

Annual School Test Guidelines and Updated FY2021 Annual School Test Results - ADDENDUM

-  Hye-Soo Baek, Senior Planner, Countywide Planning & Policy, Hye-Soo.Baek@montgomeryplanning.org, 301-495-2192
-  Jason Sartori, Chief, Countywide Planning & Policy, Jason.Sartori@montgomeryplanning.org, 301-495-2172
-

Completed: 12/15/20

ADDENDUM

Upon further examination of the approach to calculating the Utilization Premium Payment factors for an amendment to a previously approved development application, Planning staff found the methodology unnecessarily and overly complicated. The original proposed methodology could also be construed as a retesting of previously approved units.

Therefore, Planning staff has revisited the methodology and requests the Annual School Test Guidelines (Attachment A) be approved replacing page 29 of the originally proposed guidelines with the follow updated version. The revised approach is simpler and is limited to assessing the composition of residential units proposed in the amendment separately, based on the Annual School Test results established for the fiscal year of the amendment.

Amendment

- When a previously approved project files for an amendment, a new Utilization Premium Payment factor is calculated for the newly proposed units.
- Previously approved units will continue to require UPPs based on the conditions that applied to their approval.
- The net enrollment impacts of all changes proposed in the amendment (including any units removed from previous approvals) are used to determine whether multiple tiers of UPPs will be required for the units added by the amendment.

➤ Application Amendment

❖ Example: Hypothetical Development Amendment

The following hypothetical amendment to a previously approved application removes 10 single-family detached homes and adds 8 single-family attached (townhouse) and 50 multifamily low-rise units.

Additional Enrollment Impact from Amendment:

AMENDMENT IMPACT	Net Change in Units	Infill SGRs			Students		
		ES	MS	HS	ES	MS	HS
Single-family Detached	-10	0.201	0.096	0.139	-2.01	-0.96	-1.39
Single-family Attached	8	0.176	0.087	0.117	1.408	0.696	0.936
Multifamily Low-rise	50	0.055	0.023	0.033	2.75	1.15	1.65
Multifamily High-rise	0	0.039	0.014	0.016	0	0	0
TOTAL	48				2	0	1

The enrollment impacts of the amendment are calculated as a net enrollment impact relative to previous approvals. In this example, the net impact is two additional elementary school students and one additional high school student.

UPP Factor Calculation:

	Status	UPP Adequacy Ceiling			Student Allocation					Amendment Payment Ratio			
		Tier 1	Tier 2	Tier 3	No UPP	Tier 1	Tier 2	Tier 3	Total	No UPP	Tier 1	Tier 2	Tier 3
ES:		10	32	136	2	0	0	0	2	1.000	0.000	0.000	0.000
MS:	Tier 1 UPP		54	258	0	0	0	0	0	0.000	1.000	0.000	0.000
HS:	Tier 2 UPP			35	0	0	1	0	1	0.000	0.000	1.000	0.000

An amendment UPP Factor ratio is calculated using the updated adequacy status and ceiling information for the Annual School Test under which the amendment is reviewed. These new payment ratios will apply to the 8 single-family attached (townhouse) and 50 multifamily low-rise units proposed by the amendment only.

