

June 2012

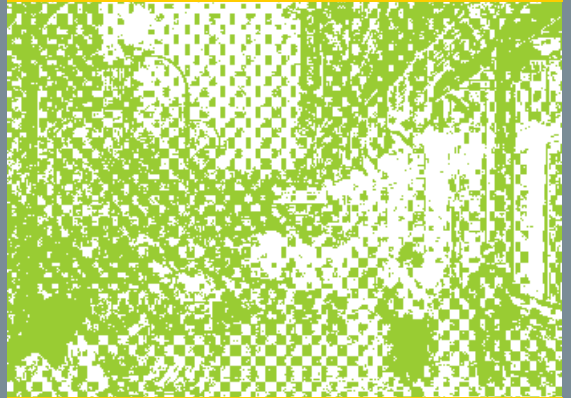
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2012-2016 Subdivision Staging Policy

appendix 4

School Capacity Forecasting

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staging growth



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2012 Subdivision Staging Policy

- Appendix 1 Pace and Pattern of Development
- Appendix 2 TPAR Report
- Appendix 3 Developer Contributions to Infrastructure
- Appendix 4 School Capacity Forecasting**
- Appendix 5 Draft County Council Resolution

Methodology

The SSP defines adequate school capacity by establishing thresholds for school use. These thresholds are used in the annual school test to determine whether residential development within a particular area will be subject to an assessment (school facility payment) or moratorium.

The adequate school capacity calculation compares projected enrollment numbers with existing and planned facility capacity. The current SSP school test uses a definition of facility capacity based on Montgomery County Public School (MCPS) program capacity. Program capacity is the number of students planned per classroom, per school level (elementary, middle, or high school) based on curriculum standards.

Projected capacity figures used in the annual school test are based on existing capacity and planned capacity; planned capacity is the capacity funded in the six-year Capital Improvements Program (CIP). Projected enrollment is based on three factors: the number of children born, aging of the school-age population (natural increase), and the number of families moving into and out of the County (migration).

These factors are interrelated and, in some years, difficult to predict. Since 2007, there has been a marked increase in school system enrollment—especially at the elementary school level. One factor in this growth was the State mandate for public schools to provide full-day kindergarten programs.

Predicting enrollment by the aging of students from kindergarten through grade 12 is the most straightforward component of the forecast. Past records of the rate of change between grades show that, at most grade levels, enrollment can be accurately predicted by simply moving cohorts forward one grade for each year of the forecast.

Migration is the least predictable component of enrollment change. Migration is driven by economic forces tied to housing and job opportunities making it a more variable element of enrollment change. Over the past several years, the County has experienced a net in-migration of students each year. Part of this in-migration is due to a significant increase in students entering MCPS from nonpublic schools. This is the fourth year in a row in which the County has experienced a net gain in enrollment of 500 or more students from nonpublic schools.

The turnover of existing homes and apartments and the occupancy of new housing all contribute to new households in the County and children in the school system. There are many more existing homes, and rental units, than there are new residential units in any given year. Therefore, turnover of existing residential units has a much greater impact on enrollment change than new home sales and new apartment rentals.

Whatever the level of activity in the housing market, MCPS factors it into enrollment forecasts. MCPS tracks new housing incorporating subdivision applications into school enrollment forecasts once they have received preliminary plan approval. Once a subdivision plan has approval, developers and builders are contacted regularly to determine construction schedules and estimated completion dates.

The enrollment factors are, in some years, difficult to predict. One unexpected consequence of the recession was an unprecedented surge in enrollment that began in 2008. This sudden change in the enrollment trend was particularly pronounced in down-County elementary schools (the Bethesda-Chevy

Chase, Walter Johnson, and Richard Montgomery clusters), communities with little new housing construction. Catching up to these rapid increases in enrollment will take several years as school capacity projects are planned and funds requested through the CIP.

The annual school test evaluates school utilization levels in all 25 school cluster areas at the elementary, middle, and high school levels (referred to in the SSP resolution as grade levels). Each year, MCPS prepares the data on school cluster utilizations for the annual school test, the Planning Board adopts the results effective July 1, and the standards apply to the following fiscal year.

The SSP defines adequate school capacity by establishing thresholds for school use. These thresholds are used in the annual school test to determine whether residential development within a particular area will be subject to an assessment (school facility payment) or moratorium.

The current SSP test thresholds are:

- School Facility Payment Threshold - If projected enrollment, five years in the future, at any grade level in any cluster will exceed 105 percent utilization but does not exceed 120 percent utilization, the Board may approve a residential subdivision in that cluster during the next fiscal year 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.
- Moratorium Threshold - If projected enrollment at any grade level in any cluster will exceed 120 percent utilization, the Planning Board must not approve any residential subdivisions in that cluster during the next fiscal year.

There are a few exceptions to these requirements. The Planning Board may approve a subdivision in a cluster in moratorium if:

- the subdivision consists solely of multifamily housing and related facilities for elderly or handicapped persons
- multifamily housing units are located in the age-restricted section of a planned retirement community.
- the subdivision consists of no more than three housing units and the applicant commits to a School Facilities Payment as otherwise required before receiving a building permit.

A new component introduced in the 2007-2009 Growth Policy was the administration of a school capacity ceiling, commonly referred to as the School Queue. 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.

School Test Results

The Montgomery County Subdivision Staging Policy continues to monitor school capacity by means of an annual test of school capacity. As stated above, 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 Improvements Program. The school test determines if residential subdivisions in any school cluster should be subject to either a school facilities payment or a moratorium. If projected enrollment at any level exceeds 105 percent of program capacity, 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, residential subdivisions in the affected cluster will be under moratorium.

For FY2013, the total number of clusters exceeding 105 percent program capacity is fifteen, five of which exceed at more than one school level (see Figure 1). Residential development in these fifteen 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.

According to the analysis, a school facility payment will be required in the following clusters at the elementary school level: Blake, Gaithersburg, Magruder, Paint Branch, Quince Orchard, Rockville, and Seneca Valley. At the middle school level, residential development in the Blair, Walter Johnson, Rockville, Springbrook, 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 Bethesda-Chevy Chase, Blake, Walter Johnson, Northwood, Quince Orchard, Whitman, and Wootton clusters. A school facility payment will be levied at each school level found to be inadequate.

By comparison, during FY2012, thirteen school clusters required the payment of a school facility fee with eight school clusters exceeding capacity at more than one school level. One cluster was under moratorium for residential development in FY2012, the Richard Montgomery cluster. Following the change to program capacity and the tighter school facility fee threshold adopted in the 2007-2009 Growth Policy, a school facility fee has been required in several school clusters each year, with a handful of clusters requiring a payment at more than one school level. Figure 2 shows status of all 25 clusters since 2007.

The Annual School Test findings for FY2013 are attached in Tables 3 and 4. These tables (along with the SSP Resolution adopted by the Council in November 2009) will constitute Montgomery County's Subdivision Staging Policy as it relates to school capacity until the next Subdivision Staging Policy is adopted later this year.

Figure 1: School Clusters Requiring a School Facility Payment FY 2013

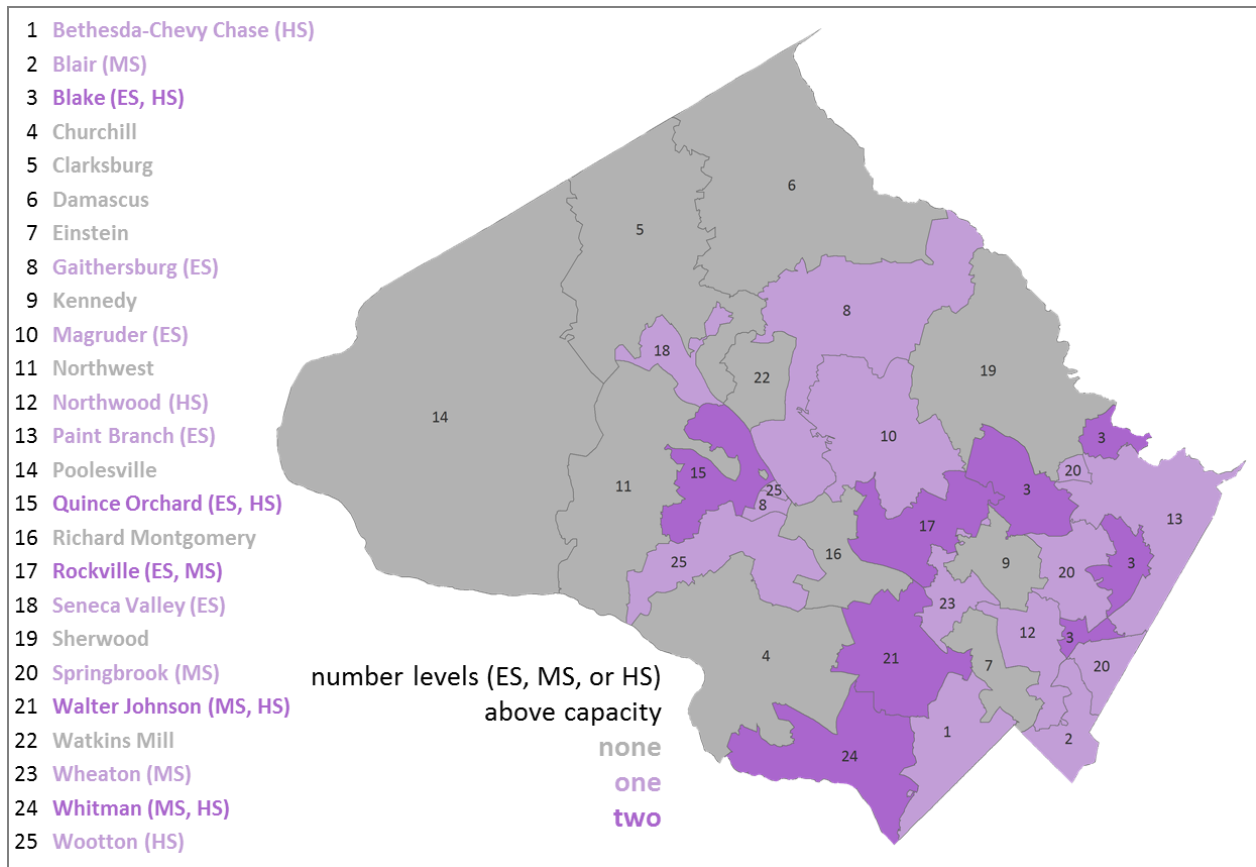


Figure 2: School Cluster Status by Level since FY 2007

# Cluster	Level	FY2007	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013
1 Bethesda-Chevy Chase	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
2 Blair	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
3 Blake	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
4 Churchill	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
5 Clarksburg	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
6 Damascus	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
7 Einstein	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
8 Gaithersburg	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
9 Kennedy	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
10 Magruder	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
11 Northwest	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
12 Northwood	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
13 Paint Branch	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
14 Poolesville	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
15 Quince Orchard	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
16 Richard Montgomery	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
17 Rockville	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
18 Seneca Valley	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
19 Sherwood	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
20 Springbrook	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
21 Walter Johnson	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
22 Watkins Mill	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
23 Wheaton	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
24 Whitman	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate
25 Wootton	ES MS HS	adequate	adequate	adequate	adequate	adequate	adequate	adequate

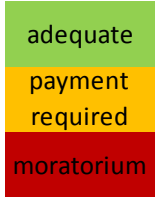


Table 3: Subdivision Staging Policy - Results of School Test for FY 2013

Reflects County Council Adopted FY 2013 Capital Budget and FY 2013–2018 Capital Improvements Program (CIP)
Effective July 1, 2012

School Test Level	Description	Cluster Outcomes by Level		
		Elementary Inadequate	Middle Inadequate	High Inadequate
Clusters over 105% utilization	5-year test Effective July 1, 2012 Test year 2017-18 School facility payment required in inadequate clusters to proceed.	Blake (106.7%) Gaithersburg (110.0%) Magruder (105.4%) Paint Branch (114.5%) Quince Orchard (108.9%) Rockville (113.3%) Seneca Valley (111.9%)	Blair (106.9%) Walter Johnson (112.3%) Rockville (115.4%) Springbrook (106.7%) Wheaton (109.4%) Whitman (116.0%)	B-CC (115.8%) * Blake (106.7%) Walter Johnson (106.3%) Northwood (111.5%) Quince Orchard (107.1%) Whitman (109.3%) Wootton (107.6%)
Clusters over 120% utilization	5-year test Effective July 1, 2012 Test year 2017-18 Moratorium required in clusters that are inadequate.			

* Utilization of B-CC HS includes a "placeholder" capital project of ten classrooms, pending a request for an addition in a future CIP.

Table 4: Subdivision Staging Policy FY 2013 School Test - Cluster Utilizations in 2017–2018

Reflects County Council Adopted FY 2013 Capital Budget and FY 2013–2018 Capital Improvements Program (CIP)
Effective July 1, 2012

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

Cluster Area	Projected August 2017 Enrollment	100% MCPS Program Capacity With Adopted FY 13-18 CIP	Cluster Percent Utilization in 2017	School Test Result Capacity is:	Cluster is?
Bethesda-Chevy Chase	3,501	3,810	91.9%	Adequate	Open
Montgomery Blair	4,222	4,154	101.6%	Adequate	Open
James Hubert Blake	2,585	2,423	106.7%	Inadequate	School Payment
Winston Churchill	2,650	2,887	91.8%	Adequate	Open
Clarksburg	4,029	3,998	100.8%	Adequate	Open
Damascus	2,395	2,409	99.4%	Adequate	Open
Albert Einstein	2,760	2,639	104.6%	Adequate	Open
Gaithersburg	4,001	3,637	110.0%	Inadequate	School Payment
Walter Johnson	4,089	3,946	103.6%	Adequate	Open
John F. Kennedy	2,773	2,910	95.3%	Adequate	Open
Col. Zadok Magruder	2,683	2,546	105.4%	Inadequate	School Payment
Richard Montgomery	2,745	2,978	92.2%	Adequate	Open
Northwest	4,249	4,309	98.6%	Adequate	Open
Northwood	3,464	3,376	102.6%	Adequate	Open
Paint Branch	2,464	2,152	114.5%	Inadequate	School Payment
Poolesville	652	758	86.0%	Adequate	Open
Quince Orchard	3,035	2,787	108.9%	Inadequate	School Payment
Rockville	2,609	2,303	113.3%	Inadequate	School Payment
Seneca Valley	2,401	2,145	111.9%	Inadequate	School Payment
Sherwood	2,017	2,427	83.1%	Adequate	Open
Springbrook	3,295	3,151	104.6%	Adequate	Open
Watkins Mill	2,663	2,721	97.9%	Adequate	Open
Wheaton	3,156	3,304	95.5%	Adequate	Open
Walt Whitman	2,554	2,560	99.8%	Adequate	Open
Thomas S. Wootton	2,893	3,246	89.1%	Adequate	Open

Table 4 (continued)

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

Cluster Area	Projected August 2017 Enrollment	100% MCPS Program Capacity With Adopted FY 13-18 CIP	Cluster Percent Utilization in 2017	School Test Result Capacity is:	Cluster is?
Bethesda-Chevy Chase	1,608	2,007	80.1%	Adequate	Open
Montgomery Blair	2,455	2,296	106.9%	Inadequate	School Payment
James Hubert Blake	1,301	1,314	99.0%	Adequate	Open
Winston Churchill	1,345	1,593	84.4%	Adequate	Open
Clarksburg	1,871	2,381	78.6%	Adequate	Open
Damascus	758	740	102.4%	Adequate	Open
Albert Einstein	1,234	1,332	92.6%	Adequate	Open
Gaithersburg	1,711	1,797	95.2%	Adequate	Open
Walter Johnson	2,057	1,831	112.3%	Inadequate	School Payment
John F. Kennedy	1,411	1,436	98.3%	Adequate	Open
Col. Zadok Magruder	1,277	1,637	78.0%	Adequate	Open
Richard Montgomery	1,331	1,444	92.2%	Adequate	Open
Northwest	2,135	2,052	104.0%	Adequate	Open
Northwood	1,453	1,459	99.6%	Adequate	Open
Paint Branch	1,279	1,228	104.2%	Adequate	Open
Poolesville	317	459	69.1%	Adequate	Open
Quince Orchard	1,453	1,688	86.1%	Adequate	Open
Rockville	1,099	952	115.4%	Inadequate	School Payment
Seneca Valley	1,302	1,485	87.7%	Adequate	Open
Sherwood	1,127	1,501	75.1%	Adequate	Open
Springbrook	1,361	1,275	106.7%	Inadequate	School Payment
Watkins Mill	1,239	1,359	91.2%	Adequate	Open
Wheaton	1,738	1,588	109.4%	Inadequate	School Payment
Walt Whitman	1,474	1,271	116.0%	Inadequate	School Payment
Thomas S. Wootton	1,434	1,567	91.5%	Adequate	Open

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

Cluster Area	Projected August 2017 Enrollment	100% MCPS Program Capacity With Adopted FY 13-18 CIP	Cluster Percent Utilization in 2017	School Test Result Capacity is:	Cluster is?
Bethesda-Chevy Chase*	2,162	1,867	115.8%	Inadequate	School Payment
Montgomery Blair	2,980	2,875	103.7%	Adequate	Open
James Hubert Blake	1,840	1,724	106.7%	Inadequate	School Payment
Winston Churchill	1,860	1,941	95.8%	Adequate	Open
Clarksburg	1,933	1,971	98.1%	Adequate	Open
Damascus	1,267	1,479	85.7%	Adequate	Open
Albert Einstein	1,468	1,618	90.7%	Adequate	Open
Gaithersburg	2,087	2,284	91.4%	Adequate	Open
Walter Johnson	2,437	2,292	106.3%	Inadequate	School Payment
John F. Kennedy	1,694	1,793	94.5%	Adequate	Open
Col. Zadok Magruder	1,626	1,896	85.8%	Adequate	Open
Richard Montgomery	2,301	2,232	103.1%	Adequate	Open
Northwest	2,246	2,151	104.4%	Adequate	Open
Northwood	1,686	1,512	111.5%	Inadequate	School Payment
Paint Branch	1,881	1,899	99.1%	Adequate	Open
Poolesville	1,097	1,152	95.2%	Adequate	Open
Quince Orchard	1,903	1,777	107.1%	Inadequate	School Payment
Rockville	1,499	1,530	98.0%	Adequate	Open
Seneca Valley	1,376	1,694	81.2%	Adequate	Open
Sherwood	1,868	2,013	92.8%	Adequate	Open
Springbrook	1,806	2,082	86.7%	Adequate	Open
Watkins Mill	1,499	1,980	75.7%	Adequate	Open
Wheaton	1,388	1,604	86.5%	Adequate	Open
Walt Whitman	1,998	1,828	109.3%	Inadequate	School Payment
Thomas S. Wootton	2,249	2,091	107.6%	Inadequate	School Payment

* Capacity at Bethesda-Chevy Chase HS includes a "placeholder" capital project of ten classrooms, pending a request for an addition in a future CIP.

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2012-2016 Subdivision Staging Policy

appendix 4

School Capacity Forecasting



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