

FY 2027 Annual School Test & School Utilization Report

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Montgomery Planning

06/25/2026

Agenda Item 16



Agenda

- FY 2027 Annual School Test
 - Methodology
 - MCPS Capital Planning Decisions
 - Utilization Premium Payment (UPP) Tier Placements
 - School Service Areas with Low Adequacy Ceilings
- FY 2027 School Utilization Report
 - Countywide Trend Analysis by School Level
 - Summary of 2025 Housing Sales Analysis
- Staff Recommendation

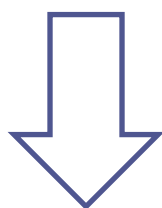
FY 2027
Annual School Test

Annual School Test Methodology

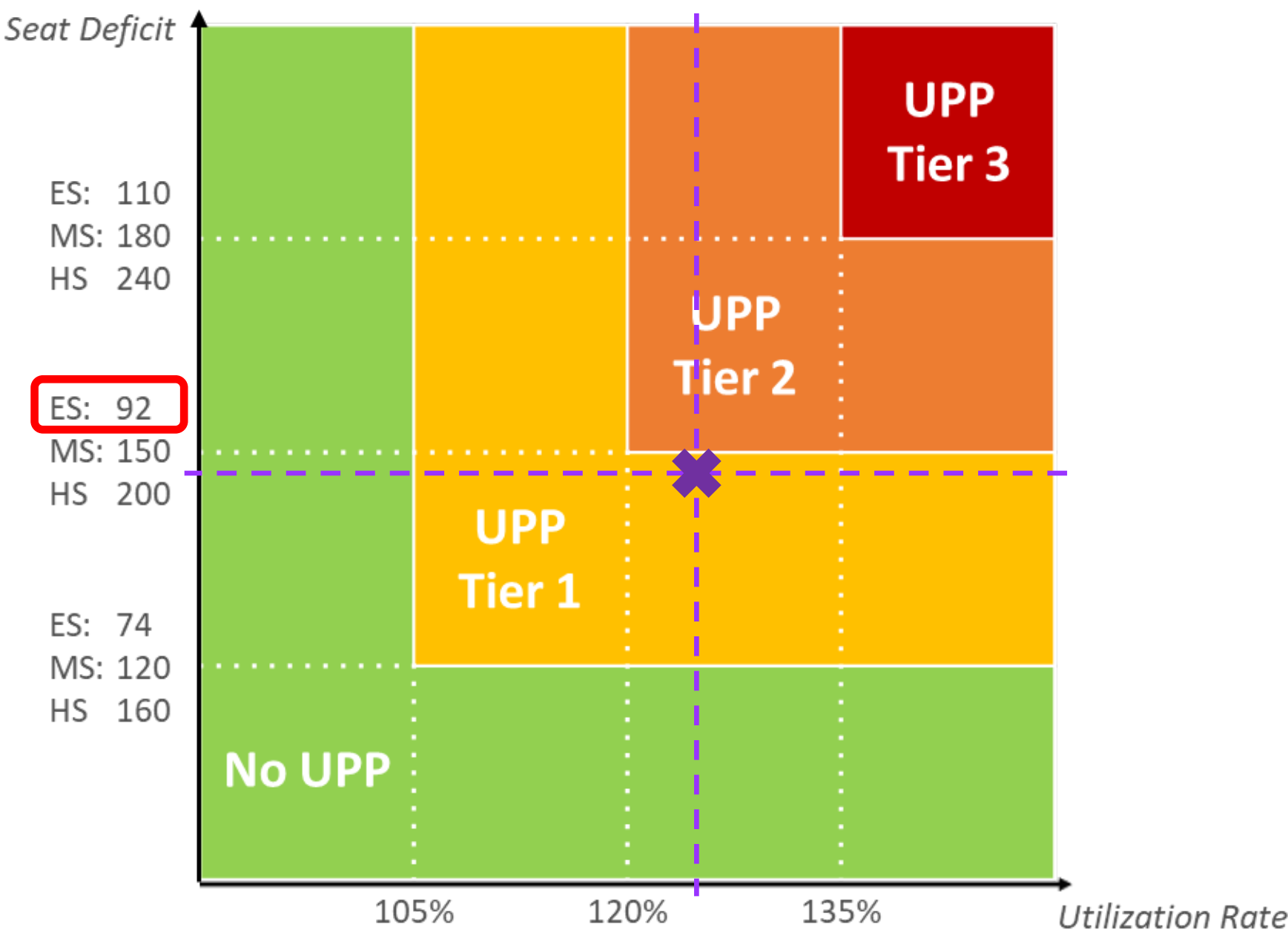
Data Source & Adequacy Standards

- FY2027 Annual School Test evaluates adequacy of the 2030-2031 school year based on MCPS’s FY 2027 CIP Master Plan projections.

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



Tier 1 UPP
(adequacy ceiling: 2)



MCPS Capital Planning Decisions

Planned Capacity Increases & Boundaries Reflected in FY 2027 Test

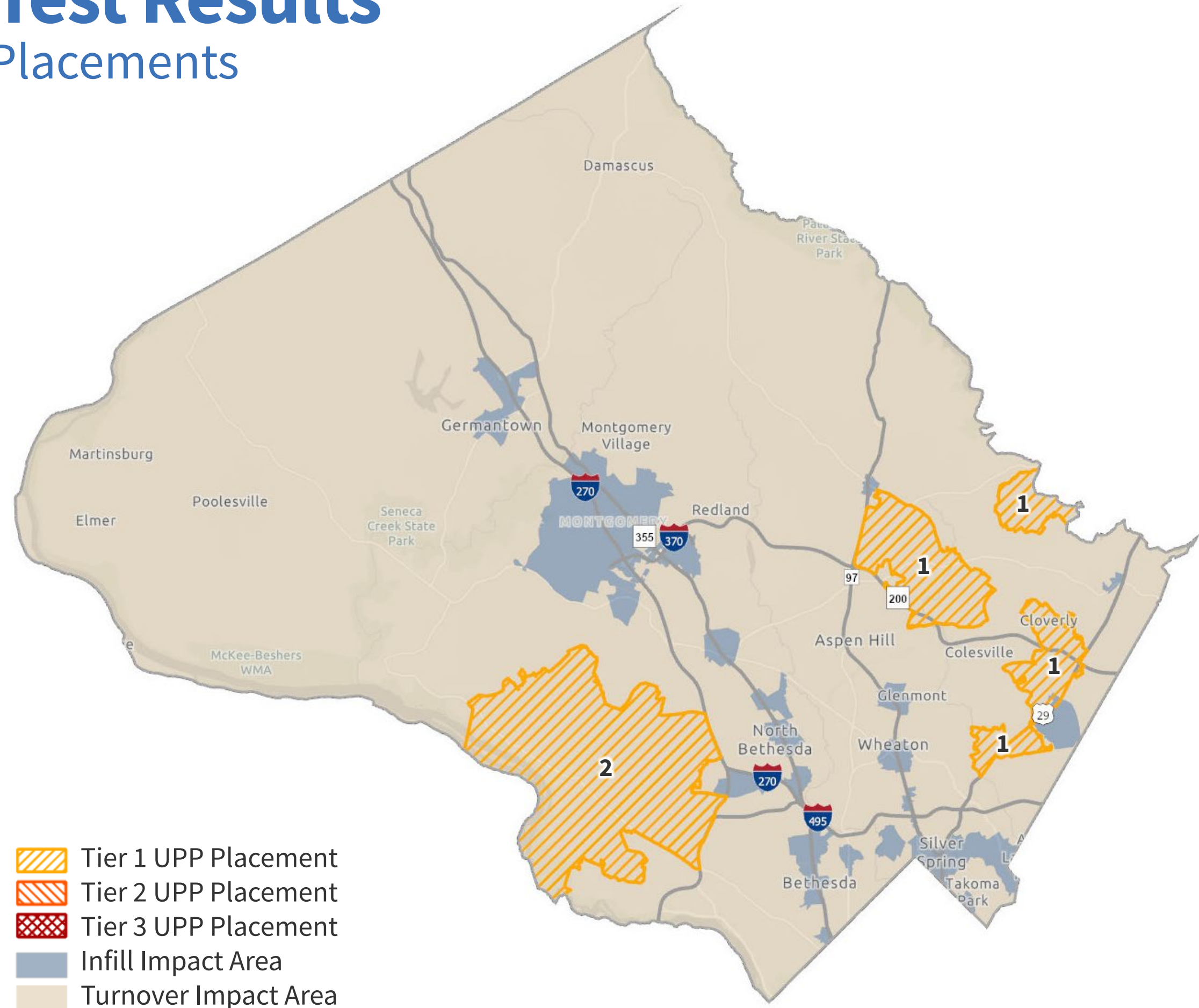
- Board of Education Adopted Boundary Change
 - Reopening of Woodward High School (2027) – 2,249 seats
 - Expansion of Northwood High School (2027) – 735 seat increase
 - Relocation of Wootton High School (2027) – 99 seat increase
- * Expansion of Damascus High School (2031) is included in the boundary change scope, but the additional capacity is not captured by the FY 2027 Test due to the project not being complete by the Test's evaluation time frame (2030-2031 school year).
- Additional Projects in Approved FY 2027-2032 CIP
 - Burtonsville Elementary School (2026) – 278 seat increase
 - JoAnn Leleck Elementary School (2026) – 206 seat increase
 - Eastern Middle School (2030) – 100 seat increase

FY 2027 Annual School Test Results

High School Service Area UPP Tier Placements

Tier 1 (13-1/3% surcharge)

1. James Hubert Blake HS
2. Winston Churchill HS

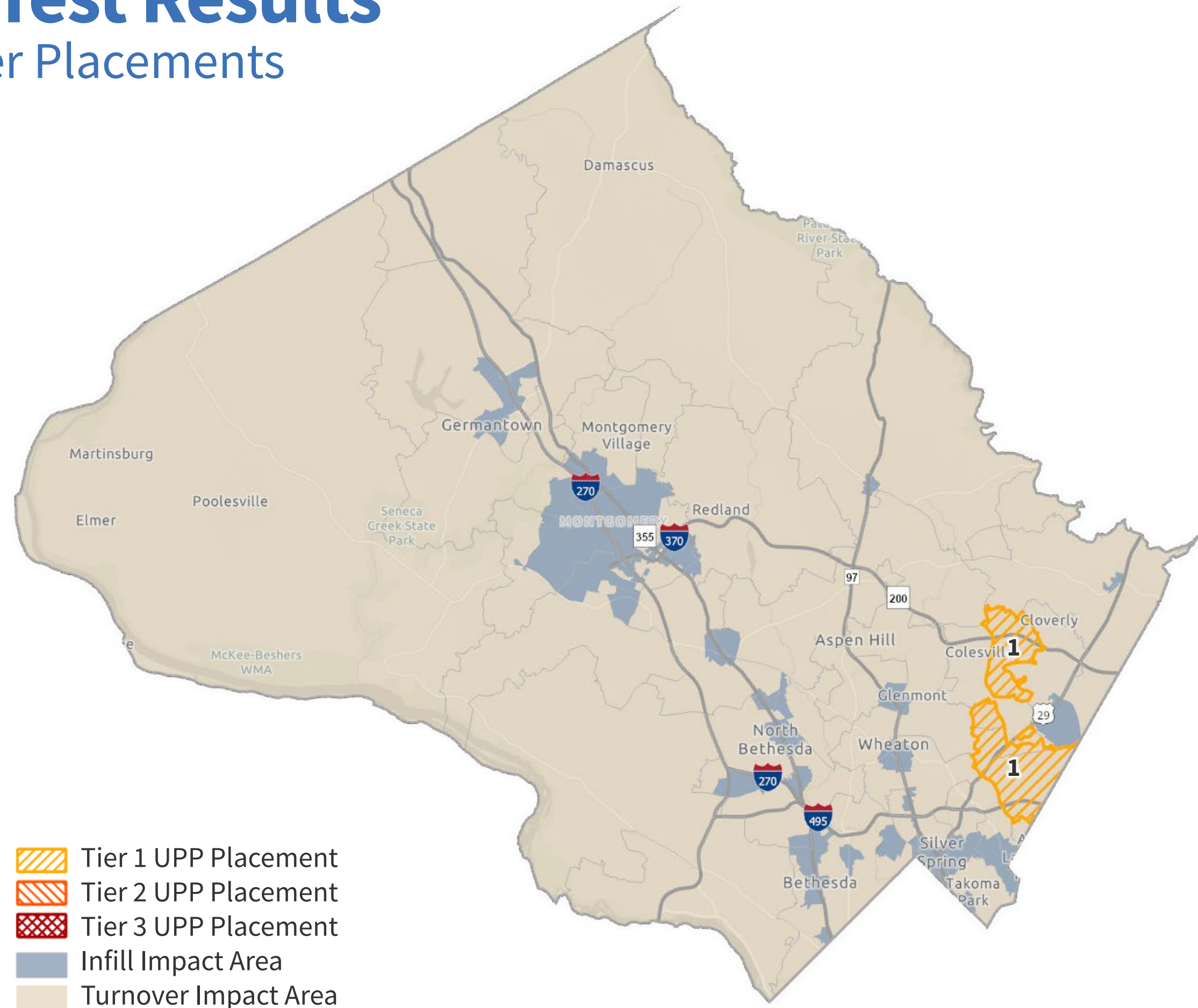


FY 2027 Annual School Test Results

Middle School Service Area UPP Tier Placements

 Tier 1 (10% surcharge)

1. Francis Scott Key MS



FY 2027 Annual School Test Results

Elementary School Service Area UPP Tier Placements

Tier 1 (16-2/3% surcharge)

1. Cashell ES

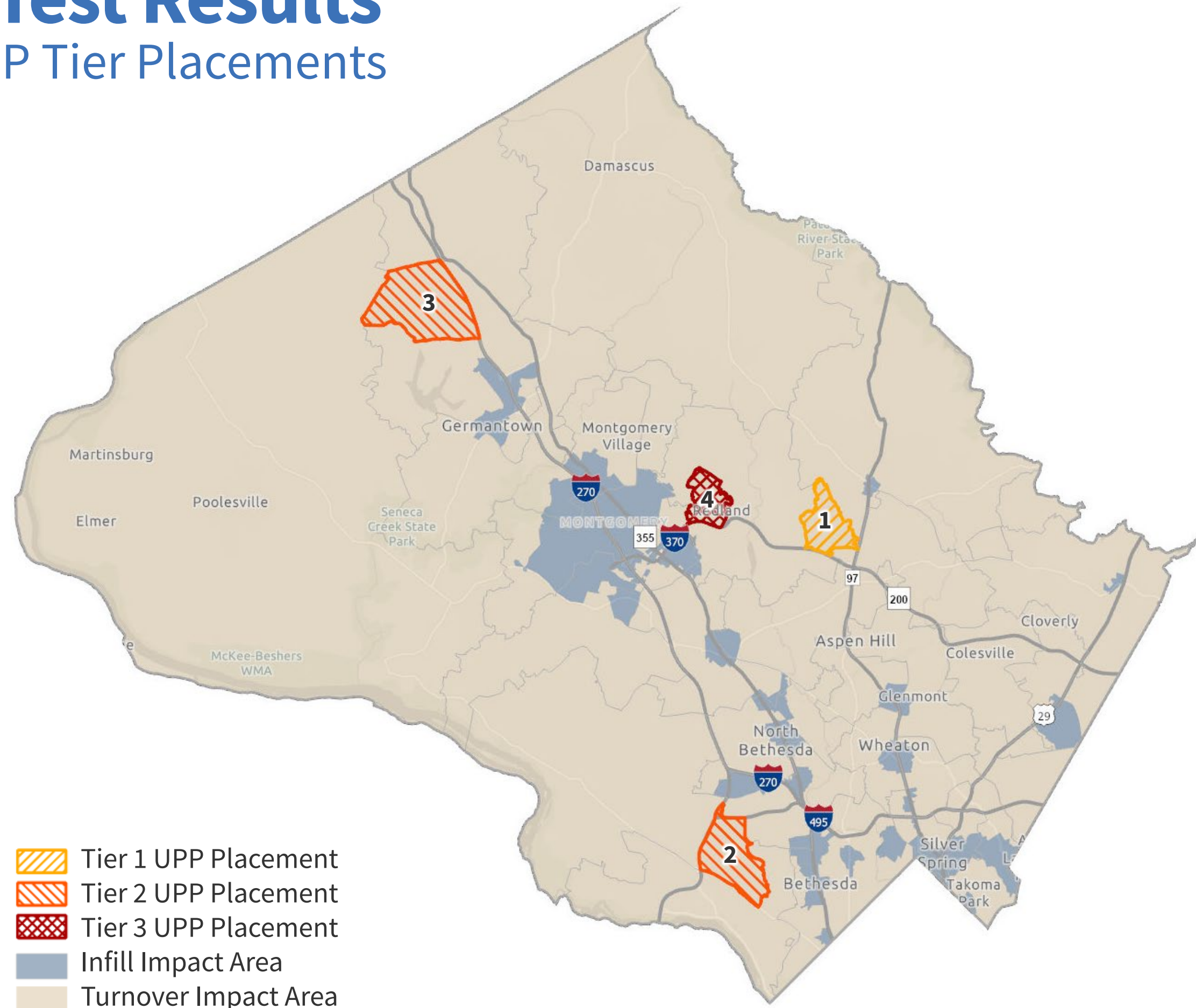
Tier 2 (33-1/3% surcharge)

2. Burning Tree ES

3. Cabin Branch ES

Tier 3 (50% surcharge)

4. Mill Creek Towne ES



Utilization Premium Payment Rates

FY 2027

- Actual amount to be paid for a UPP condition is dependent on the school impact tax rate due, which is assessed at the time of building permit.
- ❖ During FY 2026-2027, applicants with a Tier 1 UPP condition pulling building permits are assessed:

Tier 1 UPP FY 2026-2027	Infill Impact Areas			Turnover Impact Areas		
	ES	MS	HS	ES	MS	HS
Single Family Detached	\$5,001	\$3,001	\$4,001	\$5,217	\$3,130	\$4,173
Single Family Attached	\$4,333	\$2,600	\$3,466	\$5,891	\$3,535	\$4,713
Multi-Family Low Rise	\$1,317	\$790	\$1,053	\$2,725	\$1,635	\$2,180
Multi-Family High Rise	\$748	\$449	\$598	\$1,215	\$729	\$972

FY 2027 Annual School Test Results

School Service Areas with Low Adequacy Ceilings

- Development applications can trigger UPP surcharge factors higher than the Annual School Test's default placement if the project's estimated number of students exceed an adequacy ceiling of a school serving the project.
- The following schools have low adequacy ceilings (less than 10 seats):
 - Paint Branch HS – 5 seat ceiling to Tier 1 UPP
 - Earle B. Wood MS – 7 seat ceiling to Tier 1 UPP
 - Cashell ES – 7 seat ceiling to Tier 2 UPP
 - Damascus ES – 7 seat ceiling to Tier 1 UPP
 - Waters Landing ES – 9 seat ceiling to Tier 1 UPP

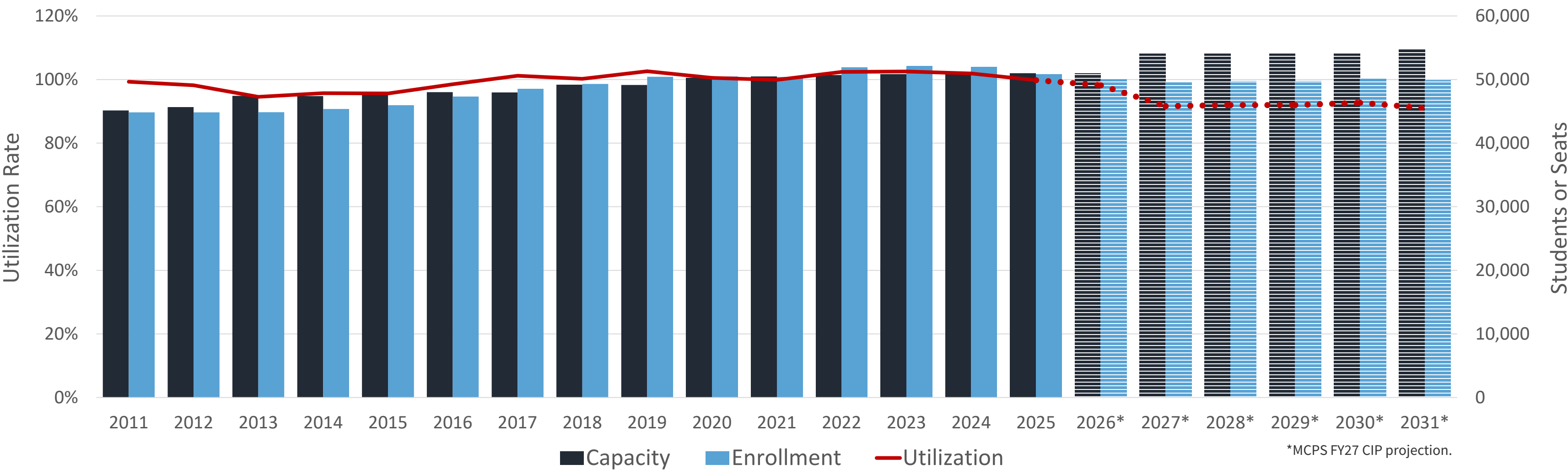
FY 2027

School Utilization Report

FY 2027 School Utilization Report

Countywide High School Enrollment Trends & Projections

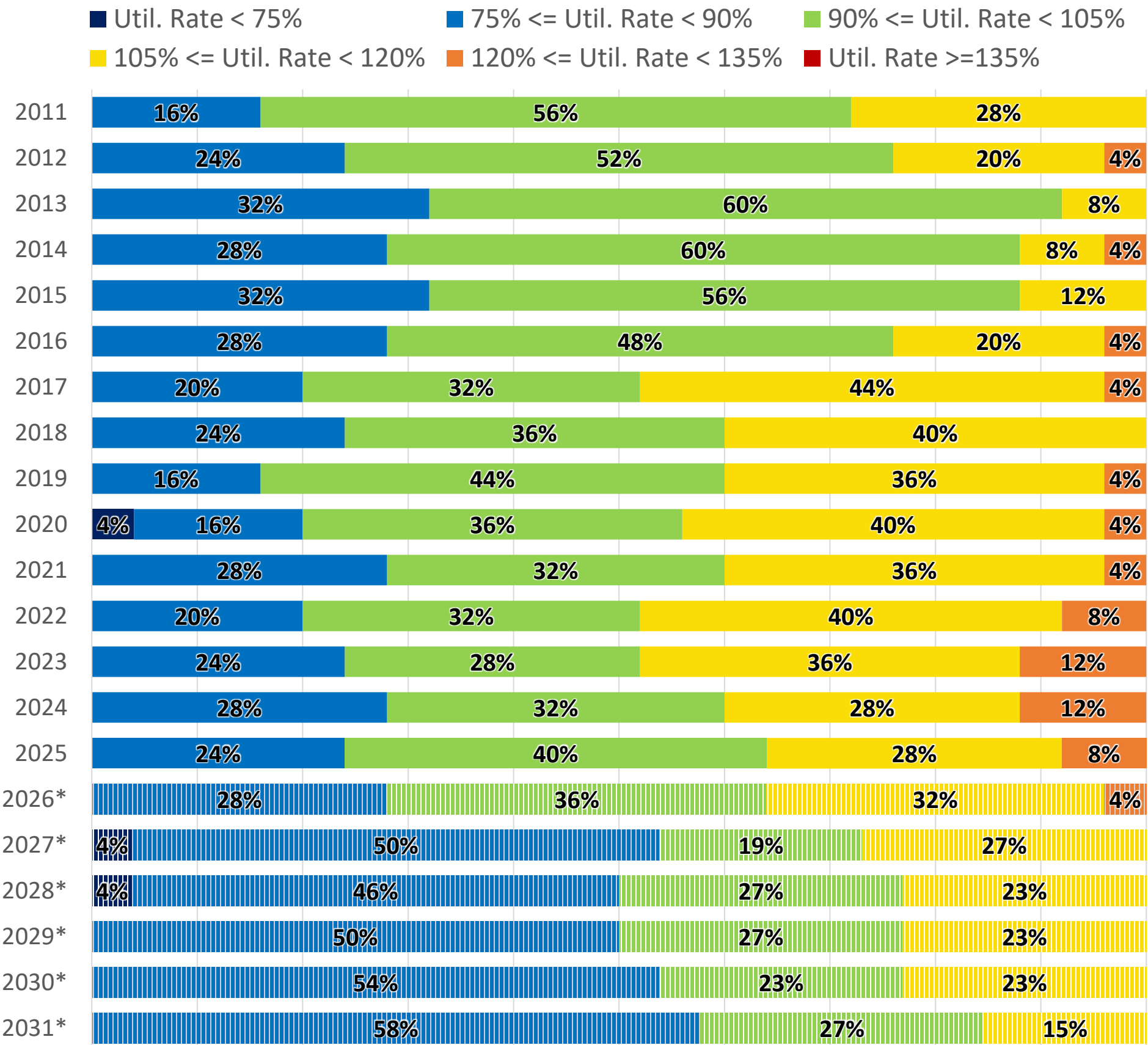
- Countywide enrollment declined by 1,258 students (2.4%) since its peak in 2023.
- MCPS projects over 4,900 surplus seats (9% of total capacity) in the last year of its CIP.



FY 2027 School Utilization Report

Distribution of High School Utilization Rates

- Boundary change in 2027 is expected to alleviate utilization imbalance between schools to some extent.

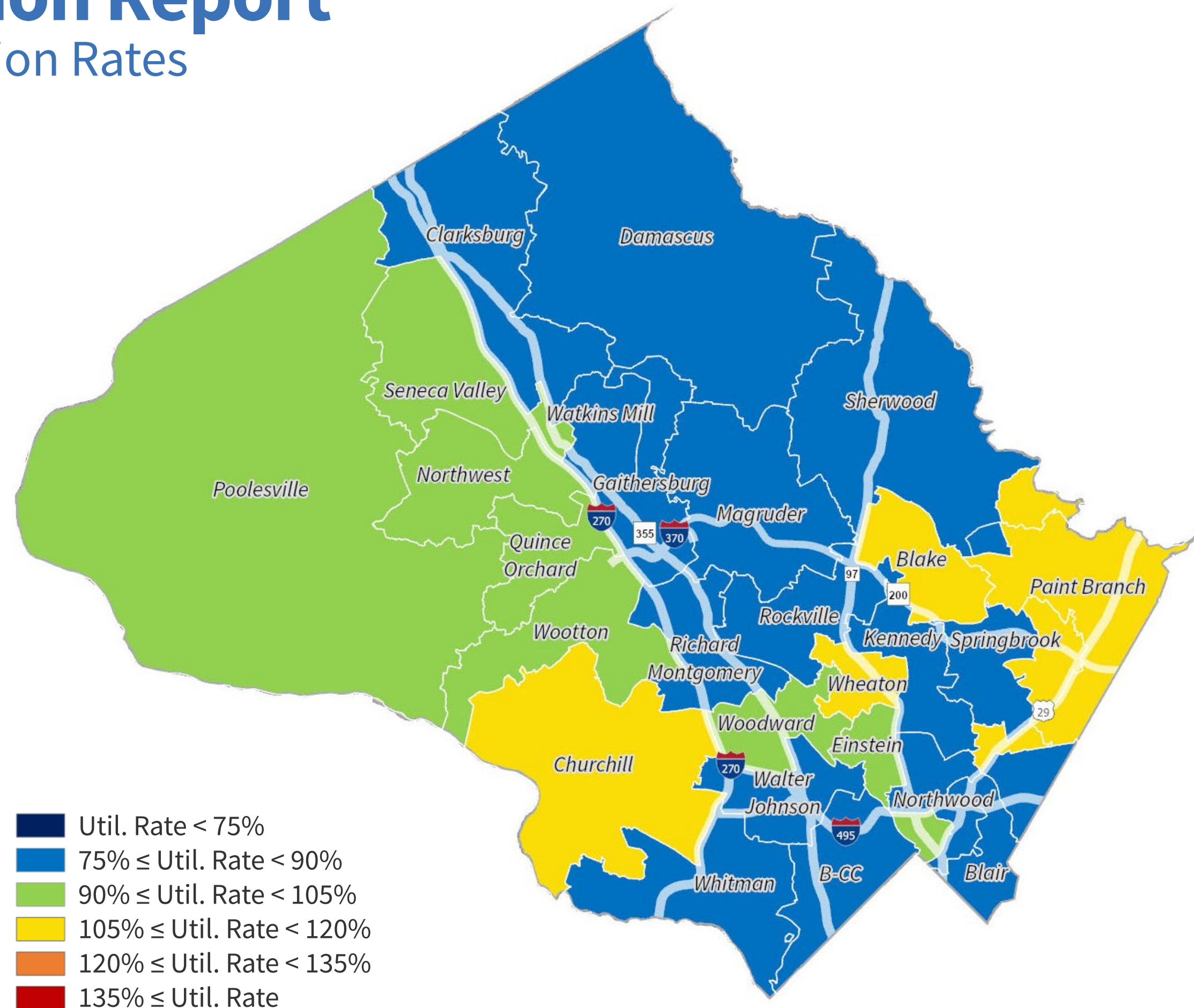


*MCPS FY27 CIP projection.

FY 2027 School Utilization Report

Distribution of High School Utilization Rates

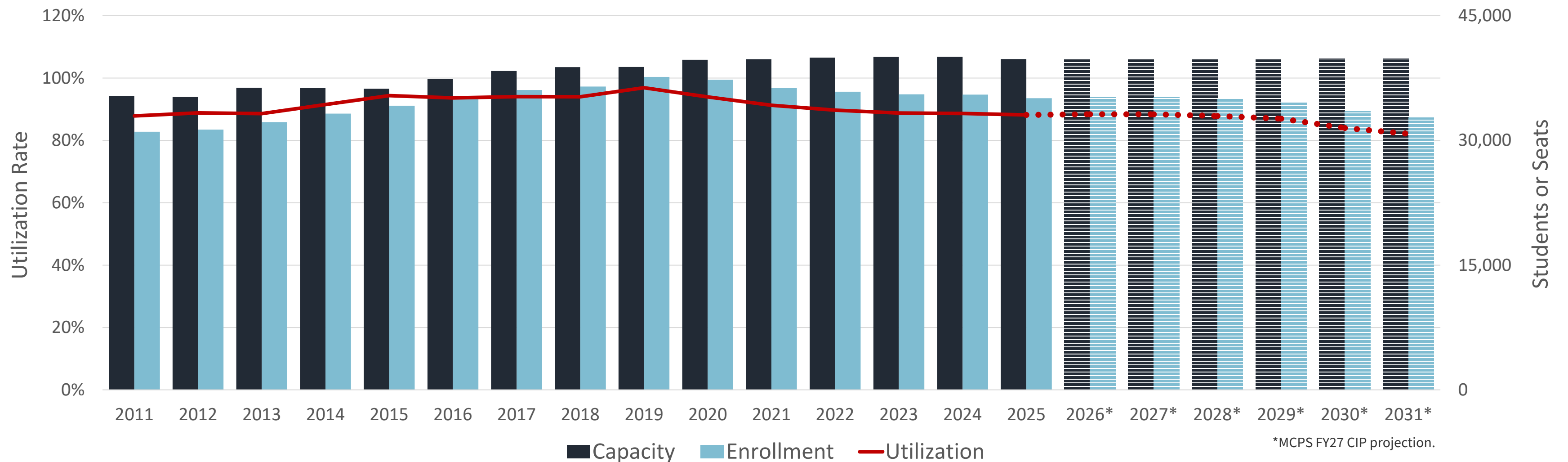
- In the last year of the CIP:
 - 4 of the 26 schools are projected to operate at 105% or more of their seat capacity



FY 2027 School Utilization Report

Countywide Middle School Enrollment Trends & Projections

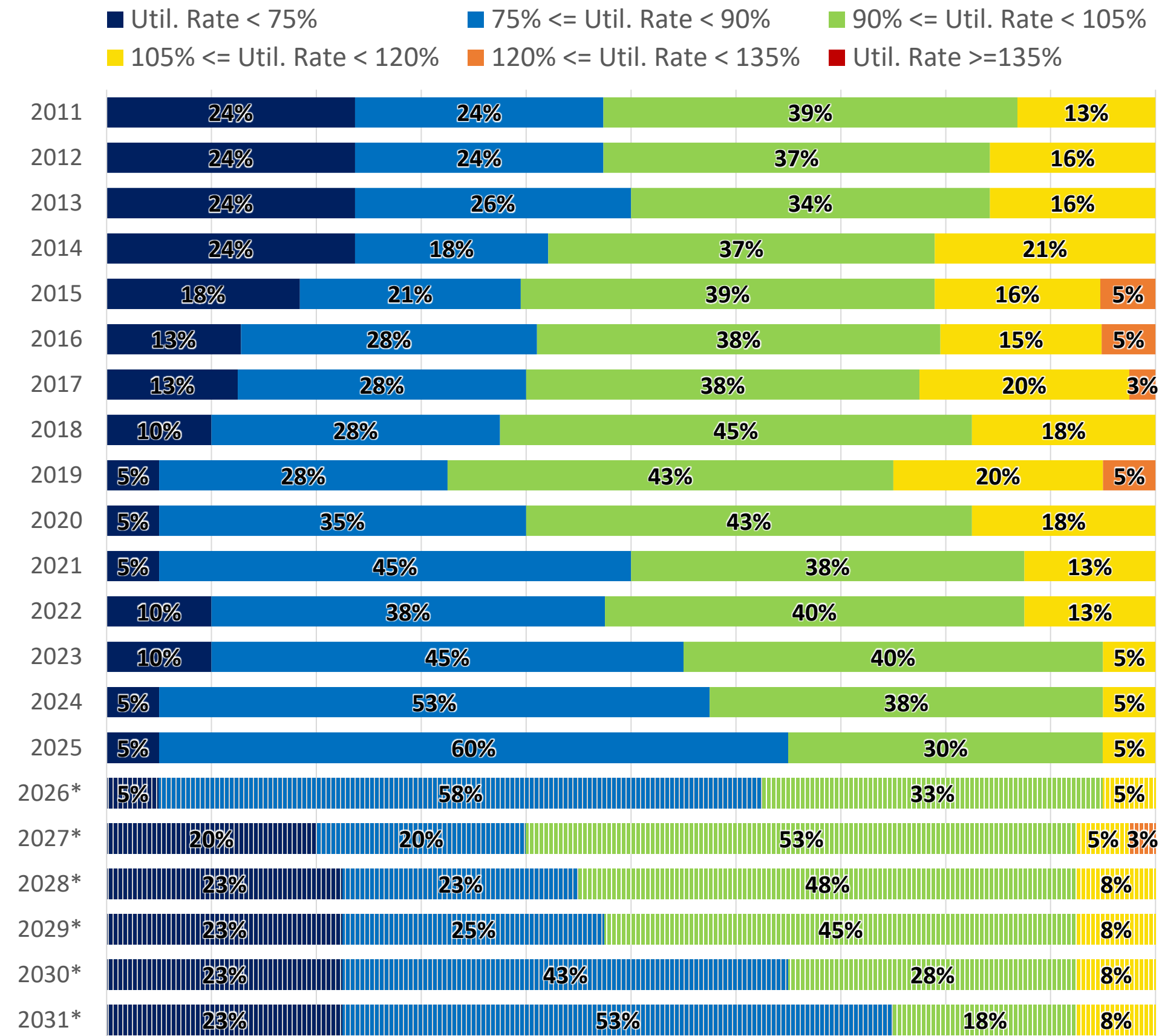
- Countywide enrollment declined by 2,550 students (6.8%) since its peak in 2019.
- MCPS projects over 7,100 surplus seats (18% of total capacity) in the last year of its CIP.



FY 2027 School Utilization Report

Distribution of Middle School Utilization Rates

- Boundary change in 2027 is expected to alleviate utilization imbalance between schools to some extent.

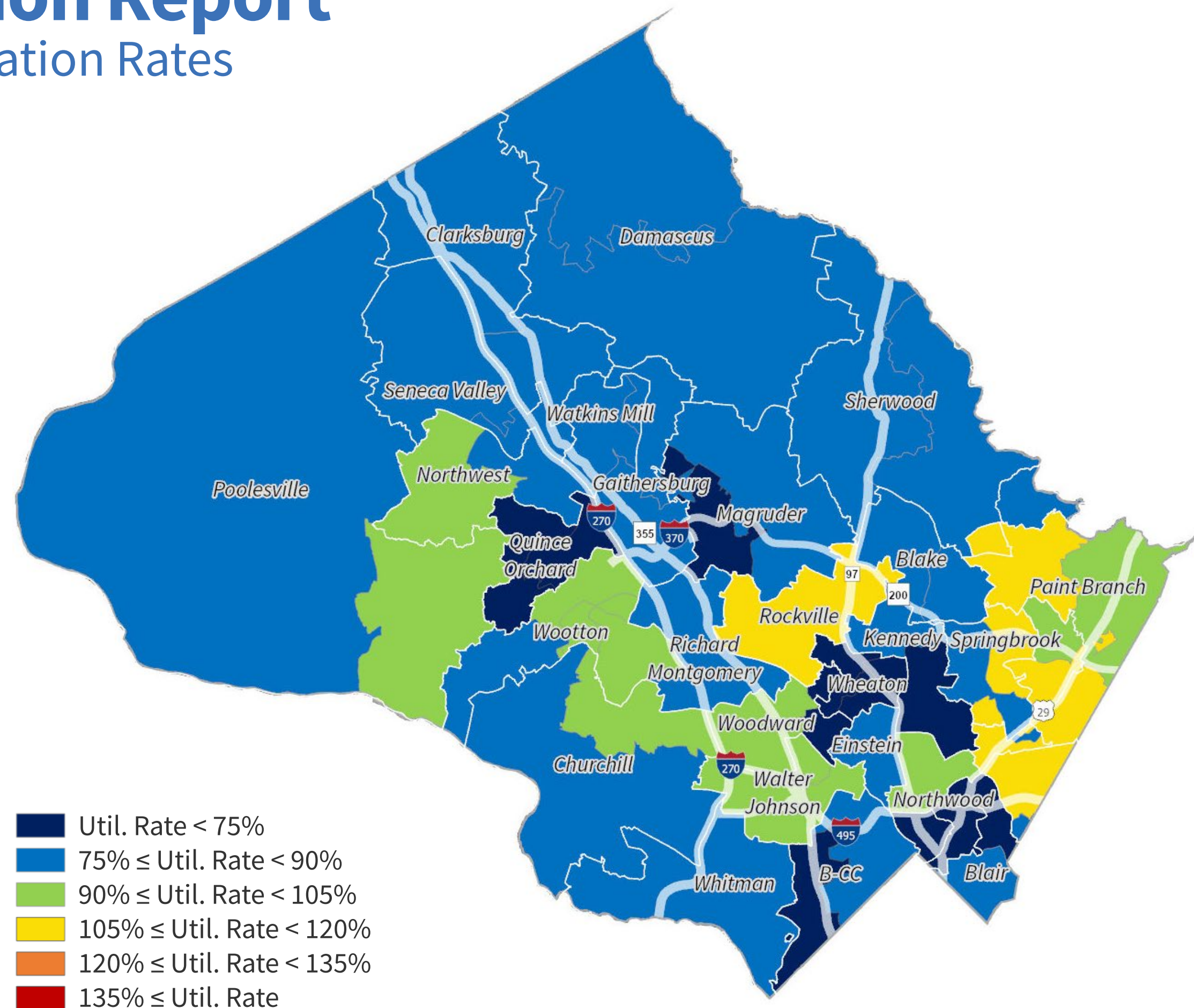


*MCPS FY27 CIP projection.

FY 2027 School Utilization Report

Distribution of Middle School Utilization Rates

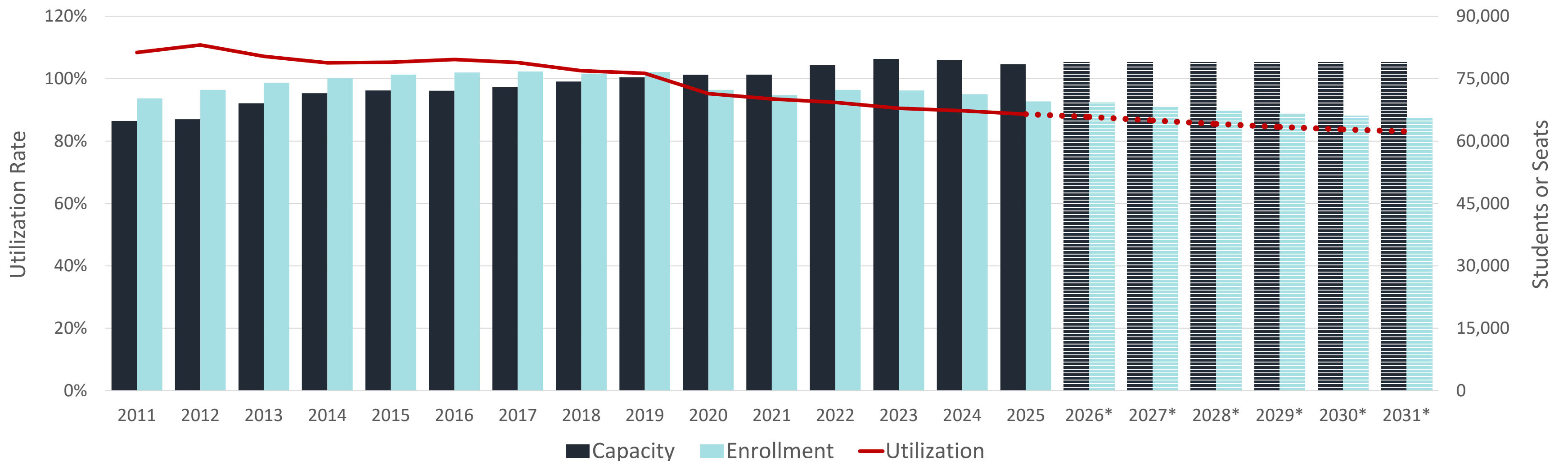
- In the last year of the CIP:
 - 3 of the 40 schools are projected to operate at 105% or more of their seat capacity
 - 9 schools are projected to operate at less than 75% of their seat capacity



FY 2027 School Utilization Report

Countywide Elementary School Enrollment Trends & Projections

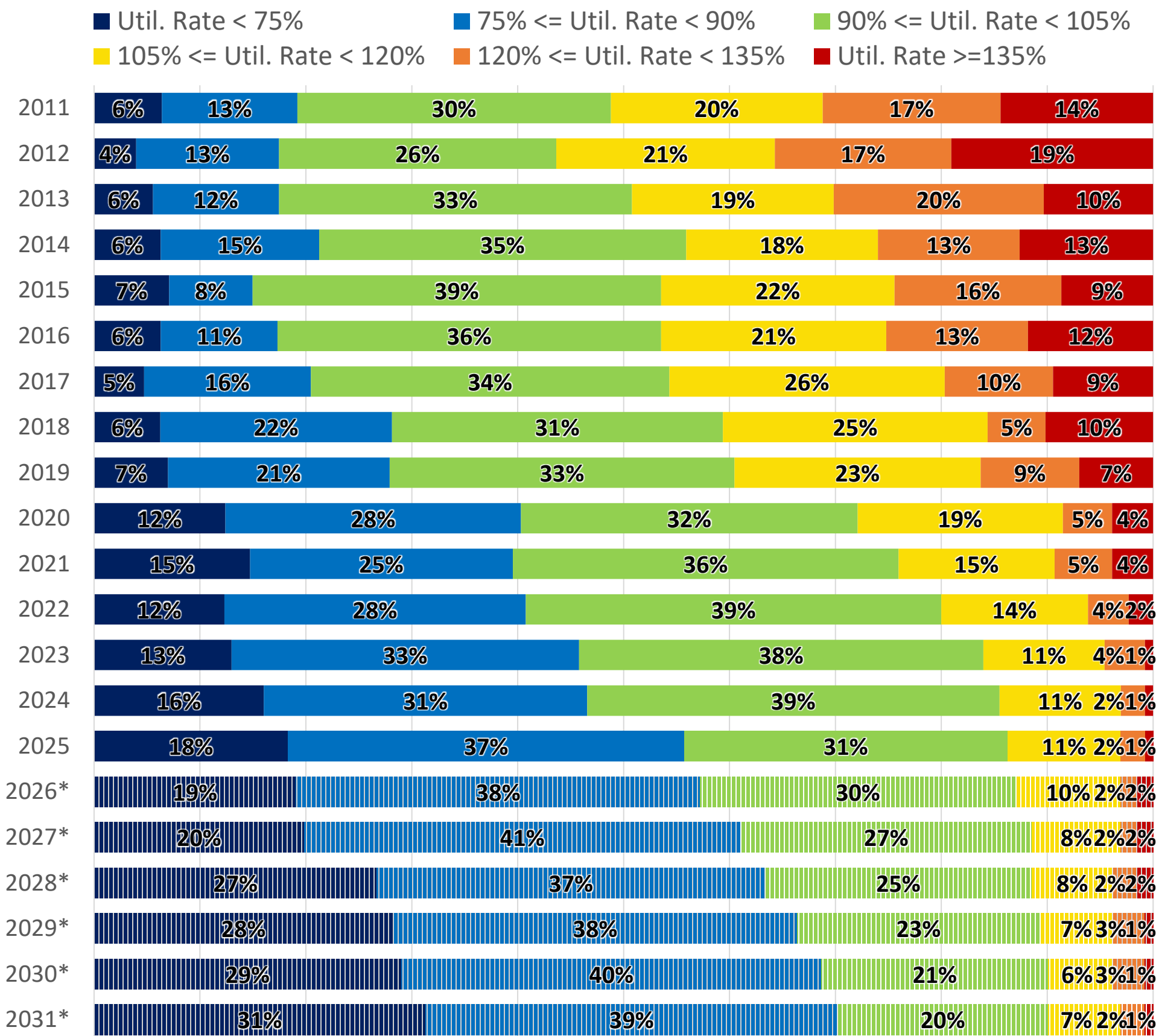
- Countywide enrollment declined by 7,204 students (9.4%) since its peak in 2017.
- MCPS projects over 13,300 surplus seats (17% of total capacity) in the last year of its CIP.



FY 2027 School Utilization Report

Distribution of Elementary School Utilization Rates

- Utilization imbalance is most pronounced at the elementary school level.

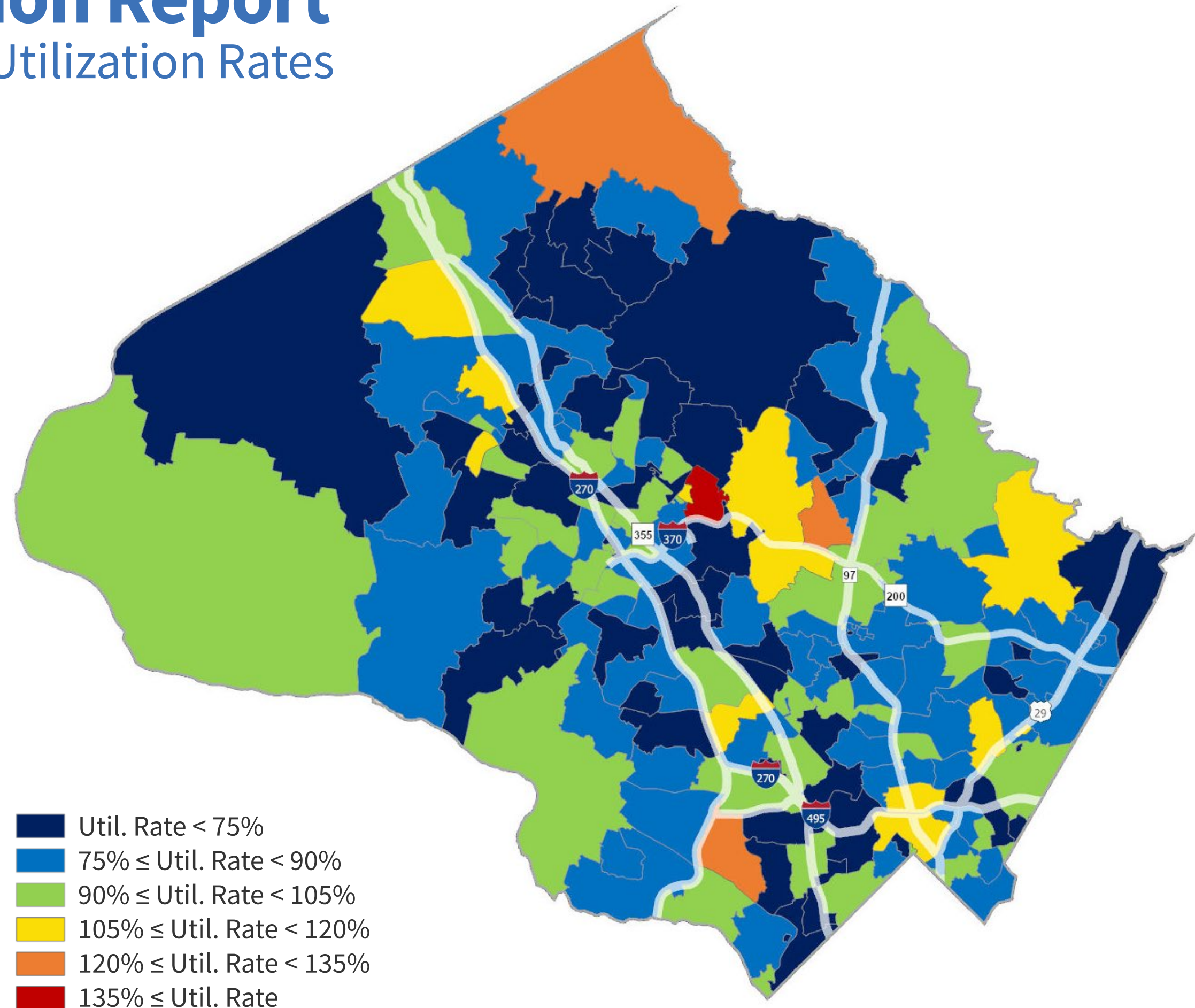


*MCPS FY27 CIP projection.

FY 2027 School Utilization Report

Distribution of Elementary School Utilization Rates

- In the last year of the CIP:
 - 13 of the 131 schools are projected to operate at 105% or more of their seat capacity
 - 41 schools are projected to operate at less than 75% of their seat capacity
- MCPS is planning a countywide elementary school boundary study to examine possible consolidations and boundary adjustments.



FY 2027 School Utilization Report

Summary of 2025 Housing Sales Analysis

Most single family home sales:

HS Service Areas

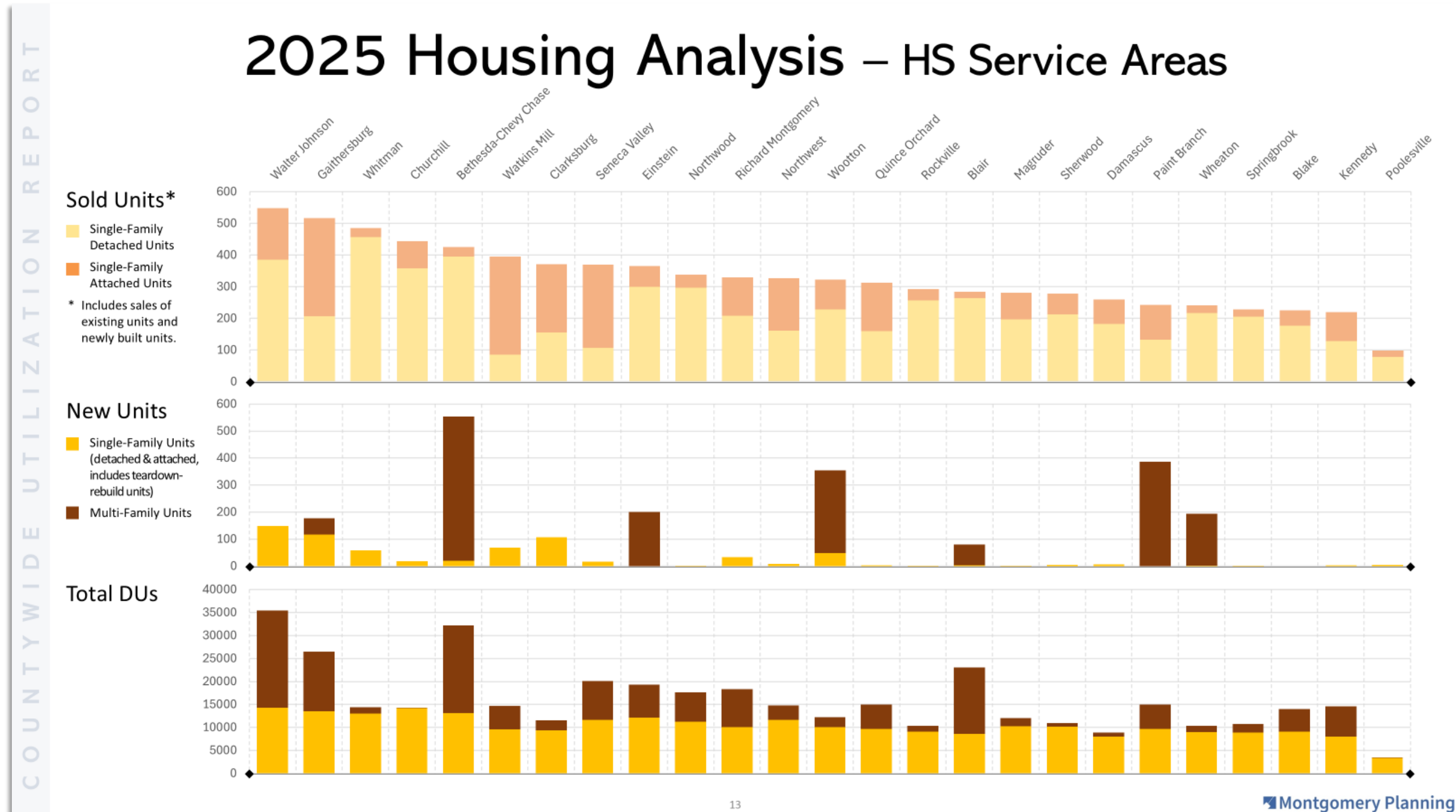
1. Walter Johnson
2. Gaithersburg
3. Whitman

MS Service Areas

1. Pyle
2. North Bethesda
3. Julius West

ES Service Areas

1. Cabin Branch (*Tier 2 UPP*)
2. Ashburton
3. Washington Grove



Staff Recommendation

- Planning Board certification of the FY 2027 Annual School Test results.
 - : Once certified, the results will take effect on July 1, 2026 and remain effective throughout the fiscal year.

Thank you!

For more info:

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