



Montgomery Planning Countywide Planning and Policy

06/26/2025

Agenda Item 9

# FY 2026 Annual School Test

- + School Utilization Report
- + MCPS's Initial Boundary Options Overview

# Agenda

- FY 2026 Annual School Test & School Utilization Report
- FY 2026-2027 Student Generation Rates & School Impact Tax Rates
- MCPS's Woodward Boundary Study Initial Options

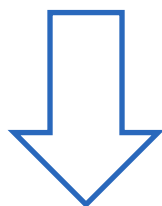
# **FY 2026 Annual School Test & School Utilization Report**

# Annual School Test Methodology

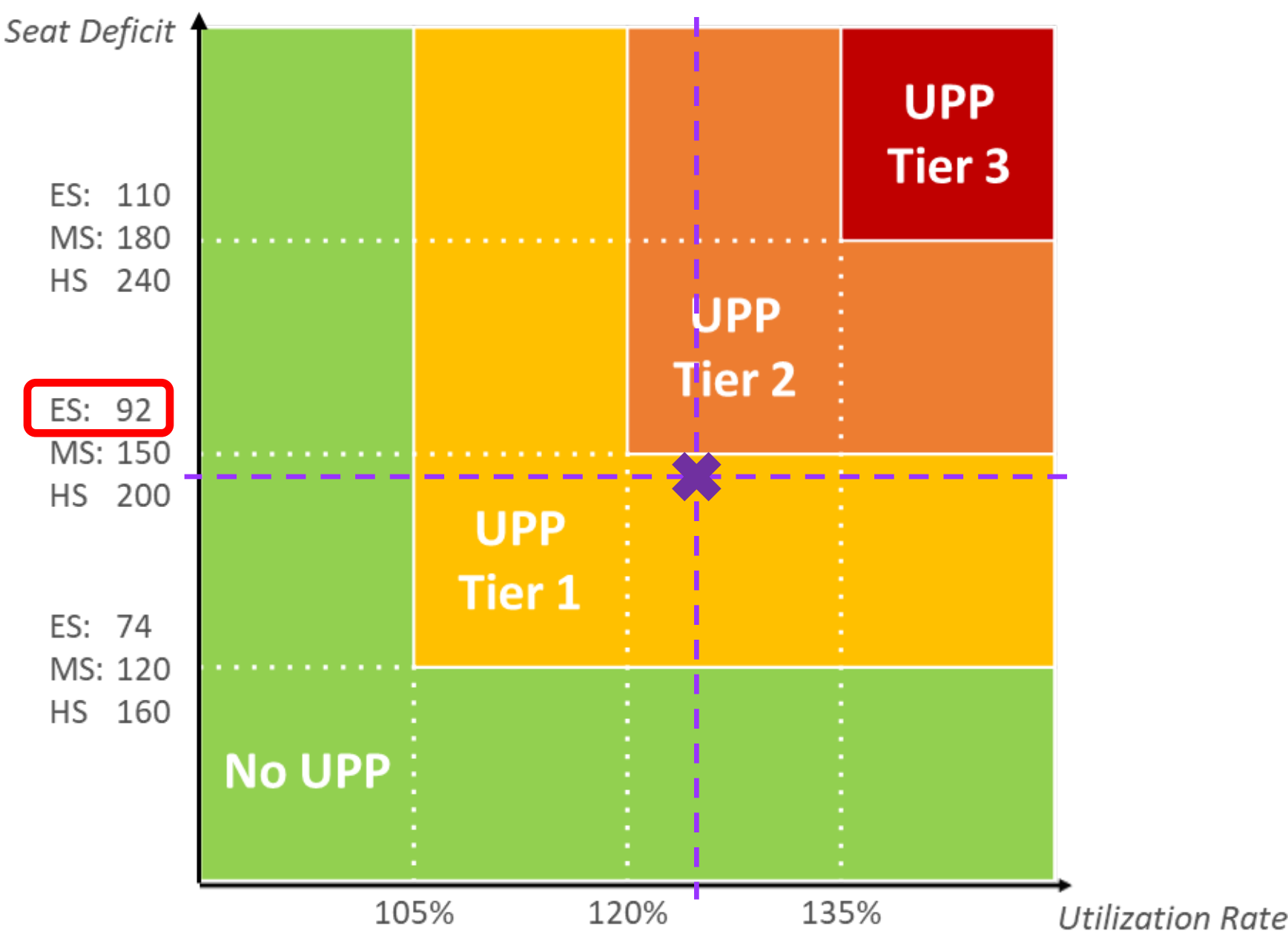
## Data Source & Adequacy Standards

- FY2026 Annual School Test evaluates adequacy of 2029-2030 school year based on MCPS’s FY 2026 CIP Master Plan projections.

❖ *Ex) Elementary School with:*  
- Util. Rate = 125%  
- Seat Deficit = 90



*Tier 1 UPP  
(adequacy ceiling: 2)*



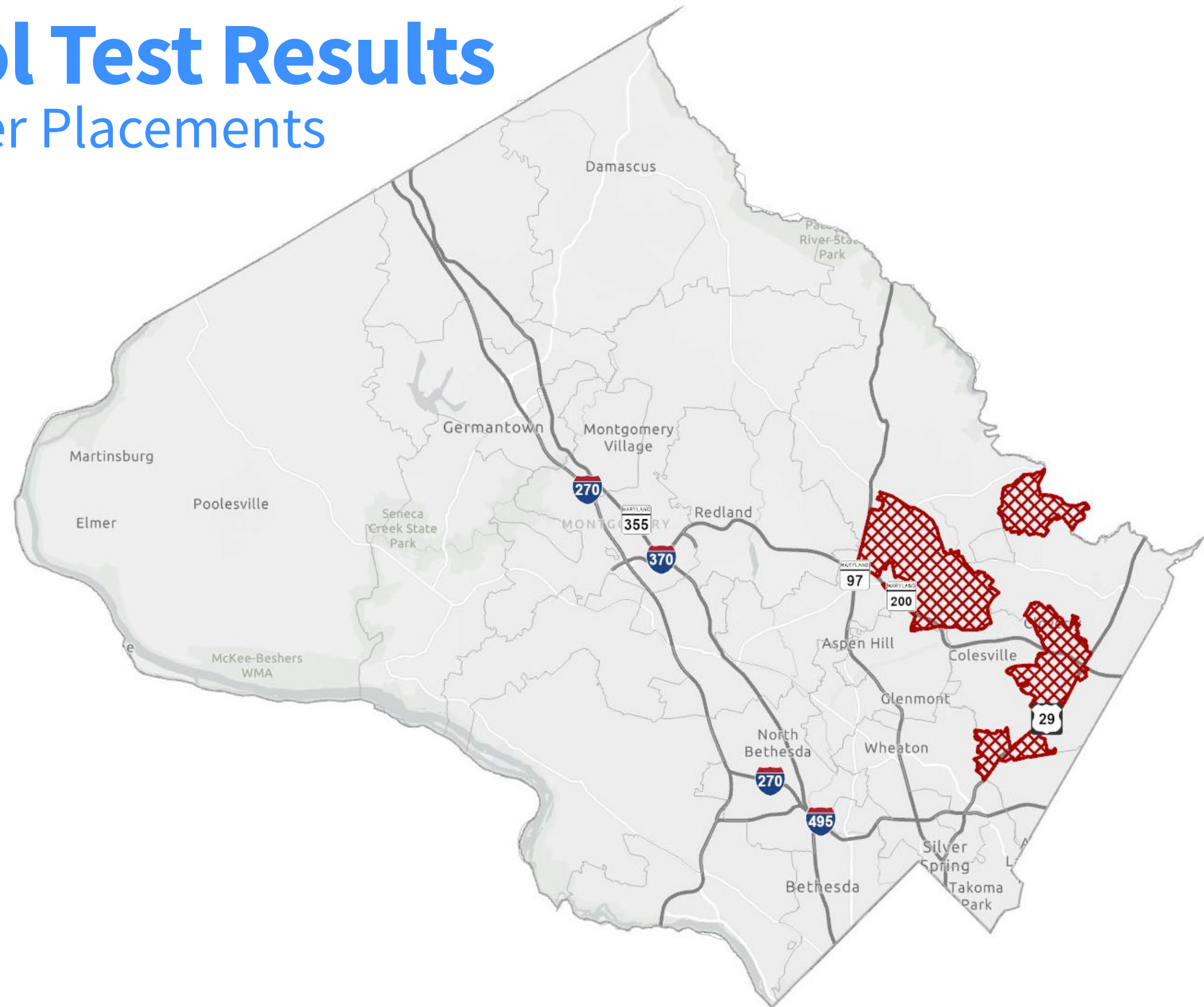


# FY 2026 Annual School Test Results

## High School Service Area UPP Tier Placements

### Tier 3

- James H. Blake HS

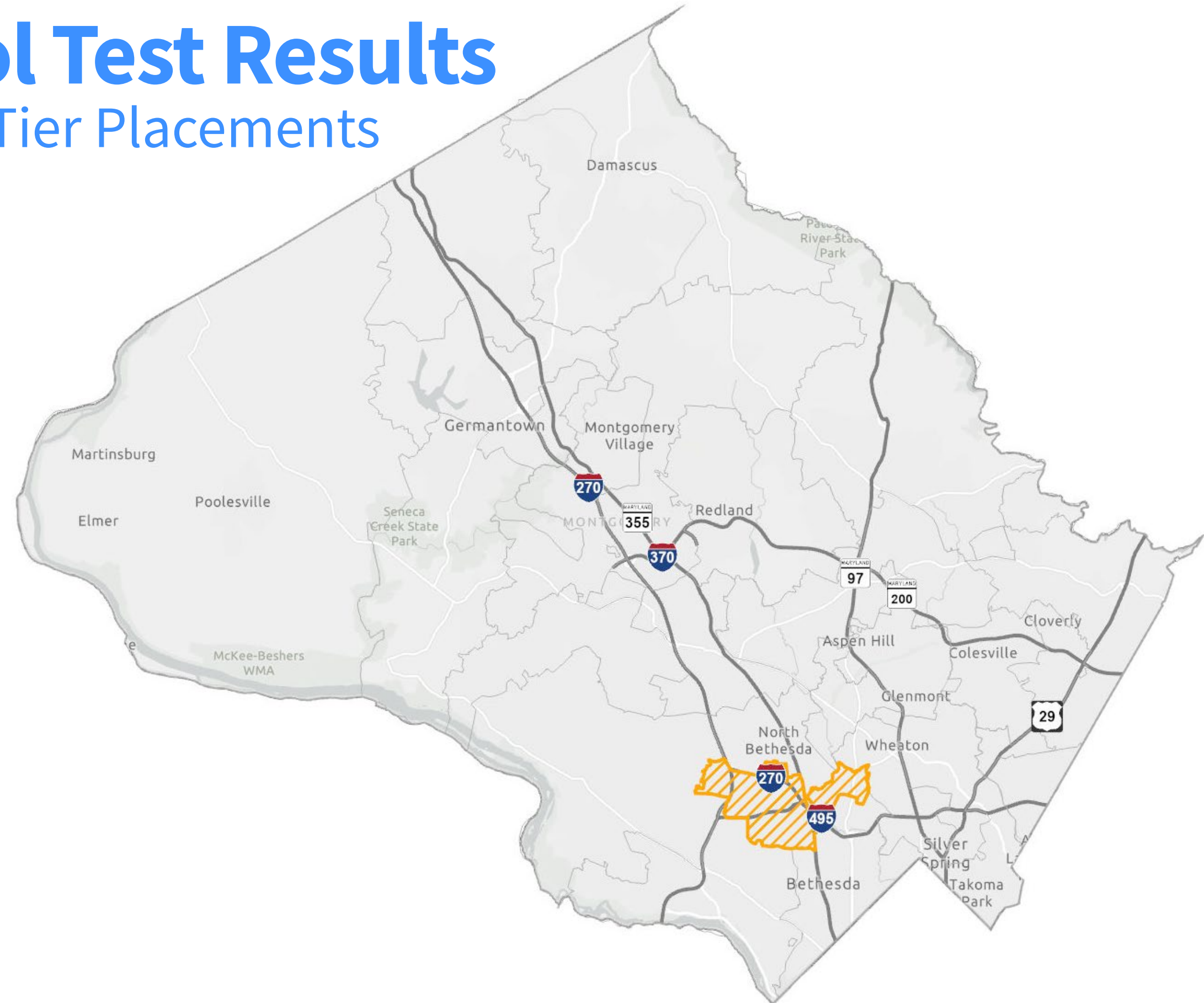


# FY 2026 Annual School Test Results

## Middle School Service Area UPP Tier Placements

### Tier 1

- North Bethesda MS





# FY 2026 Annual School Test Results

## Elementary School Service Area UPP Tier Placements

### Tier 1

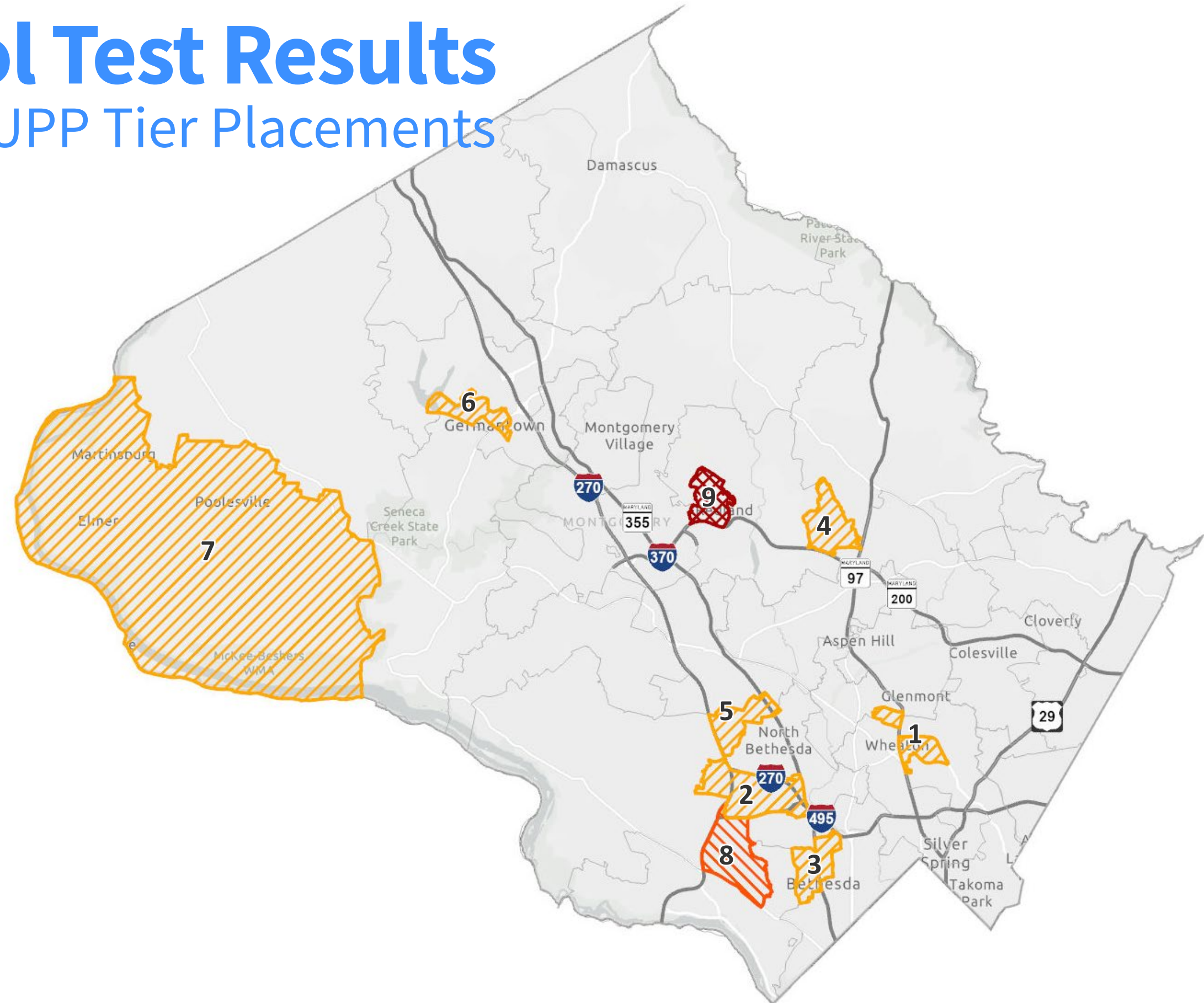
1. Arcola ES
2. Ashburton ES
3. Bethesda ES
4. Cashell ES
5. Farmland ES
6. Lake Seneca ES
7. Poolesville ES

### Tier 2

8. Burning Tree ES

### Tier 3

9. Mill Creek Towne ES

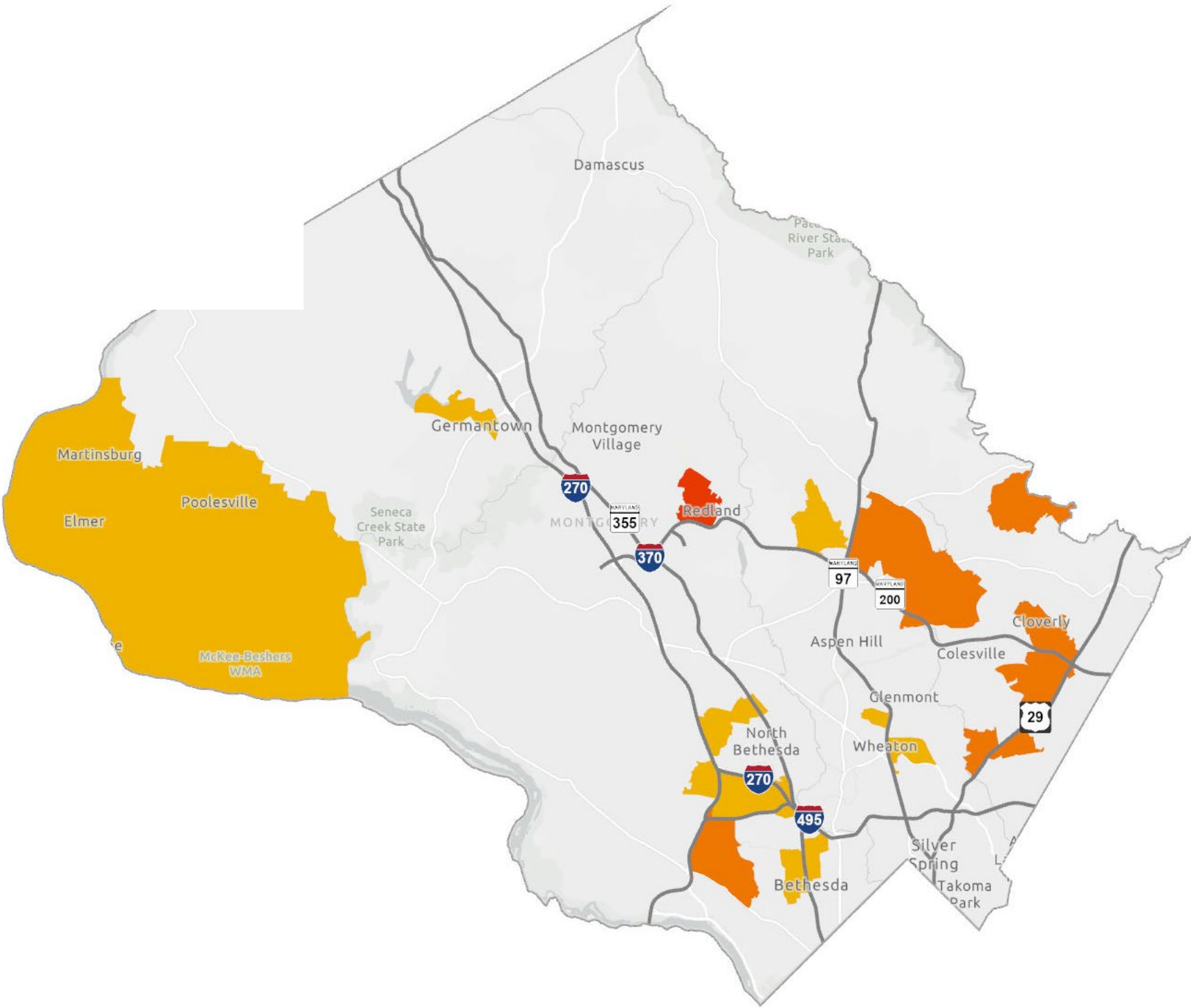


# FY 2026 Annual School Test Results

Default UPP Factors

(ES+MS+HS)

	Tier 1	Tier 2	Tier 3
Elementary School	16 2/3%	33 1/3%	50%
Middle School	10%	20%	30%
High School	13 1/3%	26 2/3%	40%



# FY 2026 Annual School Test Results

## Schools with Low Adequacy Ceilings

- ❖ UPP rates may be adjusted higher than indicated by Annual School Test results if a development application's estimated enrollment impact exceeds the adequacy ceiling of a school serving the project.

The following schools have low adequacy ceilings (less than 10 seats):

- John T. Baker MS (No UPP) – 9 seat ceiling to Tier 1
- Earle B. Wood MS (No UPP) – 9 seat ceiling to Tier 1
- Cashell ES (Tier 1) – 3 seat ceiling to Tier 2 UPP
- Lake Seneca ES (Tier 1) – 7 seat ceiling to Tier 2 UPP
- Sequoyah ES (No UPP) – 7 seat ceiling to Tier 1 UPP

# FY 2026 School Utilization Report

## MCPS Countywide Projections (2030-2031 School Year)

### Elementary Schools

- Countywide utilization rate: 87.4%
- Countywide seat surplus: 10,117
- Schools overutilized: 13%  
*(utilization rate  $\geq$  105%)*
- Schools severely underutilized: 20%  
*(utilization rate  $<$  75%)*

### Middle Schools

- Countywide utilization rate: 90.4%
- Countywide seat surplus: 3,842

### High Schools

- Countywide utilization rate: 96.3%
- Countywide seat surplus: 2,090



# FY 2026 School Utilization Report

## 2024 Housing Sales Analysis

### Elementary School Service Areas

- 1. Ashburton (Tier 1 UPP)
- 2. Whetstone
- 3. Stedwick

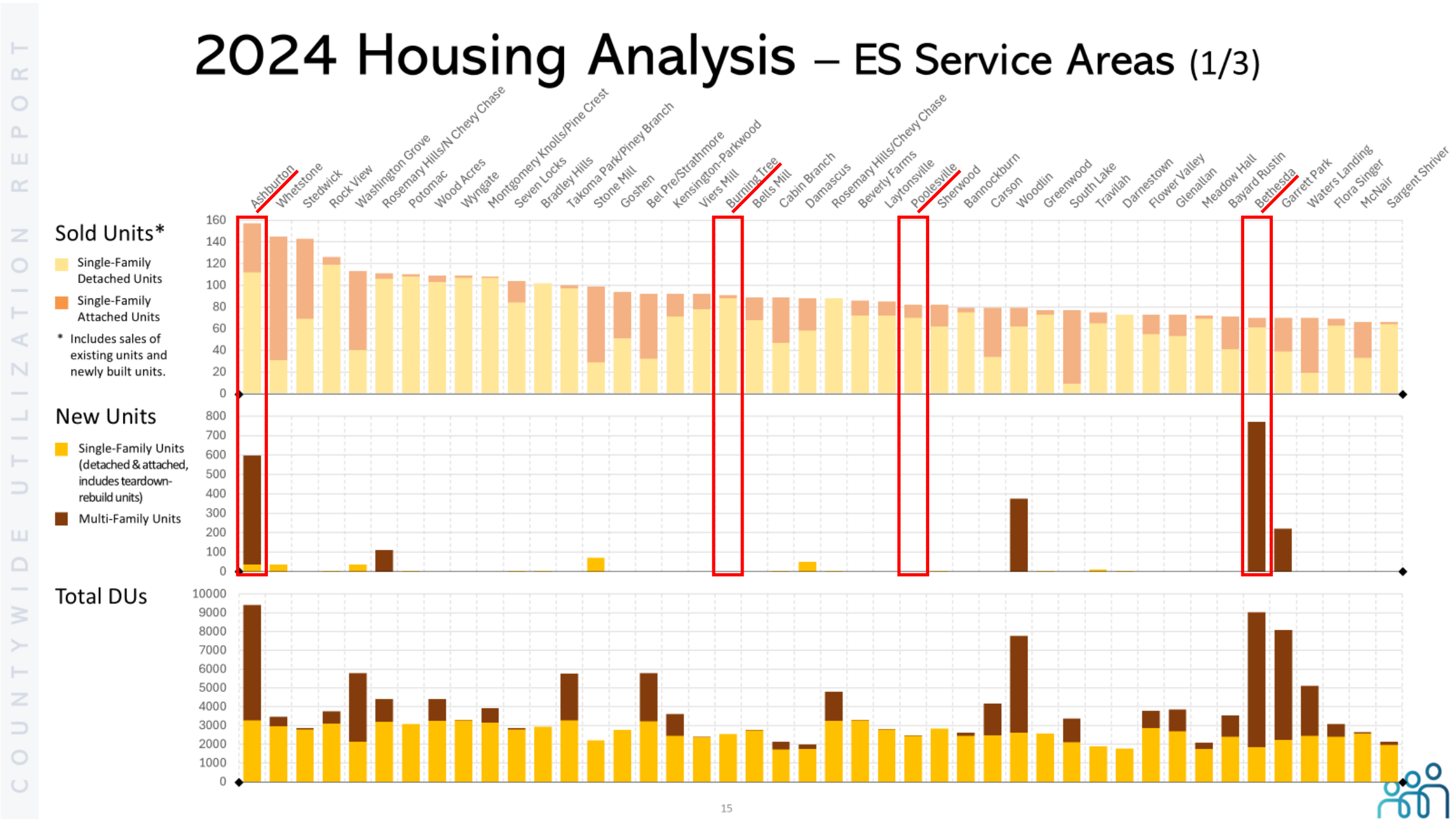
### Middle School Service Areas

- 1. Pyle
- 2. North Bethesda (Tier 1 UPP)
- 3. Cabin John

### High School Service Areas

- 1. Walter Johnson
- 2. Gaithersburg
- 3. Churchill

### 2024 Housing Analysis – ES Service Areas (1/3)





# **FY 2026-2027 Student Generation Rates & School Impact Tax Rates**

# FY 2026-2027 Student Generation Rates

- K-12 rates dropped overall compared to the updated FY2025 rates, except for multifamily units in Turnover Impact Areas.

School Impact Area Type	Housing Type	FY2026-2027 Student Generation Rates				<i>Difference from Updated FY2025</i>
		ES	MS	HS	K-12	
Infill	Single Family Detached (SFD)	0.197	0.104	0.152	0.453	-2.6%
	Single Family Attached (SFA)	0.165	0.088	0.137	0.390	-3.5%
	Multifamily Low-rise (MFL)	0.066	0.034	0.049	0.149	-3.9%
	Multifamily High-rise (MFH)	0.039	0.016	0.020	0.076	-1.3%
Turnover	Single Family Detached (SFD)	0.180	0.098	0.148	0.427	-2.5%
	Single Family Attached (SFA)	0.207	0.113	0.166	0.487	-3.0%
	Multifamily Low-rise (MFL)	0.123	0.064	0.083	0.270	0.4%
	Multifamily High-rise (MFH)	0.059	0.026	0.040	0.124	17.0%

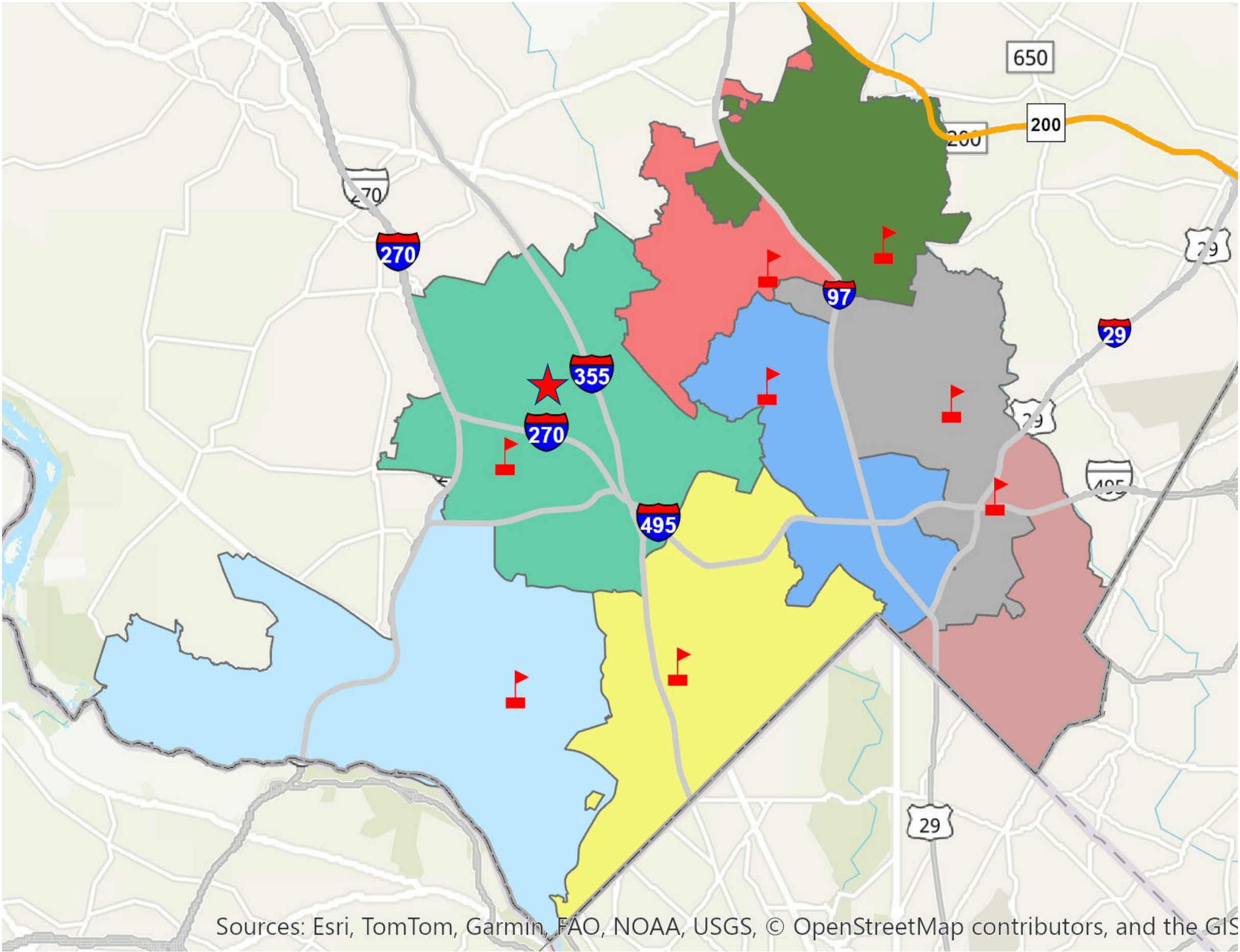
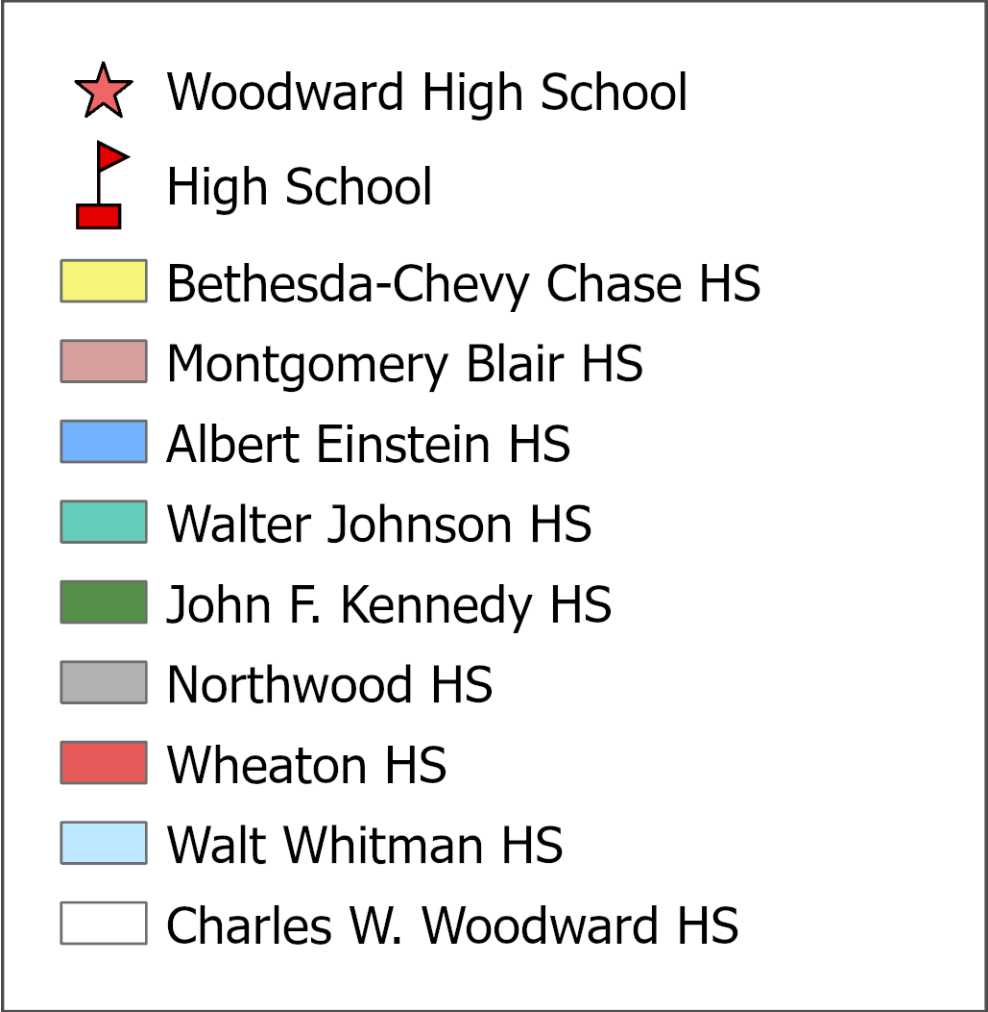
# FY 2026-2027 School Impact Tax Rate

- 20% cap from previous rate activated for all impact areas and housing types.
  - Raw calculation increased from previous raw calculation, mostly due to elementary school construction cost.

	Raw Calc Rate	Official Rate (with 20% Cap)
<b>Infill Impact Areas</b>		
Single-Family Detached (SFD)	\$ 33,633	\$ 30,005
Single-Family Attached (SFA)	\$ 28,972	\$ 25,997
Multifamily Low-rise (MFL)	\$ 11,063	\$ 7,901
Multifamily High-rise (MFH)	\$ 5,574	\$ 4,487
<b>Turnover Impact Areas</b>		
Single-Family Detached (SFD)	\$ 31,630	\$ 31,301
Single-Family Attached (SFA)	\$ 36,074	\$ 35,347
Multifamily Low-rise (MFL)	\$ 20,025	\$ 16,350
Multifamily High-rise (MFH)	\$ 9,300	\$ 7,288

# **MCPS's Woodward Boundary Study Initial Options**

# Woodward Boundary Study Scope – HS

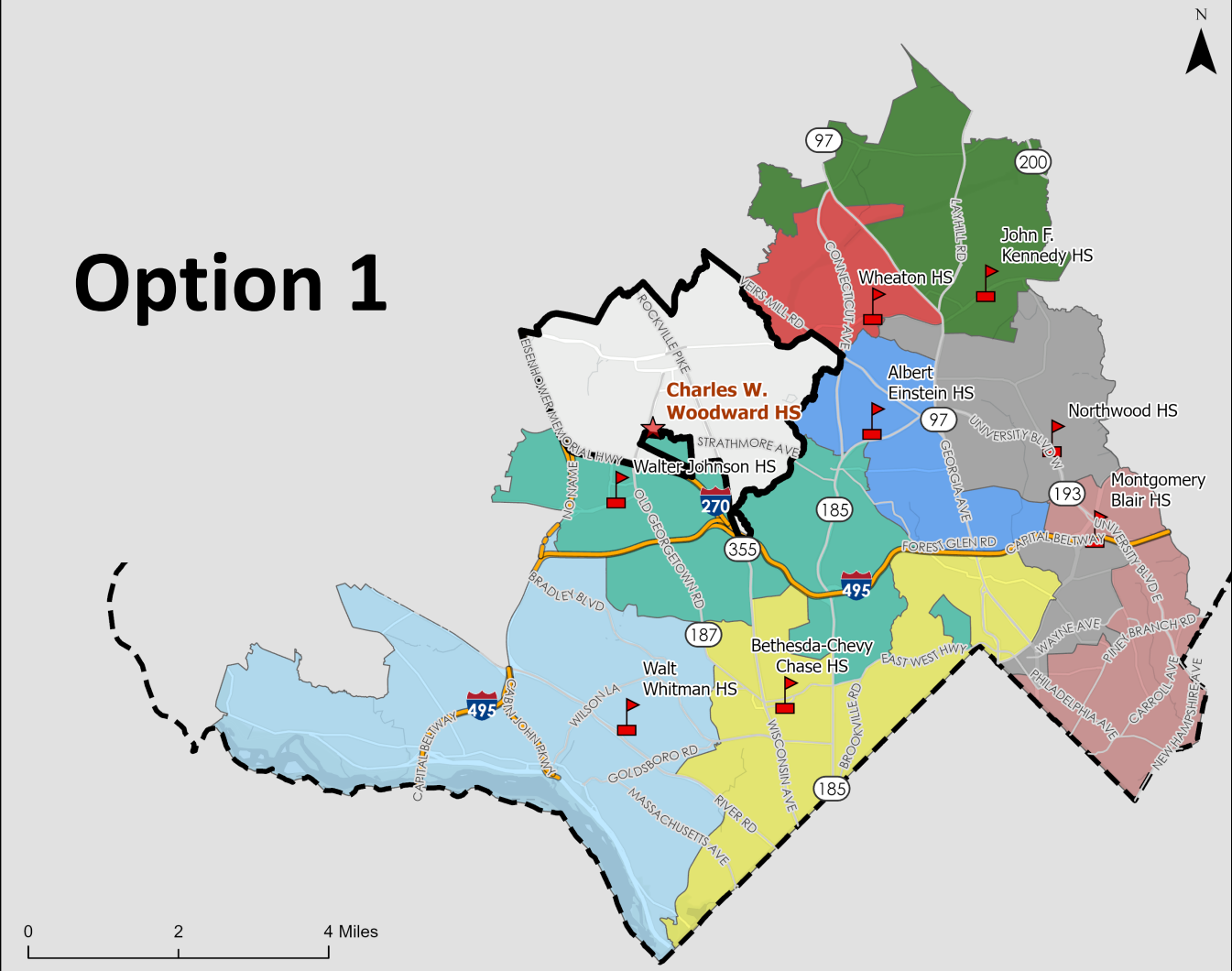




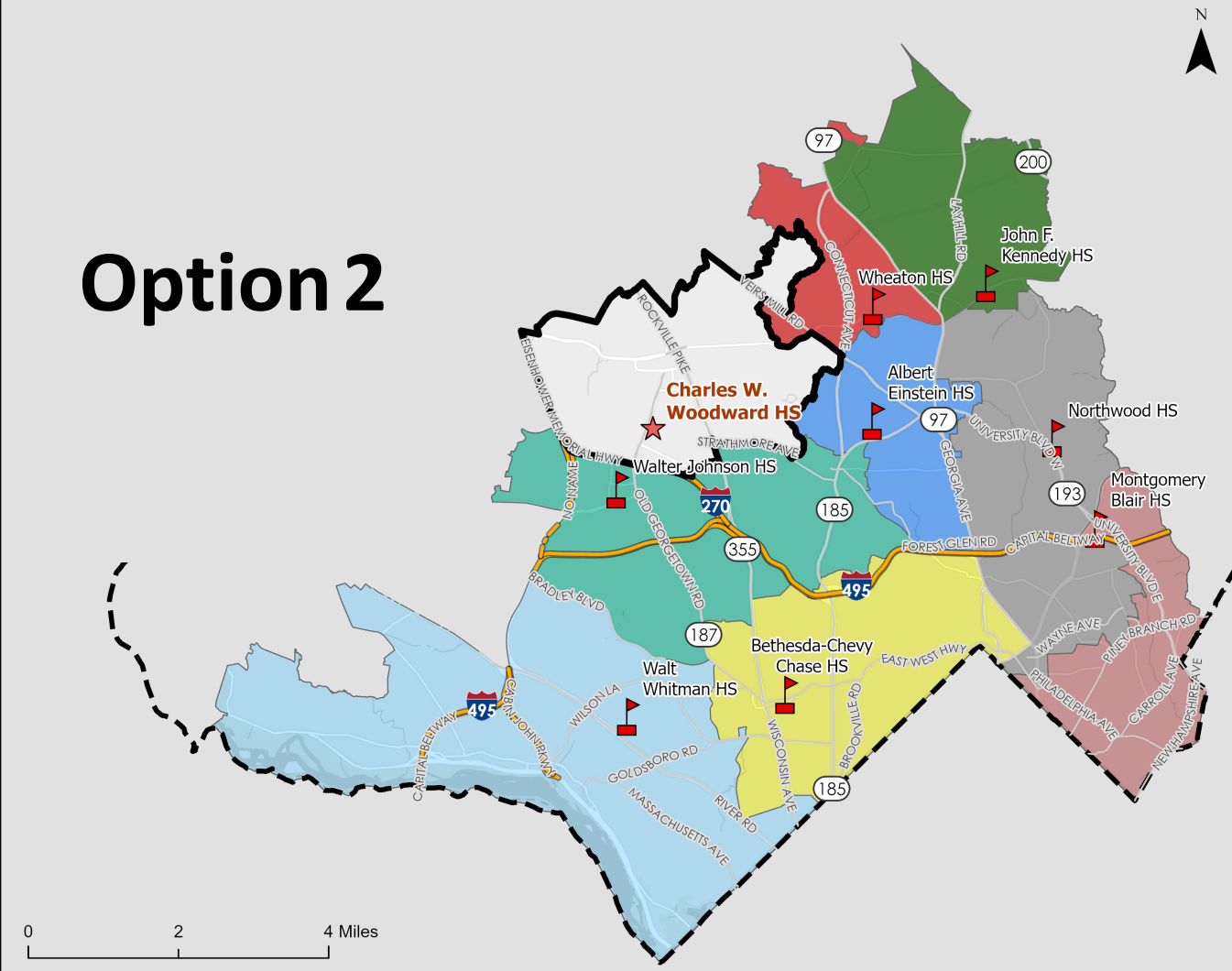
# Woodward Boundary Study Initial Options – HS

- ★ Woodward High School
- ▮ High School
- Bethesda-Chevy Chase HS
- Montgomery Blair HS
- Albert Einstein HS
- Walter Johnson HS
- John F. Kennedy HS
- Northwood HS
- Wheaton HS
- Walt Whitman HS
- Charles W. Woodward HS

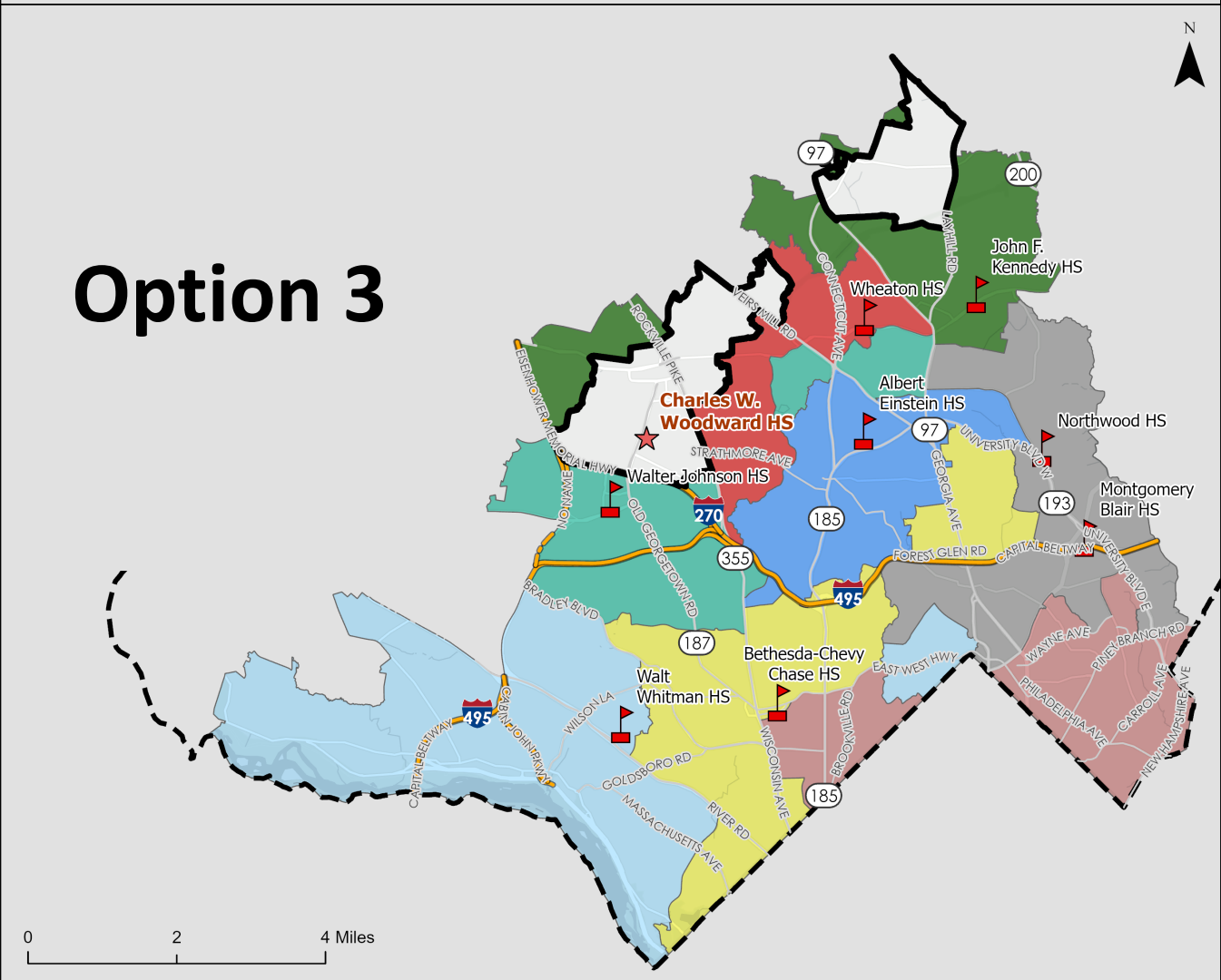
Option 1



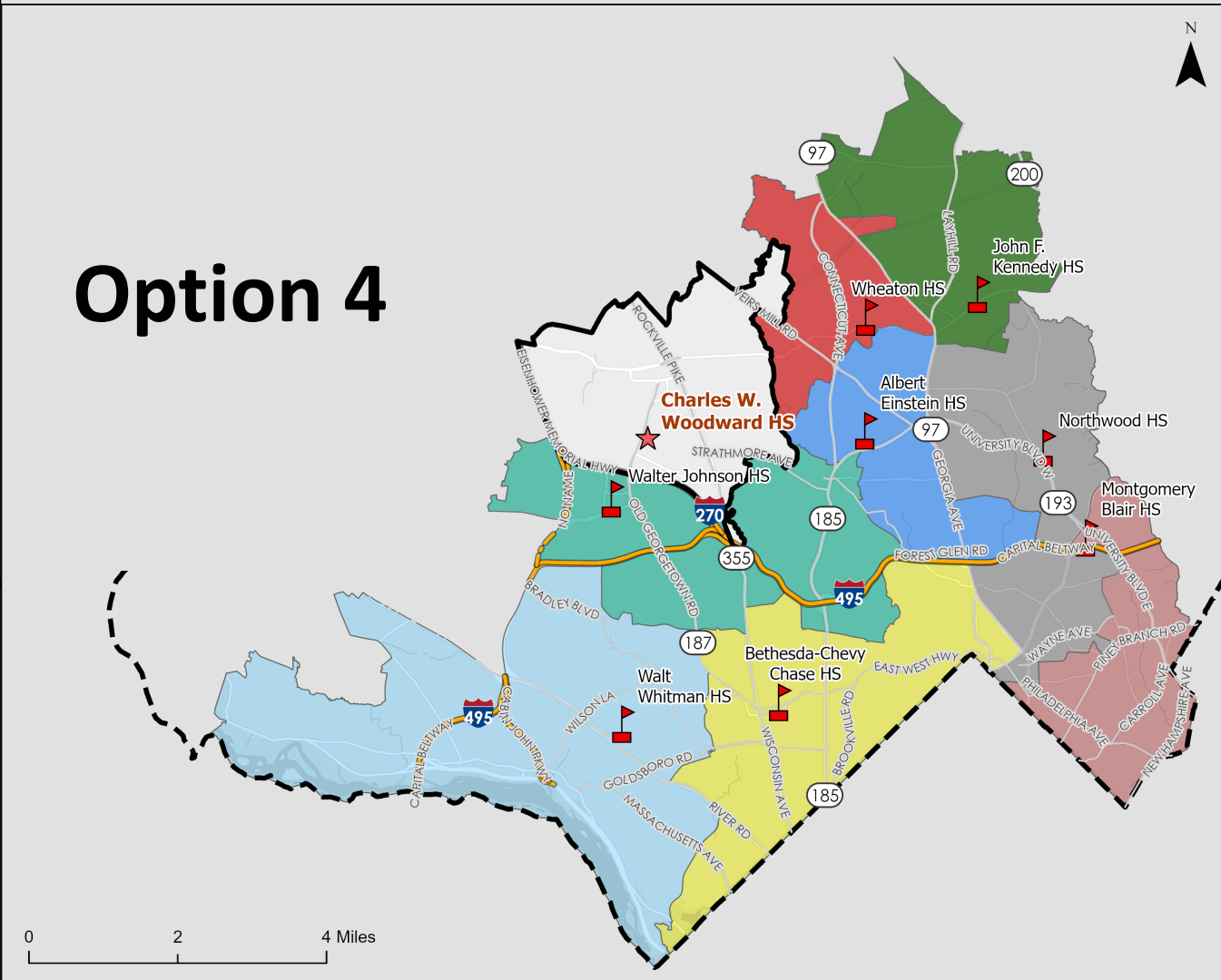
Option 2



Option 3

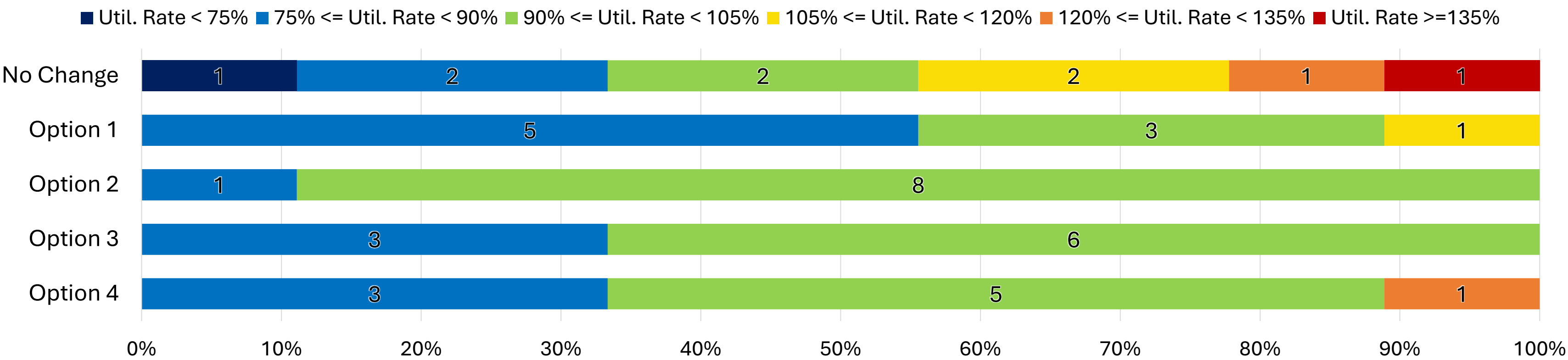


Option 4



# Woodward Boundary Study Initial Options - HS

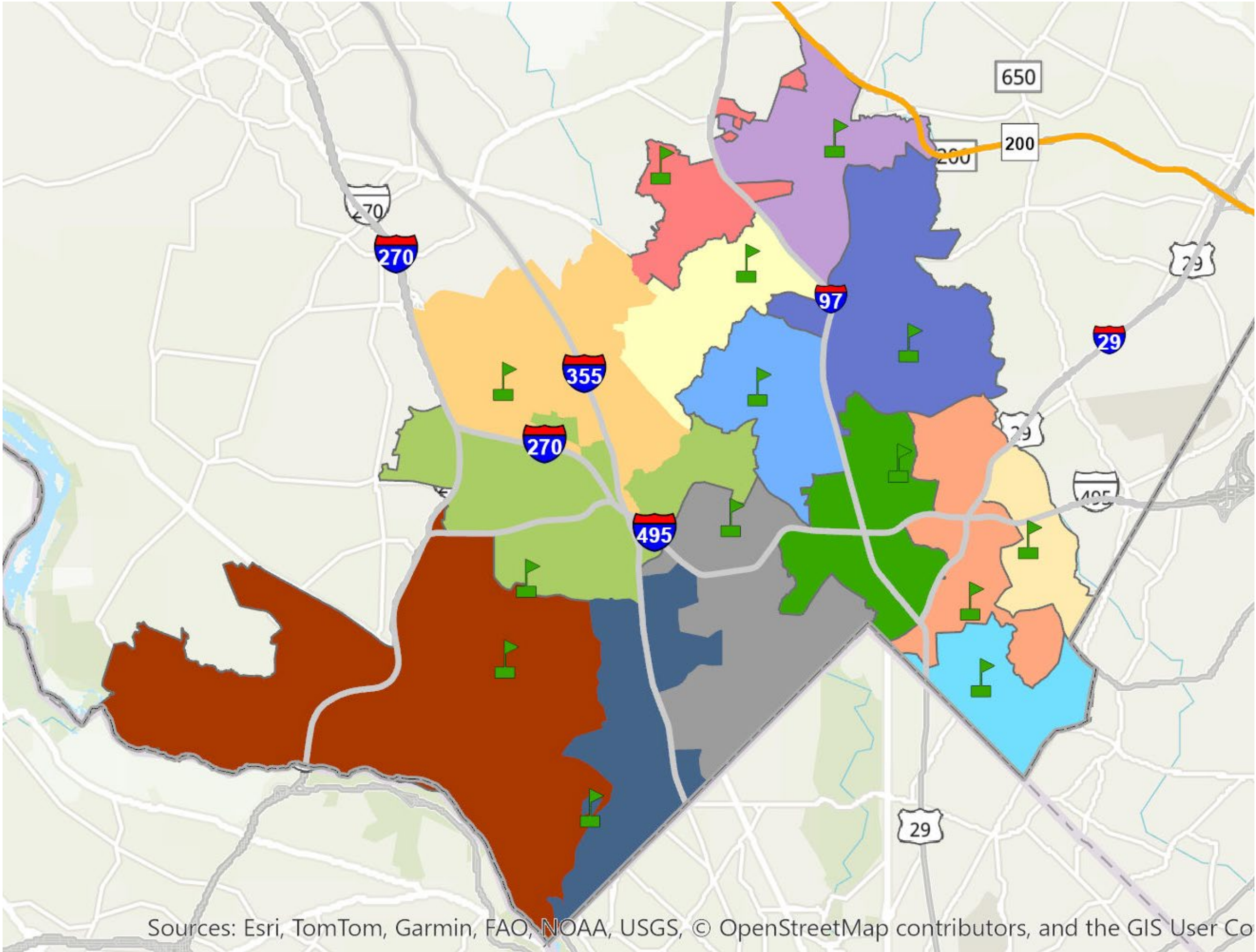
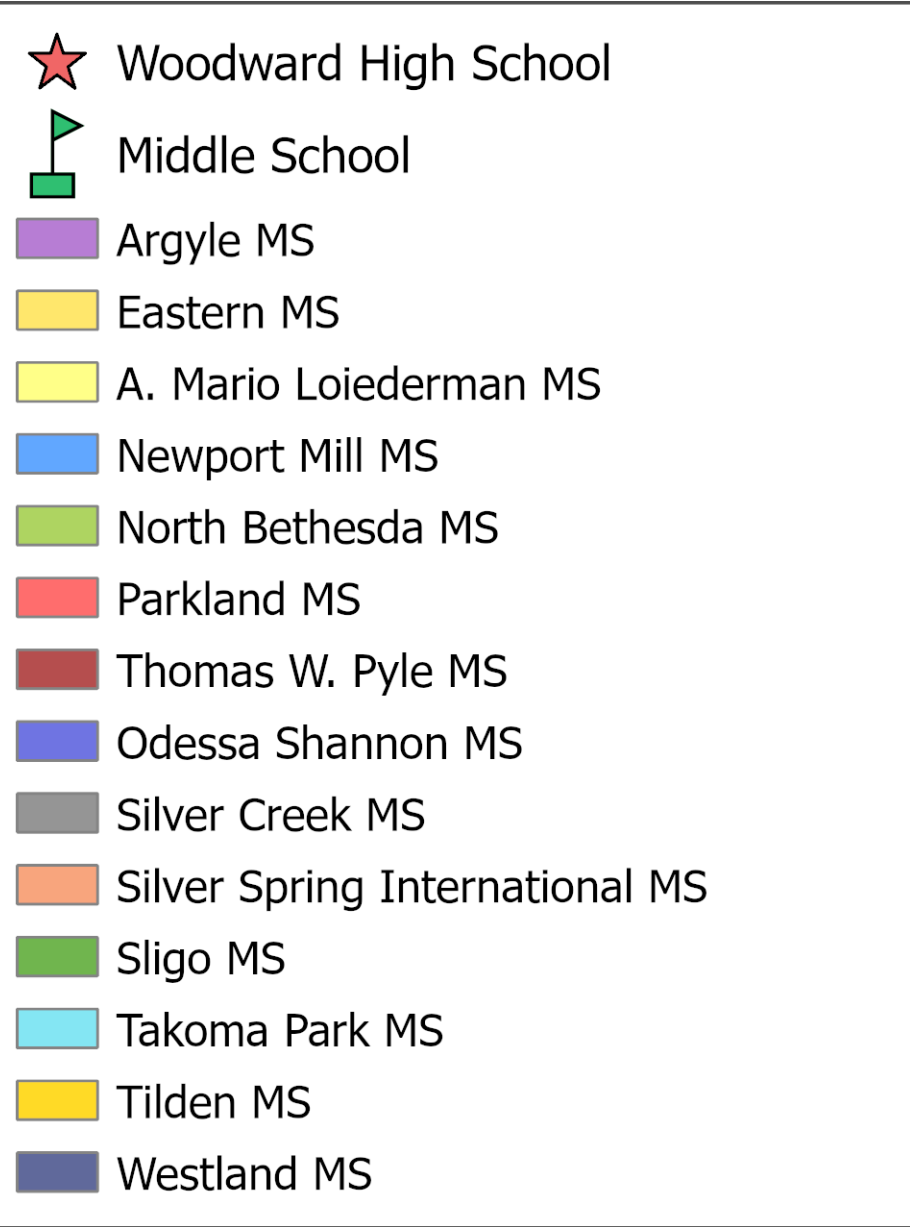
High School Utilization Level Distribution by Boundary Option



High School	No Change	Option 1	Option 2	Option 3	Option 4
Bethesda-Chevy Chase HS	97.5%	97.3%	85.4%	100.8%	98.7%
Montgomery Blair HS	104.8%	104.7%	96.8%	99.6%	100.6%
Albert Einstein HS	111.0%	84.0%	94.9%	86.1%	92.9%
Walter Johnson HS	139.0%	88.6%	92.0%	87.0%	77.0%
John F. Kennedy HS	110.9%	104.3%	99.4%	102.7%	95.8%
Northwood HS	81.9%	82.1%	95.8%	83.2%	87.7%
Wheaton HS	127.8%	117.3%	99.0%	102.6%	120.2%
Walt Whitman HS	89.8%	89.8%	97.1%	98.3%	89.0%
Charles W. Woodward HS	0.0%	85.2%	99.3%	94.7%	94.5%



# Woodward Boundary Study Scope – MS

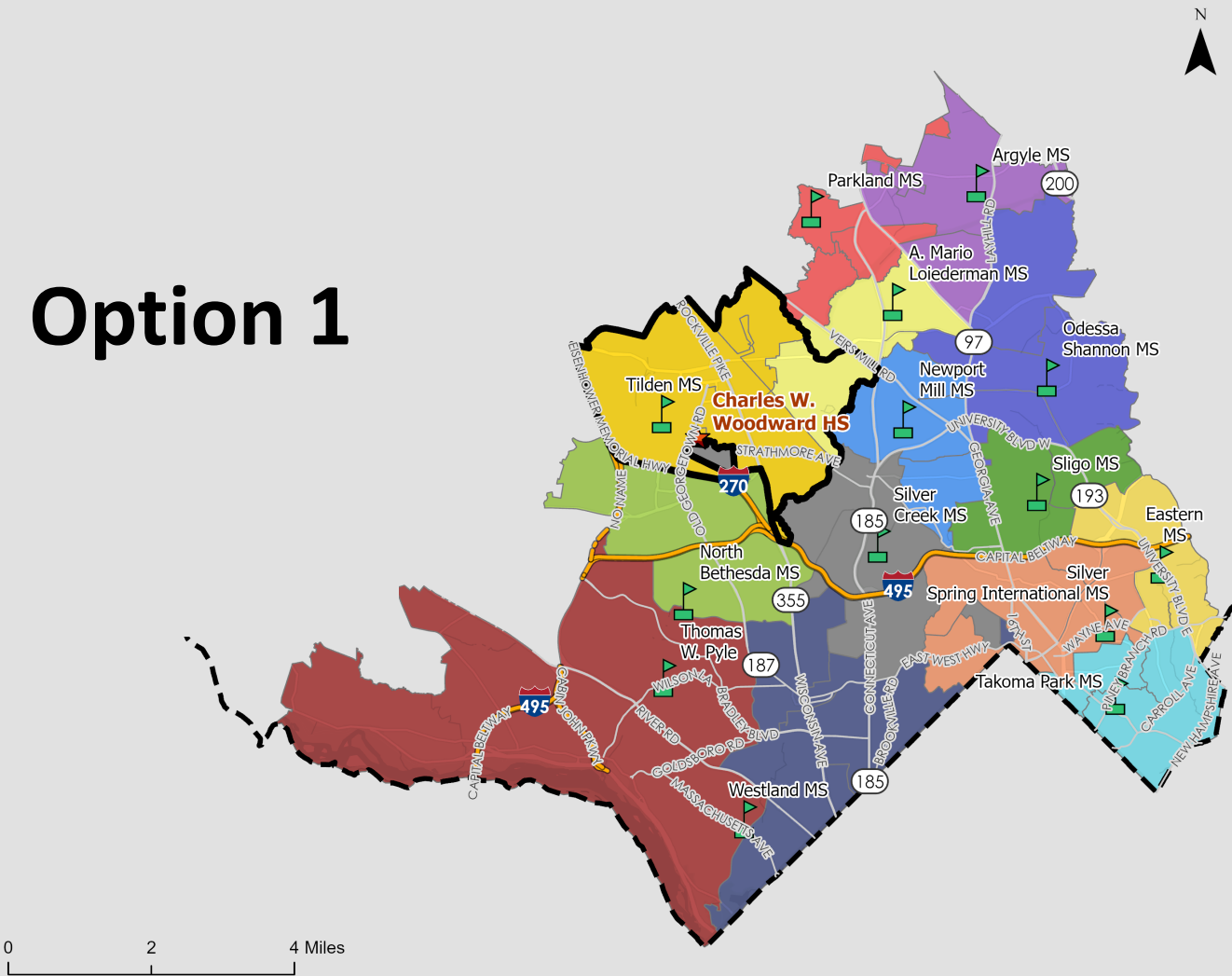




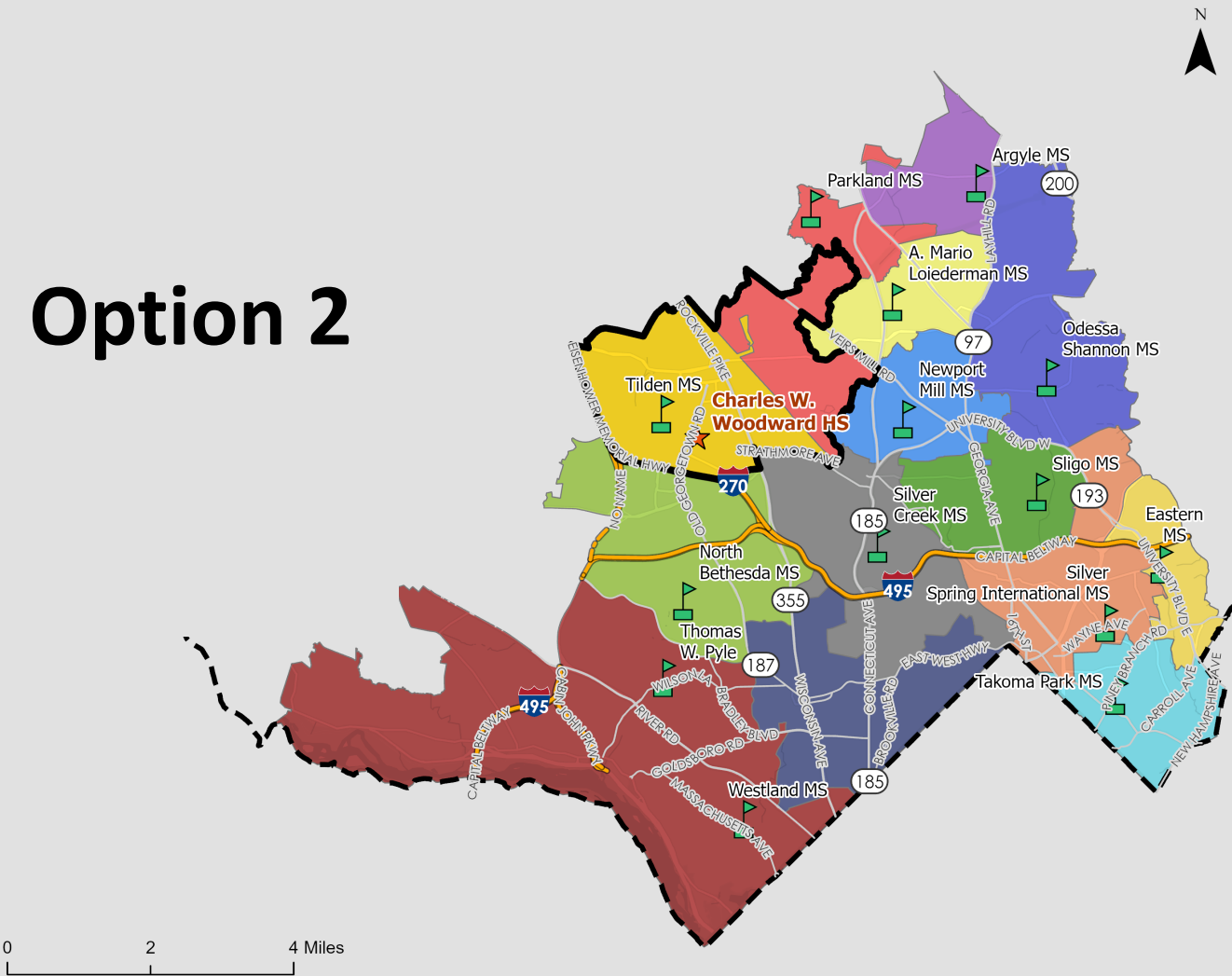
# Woodward Boundary Study Initial Options – MS

- ★ Woodward High School
- 🚩 Middle School
- Argyle MS
- Eastern MS
- A. Mario Loiederman MS
- Newport Mill MS
- North Bethesda MS
- Parkland MS
- Thomas W. Pyle MS
- Odessa Shannon MS
- Silver Creek MS
- Silver Spring International MS
- Sligo MS
- Takoma Park MS
- Tilden MS
- Westland MS

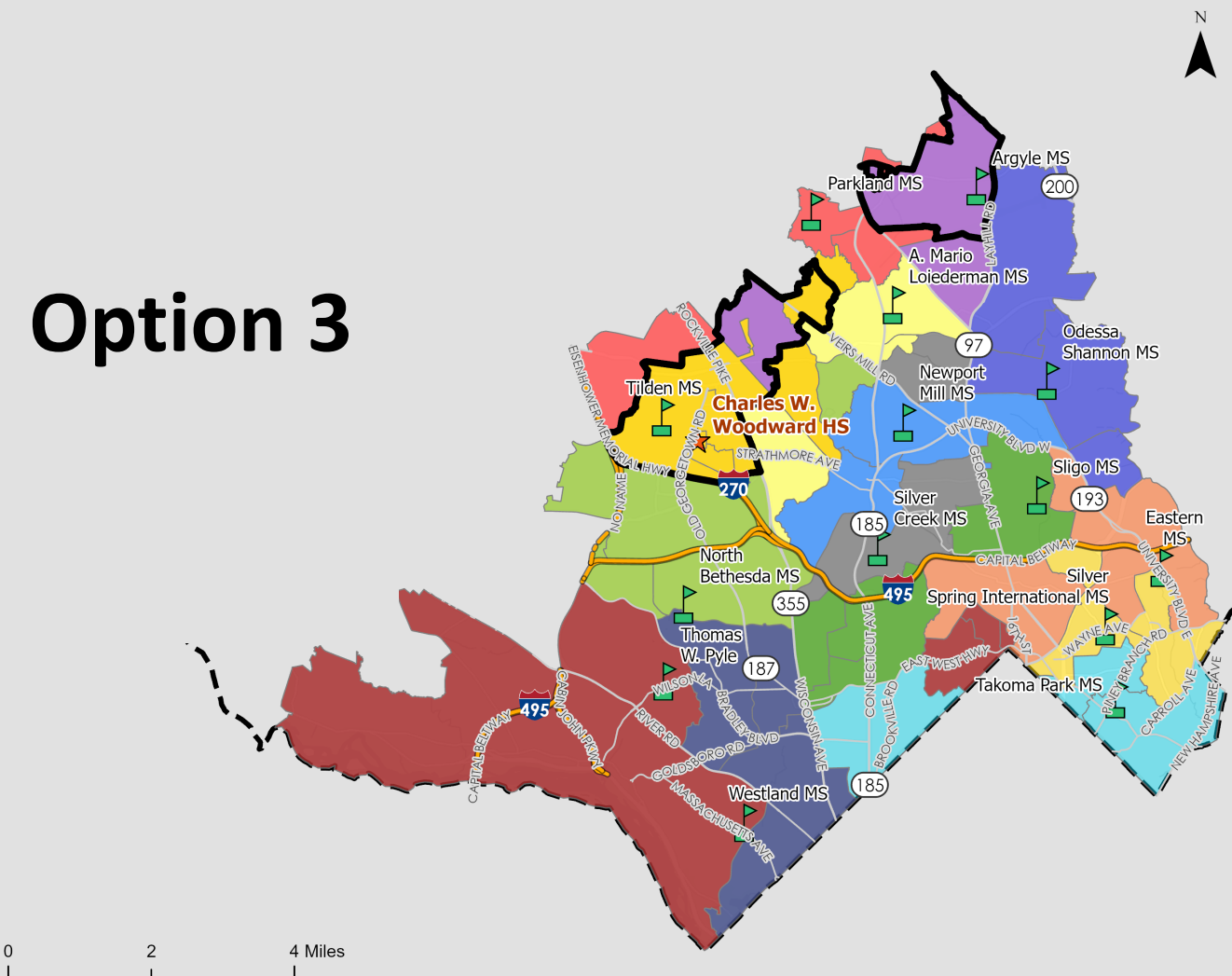
Option 1



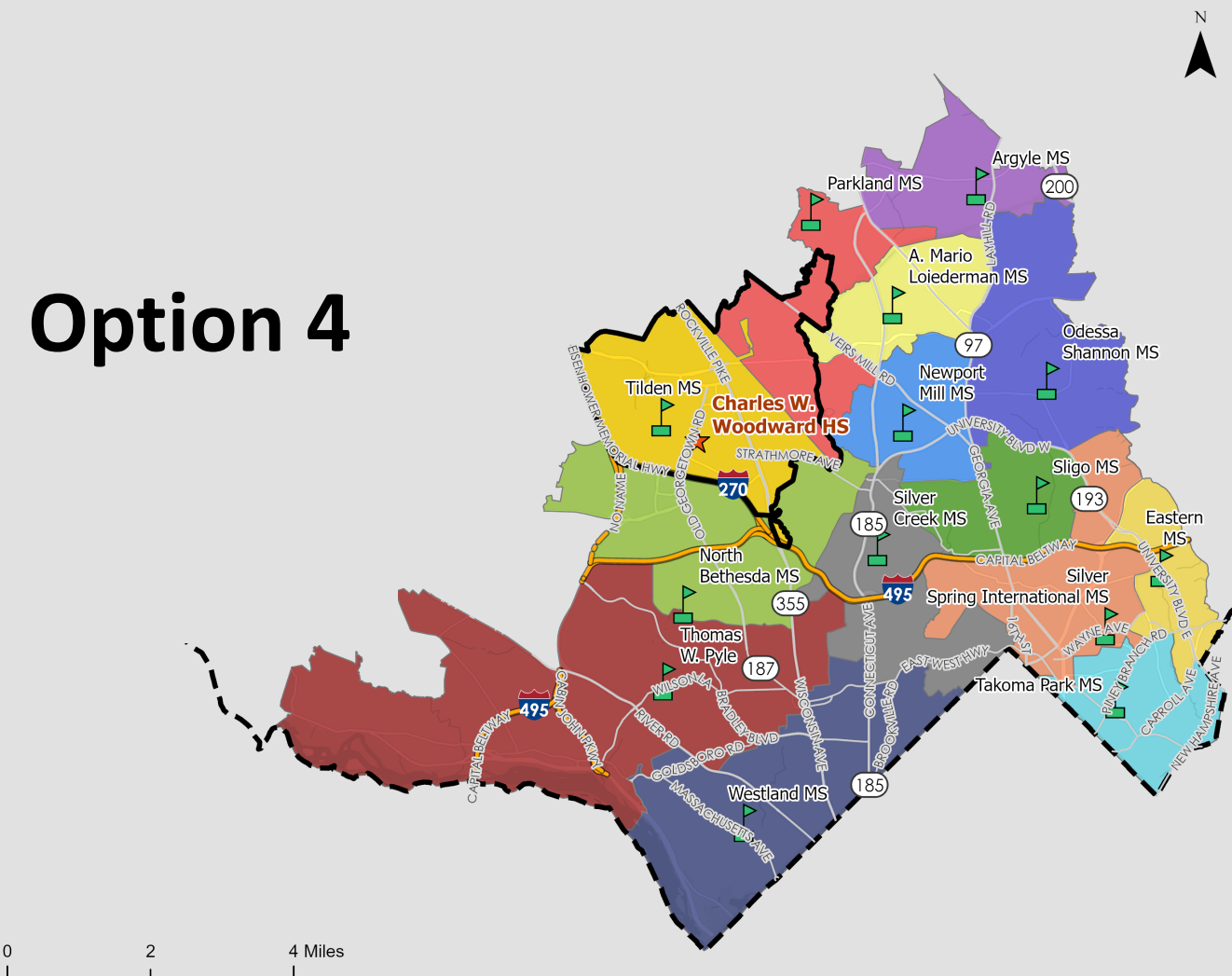
Option 2



Option 3

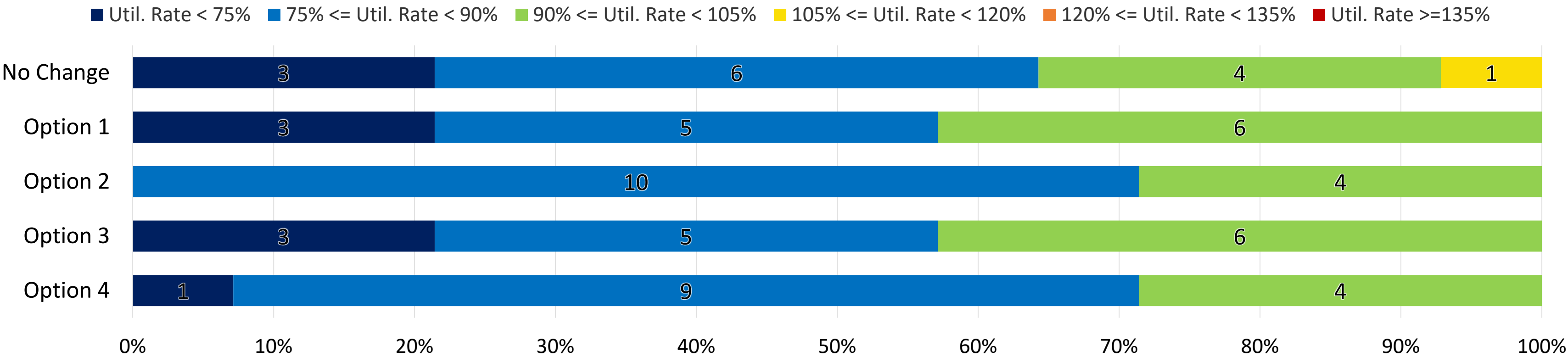


Option 4



# Woodward Boundary Study Initial Options – MS

Middle School Utilization Level Distribution by Boundary Option



Middle School	No Change	Option 1	Option 2	Option 3	Option 4
Argyle MS	102.8%	102.8%	88.1%	105.0%	101.5%
Eastern MS	76.0%	85.5%	83.5%	94.8%	86.3%
Loiederman MS	99.4%	99.4%	83.6%	91.4%	86.1%
Newport Mill MS	84.4%	84.4%	90.1%	95.8%	79.5%
North Bethesda MS	109.2%	80.6%	96.8%	96.1%	93.3%
Parkland MS	67.3%	67.3%	92.6%	82.2%	86.2%
Thomas W. Pyle MS	84.9%	84.9%	88.2%	95.6%	82.5%

Middle School	No Change	Option 1	Option 2	Option 3	Option 4
Odessa Shannon MS	103.9%	103.9%	80.2%	84.2%	92.1%
Silver Creek MS	89.2%	71.0%	91.3%	73.1%	84.4%
Silver Spring Int'l MS	87.3%	78.4%	86.9%	85.3%	80.2%
Sligo MS	82.5%	72.4%	81.1%	73.4%	72.4%
Takoma Park MS	71.0%	95.8%	82.7%	81.9%	87.8%
Tilden MS	92.8%	92.8%	84.3%	72.0%	94.7%
Westland MS	69.7%	97.4%	80.7%	83.3%	85.2%

# Recommended Motion

- Certify the FY 2026 Annual School Test results to take effect on July 1, 2025.