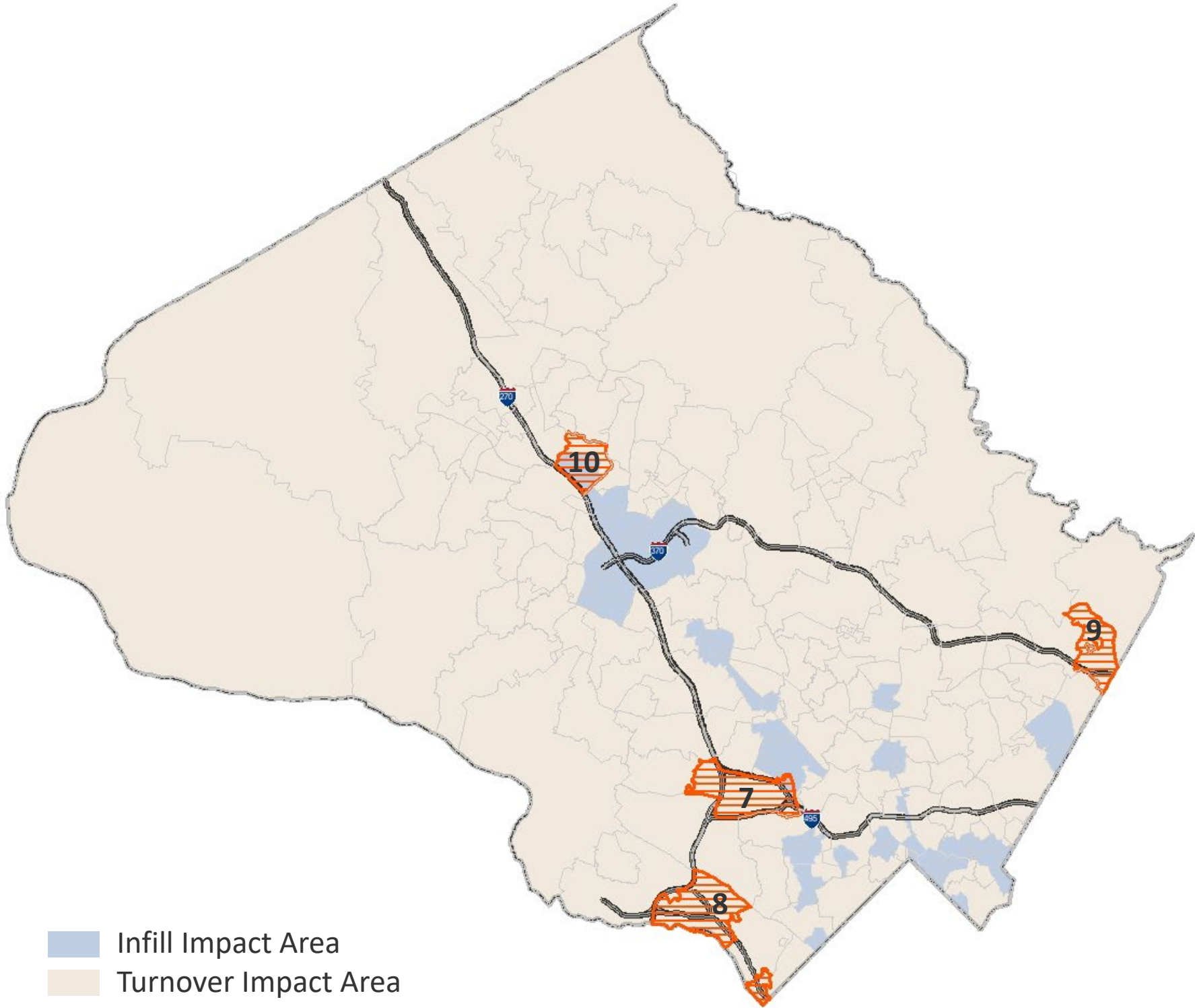
UPP Tier	Elementary Schools
TIER 1 UPP	16⅓% of Impact Tax
Utilization: ≥105% & Seat Deficit: ≥ 85 Payment Level: 40% total	1. Arcola ES 2. Burning Tree ES 3. Diamond ES 4. Farmland ES 5. Judith A. Resnik ES 6. Sargent Shriver ES
TIER 2 UPP	33⅓% of Impact Tax
Utilization: ≥ 120% & Seat Deficit: ≥ 102 Payment Level: 80% total	7. Ashburton ES 8. Bannockburn ES 9. Greencastle ES 10. Watkins Mill ES
TIER 3 UPP	50% of Impact Tax
Utilization: ≥135% & Seat Deficit: ≥ 115 Payment Level: 120% total	11. Burtonsville ES 12. Mill Creek Towne ES



FY 2022 Annual School Test Results

Elementary School Service Areas

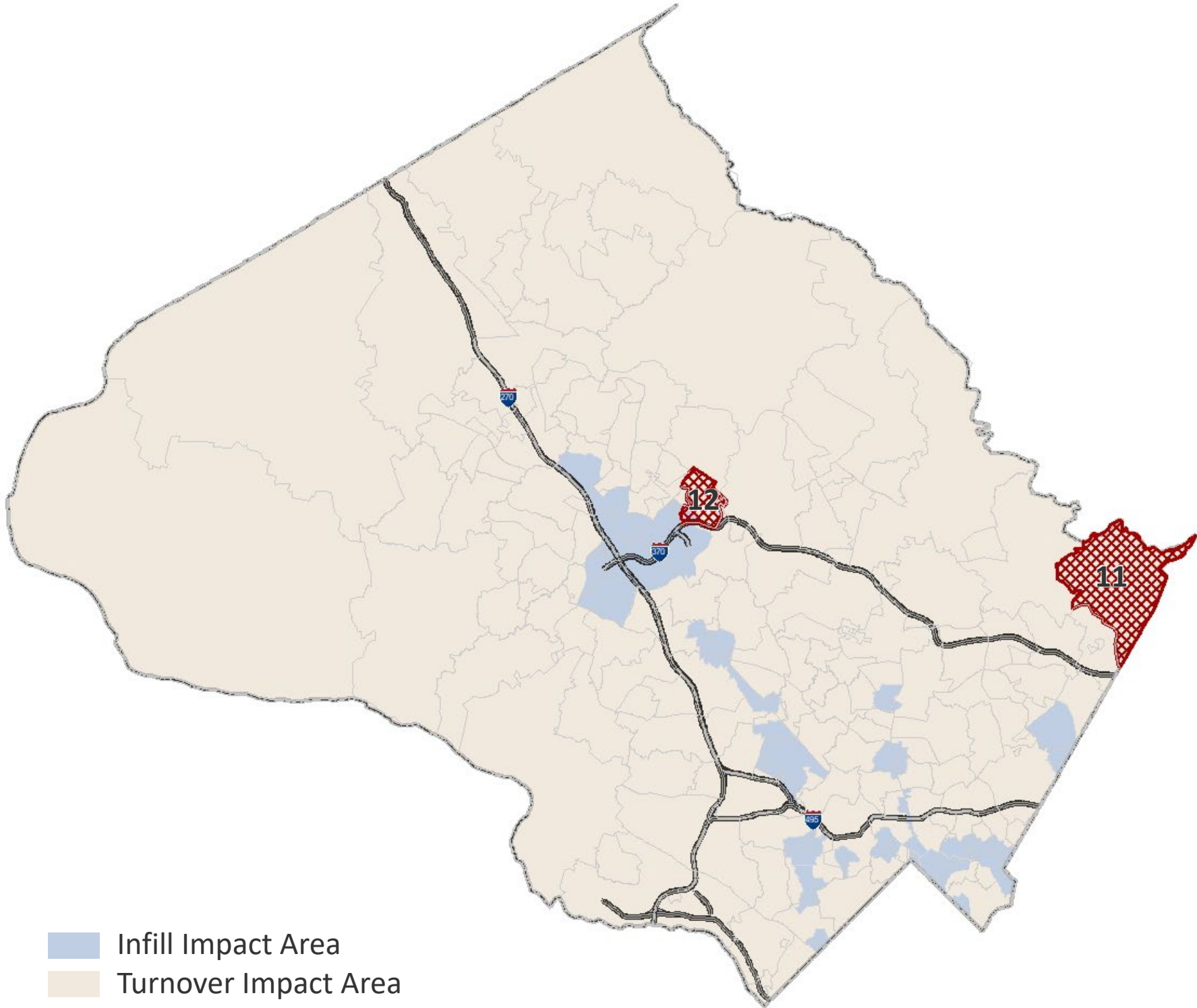
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FY 2022 Annual School Test Results

Elementary School Service Areas

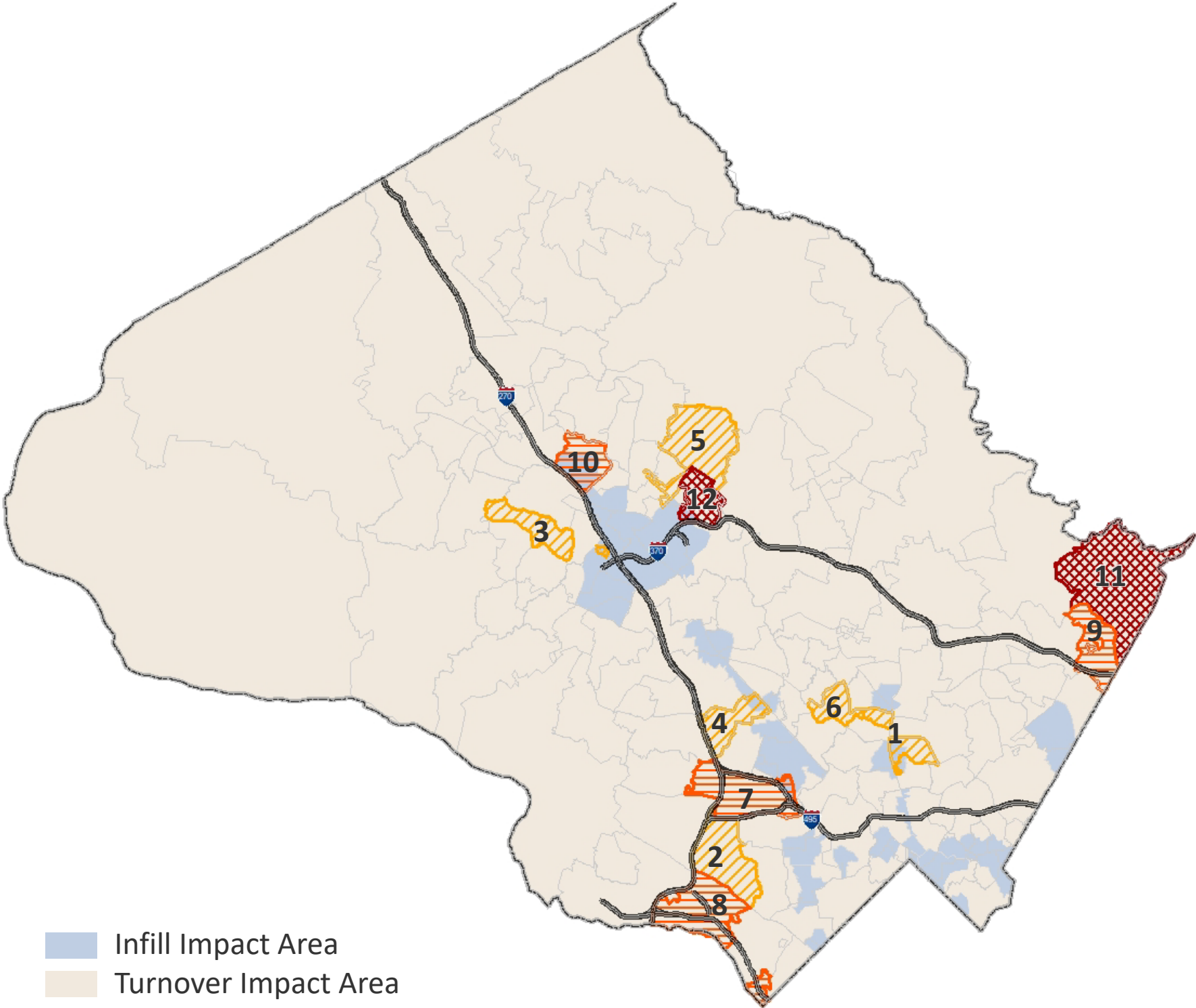
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FY 2022 Annual School Test Results

Elementary School Service Areas

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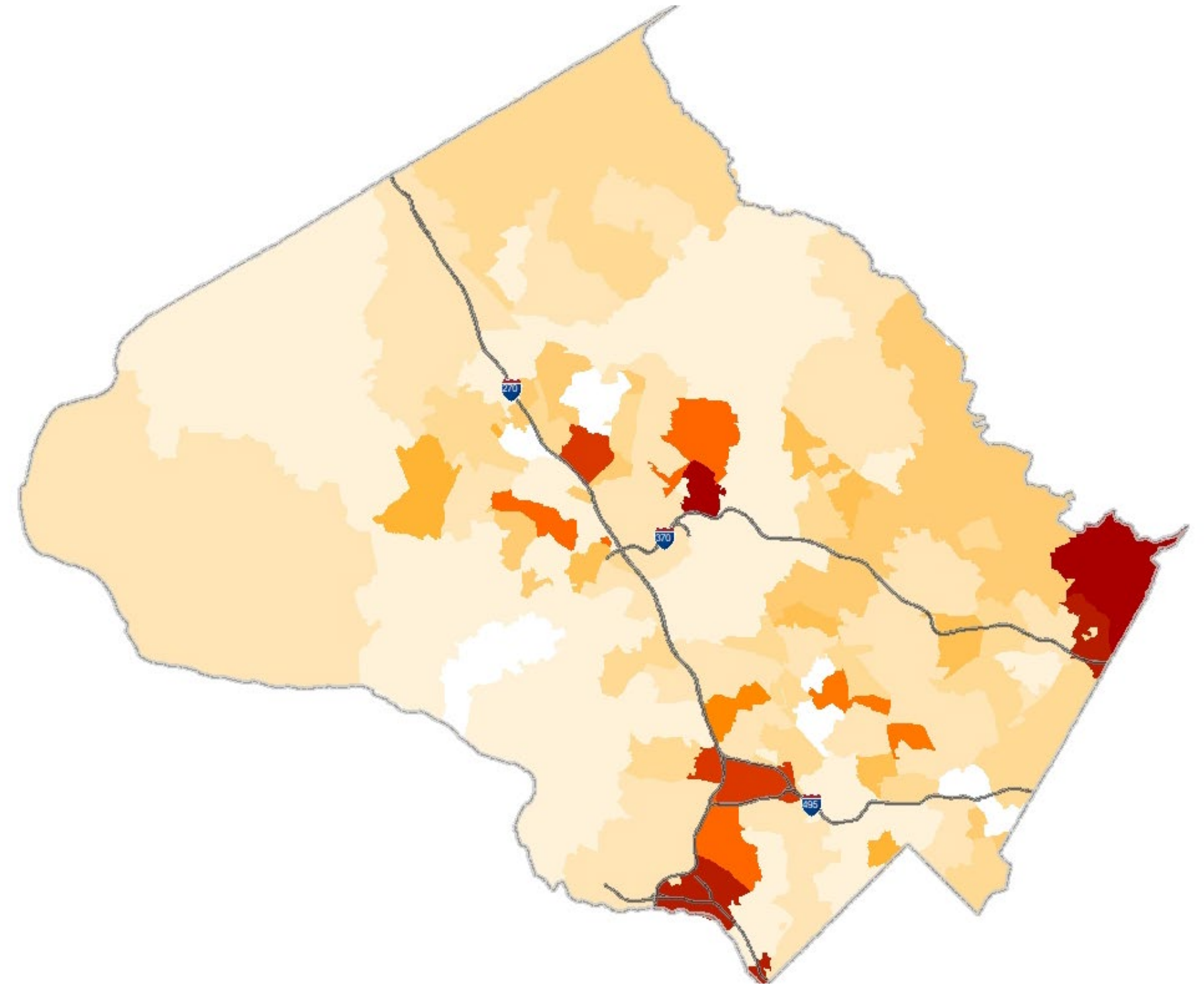
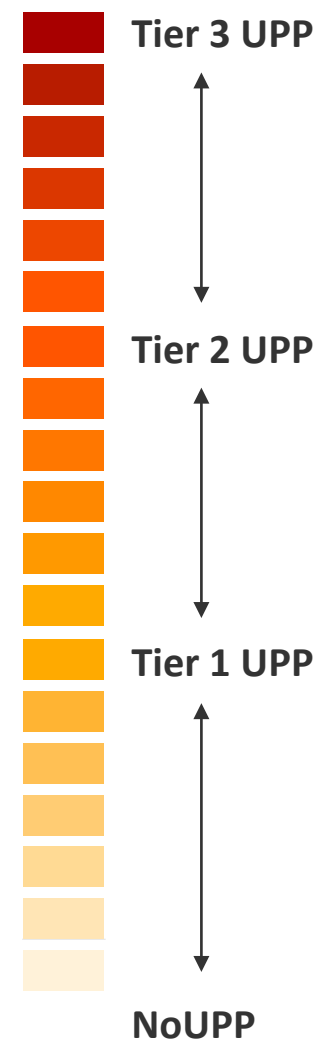


FY 2022 AST - Adequacy Ceilings

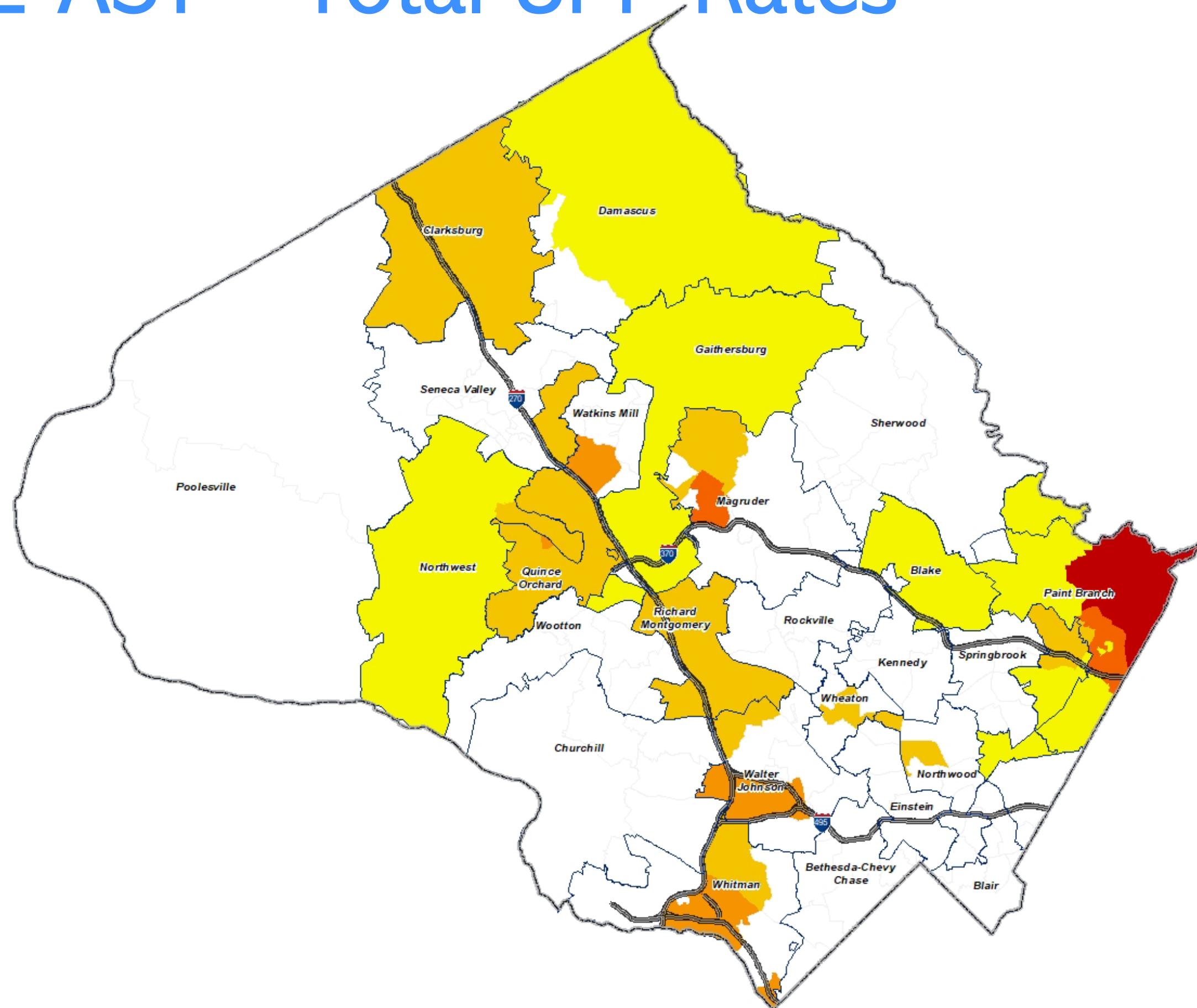
Elementary School Service Areas

❖ Adequacy ceilings with less than 15 seats:

- **Bannockburn ES**
11 students from Tier 3
- **Burning Tree ES**
2 students from Tier 2
- **Diamond ES**
9 students from Tier 2
- **Greencastle ES**
8 students from Tier 3
- **Spark M. Matsunaga ES**
4 students from Tier 1
- **Judith A. Resnik ES**
8 students from Tier 2
- **Rock Creek Forest ES**
2 students from Tier 1



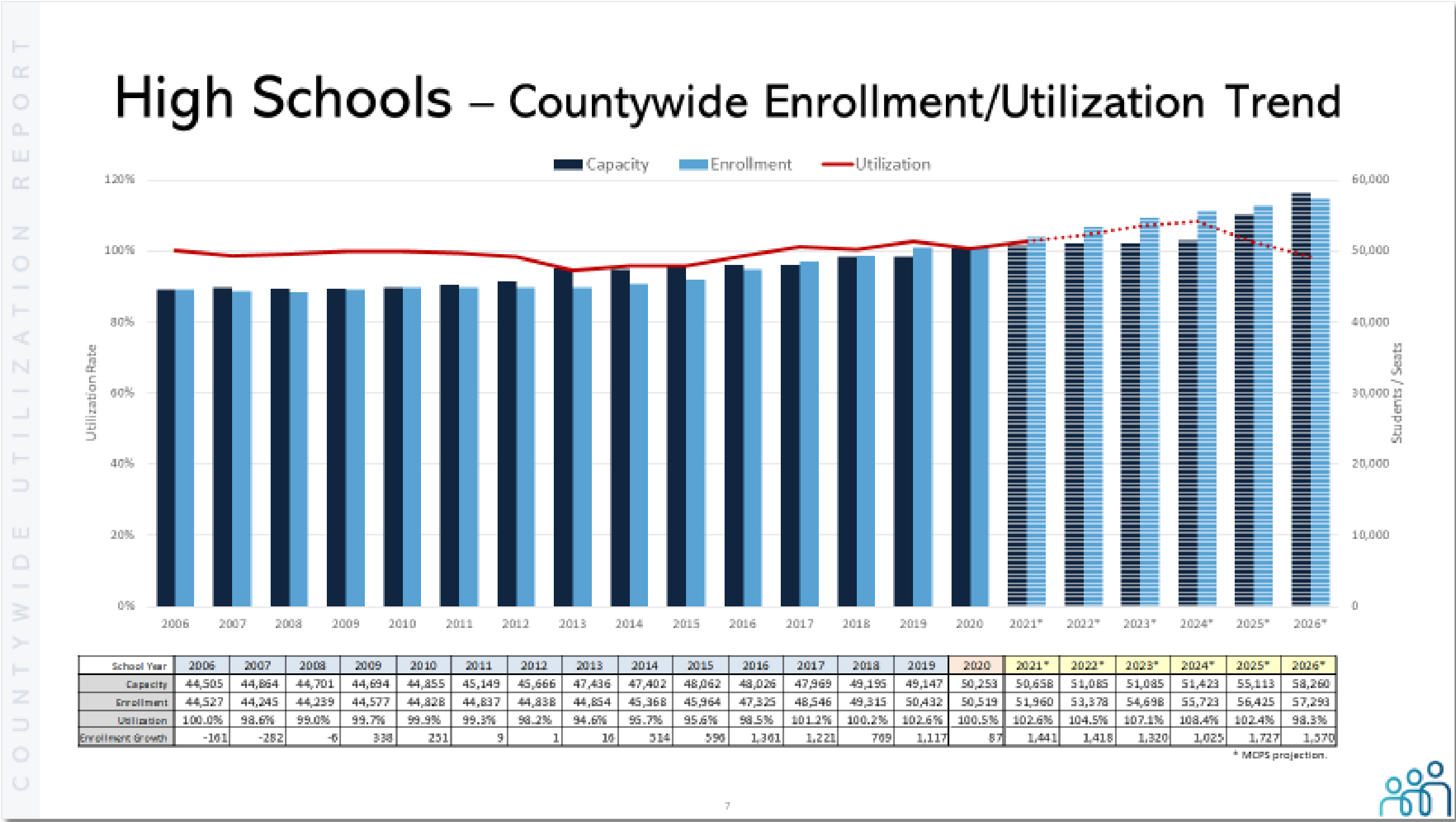
FY 2022 AST – Total UPP Rates



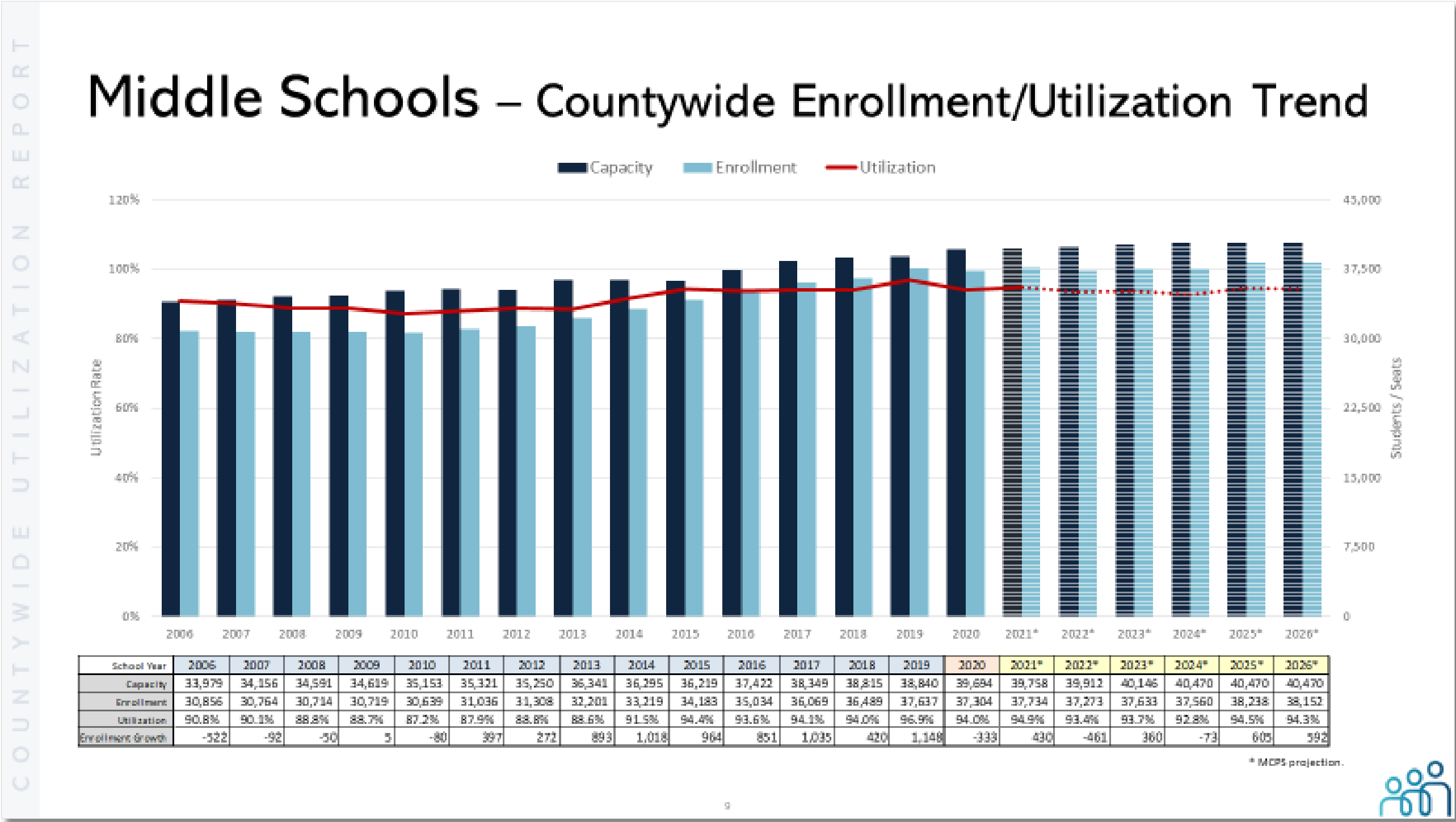
FY2022 School Utilization Report



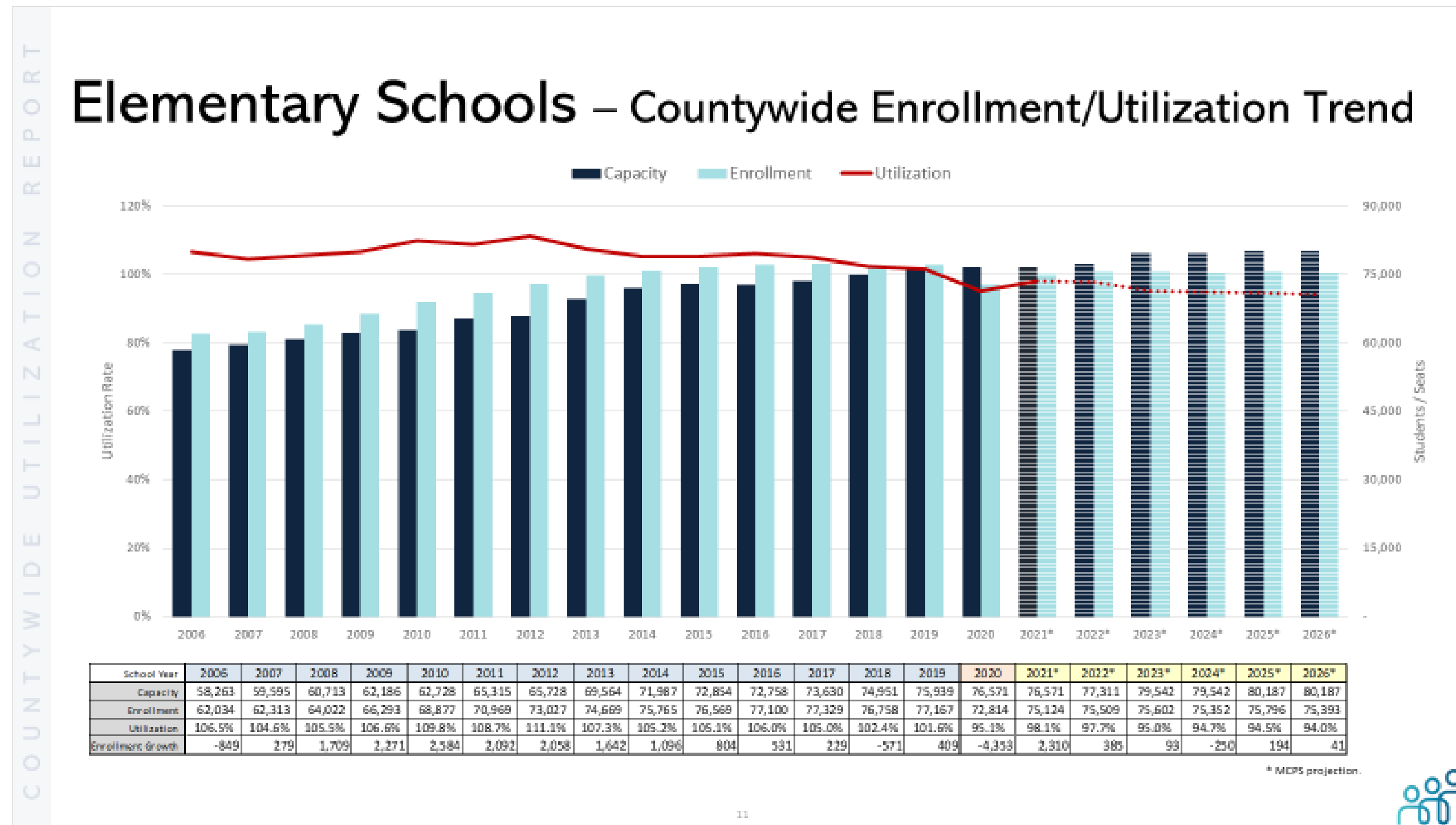
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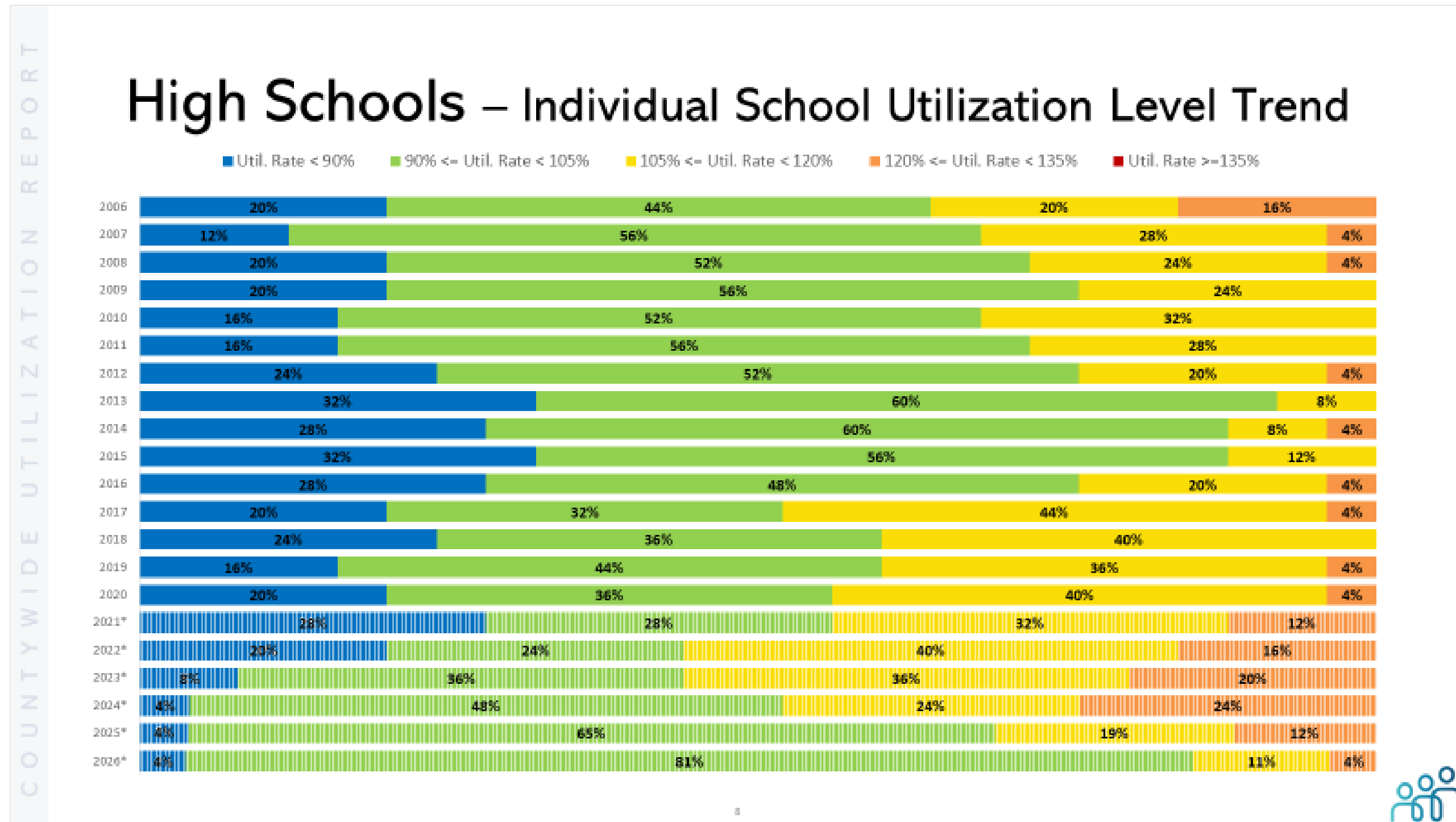
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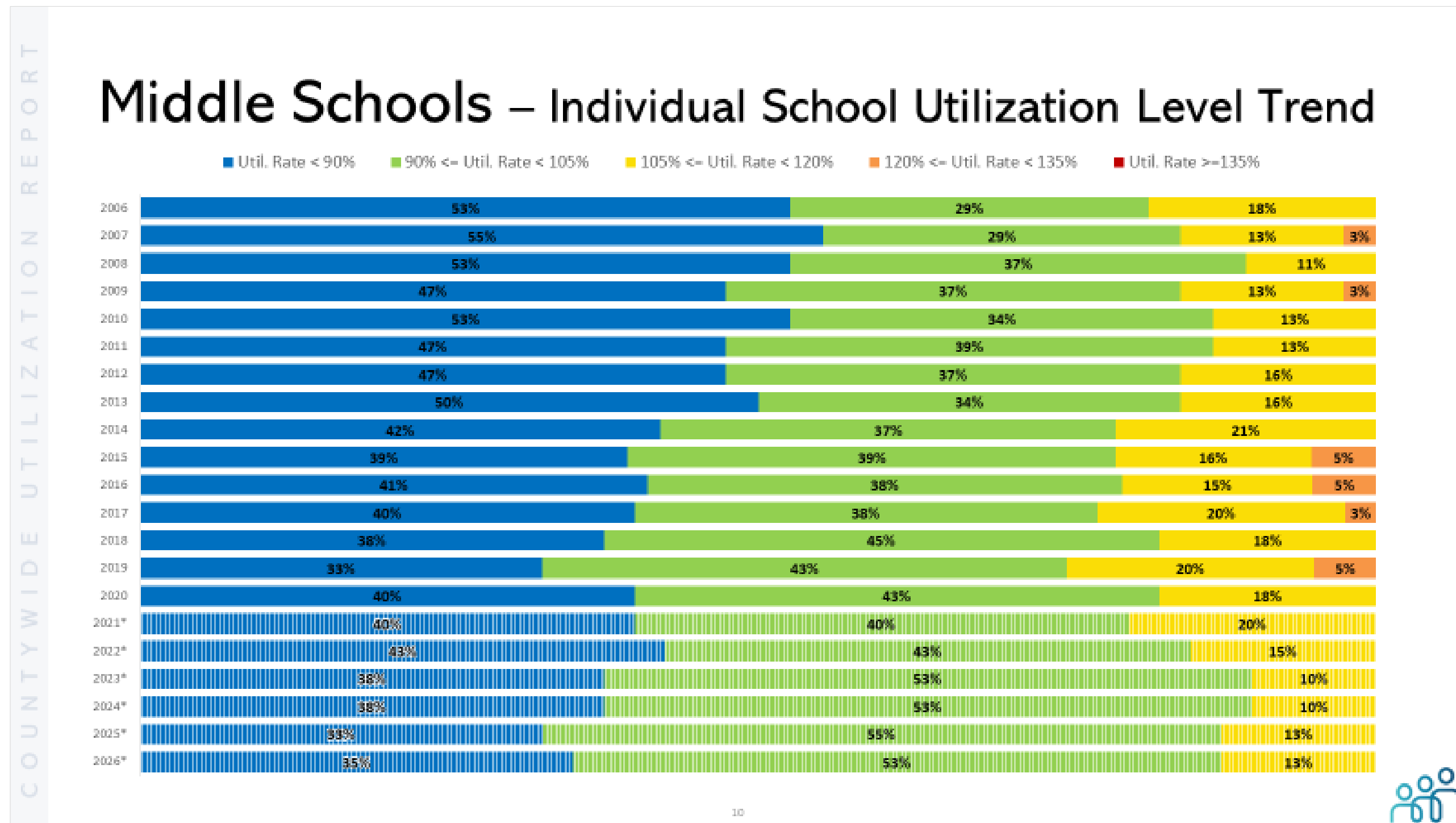
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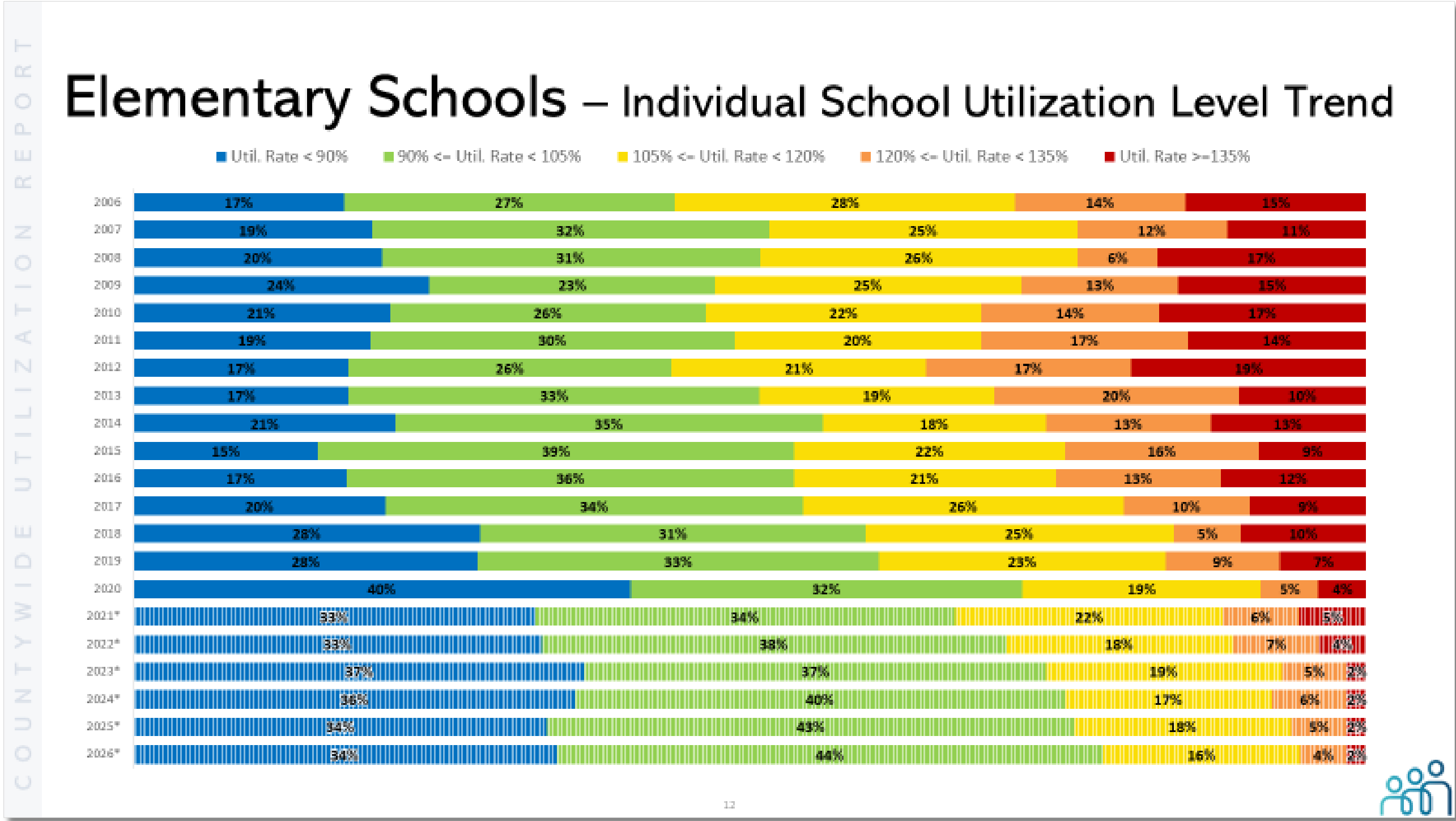
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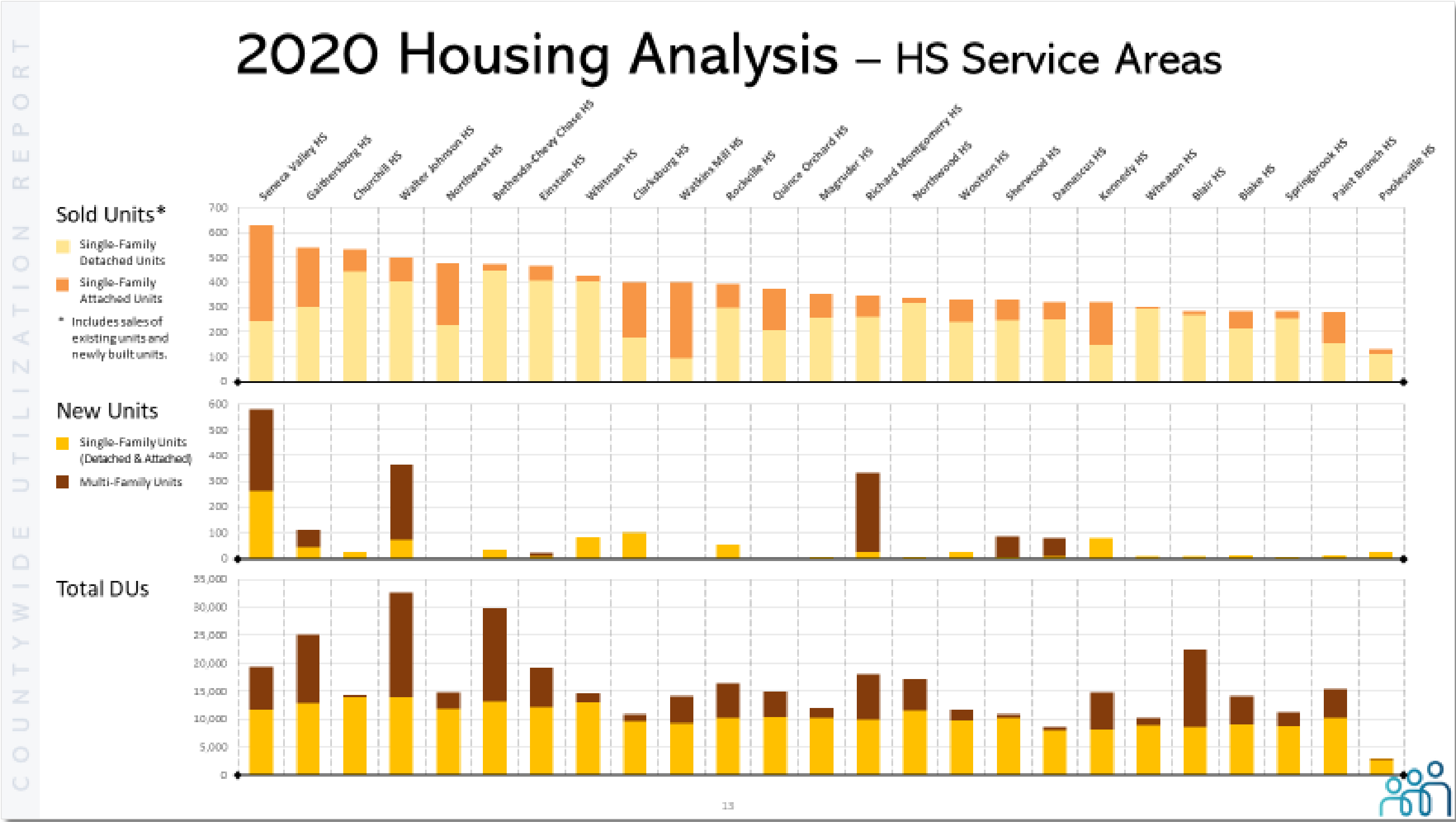
FY2022 School Utilization Report



FY2022 School Utilization Report



FY2022 School Utilization Report



FY22-23 Impact Tax & UPP Updates

New Impact Tax Rates (effective 7/1/21)

❖ Transportation

	Red Policy Areas	Orange Policy Areas	Yellow Policy Areas	Green Policy Areas
Residential Uses (per unit)				
Single-Family Detached	\$8,071	\$20,173	\$25,217	\$25,217
Single-Family Attached	\$6,603	\$16,506	\$20,633	\$20,633
Multifamily Low-rise	\$5,134	\$12,835	\$16,044	\$16,044
Multifamily High-rise	\$3,667	\$9,168	\$11,460	\$11,460
Senior Residential	\$1,466	\$3,668	\$4,584	\$4,584
Student-Built Houses	\$0	\$0	\$0	\$0
Commercial Uses (per sf GFA)				
Office	\$7.35	\$18.45	\$23.05	\$23.05
Industrial	\$3.70	\$9.15	\$11.55	\$11.55
Bioscience Facility	\$0.00	\$0.00	\$0.00	\$0.00
Retail	\$6.55	\$16.45	\$20.55	\$20.55
Place of Worship	\$0.00	\$0.00	\$0.00	\$0.00
Clergy House	\$0.00	\$0.00	\$0.00	\$0.00
Private School	\$0.60	\$1.50	\$1.90	\$1.90
Hospital	\$0.00	\$0.00	\$0.00	\$0.00
Charitable, Philanthropic Institution	\$0.00	\$0.00	\$0.00	\$0.00
Other Nonresidential	\$3.70	\$9.15	\$11.55	\$11.55
Agricultural Facility	\$0.00	\$0.00	\$0.00	\$0.00

New Impact Tax Rates (effective 7/1/21)

❖ School

- Current Rates (effective until June 30, 2021)

	Single-family		Multifamily	
	Detached	Attached	Low-Rise	High-Rise
Infill Impact Areas	\$20,510	\$17,841	\$5,200	\$3,193
Turnover Impact Areas	\$21,990	\$23,813	\$12,148	\$2,600

- New Rates

	Single-family		Multifamily	
	Detached	Attached	Low-Rise	High-Rise
Infill Impact Areas	\$20,837	\$18,053	\$5,487	\$3,116
Turnover Impact Areas	\$21,737	\$24,547	\$11,354	\$5,061

- Rate Change

	Single-family		Multifamily	
	Detached	Attached	Low-Rise	High-Rise
Infill Impact Areas	\$327	\$212	\$287	-\$77
Turnover Impact Areas	-\$253	\$734	-\$794	\$2,461

New UPP Rates (effective 7/1/21)

■ Tier 1 UPP

Tier 1 UPP Payments (40%)		Single-family		Multifamily	
		Detached	Attached	Low-Rise	High-Rise
Infill Impact Areas	Elementary	\$3,473	\$3,009	\$915	\$519
	Middle	\$2,084	\$1,805	\$549	\$312
	High	\$2,778	\$2,407	\$732	\$415
Turnover Impact Areas	Elementary	\$3,623	\$4,091	\$1,892	\$844
	Middle	\$2,174	\$2,455	\$1,135	\$506
	High	\$2,898	\$3,273	\$1,514	\$675

■ Tier 2 UPP

Tier 2 UPP Payments (80%)		Single-family		Multifamily	
		Detached	Attached	Low-Rise	High-Rise
Infill Impact Areas	Elementary	\$6,946	\$6,018	\$1,829	\$1,039
	Middle	\$4,167	\$3,611	\$1,097	\$623
	High	\$5,557	\$4,814	\$1,463	\$831
Turnover Impact Areas	Elementary	\$7,246	\$8,182	\$3,785	\$1,687
	Middle	\$4,347	\$4,909	\$2,271	\$1,012
	High	\$5,797	\$6,546	\$3,028	\$1,350

■ Tier 3 UPP

Tier 3 UPP Payments (120%)		Single-family		Multifamily	
		Detached	Attached	Low-Rise	High-Rise
Infill Impact Areas	Elementary	\$10,419	\$9,027	\$2,744	\$1,558
	Middle	\$6,251	\$5,416	\$1,646	\$935
	High	\$8,335	\$7,221	\$2,195	\$1,246
Turnover Impact Areas	Elementary	\$10,869	\$12,274	\$5,677	\$2,531
	Middle	\$6,521	\$7,364	\$3,406	\$1,518
	High	\$8,695	\$9,819	\$4,542	\$2,024

Recommended Motion

- Certify the FY 2022 Annual School Test results to take effect on July 1, 2022.