



June 17, 2005

Memorandum

To: Montgomery County Planning Board

From: Karl Moritz, Research & Technology Center, 301-495-1312

Re: FY2006 Growth Policy: Review of School Forecasting Methodology and Acceptance of School Test Results

Beginning in July 2004, the Montgomery County Growth Policy is not revisited by the County Council on an annual basis. However, there continues to be an annual component of the new growth policy: a review of the results of the school test. The school test determines if residential subdivisions in any school clusters should be subject to either a school facilities payment or a moratorium.

A year ago, when the Planning Board reviewed the school test results based on the FY2005-2010 Capital Improvements Program, the Planning Board requested a presentation of the methodology underlying the school forecasts and a discussion of the major capacity issues facing Montgomery County Public Schools.

Montgomery County Public Schools staff, along with Park and Planning staff, will make this presentation at the Board's June 23, 2005 worksession. Staff will also be requesting the Planning Board's acceptance of the attached school test results for FY06.

Acceptance of School Test Results

As in the past, the School Test analysis is prepared by Montgomery County Public Schools staff using the methodology adopted by the County Council. Park and Planning staff have reviewed the results of the MCPS analysis and we endorse the findings that there are no clusters where subdivisions should be subject to either the school facilities payment or to a moratorium.

The school test compares projected 2010 enrollment with 2010 classroom capacity for each of the 24 high school clusters at the elementary, middle and high school levels. At the elementary and middle school levels, enrollment must not exceed 105 percent of capacity and "borrowing" from adjacent clusters is not permitted. At the high

school level, enrollment must not exceed 100 percent of capacity, but if it does, “borrowing” from an adjacent cluster is permitted.

According to the analysis, enrollment does not exceed 105 percent of capacity in any cluster at the elementary or middle school level. At the high school level, there are three clusters where enrollment exceeds 100 percent of capacity: Blake, Magruder, and Wootton. For each of these clusters, however, there is an adjacent cluster with sufficient excess capacity so that the growth policy test result is “adequate.”

The Planning Board has the official role of finding that school facilities are adequate for FY2006. In making this determination, the Planning Board must use the methodology adopted by the County Council to make that finding. Staff has attached the school text portion of the growth policy to this memo, and will be reviewing the test with the Board at the worksession.

Park and Planning staff recommend that Planning Board accept the results of the school test as calculated by Montgomery County Public Schools staff, for FY2006. These findings are attached at circle 1.

Once accepted by the Planning Board, this table (along with the resolution adopted by the Council in October 2004) will constitute Montgomery County’s growth policy for FY 2006.

Annual Growth Policy - Schools Test for FY 2006

Reflects County Council Amended FY 2005 - 2010 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Elementary School Enrollment and Capacity

Cluster Area	Projected Sept. 2010 Enrollment	100% MCPS* Capacity With Adopted FY05-10 CIP	Capacity Remaining @ 100% MCPS capacity
B- CC	3,080	2,706	-374
Blair	3,936	3,359	-577
Blake	2,598	2,148	-450
Churchill	2,638	2,466	-172
Damascus	3,970	4,101	131
Einstein	2,483	2,020	-463
Gaithersburg	3,990	3,630	-360
Walter Johnson	3,068	2,548	-520
Kennedy	2,364	1,781	-583
Magruder	2,923	2,514	-409
R. Montgomery	2,413	1,983	-420
Northwest	3,777	3,503	-274
Northwood	2,534	2,419	-115
Paint Branch	2,463	2,307	-176
Poolesville	720	754	34
Quince Orchard	2,847	2,632	-215
Rockville	2,466	2,172	-294
Seneca Valley	3,184	2,640	-544
Sherwood	2,357	2,277	-80
Springbrook	2,698	2,672	174
Watkins Mill	3,232	2,655	-577
Wheaton	2,469	2,291	-178
Whitman	2,238	2,021	-217
Wootton	3,269	2,914	-355

AGP Test

105% AGP** Capacity With Adopted FY05-10 CIP	AGP Test: Students Above or Below 105 % AGP Cap.	AGP Test Result - Capacity is:
3,238	158	Adequate
4,818	882	Adequate
2,815	217	Adequate
2,808	170	Adequate
4,895	925	Adequate
2,809	326	Adequate
4,729	739	Adequate
3,110	42	Adequate
2,789	425	Adequate
3,436	513	Adequate
2,591	178	Adequate
4,187	410	Adequate
3,071	537	Adequate
2,720	237	Adequate
851	131	Adequate
3,159	312	Adequate
3,166	700	Adequate
3,261	77	Adequate
2,798	441	Adequate
3,576	878	Adequate
3,738	506	Adequate
2,949	480	Adequate
2,394	156	Adequate
3,425	156	Adequate

Annual Growth Policy - Schools Test for FY 2006

Reflects County Council Amended FY 2005 - 2010 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Middle School Enrollment and Capacity

Cluster Area	Projected Sept. 2010 Enrollment	100% MCPS* Capacity With Adopted FY05-10 CIP	Capacity Remaining @ 100% MCPS capacity
B- CC	991	1,098	107
Blair	2,155	2,438	283
Blake	1,181	1,380	199
Churchill	1,426	1,437	11
Damascus	1,806	1,706	-100
Einstein	1,044	1,506	462
Gaithersburg	1,540	1,866	326
Walter Johnson	1,556	1,843	287
Kennedy	1,238	1,335	97
Magruder	1,391	1,714	323
R. Montgomery	1,018	1,044	26
Northwest	1,868	2,140	272
Northwood	1,027	1,480	453
Paint Branch	1,227	1,351	124
Poolesville	332	500	168
Quince Orchard	1,351	1,712	361
Rockville*	916	1,030	114
Seneca Valley	1,440	1,421	-19
Sherwood	1,244	1,577	333
Springbrook	1,118	1,248	130
Watkins Mill	1,511	1,721	210
Wheaton	1,530	1,554	24
Whitman	1,267	1,341	74
Wootton	1,528	1,599	71

AGP Test

105% AGP** Capacity With Adopted FY05-10 CIP	AGP Test: Students Above or Below 105 % AGP Cap.	AGP Test Result - Capacity is:
1,181	190	Adequate
2,646	491	Adequate
1,559	378	Adequate
1,654	228	Adequate
1,914	108	Adequate
1,820	776	Adequate
2,292	752	Adequate
2,245	689	Adequate
1,583	345	Adequate
1,890	499	Adequate
1,229	211	Adequate
2,387	519	Adequate
1,772	745	Adequate
1,489	262	Adequate
544	212	Adequate
1,843	492	Adequate
1,205	289	Adequate
1,607	167	Adequate
1,701	457	Adequate
1,465	347	Adequate
2,009	498	Adequate
1,890	360	Adequate
1,465	198	Adequate
1,772	244	Adequate

Annual Growth Policy - Schools Test for FY 2006

Reflects County Council Amended FY 2005 - 2010 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

High School Enrollment and Capacity

Cluster Area	Projected Sept. 2010 Enrollment	100% MCPS* Capacity With Adopted FY05-10 CIP	Capacity Remaining @ 100% MCPS capacity
B- CC	1,689	1,652	-37
Blair	2,759	2,830	71
Blake	1,797	1,716	-81
Churchill	2,097	2,008	-89
Damascus	2,138	2,691	553
Einstein	1,555	1,457	-98
Gaithersburg	2,190	2,143	-47
Walter Johnson	2,137	2,154	17
Kennedy	1,584	1,727	143
Magruder	2,140	2,030	-110
R. Montgomery	1,909	1,966	57
Northwest	2,135	2,241	106
Northwood	1,489	1,630	141
Paint Branch	1,684	1,998	314
Poolesville	782	868	86
Quince Orchard	1,970	1,782	-188
Rockville	1,233	1,633	400
Seneca Valley	1,735	1,842	107
Sherwood	2,062	2,055	-7
Springbrook	2,128	2,131	3
Watkins Mill	2,065	2,178	113
Wheaton	1,345	1,508	163
Whitman	2,001	1,913	-88
Wootton	2,289	2,050	-239

AGP Test

100% AGP** Capacity With Adopted FY05-10 CIP	AGP Test: Students Above or Below 100 % AGP Cap.	AGP Test Result - Capacity is:	AGP Test Result - Capacity is:
1,710	21	Paint Branch 409	Adequate
2,993	234		
1,778	-19		
2,115	18		
2,745	607	Adequate	
1,710	155	Gaithersburg 150	Adequate
2,340	150		
2,363	226		
1,935	351		
2,115	-25	Adequate	
2,093	184	R. Montgomery 184	Adequate
2,295	160		
1,688	199		
2,093	409		
900	118	Adequate	
1,980	10	Adequate	
1,778	545	Adequate	
1,935	200	Adequate	
2,183	121	Adequate	
2,273	145	Adequate	
2,295	230	Adequate	
1,643	298	Adequate	
2,025	24	Adequate	
2,183	-106	Adequate	

The Annual Growth Policy schools test compares projected enrollment in 2010-11 to total capacity in 2010-11, including programmed additional capacity available by that year.

The AGP schools test uses 105% AGP Capacity for elementary and middle schools, and 100% AGP Capacity for high schools.

The AGP schools test is within cluster for elementary and middle schools, and at high school level capacity may be "borrowed" from adjacent clusters.

* MCPS program capacity based on rating of capacity for special programs as well as regular education program, (published in November in the CIP and in June in the Master Plan)

** AGP elementary cluster capacity for schools without class-size reductions based on rating all K rooms at 22, and all other elementary rooms for Grades 1 - 5 at 23:1.

** AGP elementary cluster capacity for schools with class-size reductions based on rating all K rooms at 15, elementary rooms for Grades 1-2 at 17:1, and elementary rooms for Grades 3-5 at 23:1.

**AGP secondary school capacity for Grades 6-12 based on rating all rooms at 22.5:1.

Enrollment projections by Montgomery County Public Schools, October 2004.

In cases where elementary or middle schools articulate to more than one high school, enrollments and capacities are allocated proportionately to clusters.

Public School Facilities

S1 Geographic Areas

For the purposes of public school analysis and local area review of school facilities at time of subdivision, the County has been divided into 24 areas called high school clusters, as shown in Map 32. These areas coincide with the cluster boundaries used by the Montgomery County Public School system.

The groupings used are only to administer the Adequate Public Facilities Ordinance and do not in any way require action by the Board of Education in exercising its power to designate school service boundaries.

S2 School Capacity Measures

The Planning Board must evaluate available capacity in each high school cluster and compare enrollment projected by Montgomery County Public Schools for each fiscal year with projected school capacity in 5 years. If sufficient high school capacity will not be available in any cluster, the Planning Board must determine whether an adjacent cluster will have sufficient high school capacity to cover the projected deficit.

The Planning Board must use 100% of Council-funded capacity at the high school level and 105% of Council-funded capacity at the middle and elementary school level as its measures of adequate school capacity. This capacity measure does not count relocatable classrooms in computing a school's permanent capacity.

Council-funded regular program classroom capacity is based on calculations that assign 25 students for grades 1-6, 44 students for half day kindergarten where it is currently provided, 22 students for all day kindergarten where it is currently provided, and an effective class size of 22.5 students for secondary grades.

S3 Grade Levels

Each cluster must be assessed separately at each of the three grade levels -- elementary, intermediate/middle, and high school.

S4 Determination of Adequacy

After the Council has approved the FY 2005-2010 CIP, the Planning Board must recalculate the projected school capacity at all grade levels in each high school cluster. If the Board finds that public school capacity will be inadequate at any grade level in any cluster, but the projected enrollment at that level will not exceed 110% of capacity, the Board may approve a residential subdivision in that cluster during FY 2005 if the applicant commits to pay a School Facilities Payment as provided in County law before receiving a building permit for any building in that subdivision. If projected enrollment

at any grade level in that cluster will exceed 110% of capacity, the Board must not approve any residential subdivision in that cluster during FY 2005.

After the Council in 2005 has approved the amended FY 2005-2010 CIP, the Planning Board again must recalculate school capacity. If capacity at any level is projected to be inadequate, the Board must take the actions specified in the preceding paragraph in FY 2006.

S5 Senior Housing

If public school capacity is inadequate in any cluster, the Planning Board may nevertheless approve a subdivision in that cluster if the subdivision consists solely of multifamily housing and related facilities for elderly or handicapped persons or multifamily housing units located in the age-restricted section of a planned retirement community.

S6 Clusters in municipalities

If public school capacity will be inadequate in any cluster that is wholly or partly located in Rockville, Gaithersburg, or Poolesville, the Planning Board may nevertheless approve residential subdivisions in that cluster unless the respective municipality restricts the approval of similar subdivisions in its part of the cluster because of inadequate school capacity.

S7 Development District Participants

The Planning Board may require any development district for which it approves a provisional adequate public facilities approval (PAPF) to produce or contribute to infrastructure improvements needed to address inadequate school capacity.