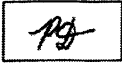


## Subdivision Staging Policy: FY16 Annual School Test Results

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### Description

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

### Staff Recommendation

Approve the FY16 Annual School Test results effective July 1, 2015.

### Summary

The Montgomery County Subdivision Staging Policy (SSP) continues to monitor school capacity by means of an annual test of school capacity. The school test compares projected enrollment five years into the future with projected capacity for each of the 25 high school clusters at the elementary, middle and high school levels. The school test results are finalized in May of each year upon the Council's adoption of the Capital Budget and Amendments to the Capital Improvements Program (CIP). If projected enrollment at any level exceeds 105 percent of program capacity, new residential subdivisions in the affected cluster will be required to make a school facility payment. In addition, if projected enrollment at any level exceeds 120 percent of program capacity, new residential subdivisions in the affected cluster will be under moratorium.

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

### FY16 Annual School Test

For FY16, the total number of clusters exceeding 105 percent program capacity is sixteen, eight of which exceed at more than one school level. Residential development in these sixteen clusters will be subject to a school facility payment. For those clusters inadequate at more than

one school level, a school facility payment will be required for each inadequate school level. No school cluster exceeds the 120 percent program capacity ceiling. Therefore, residential subdivisions will not be under moratorium in any school cluster. The Council approved placeholder capital projects in four clusters to avoid a potential moratorium. These included the following: for the Einstein cluster, funding for six high school classrooms was added to the CIP; in the Gaithersburg cluster ten elementary classrooms were added; in the Wheaton cluster four middle school classrooms were added; and in the Northwood cluster ten high school classrooms were added. To address capacity issues at the high school level in Clarksburg, MCPS reassigned future high school capacity in the Seneca Valley cluster to the Clarksburg cluster. Montgomery County Public Schools (MCPS) is planning to add capacity at Seneca Valley High School through its already funded revitalization/expansion project scheduled for completion in August 2019. Once completed, MCPS is proposing a boundary change that will make approximately 1,000 seats available to address deficits in both the Clarksburg and Northwest clusters.

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

These results are similar to the school test for FY15. During FY15 sixteen school clusters required the payment of a school facility fee with five school clusters exceeding capacity at more than one school level.

In the 2007-2009 Growth Policy the administration of a school capacity ceiling, commonly referred to as the School Queue, was introduced. If a subdivision would cause a cluster to exceed the 120 percent threshold at any level, only the number of dwelling units that would reach the threshold would be allowed. Similarly, if a subdivision would cause a cluster to exceed the 105 percent threshold at any level, then the number of dwelling units which would exceed the threshold would make a school facilities payment to proceed to approval.

It is worth noting that two clusters, Blair and Poolesville, have a utilization rate greater than 103% as of the July 1, 2015 effective date. The Blair cluster is at 103.9% at the elementary school level. The Poolesville cluster is at 103.2% at the high school level. This means that an application for residential subdivision in one of these clusters may tip the utilization rate above 105% and require a school facility payment at the applicable level for those units that exceed 105%. Following this approval, the cluster will require a school facility payment at the affected school level for all new residential subdivisions.

More importantly, two school clusters are over 119% under the FY16 Annual School Test: the Walter Johnson cluster is at 119.8% utilization at the high school level, and the Northwood

cluster is at 119.6% at the middle school level. These high utilization rates mean that there is little capacity to approve residential development within these cluster boundaries in the coming fiscal year.

Currently, there are no pending applications in the Northwood cluster; however, there are four pending applications for residential development in the Walter Johnson cluster that have not yet received Planning Board approval.

Wildwood Manor Shopping Center – 58 multifamily units (low–midrise)

White Flint View - amendment to add 10 multifamily units (high rise)

East Village at North Bethesda – 614 multifamily units (high rise)

Offutt Estates – 6 townhouse units

Wildwood Manor, White Flint View, and Offutt Estates generate few enough students that all three could be approved by the Board without exceeding the capacity available within the cluster. East Village at North Bethesda; however, generates more students than the capacity available starting July 1, 2015. The Planning Board could approve only that part of East Village for which there is sufficient capacity, leaving the remainder of the project in the queue until additional capacity becomes available, but this is not desirable. Approval of Wildwood Manor, White Flint View, and Offutt Estates, or approval of East Village up to the available capacity would effectively place the Walter Johnson cluster into moratorium for residential development for the remainder of fiscal year 2016.

On June 4, 2015, Planning Staff received a letter from Saul Centers, Inc. indicating their intent to file a preliminary plan application for mixed-use development along Rockville Pike in White Flint. This would become the ~~sixth-fifth~~ pending application in the Walter Johnson cluster, and the ~~third-second~~ pending application that the Planning Board will not be able to approve.

Planning staff recommends that the Planning Board accept the results of the school test as calculated by Montgomery County Public Schools staff, for FY16. These findings are attached on pages 6 (summary table), 7 and 8 (detailed table by cluster for each school level). Once accepted by the Planning Board, these tables (along with the resolution adopted by the Council in November 2012) will constitute Montgomery County's Subdivision Staging Policy as it relates to school capacity.

## Subdivision Staging Policy Results of School Test for FY 2016

Reflects County Council Adopted FY 2016 Capital Budget and Amendments to the FY 2015–2020 Capital Improvements Program (CIP)  
Effective July 1, 2015

School Test Level	Description	Cluster Outcomes by Level		
		Elementary Inadequate	Middle Inadequate	High Inadequate
<u>Clusters over 105% utilization</u>  School facility payment required in inadequate clusters to proceed.	5-year test  Effective July 1, 2015  Test year 2020-21	Clarksburg (113.8%) Gaithersburg (109.4%) Northwood (105.5%) Quince Orchard (115.3%)	Blair (117.1%) Damascus (109.3%) Gaithersburg (106.0%) Kennedy (115.6%) Northwood (119.6%) Rockville (109.6%) Wheaton (114.2%) Whitman (111.9%)	Blair (110.0%) Churchill (106.4%) Clarksburg (113.8%) Einstein (113.7%) Walter Johnson (119.8%) Kennedy (107.7%) Richard Montgomery (110.8%) Northwest (113.3%) Northwood (112.6%) Paint Branch (106.1%) Quince Orchard (108.7%) Wheaton (108.8%) Whitman (114.0%)
<u>Clusters over 120% utilization **</u>  Moratorium required in clusters that are inadequate.	5-year test  Effective July 1, 2015  Test year 2020-21			

Capacities in clusters include the following placeholder capital projects:  
 Ten elementary school classrooms in the Gaithersburg Cluster.  
 Four middle school classrooms in the Wheaton Cluster.  
 Six high school classrooms in the Einstein Cluster.  
 Ten high school classrooms in the Northwood Cluster

In addition to placeholder capacity projects, the Clarksburg Cluster high school capacity includes eight classrooms associated with the Seneca Valley HS revitalization/expansion that will be utilized through boundary changes between Clarksburg and Seneca Valley high schools in the future.

## Subdivision Staging Policy FY 2016 School Test: Cluster Utilizations in 2020-21

Reflects County Council Adopted FY 2016 Capital Budget and Amendments to the FY 2015–2020 Capital Improvements Program (CIP)

**Effective July 1, 2015**

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

Cluster Area	Projected August 2020 Enrollment	100% MCPS Program Capacity With County Council Adopted Amended FY15–20 CIP	Cluster Percent Utilization in 2020	School Test Result Capacity is:	Cluster is?
Bethesda-Chevy Chase	3,526	3,861	91.3%	Adequate	Open
Montgomery Blair	4,505	4,335	103.9%	Adequate	Open
James Hubert Blake	2,557	2,555	100.1%	Adequate	Open
Winston Churchill	2,571	2,913	88.3%	Adequate	Open
<b>Clarksburg</b>	<b>4,390</b>	<b>3,857</b>	<b>113.8%</b>	<b>Inadequate</b>	<b>School Payment</b>
Damascus	1,983	2,193	90.4%	Adequate	Open
Albert Einstein	3,062	3,056	100.2%	Adequate	Open
<b>Gaithersburg*</b>	<b>4,549</b>	<b>4,160</b>	<b>109.4%</b>	<b>Inadequate</b>	<b>School Payment</b>
Walter Johnson	4,277	4,630	92.4%	Adequate	Open
John F. Kennedy	3,035	3,199	94.9%	Adequate	Open
Col. Zadok Magruder	2,661	2,877	92.5%	Adequate	Open
Richard Montgomery	2,724	2,884	94.5%	Adequate	Open
Northwest	4,146	4,530	91.5%	Adequate	Open
<b>Northwood</b>	<b>3,778</b>	<b>3,582</b>	<b>105.5%</b>	<b>Inadequate</b>	<b>School Payment</b>
Paint Branch	2,533	2,493	101.6%	Adequate	Open
Poolesville	583	758	76.9%	Adequate	Open
<b>Quince Orchard</b>	<b>3,194</b>	<b>2,770</b>	<b>115.3%</b>	<b>Inadequate</b>	<b>School Payment</b>
Rockville	2,554	2,643	96.6%	Adequate	Open
Seneca Valley	2,344	2,494	94.0%	Adequate	Open
Sherwood	1,986	2,410	82.4%	Adequate	Open
Springbrook	3,307	3,328	99.4%	Adequate	Open
Watkins Mill	2,799	2,871	97.5%	Adequate	Open
Wheaton	3,181	3,805	83.6%	Adequate	Open
Walt Whitman	2,439	2,571	94.9%	Adequate	Open
Thomas S. Wootton	2,686	3,224	83.3%	Adequate	Open

\* Gaithersburg Cluster elementary school capacity includes 10 classroom addition in placeholder capital project.

## Subdivision Staging Policy FY 2016 School Test: Cluster Utilizations in 2020-21

Reflects County Council Adopted FY 2016 Capital Budget and Amendments to the FY 2015–2020 Capital Improvements Program (CIP)

Effective July 1, 2015

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

Cluster Area	Projected August 2020 Enrollment	100% MCPS Program Capacity With County Council Adopted Amended FY15–20 CIP	Cluster Percent Utilization in 2020	School Test Result Capacity is:	Cluster is?
Bethesda-Chevy Chase	1,765	2,019	87.4%	Adequate	Open
<b>Montgomery Blair</b>	<b>2,756</b>	<b>2,354</b>	<b>117.1%</b>	<b>Inadequate</b>	<b>School Payment</b>
James Hubert Blake	1,263	1,345	93.9%	Adequate	Open
Winston Churchill	1,422	1,696	83.8%	Adequate	Open
Clarksburg*	2,164	2,322	93.2%	Adequate	Open
<b>Damascus</b>	<b>919</b>	<b>841</b>	<b>109.3%</b>	<b>Inadequate</b>	<b>School Payment</b>
Albert Einstein*	1,269	1,420	89.4%	Adequate	Open
<b>Gaithersburg</b>	<b>1,994</b>	<b>1,882</b>	<b>106.0%</b>	<b>Inadequate</b>	<b>School Payment</b>
Walter Johnson	2,212	2,408	91.9%	Adequate	Open
<b>John F. Kennedy</b>	<b>1,775</b>	<b>1,536</b>	<b>115.6%</b>	<b>Inadequate</b>	<b>School Payment</b>
Col. Zadok Magruder	1,278	1,624	78.7%	Adequate	Open
Richard Montgomery	1,351	1,445	93.5%	Adequate	Open
Northwest	2,220	2,229	99.6%	Adequate	Open
<b>Northwood*</b>	<b>1,854</b>	<b>1,550</b>	<b>119.6%</b>	<b>Inadequate</b>	<b>School Payment</b>
Paint Branch	1,404	1,401	100.2%	Adequate	Open
Poolesville	300	468	64.1%	Adequate	Open
Quince Orchard	1,503	1,636	91.9%	Adequate	Open
<b>Rockville</b>	<b>1,053</b>	<b>961</b>	<b>109.6%</b>	<b>Inadequate</b>	<b>School Payment</b>
Seneca Valley	1,242	1,397	88.9%	Adequate	Open
Sherwood	1,118	1,429	78.2%	Adequate	Open
Springbrook	1,251	1,250	100.1%	Adequate	Open
Watkins Mill	1,346	1,339	100.5%	Adequate	Open
<b>Wheaton*</b>	<b>1,771</b>	<b>1,551</b>	<b>114.2%</b>	<b>Inadequate</b>	<b>School Payment</b>
<b>Wait Whitman</b>	<b>1,443</b>	<b>1,289</b>	<b>111.9%</b>	<b>Inadequate</b>	<b>School Payment</b>
Thomas S. Wootton	1,443	1,632	88.4%	Adequate	Open

\* Wheaton Cluster middle school capacity includes 4 classroom addition in placeholder capital project.

## Subdivision Staging Policy FY 2016 School Test: Cluster Utilizations in 2020-2021

Reflects County Council Adopted FY 2016 Capital Budget and Amendments to the FY 2015–2020 Capital Improvements Program (CIP)

Effective July 1, 2015

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

Cluster Area	Projected August 2020 Enrollment	100% MCPS Program Capacity With County Council Adopted Amended FY15–20 CIP	Cluster Percent Utilization in 2020	School Test Result Capacity is:	Cluster is?
Bethesda-Chevy Chase	2,367	2,399	98.7%	Adequate	Open
<b>Montgomery Blair</b>	<b>3,212</b>	<b>2,921</b>	<b>110.0%</b>	<b>Inadequate</b>	<b>School Payment</b>
James Hubert Blake	1,781	1,743	102.2%	Adequate	Open
<b>Winston Churchill</b>	<b>2,142</b>	<b>2,013</b>	<b>106.4%</b>	<b>Inadequate</b>	<b>School Payment</b>
<b>Clarksburg*</b>	<b>2,458</b>	<b>2,160</b>	<b>113.8%</b>	<b>Inadequate</b>	<b>School Payment</b>
Damascus	1,467	1,551	94.6%	Adequate	Open
<b>Albert Einstein**</b>	<b>1,978</b>	<b>1,739</b>	<b>113.7%</b>	<b>Inadequate</b>	<b>School Payment</b>
Gaithersburg	2,451	2,407	101.8%	Adequate	Open
<b>Walter Johnson</b>	<b>2,798</b>	<b>2,335</b>	<b>119.8%</b>	<b>Inadequate</b>	<b>School Payment</b>
<b>John F. Kennedy</b>	<b>1,975</b>	<b>1,833</b>	<b>107.7%</b>	<b>Inadequate</b>	<b>School Payment</b>
Col. Zadok Magruder	1,686	1,941	86.9%	Adequate	Open
<b>Richard Montgomery</b>	<b>2,479</b>	<b>2,237</b>	<b>110.8%</b>	<b>Inadequate</b>	<b>School Payment</b>
<b>Northwest</b>	<b>2,540</b>	<b>2,241</b>	<b>113.3%</b>	<b>Inadequate</b>	<b>School Payment</b>
<b>Northwood**</b>	<b>1,963</b>	<b>1,744</b>	<b>112.6%</b>	<b>Inadequate</b>	<b>School Payment</b>
<b>Paint Branch</b>	<b>2,158</b>	<b>2,034</b>	<b>106.1%</b>	<b>Inadequate</b>	<b>School Payment</b>
Poolesville	1,208	1,170	103.2%	Adequate	Open
<b>Quince Orchard</b>	<b>2,019</b>	<b>1,857</b>	<b>108.7%</b>	<b>Inadequate</b>	<b>School Payment</b>
Rockville	1,536	1,571	97.8%	Adequate	Open
Seneca Valley	1,395	2,400	58.1%	Adequate	Open
Sherwood	1,772	2,166	81.8%	Adequate	Open
Springbrook	1,976	2,162	91.4%	Adequate	Open
Watkins Mill	1,779	1,906	93.3%	Adequate	Open
<b>Wheaton</b>	<b>1,737</b>	<b>1,596</b>	<b>108.8%</b>	<b>Inadequate</b>	<b>School Payment</b>
<b>Walt Whitman</b>	<b>2,155</b>	<b>1,891</b>	<b>114.0%</b>	<b>Inadequate</b>	<b>School Payment</b>
Wootton	2,188	2,167	101.0%	Adequate	Open

\* Clarksburg high school capacity includes 8 classrooms that are part of Seneca Valley HS revitalization/expansion.

\*\* Einstein capacity includes 6 classrooms in a placeholder capital project and Northwood capacity includes 10 classrooms in a placeholder capital project.