

The revised request is approximately \$3 million less in total and about \$130,000 less in the six-year period.<sup>1</sup> However, much of the savings occurs in FY09, FY10, and beyond six-years (when the modernization under the original proposal would occur) while substantial additional expenditures are required in FY07 and FY08. Therefore, while the overall cost is less, the revised proposal will complicate the Council's CIP reconciliation process.

### Enrollment and Capacity Issues

The following chart shows Churchill cluster enrollment and capacity projections under both scenarios.

| Churchill Cluster Capacity Review                                   |        |        |        |        |        |        |        |        |
|---|--------|--------|--------|--------|--------|--------|--------|--------|
| Seven Locks ES Addition (Proposed to Open in September 2006)        |        |        |        |        |        |        |        |        |
|   | FY05   | FY06   | FY07   | FY08   | FY09   | FY10   | 2015   | 2020   |
| Capacity (with addition)  | 2313   | 2263   | 2466   | 2394   | 2394   | 2544   | 2544   | 2544   |
| Enrollment  | 2369   | 2384   | 2417   | 2441   | 2524   | 2546   | 2600   | 2600   |
| Space Available   | -56    | -121   | 49     | -47    | -130   | -2     | -56    | -56    |
| Utilization   | 102.4% | 105.3% | 98.0%  | 102.0% | 105.4% | 100.1% | 102.2% | 102.2% |
| New School at the Kendale Site (Proposed to Open in September 2007) |        |        |        |        |        |        |        |        |
|   | FY05   | FY06   | FY07   | FY08   | FY09   | FY10   | 2015   | 2020   |
| Capacity (with new school)  | 2313   | 2263   | 2216   | 2475   | 2475   | 2625   | 2625   | 2625   |
| Enrollment  | 2369   | 2384   | 2417   | 2441   | 2524   | 2546   | 2600   | 2600   |
| Space Available   | -56    | -121   | -201   | 34     | -49    | 79     | 25     | 25     |
| Utilization   | 102.4% | 105.3% | 109.1% | 98.6%  | 102.0% | 97.0%  | 99.0%  | 99.0%  |

School capacity needs are a key component of the request. The approved 10-room addition would add 250 seats, bringing Seven Locks' capacity to 519 students (after factoring in the transition to all-day kindergarten at the school in September 2007) and relieve capacity problems at Potomac Elementary School. The addition at Seven Locks Elementary School would also balance out enrollment at the cluster's elementary schools in the 400 to 600 range.

Building a new elementary school, would add up to 600 seats plus a core capacity that could accommodate 740 seats in the future. The following chart shows Churchill cluster enrollment and capacity projections under both scenarios.

As shown on the chart, either alternative brings the cluster close to 100 percent utilization levels. The original proposal brings utilization down to 102.2% while the new school brings utilization down to 99.0%. However, if the new school's design provides a core capacity of 740; future classrooms could be built, adding 150 to 200 more seats.

At the Committee meeting, Councilmember Denis asked that the community be given the opportunity to provide input regarding the design of the replacement school. One issue that has been raised is the capacity of the replacement school. Both the Board President and the Superintendent assured Councilmember Denis that community input would be an important component as the replacement school moves into design.

The Council has also received correspondence and public hearing testimony from citizens in the area expressing concerns regarding the surplus of school sites, given the scarcity of available

<sup>1</sup>This cost savings does not include any assumptions regarding the disposition of the existing Seven Locks Elementary School site.

land in the area and the possibility that school capacity beyond current projections may be needed in the future.

MCPS does not believe the current Seven Locks site will be needed if the new school is built at Kendale, since the existing five elementary schools would be able to handle the projected enrollment for the next 10 to 15 years, and a sixth school could be opened at the former Tuckerman Elementary School site if needed.

MCPS intends to study whether "sufficient value can be generated through a sale or Public/Private partnership...to fund some of the requested CIP projects that may have to be deferred." (See ©3.) Future Board action is required if the site is to be formally surplus. The Board policy regarding the disposition of property is attached on ©11-12.

According to MCPS staff, as assumed with the original addition project at Seven Locks Elementary School, the new school would provide space to relieve overcrowding at Potomac Elementary School while balancing elementary school enrollments in the cluster at 500 to 600 per school. Specific school assignments will be made through a future boundary study process.

#### Committee Recommendation

The revised proposal offers a number of benefits over the original proposal including: lower overall cost, more capacity provided, and the avoidance of staging construction with students on-site. Building a new school also provides reuse potential for the current Seven Locks Elementary School site. However, MCPS is not proposing to surplus the site at this time.

**The Committee recommends approval of the revised proposal to build a new school (with a gymnasium) at the Kendale site instead of an addition/modernization solution at the existing Seven Locks Elementary School.**

#### Attachments

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Office of the Superintendent of Schools  
MONTGOMERY COUNTY PUBLIC SCHOOLS  
Rockville, Maryland

March 25, 2004

008424

MEMORANDUM

To: The Honorable Douglas Duncan, County Executive  
The Honorable Steven Silverman, President, County Council

From: Jerry D. Weast, Superintendent of Schools 

Subject: Transmittal - Revised Requested FY 2005 Capital Budget and FY 2005-2010  
Capital Improvements Program (CIP)

Board of Education Meeting Date: March 22, 2004

Type of Action:

- Special Appropriation
- Transfer
- Notification

JDW:JLL:ak

Attachments

Copy to:  
Montgomery County Office of Management and Budget  
Department of Management, Budget and Planning

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Replacement

Seven Locks ES Addition -- No. 026503

Category MCPS  
 Agency Public Schools  
 Planning Area Potomac-Travilah  
 Relocation Impact None.

Date Last Modified March 24, 2004  
 Previous PDF Page Number 7-52 (02 App)  
 Required Adequate Public Facility NO

EXPENDITURE SCHEDULE (\$000)

| Cost Element                     | Total        | Thru FY03  | Est. FY04 | Total 6 Years | FY05       | FY06        | FY07        | FY08        | FY09     | FY10     | Beyond 6 Years |
|----------------------------------|--------------|------------|-----------|---------------|------------|-------------|-------------|-------------|----------|----------|----------------|
| Planning, Design and Supervision | 1273         | 250        | 0         | 1023          | 496        | 292         | 255         | 0           | 0        | 0        | 0              |
| Land                             |              |            |           |               |            |             |             |             |          |          |                |
| Site Improvements and Utilities  | 1475         | 0          | 0         | 1475          | 0          | 975         | 500         | 0           | 0        | 0        | 0              |
| Construction                     | 10976        | 0          | 0         | 10579         | 0          | 500         | 7326        | 2750        | 0        | 0        | 0              |
| Other                            | 700          | 0          | 0         | 700           | 0          | 101         | 300         | 400         | 0        | 0        | 0              |
| <b>Total</b>                     | <b>14024</b> | <b>250</b> | <b>0</b>  | <b>12708</b>  | <b>496</b> | <b>1779</b> | <b>8351</b> | <b>3150</b> | <b>0</b> | <b>0</b> | <b>0</b>       |

FUNDING SCHEDULE (\$000)

|            |       |     |   |       |     |       |       |   |   |   |   |
|------------|-------|-----|---|-------|-----|-------|-------|---|---|---|---|
| G.O. Bonds | 5,993 | 250 | 0 | 5,743 | 496 | 4,133 | 1,238 | 0 | 0 | 0 | 0 |
|------------|-------|-----|---|-------|-----|-------|-------|---|---|---|---|

ANNUAL OPERATING BUDGET IMPACT (\$000)

| Maintenance       |  |  |  | 192        | 0        | 0        | 48        | 48        | 48        | 48        | 0        |
|-------------------|--|--|--|------------|----------|----------|-----------|-----------|-----------|-----------|----------|
| Energy            |  |  |  | 56         | 0        | 0        | 14        | 14        | 14        | 14        | 0        |
| <b>Net Impact</b> |  |  |  | <b>248</b> | <b>0</b> | <b>0</b> | <b>62</b> | <b>62</b> | <b>62</b> | <b>62</b> | <b>0</b> |

DESCRIPTION

Enrollment projections for Potomac Elementary School reflect a need for an 10 classroom addition. Potomac Elementary School has a program capacity for 488 students. Enrollment is expected to reach 615 by September 2009. A feasibility study was completed in FY 2001 to determine the cost and scope of this project. An amendment to the FY 2001-2006 CIP was approved for planning funds only. The planning funds were used to conduct a feasibility study at Seven Locks Elementary School to determine the scope and cost of an addition at this facility. The County Council directed the Board of Education to consider building an addition at Seven Locks Elementary School in lieu of an addition at Potomac Elementary School and then conducting a boundary study between Seven Locks and Potomac elementary schools to shift some students to Seven Locks.

In FY 2002, a feasibility study was conducted to determine the cost and scope of an addition at Seven Locks Elementary School. Due to the growth at Potomac Elementary School, it was concluded that an addition at Seven Locks would be built to relieve Potomac. An FY 2005 appropriation is requested to continue planning and architectural design of this addition. An FY 2006 appropriation will be requested for construction funds. This addition is scheduled to be completed September 2006.

On March 22, 2004, the Board of Education adopted a resolution to amend its Requested FY 2005 Capital Budget and FY 2005-2010 Capital Improvements Program (CIP). Included in the resolution was a request to remove funding for the addition planned for Seven Locks Elementary School, as well as funding for its modernization planned in the latter part of the CIP in the Future Replacement/Modernization project. Instead of these two projects, the Board of Education is requesting funding for a replacement facility for Seven Locks Elementary School to accommodate students from both Seven Locks Elementary School, as well as students from Potomac Elementary School.

The replacement facility will be located on a site known as the Kendale Road site in the Winston Churchill Cluster. The new site for the replacement facility is in a better location to serve a larger school population and will alleviate concerns from the community regarding traffic problems at the current Seven Locks Elementary School site. The community also had concerns regarding the disruption to students and staff due to an addition at the current Seven Locks Elementary School and then a relocation to a holding facility during the school's modernization. The amended request by the Board of Education will be less disruptive to the students, since the current Seven Locks and Potomac elementary school students will stay in their respective facilities until the replacement facility is built. From a fiscal perspective, the replacement facility will be approximately \$2 million less than the cost to provide an addition, gymnasium, and modernization to Seven Locks Elementary School.

The addition for Seven Locks Elementary School was scheduled to be completed by September 2006, with the modernization scheduled to be completed by September 2010. The request by the Board of Education includes a completion date of September 2007, for the replacement facility for Seven Locks Elementary School. An FY 2005 appropriation is requested to begin planning for the new replacement facility.

Capacity  
 Program Capacity After Project: 550  
 Teaching Stations Added: 22

| APPROPRIATION AND EXPENDITURE DATA    | COORDINATION  | MAP |
|---------------------------------------|---|-----|
| Date First Appropriation FY01 (\$000) | Mandatory Referral - M-NCPPC  |     |
| Initial Cost Estimate 4,070           | Department of Environmental Protection  |     |
| First Cost Estimate                   | Building Permits:   |     |
| Current Scope FY02 4,070              | Code Review   |     |
| Last FY's Cost Estimate 250           | Fire Marshal  |     |
| Present Cost Estimate 5,993           | Department of Transportation  |     |
| Appropriation Request FY05 818        | Inspections   |     |
| Appropriation Req. Est. FY06 5,247    | Sediment Control  |     |
| Supplemental                          | Stormwater Management   |     |
| Appropriation Request FY04 0          | WSSC Permits  |     |
| Transfer 0                            | MCPS asserts that this project conforms to the requirements of relevant local plans, as required by the Maryland Economic Growth, Resource Protection and Planning Act. |     |
| Cumulative Appropriation 250          |   |     |
| Expenditures/                         |   |     |
| Encumbrances 0                        |   |     |
| Unencumbered Balance 250              |   |     |
| Partial Closeout Thru FY02 0          |   |     |
| New Partial Closeout FY03 0           |   |     |
| Total Partial Closeout 0              |   |     |

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## Future Replacements/Modernizations -- No. 886536

Category  
Agency  
Planning Area  
Relocation Impact

MCPS  
Public Schools  
Countywide

Date Last Modified  
Previous PDF Page Number  
Required Adequate Public Facility

November 21, 2003  
7-64 (02 App)  
NO

### EXPENDITURE SCHEDULE (\$000)

| Cost Element                     | Total          | Thru FY03 | Est. FY04 | Total 6 Years | FY05     | FY06     | FY07       | FY08         | FY09          | FY10          | Beyond 6 Years |
|----------------------------------|----------------|-----------|-----------|---------------|----------|----------|------------|--------------|---------------|---------------|----------------|
| Planning, Design and Supervision | 19355          | 0         | 0         | 11280         | 0        | 0        | 788        | 2858         | 2822          | 4752          | 8,135          |
| Land                             | 0              | 0         | 0         | 0             | 0        | 0        | 0          | 0            | 0             | 0             | 0              |
| Site Improvements and Utilities  | 23182          | 0         | 0         | 6251          | 0        | 0        | 0          | 0            | 1500          | 304,751       | 16,931         |
| Construction                     | 249041         | 0         | 0         | 45,552        | 39284    | 0        | 0          | 0            | 7,975         | 27,577        | 243,849        |
| Other                            | 15790          | 0         | 0         | 300           | 1,700    | 0        | 0          | 0            | 0             | 300           | 14,840         |
| <b>Total</b>                     | <b>320,830</b> | <b>0</b>  | <b>0</b>  | <b>67,075</b> | <b>0</b> | <b>0</b> | <b>788</b> | <b>3,357</b> | <b>14,024</b> | <b>48,042</b> | <b>253,755</b> |
| <b>FUNDING SCHEDULE (\$000)</b>  |                |           |           |               |          |          |            |              |               |               |                |
| G.O. Bonds                       | 309318         | 0         | 0         | 58055         | 0        | 0        | 788        | 2858         | 12297         | 42112         | 249313         |
| State Aid                        | 0              | 0         | 0         | 67,075        | 0        | 0        | 0          | 0            | 0             | 0             | 0              |

### ANNUAL OPERATING BUDGET IMPACT (\$000)

#### DESCRIPTION

A schedule is required to arrest deterioration and to ensure that aging facilities remain suitable for instruction on an approximate 30-year cycle. The Board of Education strongly supports the upgrading of facilities through comprehensive modernizations to replace major building systems and to bring schools up to current educational standards. MCPS has designed an instrument to assess the condition of the schools (FACT) as they reach 30 years old and rank them in order of need. Schools will be planned according to the priority listing in the FACT survey. The approved project provides for replacements/modernizations as adopted in the Amended FY 2001-2006 CIP. This project includes funds for schools with scheduled expenditures in FY 2004 and beyond. The project includes 10 elementary, three middle, and two high schools. It is anticipated that at some point in the future, holding facilities will require a full modernization for continued use.

As feasibility studies are completed and architectural planning is scheduled, individual schools will move from this project to the Current Replacements/Modernizations PDF No. 926575. The funding shown in FY 2007 and beyond is for fiscal planning purposes. Asbestos costs are included in school replacement/modernization projects based on a square foot average. On May 1, 2001, a 90-day moratorium on bidding MCPS construction projects was implemented due to rapidly escalating construction costs. In FY 2003, due to fiscal constraints, all future modernization projects were delayed.

An amendment to the FY 2003-2008 CIP was approved to move one high school from this project to the Current Replacement/Modernization project. As part of the Board of Education's adopted FY 2004 Capital Budget and Amendments to the FY 2003-2008 CIP, planning expenditures for some future modernizations were shifted to more closely couple these planning expenditures with approved project construction schedules. The realignment of planning expenditures will not affect any project completion schedule. As part of the Board of Education's adopted FY 2005 Capital Budget and FY 2005-2010 CIP, the Board approved the move of three elementary schools and one middle school from this project to the Current Replacement/Modernizations Project.

#### FISCAL NOTE

State Reimbursement: Reimbursement of the state share of eligible costs will continue to be pursued.

| APPROPRIATION AND EXPENDITURE DATA   | COORDINATION             | MAP     |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
|--|--------------------------|---------|---------|-----------------------|--|---|---------------------|--|--|---------------|------|---------|-------------------------|--|---------|-----------------------|--|---------|-----------------------|------|---|-------------------------|------|---|---------------------------|------|---|----------|--|---|--------------------------|--|---|---------------------------|--|---|----------------------|--|---|-----------------------|------|---|----------------------|------|---|------------------------|--|---|--|--|
| <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Date First Appropriation</td> <td>FY01</td> <td>(\$000)</td> </tr> <tr> <td>Initial Cost Estimate</td> <td></td> <td>0</td> </tr> <tr> <td>First Cost Estimate</td> <td></td> <td></td> </tr> <tr> <td>Current Scope</td> <td>FY02</td> <td>191,940</td> </tr> <tr> <td>Last FY's Cost Estimate</td> <td></td> <td>194,751</td> </tr> <tr> <td>Present Cost Estimate</td> <td></td> <td>320,830</td> </tr> <tr> <td>Appropriation Request</td> <td>FY05</td> <td>0</td> </tr> <tr> <td>Appropriation Req. Est.</td> <td>FY06</td> <td>0</td> </tr> <tr> <td>Supplemental Approp. Req.</td> <td>FY04</td> <td>0</td> </tr> <tr> <td>Transfer</td> <td></td> <td>0</td> </tr> <tr> <td>Cumulative Appropriation</td> <td></td> <td>0</td> </tr> <tr> <td>Expenditures/Encumbrances</td> <td></td> <td>0</td> </tr> <tr> <td>Unencumbered Balance</td> <td></td> <td>0</td> </tr> <tr> <td>Partial Closeout Thru</td> <td>FY02</td> <td>0</td> </tr> <tr> <td>New Partial Closeout</td> <td>FY03</td> <td>0</td> </tr> <tr> <td>Total Partial Closeout</td> <td></td> <td>0</td> </tr> </table> | Date First Appropriation | FY01    | (\$000) | Initial Cost Estimate |  | 0 | First Cost Estimate |  |  | Current Scope | FY02 | 191,940 | Last FY's Cost Estimate |  | 194,751 | Present Cost Estimate |  | 320,830 | Appropriation Request | FY05 | 0 | Appropriation Req. Est. | FY06 | 0 | Supplemental Approp. Req. | FY04 | 0 | Transfer |  | 0 | Cumulative Appropriation |  | 0 | Expenditures/Encumbrances |  | 0 | Unencumbered Balance |  | 0 | Partial Closeout Thru | FY02 | 0 | New Partial Closeout | FY03 | 0 | Total Partial Closeout |  | 0 | <p><b>MANDATORY REFERRAL - M-NCPPC</b></p> <p>Department of Environmental Protection</p> <p>Building Permits:</p> <ul style="list-style-type: none"> <li>Code Review</li> <li>Fire Marshal</li> </ul> <p>Department of Transportation</p> <p>Inspections</p> <ul style="list-style-type: none"> <li>Sediment Control</li> <li>Stormwater Management</li> </ul> <p>WSSC Permits</p> | <div style="border: 1px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;"> <span style="font-size: 2em;">8</span> </div> |
| Date First Appropriation   | FY01                     | (\$000) |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| Initial Cost Estimate  |                          | 0       |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| First Cost Estimate  |                          |         |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| Current Scope  | FY02                     | 191,940 |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| Last FY's Cost Estimate  |                          | 194,751 |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| Present Cost Estimate  |                          | 320,830 |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| Appropriation Request  | FY05                     | 0       |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| Appropriation Req. Est.  | FY06                     | 0       |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| Supplemental Approp. Req.  | FY04                     | 0       |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| Transfer   |                          | 0       |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| Cumulative Appropriation   |                          | 0       |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| Expenditures/Encumbrances  |                          | 0       |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| Unencumbered Balance   |                          | 0       |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| Partial Closeout Thru  | FY02                     | 0       |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| New Partial Closeout   | FY03                     | 0       |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |
| Total Partial Closeout   |                          | 0       |         |                       |  |   |                     |  |  |               |      |         |                         |  |         |                       |  |         |                       |      |   |                         |      |   |                           |      |   |          |  |   |                          |  |   |                           |  |   |                      |  |   |                       |      |   |                      |      |   |                        |  |   |  |  |

# POLICY BOARD OF EDUCATION OF MONTGOMERY COUNTY

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Related Entries: DNA-RA

## Disposition of Board of Education Property

### A. PURPOSE

To provide for the disposal of Board of Education property

### B. PROCESS AND CONTENT

1. *The Annotated Code of Maryland, Education*, governing disposal of real property provides that:

- a) Subject to the approval of the state superintendent of schools, local boards of education shall transfer grounds, school sites, or buildings no longer needed for school purposes to the County Council
- b) the State Board of Public Works, by rule and regulation, can require that the proceeds from the sale, lease, or disposal of school buildings constructed primarily with state funds after February 1, 1971, be utilized solely as a part of the state funding of future school buildings within the subdivision in which the disposal occurred

2. Board of Education property will be disposed of as follows:

a) Real Property – Buildings and Grounds

(1) Disposal

In the event that any Board of Education real property is considered to have no further use for school system purposes, the superintendent of schools shall make a recommendation to the Board of Education for disposition. The recommendation will include the rationale for the proposal, an estimate of the market value of the property, and the identification of the amount and year of state appropriations for construction and/or improvements of buildings on the site.

(2) Easements and Rights-of-Way

The granting of easements and rights-of-way requested by other public agencies and utility firms in the public interest shall be by Board action upon the recommendation of the superintendent.

b) Other Than Real Property

(1) The superintendent of schools will effect the trade-in of other than real property and equipment at the time bids are invited for replacement. The superintendent is authorized to effect the direct sale of items which have no trade-in value nor significant use to the instructional or support programs. The sale of any item exceeding \$5,000 in proceeds will be approved by the Board.

(2) Requested authorization for the disposition of obsolete school books by sale or transfer to such agencies as may have use for these books be and it is hereby approved, it being understood that any transfer to an agency would be at no cost to the Board of Education.

**C. REVIEW AND REPORTING**

1. The superintendent will report to the Board annually the disposition of nontraded items indicating quantity, description of property, method of disposal, and value received.
2. This policy will be reviewed every three years in accordance with the Board of Education policy review process.

*Policy History:* Adopted by Resolution No. 431-58, August 12, 1958, amended by Resolution No. 447-73, July 10, 1973; reformatted by Resolution No. 333-86, June 12, 1986, and Resolution No. 458-86, August 12, 1986;

**FY 2005 STATE CAPITAL IMPROVEMENTS PROGRAM FOR  
MONTGOMERY COUNTY PUBLIC SCHOOLS**

( figures in thousands)

| LOCAL<br>PRIOR-<br>ITY<br>No.            | STATE<br>PFA*<br>YES/<br>NO | PROJECT  | TOTAL<br>ESTIMATED<br>COST | PRIOR<br>IAC<br>FUNDING<br>THRU FY 04 | FY 2005<br>REQUEST<br>FOR<br>FUNDING | B.P.W.<br>APPROVED<br>5/5/04 |
|--|-----------------------------|--|----------------------------|---------------------------------------|--------------------------------------|------------------------------|
| <b>CONSTRUCTION FUNDING BALANCE</b>      |                             |  |                            |                                       |                                      |                              |
| 1  | Y                           | Quince Orchard M.S. #2 New                         | 26,171                     | 5,000                                 | 4,032                                | 2,900                        |
| 2  | Y                           | Somerset E.S. Modernization                        | 13,337                     | 2,600                                 | 1,943                                | 900                          |
| 3  | Y                           | Gaithersburg E.S.-Addition                         | 7,272                      | 708                                   | 753                                  | 642                          |
|  |                             | <b>Subtotal</b>                                    | <b>46,780</b>              | <b>8,308</b>                          | <b>6,728</b>                         | <b>4,442</b>                 |
| <b>CONSTRUCTION FUNDING REQUEST</b>      |                             |  |                            |                                       |                                      |                              |
| 4  | Y                           | Kensington Parkwood E.S.- Replacement/Mod.         | 12,130                     |                                       | 3,238                                | 1,900                        |
| 5  | Y                           | Oakview E.S. - Core Improvements                   | 4,045                      |                                       | 1,266                                | 1,000                        |
| 6  | Y                           | Broad Acres E.S. Addition                          | 5,365                      |                                       | 1,590                                |                              |
| 7  | Y                           | John T. Baker M.S. Addition                        | 5,858                      |                                       | 1,513                                |                              |
| 8  | Y                           | Forest Knolls E.S. Addition                        | 2,918                      |                                       | 1,069                                |                              |
|  |                             | <b>Subtotal</b>                                    | <b>30,316</b>              | <b>-</b>                              | <b>8,676</b>                         | <b>2,900</b>                 |
| <b>PLANNING AND CONSTRUCTION REQUEST</b> |                             |  |                            |                                       |                                      |                              |
| 9/10                                     | Y                           | Clarksburg H.S.- (Rocky Hill M.S. Conversion/Add.) | 39,900                     |                                       | 12,014                               |                              |
| 11/12                                    | Y                           | Northwood H.S. Reopening                           | 16,500                     |                                       | 6,949                                |                              |
| 13/14                                    | Y                           | Wheaton M.S. # 2 (Col. J. Belt M.S.) Reopening     | 21,750                     |                                       | 5,870                                |                              |
| 15/16                                    | Y                           | Wheaton E.S. # 6 (Connecticut Pk. Reopening)       | 9,422                      |                                       | 5,903                                |                              |
| 17/18                                    | Y                           | Northwest H.S. Addition                            | 17,118                     |                                       | 4,641                                |                              |
| 19/20                                    | Y                           | Gaithersburg H.S. Addition                         | 9,779                      |                                       | 3,425                                |                              |
| 21/22                                    | Y                           | Rosemont E.S. - Addition                           | 5,338                      |                                       | 1,921                                |                              |
| 23/24                                    | Y                           | South Lake E.S.- Addition                          | 3,472                      |                                       | 1,182                                |                              |
|  |                             | <b>Subtotal</b>                                    | <b>123,279</b>             | <b>-</b>                              | <b>41,905</b>                        | <b>-</b>                     |
| <b>PLANNING APPROVAL REQUEST</b>         |                             |  |                            |                                       |                                      |                              |
| 25                                       | Y                           | Northeast Consortium E.S. #16 New                  | LP                         |                                       | LP                                   |                              |
| 26                                       | Y                           | Einstein/Kennedy E.S. # 6 (Arcola) Reopening       | LP                         |                                       | LP                                   |                              |
| 27                                       | Y                           | Clarksburg/Damascus # 7 New                        | LP                         |                                       | LP                                   |                              |
| 28                                       | Y                           | Northwest Area E.S. #7 New                         | LP                         |                                       | LP                                   |                              |
| 29                                       | Y                           | Farmland E.S. Addition                             | LP                         |                                       | LP                                   |                              |
| 30                                       | Y                           | Seven Locks E.S. Addition                          | LP                         |                                       | LP                                   |                              |
| 31                                       | Y                           | Garrett Park E.S. Addition                         | LP                         |                                       | LP                                   |                              |
| 32                                       | Y                           | Einstein H.S. Signature Program Addition           | LP                         |                                       | LP                                   |                              |
| 33                                       | Y                           | Spark Matsunaga E.S. Addition                      | LP                         |                                       | LP                                   |                              |
|  |                             | <b>Subtotal</b>                                    | <b>-</b>                   | <b>-</b>                              | <b>-</b>                             | <b>-</b>                     |
| <b>PREVIOUSLY APPROVED FOR PLANNING</b>  |                             |  |                            |                                       |                                      |                              |
| 34                                       | Y                           | Richard Montgomery H.S. - Modernization            |                            | Approved LP                           |                                      |                              |
| <b>SYSTEMIC PROJECTS - ROOFS</b>         |                             |  |                            |                                       |                                      |                              |
| 35                                       | Y                           | Lake Seneca ES                                     | 478                        |                                       | 239                                  | 239                          |
| 36                                       | Y                           | Silver Spring International                        | 428                        |                                       | 214                                  | 214                          |
| 37                                       | Y                           | Clopper Mill ES                                    | 410                        |                                       | 205                                  | 205                          |
| 38                                       | Y                           | Christa McAuliffe                                  | 347                        |                                       | 174                                  | 174                          |
| 39                                       | N                           | Travilah ES  | 225                        |                                       | 113                                  |                              |
| 40                                       | Y                           | Watkins Mill ES                                    | 223                        |                                       | 112                                  | 112                          |
| 41                                       | Y                           | Poolesville HS                                     | 200                        |                                       | 100                                  | 100                          |
| 42                                       | Y                           | Wyngate  | 161                        |                                       | 81                                   |                              |
|  |                             | <b>Estimated Subtotal</b>                          | <b>2,472</b>               |                                       | <b>1,236</b>                         | <b>1,044</b>                 |
| <b>SYSTEMIC PROJECTS - HVAC</b>          |                             |  |                            |                                       |                                      |                              |
| 43                                       | N                           | William Farquhar MS                                | 600                        |                                       | 300                                  | 300                          |
| 44                                       | Y                           | Fields Rd ES                                       | 600                        |                                       | 300                                  | 300                          |
| 45                                       | Y                           | Tilden MS  | 400                        |                                       | 200                                  |                              |
| 46                                       | Y                           | Woodlin ES   | 400                        |                                       | 200                                  |                              |
| 47                                       | Y                           | T.S. Wootton HS                                    | 260                        |                                       | 130                                  |                              |
| 48                                       | Y                           | Neelsville MS                                      | 130                        |                                       | 65                                   |                              |
| 49                                       | Y                           | Brooke Grove ES                                    | 120                        |                                       | 60                                   |                              |
|  |                             | <b>Estimated Subtotal</b>                          | <b>2,510</b>               |                                       | <b>1,255</b>                         | <b>600</b>                   |
| <b>RELOCATABLE CLASSROOMS</b>            |                             |  |                            |                                       |                                      |                              |
| 50                                       |                             | 2 units to be relocated                            | 100                        |                                       | 50                                   | 50                           |
|  |                             | <b>Total</b>                                       | <b>205,457</b>             | <b>8,308</b>                          | <b>59,850</b>                        | <b>9,036</b>                 |

\* PFA - Priority Funding Area



Office of the Superintendent of Schools  
MONTGOMERY COUNTY PUBLIC SCHOOLS  
Rockville, Maryland

March 22, 2004

MEMORANDUM

To: Members of the Board of Education  
From: Jerry D. Weast, Superintendent of Schools  
Subject: Recommendation for Brickyard Road, Kendale Road, and Edson Lane Properties

On October 20, 2003, the Montgomery County Public Schools (MCPS) received a request from the county executive to surplus three Board of Education owned properties—Brickyard Road, a 20-acre middle school site; Kendale Road, a 10.54-acre elementary school site; and Edson Lane, a 1.75-acre expansion parcel. The county executive requested that the Board of Education declare these three undeveloped sites in its real property inventory as no longer needed for school purposes. A response to the county executive’s request was sent on November 10, 2003, indicating that the request would be discussed with the Board of Education as part of its review of the FY 2005–2010 Capital Improvements Program (CIP).

On February 23, 2004, I sent a memorandum to members of the Board of Education containing my recommendation regarding the county’s request to surplus these sites. On March 3, 2004, the Board of Education held a public hearing on CIP items, including the surplus site issue. Having heard the public testimony and discussed this matter with some members of the Seven Locks and Potomac elementary school communities, I am revising my recommendation as follows:

I believe there are some very compelling reasons to move forward with amending the Board of Education’s Requested FY 2005 Capital Budget and FY 2005–2010 CIP to build a replacement Seven Locks Elementary School at the Kendale Road site. There would be significantly less disruption to faculty and staff by building a replacement facility than there would be with the currently approved plan that would require a two-phased approach of building the addition and then completing the modernization four years later. The new gymnasium phase also could be done as part of constructing the replacement facility and could be completed without disruption to the students and faculty. The replacement facility for Seven Locks Elementary School also would provide relief for the overutilization of Potomac Elementary School by providing ample space to reassign 150–200 students from Potomac Elementary School.

Cost is an important consideration in moving Seven Locks Elementary School to the Kendale Road site. The total cost is between \$2 and \$3 million less for building a replacement facility, because it is less expensive to build a new facility at a new site rather than phasing construction at an existing facility over a number of years. Also, we would avoid the considerable expense that would be required to improve the access to the current Seven Locks Elementary School site to accommodate the existing traffic or the traffic generated if the enrollment were increased by 150–200 students.

Once the Seven Locks Elementary School is relocated to the Kendale Road site, I believe the current site at the intersection of Seven Locks Road and Bradley Boulevard would no longer be needed for school purposes. All five of the elementary schools in the Winston Churchill Cluster are in the modernization queue and can be designed to accommodate the total elementary school enrollment projected for the cluster. The 10–15 year projection for elementary school enrollment in the Winston Churchill Cluster is 2,600 students. Given that number of students, the five elementary schools could easily be modernized to accommodate approximately 525 to 550 students each. In addition, the Board of Education still holds title to the former Tuckerman Elementary School site that could be used if a sixth elementary school for the Winston Churchill Cluster were ever needed.

The discussion regarding the Brickyard Road site should have further dialogue, and I am recommending that the Board of Education take no action on this site at this time. As indicated in my February 23, 2004, recommendation to the Board, the Brickyard Road site is not in a good location to provide middle school (or even elementary school) capacity for the Winston Churchill Cluster. Other potential middle school sites, preferably in the Thomas S. Wootton Cluster, need to be examined. If another middle school site in the Thomas S. Wootton Cluster can be identified, retaining the Brickyard Road site would serve little purpose.

The Edson Lane expansion parcel is an underutilized asset that the Board of Education should consider leveraging to provide value to help fund the requested FY 2005–2010 CIP. I recommend that MCPS staff explore developing a Memorandum of Understanding (MOU) with the county to determine if sufficient value can be generated through a sale or Public/Private Partnership to develop both the Edson Lane parcel and the current Seven Locks Elementary School site to fund some of the requested CIP projects that may have to be deferred based on county spending limits. If staff discussion indicates that an MOU could be developed that would provide valuable funding for the CIP, I will return to the Board of Education with a recommendation at a later date as to whether the Edson Lane and current Seven Locks Elementary School sites should be declared surplus to the needs of the school system.

I am not asking the Board of Education to declare any of the three aforementioned properties surplus to the needs of the school system at this time. Instead, I am asking the Board of Education to authorize staff to explore the opportunities that may exist to leverage the assets it owns to serve the needs of our growing student population.

Attached are two separate resolutions for the Board's consideration.

Recommended Resolution for the Kendale Road site and the Edson Lane property:

WHEREAS, On October 20, 2003, the county executive requested that the Board of Education surplus the Kendale Road school site and the expansion parcel, known as the Edson Lane property, owned by Montgomery County Public Schools; and

WHEREAS, The superintendent presented a recommendation to the Board of Education on February 23, 2004, concerning the county executive's request to surplus the Kendale Road site and the Edson Lane property; and

WHEREAS, On March 3, 2003, the Board of Education held a public hearing on CIP items, including the superintendent's recommendation on the request to surplus the Kendale Road site and the Edson Lane property; and

WHEREAS, The cost for building a replacement facility for the current Seven Locks Elementary School on the Kendale Road site is \$2 to \$3 million less than the plan currently included in the Board of Education's Requested FY 2005 Capital Budget and FY 2005-2010 CIP; and

WHEREAS, The superintendent has revised his recommendation for the Seven Locks Elementary School from phasing the construction of an addition and modernization to building a replacement facility; and

WHEREAS, The plan to build a replacement Seven Locks Elementary School facility will cause less disruption to the Seven Locks Elementary School students and staff and provide ample space to reassign 150-200 students from Potomac Elementary School; and

WHEREAS, The Seven Locks Elementary School would be relocated to the Kendale Road site and the current site at the intersection of Seven Locks Road and Bradley Boulevard would no longer be needed for school purposes; and

WHEREAS, The current Seven Locks Elementary School site would become an underutilized asset that the Board of Education should consider leveraging to provide value to help fund the replacement school on the Kendale Road site; and

WHEREAS, The Edson Lane expansion parcel is an underutilized asset that the Board of Education should consider leveraging to provide value to help fund the requested FY 2005-2010 CIP; now therefore be it

Resolved, That the Board of Education amend its Requested FY 2005 Capital Budget and FY 2005-2010 CIP to include a revised FY 2005 Capital Budget appropriation of \$308.3 million and a revised six-year total of \$955.2 million (Attachment) to include building a replacement Seven Locks Elementary School at the Kendale Road site to be completed by September 2007; and be it further

Resolved, That the Board of Education authorize staff to explore opportunities through a Memorandum of Understanding (MOU) with the county to use the value of the current Seven Locks Elementary School site to provide additional funding to support the construction of the Seven Locks Elementary School replacement project for the FY 2005–2010 CIP; and be it further

Resolved, That the Board of Education authorize staff to explore opportunities through a MOU with the county to use the value of the Edson Lane expansion parcel to provide additional funding for the requested FY 2005–2010 CIP; and be it further

Resolved, That the superintendent return to the Board of Education with a recommendation on the disposition of the current Seven Locks Elementary School site and the Edson Lane property once staff has completed an evaluation of the feasibility of a MOU with the county; and be it further

Resolved, That a copy of this resolution be transmitted to the county executive and County Council.

Recommended Resolution for the Brickyard Road site:

WHEREAS, On October 20, 2003, the county executive requested that the Board of Education surplus the school site, known as the Brickyard Road site, owned by Montgomery County Public Schools; and

WHEREAS, The superintendent presented a recommendation to the Board of Education on February 23, 2004, concerning the county executive's request to surplus the Brickyard Road site; and

WHEREAS, On March 3, 2003, the Board of Education held a public hearing on CIP items, including the superintendent's recommendation on the request to surplus the Brickyard Road site; and

WHEREAS, Before a decision is made on surplus the Brickyard Road site, further examination is needed regarding other potential middle school sites, preferably in the Thomas S. Wootton Cluster; now therefore be it

Resolved, That the superintendent return to the Board of Education with a recommendation on the disposition of the Brickyard Road site once staff has completed an evaluation of alternative future middle school sites for the Thomas S. Wootton and Winston Churchill clusters and the feasibility of a Memorandum of Understanding with the county; and be it further

Resolved, That a copy of this resolution be transmitted to the county executive and County Council.

JDW:LAB:JL:ak

Attachment

**Board of Education's Revised Requested FY 2005 Capital Budget  
and FY 2005-2010 Capital Improvements Program**

(figures in thousands)

| PROJECT   | FY 2005<br>APPROP. | Total          | THRU<br>FY 2003 | REMAINING<br>FY 2004 | TOTAL<br>SIX YRS | FY 2005-2010 CIP Expenditures |               |               |               |               |               |
|---|--------------------|----------------|-----------------|----------------------|------------------|-------------------------------|---------------|---------------|---------------|---------------|---------------|
|   |                    |                |                 |                      |                  | FY 2005                       | FY 2006       | FY 2007       | FY 2008       | FY 2009       | FY 2010       |
| <b>SCHOOL PROJECTS</b>                              |                    |                |                 |                      |                  |                               |               |               |               |               |               |
| BETHESDA-CHEVY CHASE HS ADDITION                    | 150                | 1797           |                 |                      | 1797             | 150                           |               |               | 268           | 739           | 640           |
| BROAD ACRES ES ADD. ENTRANCE RECONFIGURATION        | 246                | 7131           | 305             |                      | 6826             | 246                           | 4808          | 1772          |               |               |               |
| WINSTON CHURCHILL ES#6 (SEVEN LOOKS ES REPLACEMENT) | 818                |                |                 |                      | 13774            | 496                           | 1747          |               | 3150          |               |               |
| CLARKSBURG AREA HS (ROCKY HILL CONVERSION)          | 43704              | 47040          | 1000            | 836                  | 45204            | 9854                          | 20782         | 14568         |               |               |               |
| CLARKSBURG AREA MS (ROCKY HILL REPLACEMENT)         | 0                  | 27243          | 4302            | 14500                | 8441             | 8441                          |               |               |               |               |               |
| CLARKSBURG/DAMASCUS ES #7                           | 13062              | 14562          |                 | 700                  | 13862            | 2923                          | 6839          | 4100          |               |               |               |
| CLARKSBURG/DAMASCUS ES #8                           | 0                  | 14800          |                 |                      | 14800            |                               | 1182          |               | 2955          | 6895          | 3768          |
| DAMASCUS HS CORRIDOR CIRCULATION IMPROVEMENTS       | 0                  | 3643           |                 | 1709                 | 1684             | 1684                          |               |               |               |               |               |
| DAMASCUS MIDDLE LEVEL SOLUTION (BAKER MS ADDITION)  | 1478               | 5858           | 1792            |                      | 4066             | 2364                          | 1702          |               |               |               |               |
| ALBERT EINSTEIN HS SIGNATURE IMPROVEMENTS           | 3174               | 3174           |                 |                      | 3174             | 188                           | 2082          | 904           |               |               |               |
| FARMLAND ES ADDITION                                | 519                | 6244           | 310             |                      | 5934             | 389                           | 3942          | 1603          |               |               |               |
| FIELDS ROAD ES ADDITION                             | 0                  | 8042           |                 |                      | 8042             |                               | 509           | 1970          | 3100          | 2463          |               |
| FOREST KNOLLS ES ADDITION                           | 4384               | 4654           | 170             |                      | 4484             | 3257                          | 1227          |               |               |               |               |
| GAITHERSBURG ES ADDITION                            | 8175               | 8645           | 320             |                      | 8325             | 2652                          | 3309          | 2364          |               |               |               |
| GAITHERSBURG HS ADDITION                            | 8239               | 9652           | 500             | 813                  | 8339             | 5738                          | 2601          |               |               |               |               |
| GARRETT PARK ES ADDITION                            | 413                | 4496           |                 |                      | 4496             | 309                           | 2976          | 1211          |               |               |               |
| SPARK MATSUNAGA ES ADDITION                         | 1307               | 1307           |                 |                      | 1307             | 925                           | 382           |               |               |               |               |
| NORTHEAST CONSORTIUM ES #16 (BROOKVIEW E.S. SITE)   | 14628              | 16493          |                 | 500                  | 15993            | 5616                          | 6279          | 4098          |               |               |               |
| NORTHWEST ES #7                                     | 12906              | 14406          |                 | 700                  | 13706            | 3343                          | 6525          | 3838          |               |               |               |
| NORTHWEST HS ADDITION                               | 4574               | 20952          | 5835            | 851                  | 14266            | 10178                         | 4088          |               |               |               |               |
| NORTHWOOD HS REOPENING                              | 21596              | 27136          | 600             | 700                  | 25836            | 9659                          | 7653          | 4584          |               | 1970          | 1970          |
| OAK VIEW ES CORE IMPROVEMENTS                       | 2733               | 6618           | 2860            |                      | 3758             | 2847                          | 911           |               |               |               |               |
| THOMAS W. PYLE MS ADDITION                          | 200                | 3388           | 130             |                      | 3258             | 200                           |               |               | 1970          | 1088          |               |
| QUINCE ORCHARD MS #2                                | 1506               | 26171          | 1890            | 5025                 | 19256            | 11500                         | 7756          |               |               |               |               |
| REDLAND MS IMPROVEMENTS                             | 0                  | 9196           |                 |                      | 9196             |                               |               |               | 1316          | 2955          | 4925          |
| RIDGEVIEW MS IMPROVEMENTS                           | 0                  | 9614           |                 |                      | 9614             |                               |               |               | 1241          | 2955          | 5418          |
| ROSEMONT ES ADDITION                                | 7087               | 7487           |                 | 326                  | 7161             | 4609                          | 2552          |               |               |               |               |
| SENECA VALLEY HS - MINOR CORE IMPROVEMENTS          | 1000               | 1500           |                 | 500                  | 1000             | 750                           | 250           |               |               |               |               |
| SHERWOOD HS ADDITION                                | 0                  | 7690           |                 |                      | 7690             |                               | 468           | 3940          | 3282          |               |               |
| SS INT'L MS MODIFICATIONS/SLIGO CREEK ES ADDITION   | 232                | 2000           |                 |                      | 2000             | 114                           | 1412          | 474           |               |               |               |
| SOUTHLAKE ES ADDITION                               | 6377               | 6677           |                 | 230                  | 6447             | 3180                          | 1888          | 1379          |               |               |               |
| TRAVILAH ES ADDITION                                | 0                  | 3891           | 22              |                      | 3869             |                               |               | 286           | 2580          | 1003          |               |
| WATKINS MILL ES ADDITION                            | 816                | 8704           |                 |                      | 8704             | 666                           | 5193          | 2845          |               |               |               |
| WELLER ROAD ES ADDITION                             | 566                | 5193           |                 |                      | 5193             | 205                           | 204           | 3544          | 1240          |               |               |
| WESTLAND MS ADDITION                                | 0                  | 2837           | 85              |                      | 2752             |                               |               | 201           | 1867          | 684           |               |
| <b>COUNTYWIDE PROJECTS</b>                          |                    |                |                 |                      |                  |                               |               |               |               |               |               |
| ADA COMPLIANCE: MCP5                                | 890                | 6463           | 233             | 890                  | 5340             | 890                           | 890           | 890           | 890           | 890           | 890           |
| ALARF: MCP5 (FUTURE SCHOOL SITES)                   | 4325               | 10272          | 4347            | 400                  | 5525             | 4525                          | 200           | 200           | 200           | 200           | 200           |
| ASBESTOS ABATEMENT: MCP5                            | 931                | 6547           | 30              | 931                  | 5586             | 931                           | 931           | 931           | 931           | 931           | 931           |
| CURRENT REPLACEMENTS/MODERNIZATIONS                 | 73298              | 435441         | 129316          | 38650                | 267475           | 42808                         | 49632         | 65200         | 46494         | 42618         | 20723         |
| DESIGN, ENGINEERING & CONSTRUCTION                  | 3564               | 25261          | 137             | 3310                 | 21814            | 3564                          | 3650          | 3650          | 3650          | 3650          | 3650          |
| EDUCATIONAL TECHNOLOGY: GLOBAL ACCESS               | 7500               | 33506          | 10517           | 7989                 | 15000            | 7500                          |               |               |               |               |               |
| ENERGY CONSERVATION: MCP5                           | 500                | 8477           | 356             | 321                  | 7800             | 500                           | 500           | 2900          | 1300          | 1300          | 1300          |
| FACILITY PLANNING: MCP5                             | 620                | 2074           | 144             | 225                  | 1705             | 620                           | 170           | 175           | 240           | 250           | 250           |
| FIRE SAFETY CODE UPGRADES                           | 125                | 5442           | 3242            | 1450                 | 750              | 125                           | 125           | 125           | 125           | 125           | 125           |
| FUTURE REPLACEMENTS/MODERNIZATIONS                  | 0                  | 58055          |                 |                      | 58055            | 0                             | 0             | 788           | 2858          | 12297         | 42112         |
| HVAC REPLACEMENT/FACE: MCP5                         | 3000               | 22839          | 2839            | 2000                 | 18000            | 3000                          | 3000          | 3000          | 3000          | 3000          | 3000          |
| IMPROVED (SAFE) ACCESS TO SCHOOLS                   | 1600               | 5240           | 290             | 1750                 | 3200             | 1600                          | 1600          | 1600          |               |               |               |
| INDOOR AIR QUALITY                                  | 1600               | 6598           | 1798            | 1600                 | 3200             | 1600                          | 1600          |               |               |               |               |
| PLANNED LIFE CYCLE ASSET REPLACEMENT: MCP5          | 2557               | 22962          | 4053            | 3550                 | 15359            | 2539                          | 2164          | 2664          | 2664          | 2664          | 2664          |
| REHAB./RENO. OF CLOSED SCHOOLS- RR005               | 20250              | 74807          | 22812           | 4800                 | 47195            | 21558                         | 20430         | 5207          |               |               |               |
| RELOCATABLE CLASSROOMS                              | 5000               | 26944          | 111             | 4833                 | 22000            | 5000                          |               | 3000          | 3000          | 3000          | 3000          |
| RESTROOM RENOVATIONS                                | 0                  | 4650           |                 |                      | 4650             |                               | 120           | 1480          | 1500          | 850           | 700           |
| ROOF REPLACEMENT: MCP5                              | 3000               | 20276          | 485             | 1791                 | 18000            | 3000                          | 3000          | 3000          | 3000          | 3000          | 3000          |
| SCHOOL GYMNASIUMS                                   | 8600               | 38777          | 5472            | 1100                 | 32205            | 3575                          | 7435          | 7435          | 5035          | 4980          | 3745          |
| SCHOOL SECURITY SYSTEMS                             | 750                | 3825           | 125             | 200                  | 3500             | 750                           | 750           | 500           | 500           | 500           | 500           |
| STADIUM LIGHTING                                    | 0                  | 697            | 257             |                      | 280              |                               |               | 160           |               |               |               |
| TECHNOLOGY MODERNIZATION                            | 7841               | 83929          |                 | 2000                 | 81929            | 7841                          | 9478          | 15945         | 16267         | 16183         | 16215         |
| TRANSPORTATION DEPOT                                | 2500               | 2500           |                 |                      | 2500             | 500                           | 1000          | 1000          |               |               |               |
| <b>TOTAL PROPOSED SIX-YEAR CIP</b>                  | <b>308301</b>      | <b>1253823</b> | <b>206935</b>   | <b>105460</b>        | <b>955202</b>    | <b>204909</b>                 | <b>218442</b> | <b>180312</b> | <b>114623</b> | <b>117190</b> | <b>119726</b> |

BOLD indicates new project to the FY 2005-2010 CIP.

| FUNDING SOURCE            | Total          | THRU<br>FY 2003 | REMAINING<br>FY 2004 | TOTAL<br>SIX YRS | FY 2005       | FY 2006       | FY 2007       | FY 2008       | FY 2009       | FY 2010       |
|---------------------------|----------------|-----------------|----------------------|------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| GENERAL OBLIGATION BONDS  | 850836         | 87198           | 80270                | 683368           | 163748        | 171094        | 130992        | 69916         | 72557         | 75061         |
| STATE AID                 | 257993         | 98000           | 9993                 | 150000           | 20000         | 25000         | 30000         | 25000         | 25000         | 25000         |
| CURRENT REVENUE GENERAL   | 147970         | 12339           | 14997                | 120634           | 20961         | 22148         | 19120         | 19507         | 19433         | 19465         |
| PAYGO                     | 7623           | 7623            |                      |                  |               |               |               |               |               |               |
| REVOLVING FUND - GO BONDS | 3425           | 2025            | 200                  | 1200             | 200           | 200           | 200           | 200           | 200           | 200           |
| <b>TOTAL</b>              | <b>1267847</b> | <b>207185</b>   | <b>105460</b>        | <b>955202</b>    | <b>204909</b> | <b>218442</b> | <b>180312</b> | <b>114623</b> | <b>117190</b> | <b>119726</b> |

Office of the Superintendent of Schools  
MONTGOMERY COUNTY PUBLIC SCHOOLS  
Rockville, Maryland

February 23, 2004

MEMORANDUM

To: Members of the Board of Education

From: Jerry D. Weast, Superintendent of Schools

Subject: Recommendation for Brickyard Road, Kendale Road, and Edson Lane School Sites

As a follow-up to the county executive's request for the school system to relinquish three properties to the county as part of its workforce housing initiative, my recommendation to the Board of Education is attached.

There will be a public hearing on this and other CIP items on March 3, 2004, at 7:00 p.m. in the auditorium at the Carver Educational Services Center. The Board is scheduled to act on CIP and boundary items at its regularly scheduled meeting on March 22, 2004.

JDW:vnb

Attachment

## **Superintendent's Recommendation on the County's Request to Surplus the Brickyard Road, Kendale Road, and Edson Lane Properties**

This recommendation paper covers a wide range of issues surrounding a request received by the Montgomery County Public Schools (MCPS) to surplus three properties (two school sites and one expansion parcel) to the county as part of its workforce housing initiative. The request has sparked passionate discussion about whether or not the Board of Education should surplus any school sites for any reason. As is the case with most seemingly simple requests, there is never a simple answer when there are many competing interests in the answer.

To address the request from the county to surplus the properties, this recommendation discusses the background regarding the request, the legal requirements concerning the surplus of Board of Education property, and a brief description of the properties in question. Then, there is a discussion of issues and questions that have bearing on a recommendation of whether or not to surplus the properties. These issues and questions include the following:

- Are the sites needed for school purposes?
- How does the need for workforce housing affect MCPS?
- How will potential funding shortfalls impact the Board of Education's Requested FY 2005–2010 Capital Improvements Program (CIP)?
- Is there an opportunity to include a public-private partnership to address some of the funding issues?
- Is there a better facilities plan for addressing the Seven Locks and Potomac elementary schools facility needs?

This paper will address each of these questions.

### **Background**

#### The Request

The county executive wrote to me on October 20, 2003, requesting that the Board of Education declare three undeveloped sites in its real property inventory as no longer needed for school purposes. Further, the county executive asked that the property be transferred to the county for the purpose of providing sites for the development of affordable housing. The properties requested are—

1. Brickyard Road—20 acre middle school site—Winston Churchill Cluster
2. Kendale Road—10.54 acre elementary school site—Winston Churchill Cluster
3. Edson Lane—1.75 acre expansion parcel—Walter Johnson Cluster

I responded to Mr. Doug Duncan, county executive, on November 10, 2003, indicating that this request would be discussed with the Board of Education by mid-January 2004 as part of its FY 2005–2010 CIP deliberations. The correspondence from Mr. Duncan and my responses are included in the attached briefing memorandum dated January 16, 2004. The briefing memorandum was discussed by the County Council Planning, Housing, and Economic Development (PHED) Committee on January 20, 2004. This memorandum provides background on the PHED Committee's housing action plan and this priority item of utilizing publicly owned land for affordable and special needs housing.



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### **Legal requirements for surplusizing Board of Education property**

The Board of Education cannot sell land from its inventory. The Education Article of the Annotated Code of Maryland, § 4-115(c) *Disposition of real property*—(1) (i) states

...if, with the approval of the State Superintendent, a county board finds that any land, school site, or building no longer is needed for school purposes, it shall be transferred by the county board to the county commissioners or county council and may be used, sold, leased, or otherwise disposed of, except by gift, by the county commissioners or county council.

Significant in § 4-115(c) is the need for the Board of Education to find that any land or building is no longer needed for school purposes before a property can be declared surplus, and that the State Superintendent of Schools must approve of the transfer of the property. It also is important to note that once the title is transferred to the county, it is up to the County Council to determine the disposition of the property.

### **Properties requested to be surplusized by the County**

The three properties requested to be surplusized by the county executive are part of the Board of Education's real property inventory that includes 14 school sites and several expansion parcels for existing schools. The complete inventory is available for public information on the MCPS Web site—<http://www.mcps.k12.md.us/departments/facilities/REM/>.

The Brickyard Road and Kendale Road sites are located in Potomac and are middle and elementary school sites respectively. The Edson Lane site is an expansion site located adjacent to Tilden Middle School in Rockville. A listing of inventoried sites and a map showing their locations throughout the county are attached. The Edson Lane site, as an expansion parcel for Tilden Middle School, is not shown on the map. The map also indicates the locations of 12 more prospective sites that are master planned for schools as new areas develop. A brief description of each of the properties requested to be surplusized is as follows:

Brickyard Road Middle School Site consists of 20 acres of gently rolling, nearly flat land in Potomac in the southwestern most area of the Winston Churchill Cluster. The site fronts on Brickyard Road on the south, and was acquired in 1973 at a cost of \$215,274. The site is currently cleared and leased for agricultural purposes as an interim use. The zoning, consistent with the Potomac Master Plan, is rural cluster at one dwelling unit per every two acres (RE-2C). The site is currently in the W-1 (currently available) and S-6 (septic systems only) water and sewer categories, but water and sewer mains are located in Brickyard Road. Aerial and tax maps of the site are attached for information.

Kendale Road Elementary School Site consists of 10.54 acres of wooded land in Potomac within the Winston Churchill Cluster in the Seven Locks Elementary School service area. It was acquired in

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two parts in 1965 at a cost of \$117,667. The zoning, consistent with the Potomac Master Plan is rural cluster at one dwelling unit per every two acres (RE-2C). The site is currently in W-1 and S-1 (currently available) water and sewer categories, but would need a 150-foot sewer extension to the property. Aerial and tax maps of the site are attached for information.

Edson Lane Site (Expansion Parcel) consists of 1.75 acres of wooded land in Rockville within the Walter Johnson Cluster adjacent to Tilden Middle School. It was acquired in 1980 at no cost. The zoning is for planned development of nine dwelling units per acre (PD-9). The site is currently in W-1 and S-1 water and sewer categories. Aerial and tax maps of the site are attached for information.

## Issues and Questions for Consideration

### Are the sites needed for school purposes?

Brickyard Road Middle School Site—Middle school enrollment in the Winston Churchill Cluster is projected to trend downward slightly over the next 10 to 15 years. Two middle schools serve the Winston Churchill Cluster—Cabin John and Herbert Hoover middle schools. Cabin John Middle School is shared with the Thomas S. Wootton Cluster, with about half of the school's enrollment articulating to Winston Churchill High School and the other half to Thomas S. Wootton High School. Total enrollment at the two middle schools is 2,079 students this year and is projected to level off at 1,950 students through 2015. Total capacity of the two middle schools is 1,902.

While middle school enrollment is projected to stay slightly above capacity in the Winston Churchill Cluster, both middle schools are scheduled for modernization and could be expanded to accommodate 1,000–1,100 students each. There is not a sufficient amount of projected enrollment deficit to justify constructing another middle school in the area.

The Brickyard Road site is on the southwestern border of the Winston Churchill Cluster and is poorly positioned to serve the cluster. In addition, if a new middle school were to be constructed, it would be better to locate it in the Thomas S. Wootton Cluster, because there are already two middle schools in the Winston Churchill Cluster. If a new Thomas S. Wootton Cluster middle school were constructed in the future, the students attending Cabin John Middle School from the Thomas S. Wootton Cluster would be reassigned to the new middle school, resulting in additional space for Winston Churchill Cluster students at Cabin John and Herbert Hoover middle schools.

Given these enrollment trends and related considerations, it does not appear that the Brickyard Road middle school site will be needed for a new middle school in the Winston Churchill Cluster for the foreseeable future. There may be, however, other school purposes for which the Brickyard Road site could be used that will be discussed later in this recommendation.

Kendale Road Elementary School Site—Elementary enrollment in the Winston Churchill Cluster is projected to increase modestly over the next 10 to 15 years. This year, there are 2,439

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students enrolled in Winston Churchill Cluster elementary schools. By the 2009–2010 school year, this enrollment is projected to be 2,546. The longer-term forecast is for elementary enrollment to level off at approximately 2,600 students through 2015.

This year, total elementary school capacity in the Winston Churchill Cluster is 2,360. The FY 2005–2010 CIP includes plans to add elementary capacity, increasing the cluster elementary capacity to 2,544 students by the 2009–2010 school year. (This total capacity includes reductions in capacities that result from implementing full-day kindergarten in all Winston Churchill Cluster schools by the 2007–2008 school year.)

The Winston Churchill Cluster, with two small elementary schools, is able to accommodate more student capacity by providing additions to these existing schools. Scheduled in the FY 2005–2010 CIP is a ten-room addition at Seven Locks Elementary School, raising its capacity from 294 to 519 students in the 2006–2007 school year. Also, an addition to Bells Mill Elementary School will be constructed when the school is modernized, raising its capacity from 376 to 479 students in the 2009–2010 school year.

It is far more cost effective to add onto existing schools than to open additional schools when the amount of projected space needed is modest, as is the case in the Winston Churchill Cluster. Also, should there be a future need to open another elementary school in the Winston Churchill Cluster, the former Tuckerman Elementary School property remains titled to the Board of Education and could be reclaimed for use as an elementary school.

Given this set of circumstances, it does not appear that the Kendale Road site is needed for a new elementary school in the Winston Churchill Cluster. However, the Kendale Road site could be used to build a replacement Seven Locks Elementary School. Further discussion of this possible school use for the Kendale Road site is contained in a later section of this recommendation.

Edson Lane (Expansion Parcel) Site—At one time, while the school was known and operated as Charles Woodward High School, a driveway was considered for development through the parcel to obtain access to Edson Lane and relieve on-site traffic congestion. There was a great deal of opposition by the neighboring community to provide access to the school from Edson Lane. The driveway was never built and is no longer needed for the operation of the middle school, since an additional traffic signal was installed on Old Georgetown Road to facilitate ingress and egress from the school. It is unlikely that this parcel will be needed in the future.

### How does the need for workforce housing affect MCPS?

Each year MCPS hires more than 1,000 new employees, most notably teachers, but also a number of support staff, including bus drivers, paraeducators, food service workers, and building service workers. The system's ability to recruit and retain quality employees is tempered by the availability of moderately priced housing in the county. The same difficulty in recruiting and retaining other county employees, such as police officers and firefighters, affects other county agencies.

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The 2002 median price of an existing townhouse in Montgomery County is \$185,000, and the household income required to qualify for a mortgage in this price range is approximately \$61,700. The starting salary for new teachers is \$38,700, for police officers is \$38,600, and for firefighters is \$32,500. These salaries are all higher than the average starting salary for support services staff.

The 2002 median price for a new townhouse and a new single-family detached house are \$278,000 and \$481,300 respectively. Using the rule of thumb that three times the income is approximately the amount of mortgage a household can qualify for, it becomes obvious how difficult it is for teachers and others to buy a home in Montgomery County.

The areawide median income for a family of four in Montgomery County is \$84,000. Based on 80 percent to 120 percent of that figure, it could be anticipated that the price range for the workforce housing could be developed for the surplus properties would be approximately \$180,000 to \$300,000.

It is important for MCPS to assist the county in providing opportunities for our valuable county workforce, because it is discouraging for these valuable employees not to be able to afford to live in the communities for which they are providing education and life saving services. A school system such as MCPS relies on the quality of its workforce to provide for the education of its students.

### How will potential funding shortfalls impact the Requested FY 2005–2010 CIP?

The county executive did recommend the Board of Education's full \$956.2 million request for the six-year period, for which the Board is very appreciative. However, the county executive's recommendation modifies year-by-year expenditures, reducing expenditures in the first three years and increasing them in the last three years of the CIP. The county executive stated in his recommendation that he would look to the Board to adjust requested construction schedules to fit within annual affordability limits. Furthermore, the county executive's recommendation relies on \$148 million of state funding for the six year period, which, given the state's other fiscal priorities, may not be realized.

Based on the county executive's recommendation for FY 2005 expenditures and the current commitment from the state for only \$6.4 million, MCPS would have a potential combined revenue shortfall of approximately \$49 million in FY 2005. The Board of Education has been advised that if the potential shortfall cannot be closed for FY 2005, project schedules would need to be delayed.

I have attached a list of projects that would need to be delayed one year if additional local and/or state funds are not approved to support the Board's CIP request. This list has been shared with the County Council. The schools are listed based on the Board of Education's adopted priorities—health and safety, capacity, capital maintenance, modernizations, and gymnasiums. Projects on the top of the list would be the first to be delayed. The expenditures for the 23 projects on the list total approximately \$47.7 million in FY 2005. It should be noted that five of the 23 projects are

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scheduled for bidding this spring.

Is there an opportunity to address some of the funding shortfall and workforce housing issues by creating a public-private partnership?

Fairfax County recently entered into a public/private partnership to accelerate the construction of a high school and the development of other recreation and senior housing projects. Through the partnership agreement, the county was able to use the value of a portion of county-owned property to have a private developer build a high school and fund the debt service payments for the project until county financing became available later in its six-year CIP. No other school projects were delayed by the arrangement, and the county was able to occupy the high school three years ahead of schedule. Through the partnership agreement, the county was able to retain title to the site while transferring the ownership of the improvements to the developer in exchange for the developer constructing county specified projects. The developer structured the financing for all the assets developed in this project.

A similar approach could be used to help fund some of the potential shortfall in the Board's six-year CIP request. As part of this approach, the Board of Education would transfer the surplus properties to the county to assist with meeting the goal of providing workforce housing. In return, through a public-private partnership, the county could request proposals from private firms to both develop the selected sites in accordance with the approved land use plans for workforce housing and use the value of the property to provide funding for the construction of needed school projects. While the benefits of the public/private partnership or the value of the property would not be realized in time to help offset the potential FY 2005 shortfall due to the time it will take to finalize the workforce housing land use issues and select a developer, the financial benefits could be applied to the six-year total to offset any shortfall in state aid.

Is there a better facilities plan for addressing the Seven Locks and Potomac elementary schools facility needs?

Coinciding with all of the above issues and questions is the question of the best approach for addressing the facilities needs for both Seven Locks and Potomac elementary schools. The existing Seven Locks Elementary School site is located at the intersection of Seven Locks Road and Bradley Boulevard. The school faces undesirable traffic constraints and will undergo two major construction projects over the next five years—a ten-classroom and gymnasium addition project and a separate modernization project that will require the students to be relocated to a holding facility.

The currently adopted facilities plan for Seven Locks Elementary School includes the completion of the addition and gymnasium in September 2006 and January 2007 respectively, with the modernization to be started in 2008 and completed by September 2010. Partial funding for the planning of the classroom addition and gymnasium has been approved as part of the FY 2004 Capital Budget. The balance of the planning and construction funding for the additional classrooms,

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gymnasium, and modernization are included in the Board of Education's Requested FY 2005–2010 CIP.

The classrooms and gymnasium are needed prior to the modernization to accommodate approximately 200 students that will be reassigned to Seven Locks Elementary School from Potomac Elementary School to relieve the overutilization at Potomac Elementary School. The additional students will be reassigned once the classroom addition is completed.

The Seven Locks community is concerned about the disruption that will occur during the classroom and gymnasium additions followed 18 months later by a complete modernization. The other major concern of the community is the traffic congestion experienced by the school at its current site at the intersection of Seven Locks Road and Bradley Boulevard. The community also questions the current site's ability to handle the building and other amenities needed for the expansion to accommodate the 200 students that will be reassigned from Potomac Elementary School.

Winston Churchill Cluster leadership and the Seven Locks Elementary School Parent-Teacher Association have proposed a plan to build a replacement Seven Locks Elementary School on the Kendale Road site. When the replacement facility is completed, the students from Seven Locks Elementary School and the reassigned students from Potomac Elementary School would all move together to the new facility and the Seven Locks site could be transferred to the county for workforce housing. Given the complexity of the phased construction and the site measures planned as part of the modernization to address traffic concerns, it appears that building a new school on the Kendale site would be more cost effective. However, a feasibility study would have to be conducted to show conclusively that the new school was the best approach.

It may be possible with a public/private partnership, as discussed above, to create the funding necessary to construct a replacement facility for Seven Locks Elementary School at the Kendale site without delaying any other projects in the CIP. If a replacement school project could be funded on a timeline that would provide needed capacity relief for Potomac Elementary School and not impact the queue of elementary school modernizations, I believe the community would support the plan to surplus the Seven Locks site.

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For all of the reasons outlined above, I believe it would be in the best interest of the Board of Education to surplus the Edson Lane and Brickyard Road sites as requested by the county, contingent on being able to generate funding to support facility improvements for MCPS and workforce housing.

I also feel that the feasibility of building a new school on the Kendale site to serve the student needs of the current Seven Locks Elementary School and address overcrowding at Potomac Elementary School should be evaluated before a decision is made on the disposition of the

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Kendale site. If it proves more cost effective to build a new school on the Kendale site, I am inclined to recommend that the Seven Locks site be transferred to the county for workforce housing, contingent on being able to generate funding for the completion of the new school by September 2007 without impacting funding for the current queue of elementary school modernizations.

There will be a public hearing on this and other CIP items on March 3, 2004, at 7:00 p.m. in the auditorium at the Carver Educational Services Center. The Board is scheduled to act on CIP and boundary items at its regularly scheduled meeting on March 22, 2004.