

BRIEFING ON THE SCHOOLS ELEMENT OF THE CURRENT GROWTH AND INFRASTRUCTURE POLICY

Description

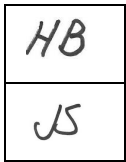
The Growth and Infrastructure Policy is the tool by which the County ensures its essential public facilities keep pace with development. The current policy, which eliminated the residential development moratoria and instead requires Utilization Premium Payments (UPP) for new development in areas with overutilized schools, was approved by the Council on November 16, 2020. It will remain in effect until 2024, but Planning staff will begin the quadrennial process of reevaluating and updating the policy later this year to reflect the County's latest growth patterns.

Completed: January 4, 2023

MCPB
Item No. 11
January 12, 2023

2425 Reedie Drive
Floor 14
Wheaton, MD 20902

Planning Staff



Hye-Soo Baek, Planner II, Countywide Planning & Policy Division,
Hye-Soo.Baek@MontgomeryPlanning.org, 301-495-2192

Jason Sartori, Chief, Countywide Planning & Policy Division,
Jason.Sartori@MontgomeryPlanning.org, 301-495-2172

POLICY

2020 Growth & Infrastructure Policy



Summary:

- Planning staff will brief the Planning Board on the schools element of the current Growth and Infrastructure Policy.

SECTION 1: BACKGROUND

The Growth and Infrastructure Policy (GIP) is the tool by which the County ensures its essential public facilities, particularly schools and transportation systems, keep pace with development. It tests the County's infrastructure for adequacy based on projected capacity, growth, and future development. The policy is updated every four years to ensure that the tools used for evaluating the impact of development on essential public facilities, such as a delay-based transportation test or student generation rates, reflect the latest growth patterns of the County.

SECTION 2: 2020-2024 GIP UPDATE – SCHOOLS

The current 2020-2024 Growth and Infrastructure Policy was approved by the County Council on November 16, 2020, following numerous work sessions, a public hearing and 17 months of work by Montgomery Planning and the Planning Board. Key revisions to the schools element of the policy that were implemented from the last update include:

- Eliminating residential development moratoria.
- Designating areas of the county by School Impact Areas, which are characterized by the amount and type of residential development they experience and its impact on school enrollment.
- Requiring developers of new housing to make Utilization Premium Payments (UPP) in areas with overutilized schools.
- Modifying the calculation and applicability of development impact taxes.

The Council approved 2020-2024 Growth and Infrastructure Policy can be found [on the Planning Department website](#).

SECTION 3: RELEVANT LINKS

ANNUAL SCHOOL TEST & SCHOOL UTILIZATION REPORT

The Annual School Test evaluates the projected capacity utilization of the County's K-12 public school facilities and establishes an adequacy status for each school service area as prescribed by the Growth and Infrastructure Policy. The results of the test are certified by the Planning Board each June to be effective for the upcoming fiscal year, and then used to determine the appropriate conditions of approval during development review.

The FY2023 Annual School Test can be found [on the Planning Department website](#).

The Annual School Test Guidelines, which explain the methodologies and procedures used to conduct the Annual School Test and relevant measures used for development review, can also be found [on the Planning Department website](#).

The current Growth and Infrastructure Policy also requires the Planning Department to produce an annual School Utilization Report that provides historical and projected school utilization trends at the countywide level and for each individual school. The report also provides data by school service area on home sales and new residential construction.

The FY2023 School Utilization Report can be found [on the Planning Department website](#).

SCHOOL IMPACT TAX

Developers pay school impact tax on new residential units regardless of the adequacy status of the schools serving the area of a proposed project. School impact taxes help pay for new construction or classroom additions to school facilities countywide. The rates are determined by School Impact Area (Turnover or Infill) and residential unit type (single family detached, single family attached, multi-family low-rise, or multi-family high-rise) classifications.

Current impact tax rates can be found [on the Department of Permitting Services website](#).

INTERACTIVE GIP MAP

The current School Impact Area classifications and FY2023 Annual School Test results (Utilization Premium Payment rates), and other relevant information have been provided on an interactive map found [on the Planning Department website](#).

SECTION 4: BOARD BRIEFING PREVIEW

During the Planning Board briefing, Planning staff will provide additional detail on and explanation of the following:

- History of the County's Adequate Public Facilities policies
- Rationale for the 2020 changes to the Growth and Infrastructure Policy
- Annual School Test and School Utilization Report
- Calculation of student generation rates
- Calculation and application of school impact taxes
- Utilization Premium Payments and school adequacy reviews for residential development