


## Subdivision Staging Policy: FY17 Annual School Test Results

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### Description

Every spring, following the adoption of the Capital Budget, the Planning Board adopts the annual school test for the upcoming fiscal year. The annual school test determines if new residential subdivisions in any school cluster should be subject to either a school facility payment or a moratorium, based on the estimated utilization of school facilities.

### *Staff Recommendation*

Approve the FY17 Annual School Test results effective July 1, 2016.

### Summary

The 2016 Subdivision Staging Policy (SSP) is currently under review by the Planning Board. Until it is adopted by the County Council later this year, the 2012 Subdivision Staging Policy remains in effect. Under the current SSP, school capacity is monitored by means of an annual school test. The school test compares projected enrollment five years into the future with projected capacity for each of the 25 high school clusters at the elementary, middle and high school levels. The school test results are finalized in May of each year upon the Council's adoption of the Capital Budget and Amendments to the Capital Improvements Program (CIP). If projected enrollment at any level exceeds 105 percent of program capacity, new residential subdivisions in the affected cluster will be required to make a school facility payment. If projected enrollment at any level exceeds 120 percent of program capacity, new residential subdivisions in the affected cluster will be under moratorium.

The annual school test analysis is prepared by Montgomery County Public Schools (MCPS) staff. Planning staff has reviewed the results of the MCPS annual school test analysis as discussed below.

## **FY17 Annual School Test**

For FY17, the total number of clusters exceeding 105 percent program capacity is twelve, four of which exceed at more than one school level. Residential development in these twelve clusters will be subject to a school facility payment. For those clusters inadequate at more than one school level, a school facility payment will be required for each inadequate school level. No school cluster exceeds the 120 percent program capacity ceiling. Therefore, residential subdivisions will not be under moratorium in any school cluster. The Council approved placeholder capital projects in four clusters to avoid any potential moratoriums. The four placeholder projects are:

- 1) Einstein cluster - Funding for six high school classrooms was added to the CIP
- 2) Walter Johnson cluster – Funding for eight high school classrooms was added to the CIP
- 3) Northwood cluster - Funding for ten high school classrooms was added to the CIP
- 4) Northwest cluster – Funding for twenty elementary school classrooms was added to the CIP. These additional classrooms will be added to Spark M. Matsunaga Elementary School and Ronald McNair Elementary School, or will be constructed as part of Northwest Elementary School #8.

According to the analysis, a school facility payment will be required in the following clusters at the elementary school level: Einstein, Gaithersburg, Northwood, and Quince Orchard. At the middle school level, residential development in the Gaithersburg, Rockville, and Wheaton clusters will require a school facility payment. And, at the high school level, a school facility payment will be required in the Blair, Churchill, Einstein, Gaithersburg, Walter Johnson, Kennedy, Richard Montgomery, Northwood, Paint Branch, and Quince Orchard clusters. A school facility payment will be levied at each school level found to be inadequate.

These results are an improvement over the school test for FY16. During FY16 sixteen school clusters required the payment of a school facility fee with eight school clusters exceeding capacity at more than one school level.

In the 2007-2009 Growth Policy the administration of a school capacity ceiling, commonly referred to as the School Queue, was introduced. If a subdivision would cause a cluster to exceed the 120 percent threshold at any level, only the number of dwelling units that could be built without reaching the threshold would be allowed. Similarly, if a subdivision would cause a cluster to exceed the 105 percent threshold at any level, then the number of dwelling units which would exceed the threshold would make a school facilities payment to proceed to approval.

It is worth noting that two clusters, Blake and Seneca Valley, have a utilization rate greater than 104% as of the July 1, 2016 effective date. The Blake cluster is at 104.2% at the high school level. The Seneca Valley cluster is at 104.6% at the elementary school level. This means that

an application for residential subdivision in one of these clusters may tip the utilization rate above 105% and require a school facility payment at the applicable level for those units that exceed 105%. Following this approval, the cluster will require a school facility payment at the affected school level for all new residential subdivisions.

Planning staff recommends that the Planning Board accept the results of the school test, as calculated by Montgomery County Public Schools staff, for FY17. These findings are attached on pages 3 (summary table), 4 and 5 (detailed table by cluster for each school level). Once accepted by the Planning Board, these tables (along with the resolution adopted by the Council in November 2012) will constitute Montgomery County's Subdivision Staging Policy as it relates to school capacity for FY '17, unless modified by the 2016 Subdivision Staging Policy whose effective date may be November 15, 2016 or January 1, 2017.

## Subdivision Staging Policy

### Results of School Test for FY 2017

Reflects County Council Adopted FY 2017 Capital Budget and the FY 2017–2022 Capital Improvements Program (CIP)  
Effective July 1, 2016

School Test Level	Description	Cluster Outcomes by Level		
		Elementary Inadequate	Middle Inadequate	High Inadequate
<u>Clusters over 105% utilization</u>  School facility payment required in inadequate clusters to proceed.	5-year test  Effective July 1, 2016  Test year 2021-22	Einstein (107.4%) Gaithersburg (112.4%) Northwood (116.0%) Quince Orchard (113.2%)	Gaithersburg (107.5%) Rockville (116.2%) Wheaton (110.7%)	Blair (116.3%) Churchill (113.5%) Einstein (116.9%) Gaithersburg (107.6%) Walter Johnson (113.9%) Kennedy (112.5%) Richard Montgomery (112.2%) Northwood (114.8%) Paint Branch (111.0%) Quince Orchard (110.4%)
<u>Clusters over 120% utilization</u>  Moratorium required in clusters that are inadequate.	5-year test  Effective July 1, 2016  Test year 2021-22			

Capacities in clusters include the following placeholder capital projects:  
 Twenty elementary school classrooms in the Northwest Cluster  
 Six high school classrooms in the Einstein Cluster.  
 Eight high school classrooms in the Walter Johnson Cluster.  
 Ten high school classrooms in the Northwood Cluster.

**Subdivision Staging Policy FY 2017 School Test: Cluster Utilizations in 2021-2022**  
 Reflects County Council Adopted FY 2017 Capital Budget and the FY 2017–2022 Capital Improvements Program (CIP)  
 Effective July 1, 2016

**Elementary School Test: Percent Utilization >105% School Facility Payment and >120% Moratorium**

Cluster Area	Projected August 2021 Enrollment	100% MCPS Program Capacity With BOE Requested FY17–22 CIP	Cluster Percent Utilization in 2021-2022 School Year	School Test Result Capacity is:	Cluster is?
Bethesda-Chevy Chase	3,565	3,864	92.3%	Adequate	Open
Montgomery Blair	4,701	4,783	98.3%	Adequate	Open
James Hubert Blake	2,573	2,554	100.7%	Adequate	Open
Winston Churchill	2,492	2,913	85.5%	Adequate	Open
Clarksburg	4,279	4,522	94.6%	Adequate	Open
Damascus	2,099	2,272	92.4%	Adequate	Open
Albert Einstein	3,057	2,847	107.4%	Inadequate	School Payment
Gaithersburg	4,685	4,170	112.4%	Inadequate	School Payment
Walter Johnson	4,513	4,631	97.5%	Adequate	Open
John F. Kennedy	3,086	3,199	96.5%	Adequate	Open
Col. Zadok Magruder	2,609	2,843	91.8%	Adequate	Open
Richard Montgomery	2,750	2,884	95.4%	Adequate	Open
Northwest*	4,069	4,194	97.0%	Adequate	Open
Northwood	3,687	3,178	116.0%	Inadequate	School Payment
Paint Branch	2,570	2,503	102.7%	Adequate	Open
Poolesville	506	758	66.8%	Adequate	Open
Quince Orchard	3,148	2,781	113.2%	Inadequate	School Payment
Rockville	2,580	2,636	97.9%	Adequate	Open
Seneca Valley	2,537	2,425	104.6%	Adequate	Open
Sherwood	1,908	2,394	79.7%	Adequate	Open
Springbrook	3,409	3,332	102.3%	Adequate	Open
Watkins Mill	2,764	2,858	96.7%	Adequate	Open
Wheaton	3,150	3,454	91.2%	Adequate	Open
Walt Whitman	2,409	2,571	93.7%	Adequate	Open
Thomas S. Wootton	2,551	3,205	79.6%	Adequate	Open

\*Northwest Cluster elementary school capacity includes 20 classrooms of capacity for a solution to space deficits in the cluster.

**Subdivision Staging Policy FY 2017 School Test: Cluster Utilizations in 2021-2022**  
 Reflects County Council Adopted FY 2017 Capital Budget and the FY 2017–2022 Capital Improvements Program (CIP)  
 Effective July 1, 2016

**Middle School Test: Percent Utilization >105% School Facility Payment and >120% Moratorium**

Cluster Area	Projected August 2021 Enrollment	100% MCPS Program Capacity With BOE Requested FY17–22 CIP	Cluster Percent Utilization in 2021-2022 School Year	School Test Result Capacity is:	Cluster is?
Bethesda-Chevy Chase	1,774	2,027	87.5%	Adequate	Open
Montgomery Blair	2,878	2,913	98.8%	Adequate	Open
James Hubert Blake	1,275	1,345	94.8%	Adequate	Open
Winston Churchill	1,426	1,696	84.1%	Adequate	Open
Clarksburg	2,117	2,171	97.5%	Adequate	Open
Damascus	923	982	94.0%	Adequate	Open
Albert Einstein	1,278	1,420	90.0%	Adequate	Open
Gaithersburg	2,041	1,898	107.5%	Inadequate	School Payment
Walter Johnson	2,313	2,429	95.2%	Adequate	Open
John F. Kennedy	1,724	1,698	101.5%	Adequate	Open
Col. Zadok Magruder	1,180	1,616	73.0%	Adequate	Open
Richard Montgomery	1,392	1,445	96.3%	Adequate	Open
Northwest	2,145	2,235	96.0%	Adequate	Open
Northwood	1,813	1,830	99.1%	Adequate	Open
Paint Branch	1,380	1,401	98.5%	Adequate	Open
Poolesville	307	468	65.6%	Adequate	Open
Quince Orchard	1,442	1,646	87.6%	Adequate	Open
Rockville	1,106	952	116.2%	Inadequate	School Payment
Seneca Valley	1,252	1,397	89.6%	Adequate	Open
Sherwood	1,132	1,429	79.2%	Adequate	Open
Springbrook	1,276	1,250	102.1%	Adequate	Open
Watkins Mill	1,285	1,355	94.8%	Adequate	Open
Wheaton	1,623	1,466	110.7%	Inadequate	School Payment
Walt Whitman	1,511	1,502	100.6%	Adequate	Open
Thomas S. Wootton	1,348	1,641	82.1%	Adequate	Open

**Subdivision Staging Policy FY 2017 School Test: Cluster Utilizations in 2021-2022**  
 Reflects County Council Adopted FY 2017 Capital Budget and the FY 2017–2022 Capital Improvements Program (CIP)  
 Effective July 1, 2016

**High School Test: Percent Utilization >105% School Facility Payment and >120% Moratorium**

Cluster Area	Projected August 2021 Enrollment	100% MCPS Program Capacity With BOE Requested FY17–22 CIP	Cluster Percent Utilization in 2021-2022 School Year	School Test Result Capacity is:	Cluster is?
Bethesda-Chevy Chase	2,434	2,407	101.1%	Adequate	Open
Montgomery Blair	3,396	2,920	116.3%	Inadequate	School Payment
James Hubert Blake	1,806	1,734	104.2%	Adequate	Open
Winston Churchill	2,254	1,986	113.5%	Inadequate	School Payment
Clarksburg*	1,997	2,025	98.6%	Adequate	Open
Damascus	1,390	1,551	89.6%	Adequate	Open
Albert Einstein**	2,033	1,739	116.9%	Inadequate	School Payment
Gaithersburg	2,591	2,407	107.6%	Inadequate	School Payment
Walter Johnson ***	2,865	2,515	113.9%	Inadequate	School Payment
John F. Kennedy	2,062	1,833	112.5%	Inadequate	School Payment
Col. Zadok Magruder	1,622	1,941	83.6%	Adequate	Open
Richard Montgomery	2,508	2,236	112.2%	Inadequate	School Payment
Northwest*	2,210	2,241	98.6%	Adequate	Open
Northwood****	2,002	1,744	114.8%	Inadequate	School Payment
Paint Branch	2,248	2,025	111.0%	Inadequate	School Payment
Poolesville	1,195	1,170	102.1%	Adequate	Open
Quince Orchard	2,050	1,857	110.4%	Inadequate	School Payment
Rockville	1,596	1,570	101.7%	Adequate	Open
Seneca Valley*	2,363	2,400	98.5%	Adequate	Open
Sherwood	1,915	2,166	88.4%	Adequate	Open
Springbrook	1,991	2,162	92.1%	Adequate	Open
Watkins Mill	1,845	1,942	95.0%	Adequate	Open
Wheaton	1,839	2,239	82.1%	Adequate	Open
Walt Whitman	2,231	2,398	93.0%	Adequate	Open
Wootton	2,237	2,420	92.4%	Adequate	Open

\* Enrollments for Clarksburg, Northwest and Seneca Valley high schools are estimated to reflect future reassignments to Seneca Valley HS

\*\*Einstein High School Capacity includes a 6 classroom addition in a placeholder project

\*\*\* Walter Johnson High School Capacity includes an 8 classroom addition in a placeholder project

\*\*\*\* Northwood High School Capacity includes a 10 classroom addition in a placeholder project