

ED COMMITTEE #2
September 21, 2015
Worksession

MEMORANDUM

September 19, 2015

TO: Education Committee

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SUBJECT: **Worksession – OLO Report 2015-12, *A Review of the MCPS Revitalization/Expansion Program***

On July 28, the Council received and released Office of Legislative Oversight (OLO) Report 2015-12, *A Review of the MCPS Revitalization/Expansion Program*. The Council also received an overview briefing on the report and received comments from Montgomery County Public Schools (MCPS) staff as well as from David Lever, Executive Director, State Interagency Committee on School Construction (IAC). This is the first Education Committee review of the OLO report.

The report provides an overview of the history and policies of the Revitalization/Expansion (Rev/Ex) Program, as well as an analysis of the age and location of schools constructed under the program. The report analyzes the relationship of the Rev/Ex program to other expenditures in the Capital Improvements Program (CIP) for MCPS, and analyzes the methodology and assessment of the 2011 FACT Assessment that resulted in the current Rev/Ex program queue. The Executive Summary of the OLO report appears on © 1-4.

Councilmembers should bring a copy of the OLO report to the worksession.
The report is available online at: <http://www.montgomerycountymd.gov/olo/reports/index.html>.

The report raises several policy questions around how school facilities are assessed and how the various elements of the CIP can be integrated to maximize effective use of limited resources. The Interim Superintendent's comments in response to the report indicate that the school system will review the Rev/Ex program in light of two particular findings regarding errors in the 2011 assessment and regarding the changing conditions at schools over time.

The Interim Superintendent is scheduled to release his recommended FY17-22 CIP to the Board on October 28. There are certain issues that will have to be resolved as part of his recommendation given that the outyears of the CIP may include Rev/Ex projects for schools that were assessed as part of the 2011 FACT Assessment. The Appendices in the CIP also traditionally include information about the upcoming Rev/Ex queue and schedule, which may also need to be revised. The Superintendent and the Board will have the first responsibility to address these immediate issues in the CIP process.

In addition, there are many policy issues that extend beyond the immediate scope of the FY17-22 CIP regarding assessment of schools, allocation of resources within the range of CIP projects, and public access to facility assessment information. These issues will require a longer timeframe for review and ultimate implementation. In a recent update memorandum to the Board of Education (circles 5-13), the Superintendent outlines his intent to reconvene a FACT Review Committee this fall and make recommendations to the Board in the spring.

The purpose of today's worksession is for the Committee to discuss and provide input on the framework for the longer term policy discussion. MCPS has already stated its intent to review the parameters used in the FACT Assessment, the changing conditions at schools over time, and the duration of the project queue for assessed schools. In this context, OLO and Council staff raise the following policy areas in the packet for Committee members to provide initial input:

- Resource allocation among all CIP needs given the current fiscal conditions;
- Approach to assessing school conditions across the whole system;
- Determining the scope of work for individual schools; and
- Availability and format of facility condition information to the public.

As it prepares to reconvene the FACT Review Committee and undertake this significant policy review, it will be helpful for MCPS to have the benefit of today's Committee discussion to inform the scope of policy work that MCPS will develop for this process. It is important for Committee members and the public to keep in mind that this policy work will be complex and is in the very initial stages only at this time. The Committee discussion today will not answer or resolve the policy questions raised but begin the dialogue around what issues should be explored and give a sense of Committee members' interests in these areas. The Education Committee will continue to dialogue with MCPS, the Board, and the community as this review process moves forward.

A. Background: MCPS CIP Fiscal Constraints

While the MCPS CIP makes up the largest portion of the total CIP, current fiscal constraints will impact future CIP project expenditures.

The MCPS CIP makes up the largest share of the CIP (excluding WSSC) and, as shown in the chart below, makes up 33.7% of the County's total FY15-20 Amended CIP and 38.2% of the bond-funded portion of the FY15-20 Amended CIP.

**MCPS CIP Compared to the Total Approved CIP
(FY7-12 through FY15-20 Amended)**

	FY07-12	FY09-14	FY11-16	FY13-18	FY15-20	Amended FY15-20	% Increase from FY07-12
Total Approved CIP*	2,967,901	3,377,467	4,008,277	4,355,405	4,451,976	4,580,629	54.3%
Approved MCPS CIP	1,173,478	1,287,775	1,385,946	1,352,858	1,527,967	1,543,670	31.5%
MCPS share of total CIP	39.5%	38.1%	34.6%	31.1%	34.3%	33.7%	
Total Approved CIP* - Bonds Only	1,245,338	1,615,603	2,101,369	1,991,719	2,028,509	2,032,228	63.2%
Approved MCPS CIP - Bonds Only	515,164	712,672	842,624	765,216	796,779	775,677	50.6%
MCPS share of total CIP	41.4%	44.1%	40.1%	38.4%	39.3%	38.2%	

*Total Approved CIP excludes WSSC

Both the MCPS CIP and total CIP have increased substantially in the last 8 years. Even with this overall increase, funding has not kept pace with the demand for capital programming for MCPS, Montgomery College, transportation, public safety, and other service areas.

The MCPS CIP still makes up the largest portion of the total CIP, but its share of the total CIP has declined over time. This confirms that there is competition across all agencies for scarce CIP dollars (mostly bonds and current revenue in MCPS' case) and that significant increases in the MCPS CIP are unlikely if total CIP expenditures are constrained in the FY17-22 CIP.

The Council will soon be setting its FY17-22 Spending Affordability Guidelines (SAG) for G.O. Bonds (public hearing is scheduled for September 22 and Council action is scheduled for September 29). Initial measures related to the Council's upcoming SAG process indicate that the Council will face further pressure to constrain the growth of borrowing. Given these spending affordability issues, it is uncertain if or by how much the overall CIP pie will grow or contract in the FY17-22 period.

Within the MCPS CIP itself, MCPS is experiencing a number of fiscal pressures including:

Enrollment Growth: Enrollment has grown over 14,500 students in the past six years. An increase of over 11,500 students is projected over the next six years. As a result, over the past six years MCPS has built hundreds of new classrooms (via new schools, additions, and revitalization/expansions) and has four new schools (two middle schools and two elementary schools) and another 388 classrooms via addition and Rev/Ex projects over the next six years. However, many additional classrooms, beyond those already approved, will be needed to keep up with projected enrollment.

State Aid for School Construction: While the MCPS CIP has increased substantially in recent years (as has MCPS' estimated eligibility for State school construction dollars; \$148 million for FY16), annual State aid totals have hovered around \$40 million each of the past five years. MCPS was awarded \$39.8 million for FY16.

In both FY15 and FY16, the County also sought a new source of funding (school financing bonds) for the MCPS CIP. For FY16, the Executive had assumed (in his amendments to the

FY15-20 CIP) an additional \$213.3 million (over several years) to address urgent school capacity issues. However, MCPS ultimately was awarded only \$5.9 million in new aid (related to Senate Bill 490, which provides an additional \$20 million per year Statewide to school systems with high enrollment growth). As a result, the Council could not include a number of project accelerations requested by the Board of Education.

Construction Costs: Market conditions can also greatly affect MCPS CIP affordability from year to year. Increases in “per square foot” costs can crowd out available fiscal capacity for new projects.

For instance, from FY10 through FY12, MCPS noted average construction costs per square foot of \$203 for modernizations and \$211 for addition projects. These relatively low costs were a result of the great recession and its aftereffects in the regional economy. However, MCPS subsequently saw increases in its bid prices over the next couple of years. In FY12 and FY13, MCPS experienced square foot costs averaging approximately \$280 per square foot for additions and Rev/Ex projects. As a result, for last year’s FY15-20 CIP, MCPS adjusted its costs upward for a number of ongoing projects and its estimates for new projects.

Future Bus Depot Space: MCPS currently has a substantial shortage of bus parking spaces at its regional depots. In addition, MCPS’ Shady Grove Bus Depot will need to vacate its current location by January 2017 (as part of the County’s “Smart Growth Initiative”). The cost to purchase land and build depot space could cost in the tens of millions of dollars. No land purchase or construction dollars are currently included in the FY15-20 MCPS CIP.

Because of these and other issues, the Council has for many years faced major challenges reconciling the MCPS CIP within available CIP funding. As a result, projects in the Rev/Ex program’s queue have experienced numerous delays due to fiscal constraints in the CIP. The high cost per project (and in particular the cost of high school Rev/Ex projects) and the fact that the Board of Education generally prioritizes addressing urgent school capacity needs higher than Rev/Ex projects has meant that delaying the Rev/Ex schedule (at each of the ES, MS, and/or HS levels) has been a repeated approach to meet spending affordability requirements for the CIP in recent years. These delays in turn mean that schools in the queue which have systemic maintenance issues must wait longer to have these needs ultimately addressed through Rev/Ex.

B. Policy Discussion: MCPS CIP Priorities

The OLO report raised the issue of whether County CIP dollars for MCPS’ capital infrastructure maintenance are allocated most efficiently to address MCPS’ needs at its 200+ schools. This question is particularly relevant now given the constrained nature of the County’s overall CIP and the particular fiscal pressures MCPS is facing. These issues are explored in more detail below.

Question 1. What are the stated MCPS CIP project priorities and what projects command the largest share of funding?

Chapter 3 of MCPS' Educational Facilities Master Plan and CIP (published annually) notes MCPS' CIP priorities as:

1. Compliance Projects (i.e. mandated projects such as ADA, asbestos abatement, fire safety)
2. Capital Maintenance Projects (i.e. roofs, HVAC, PLAR)
3. Capacity Projects (i.e. new schools and additions)
4. Revitalization/Expansion Projects
5. System Infrastructure Projects (i.e. transportation depots, maintenance facilities)
6. Technology Modernization Project

However, as the OLO report presents, MCPS' total actual CIP expenditures (FY12 through FY15) and approved FY16 expenditures are heavily weighted toward Revitalization/Expansions (priority #4); making up the highest share of expenditures at 46 percent of all MCPS expenditures. New Schools/Additions (the next highest category) is at 20 percent. Capital maintenance related spending totals 18 percent. As discussed below, many Rev/Ex projects also add capacity (in addition to addressing all of the systemic capital maintenance needs) at a particular school, so the cost comparisons for these different priorities are not exact.

Question 2. Given the fiscal pressures noted above, what is the appropriate allocation of funding between systemic capital maintenance and Rev/Ex projects?

Most relevant to the issue before the Education Committee today, is MCPS' priorities of meeting its compliance projects and systemic capital maintenance needs (priorities #1 and #2 above) while also funding its Rev/Ex queue (priority #4) given the fiscal pressures noted earlier.

The Sixth Report of the Infrastructure Maintenance Task Force (Final Report, March 2014) estimates that MCPS should be spending an estimated \$178.8 million per year in various system replacement costs (in areas such as energy conservation, fire safety, HVAC, PLAR, restroom renovation, and roof replacement).¹ However, as shown in the chart below, MCPS' FY15 request (which was later approved by the Council) included \$46.1 million for these projects (or about 26 percent of the estimated funding requirement). Factoring in the Rev/Ex projects,² which are assumed to provide another \$73 million toward this effort, the MCPS request was \$119.1 million (67 percent of the estimated funding requirement).

¹ The "acceptable annual replacement cost" and "backlog" are based on MCPS' inventory of assets (i.e. number of systems, ballfields, restrooms, etc. and/or square footage of space) and assumptions of an "acceptable life span" for the various assets. The report does not assess the actual condition of MCPS' assets.

² The report allocates 75 percent of annual Rev/Ex project costs to infrastructure replacement (with the balance assumed to be for enrollment growth and program enhancements).

Infrastructure Task Force Report (March 2014)
Summary of MCPS Asset Replacement needs and Funding

	Acceptable Annual Replacement Cost	FY15 Request	% of Total Request	% of Acceptable Repl. Cost	Backlog*
Fire Safety	3,187,000	2,000,000	1.7%	62.8%	12,487,920
PLAR	130,603,841	5,042,000	4.2%	3.9%	555,943,613
HVAC	28,216,352	28,000,000	23.5%	99.2%	177,400,000
Restroom Renovation	2,407,440	1,000,000	0.8%	41.5%	17,160,000
Energy Management Systems	1,180,000	2,057,000	1.7%	174.3%	7,080,000
Roof Replacement	13,194,384	8,000,000	6.7%	60.6%	31,092,600
Total (without Rev/Ex)	178,789,017	46,099,000	38.7%	25.8%	801,164,133
Rev/Ex Projects Funding**		72,956,000	61.3%		
	178,789,017	119,055,000	100.0%	66.6%	801,164,133

*Backlog is defined as: the amount of funds that would need to be programmed in one year to eliminate the backlog immediately.

**The Report assumes to allocate 75% of total annual Rev/Ex costs to asset replacement.

However, the Rev/Ex program only touches a handful of schools each year. For the FY15 expenditures shown above, the \$73 million in Rev/Ex costs (amounting to 61 percent of MCPS' asset replacement work) were allocated to seven schools. This leaves MCPS allocating \$46.1 million to the nearly 200 other facilities.

Systemic capital maintenance projects vary greatly in cost. HVAC projects average about \$2.0 million and roof replacement projects average about \$1.2 million. Individual PLAR projects vary greatly in cost; often based on square footage costs. Some of the larger PLAR cost items noted in the Task Force report include: bleachers (\$750,000), natural grass fields (\$175,000), elevators (\$290,000), and lockers (\$275,000).

Rev/Ex projects cost on average \$30 million per elementary school and \$52 million per middle school. There is a large range in potential costs for high school Rev/Ex projects with costs ranging from \$84 million (Poolesville HS) to \$129 million (Seneca Valley HS).

Therefore, the cost for a single Rev/Ex project is equivalent to many smaller systemic projects. The fact that so much of the expenditures in the MCPS CIP are dedicated to Rev/Ex projects means that fewer schools overall can have their systemic work addressed on time. **This raises the question of what the right mix of capital spending is between systemic work and Rev/Ex and how such a mix should be determined.**

C. Policy Discussion: Approach to Assessing School Conditions

The OLO report detailed how MCPS conducted comprehensive assessments of about one-quarter of its school buildings in 2011. The questions below address the scope and purpose of future school building condition assessments.

Question 3. Should MCPS comprehensively assess the conditions of all schools regardless of building age?

MCPS' long-standing approach to building modernizations is to focus on schools over a certain age. Most recently, in 2011, MCPS conducted Facility Assessments with Criteria and Testing (FACT) evaluations for schools that were constructed (or underwent a major reconstruction) prior to 1985. Schools included in this process underwent a comprehensive, integrated assessment of both educational and physical characteristics in 2011; however, no parallel process exists to comprehensively measure the conditions of younger schools. As a result, schools are evaluated differently based on building age both in regard to educational and infrastructure specifications.

Educational specifications address building characteristics that directly influence student instruction. These building characteristics (such as open plan design or square footage of instructional space) generally remain unchanged over the life of the building. For schools included in the 2011 FACT assessment, MCPS plans to correct educational program deficiencies for schools through the Rev/Ex CIP project over the next two decades. For all other schools, MCPS does not plan to systematically evaluate educational program specifications for many years. Under current practice, a 25-year old school that was excluded from the 2011 FACT assessments may not be assessed for conformance with educational specifications until the building nears 50 years of age.

Physical infrastructure specifications address the physical condition of major building components (such as roofing, HVAC, and security systems). Building components of this sort are routinely upgraded or replaced during the lifecycle of a building. With the exception of the few schools near the top of the Rev/Ex queue, schools are eligible for infrastructure improvements through one of several CIP projects that fund building system upgrades and replacements. Nonetheless, no published document displays a comprehensive, updated school-by-school assessment of building needs.

It may be helpful to discuss whether the County's capital planning process would benefit from an assessment process that routinely identifies and updates building conditions across all schools. Council and OLO staff also note that the FACT Review Committee may need to consider the scope and form for a comprehensive assessment process. Assessments could take many forms, from a full periodic assessment to more limited update reviews. This information could allow for capital spending to be prioritized along one continuum that consolidates both educational and physical infrastructure needs for each school.

Question 4. How should long-term projected capacity needs be included in facility assessment of schools?

MCPS annually evaluates and updates long-term space needs based on the capacity of school buildings and enrollment projections. MCPS addresses space needs through construction of new schools and additions to existing schools. CIP projects focus on schools and areas of the County with the greatest space needs.

School capacity was not a criteria in the 2011 FACT assessments. Current practice establishes the Rev/Ex queue independent of school space needs and enrollment projections. However, when modernizing a school, MCPS frequently expands the project scope to address capacity needs. In recent years, MCPS has added about 30 classrooms annually through Rev/Ex projects. The FACT Review Committee may need to consider how and to what extent capacity needs should affect the timing and scope of facility projects.

D. Policy Discussion: Approach to Determining Scope of Work for Facility Improvements

The OLO report noted that the Rev/Ex program frequently resulted in complete or near complete reconstruction of school buildings. While this scope of work will be necessary for some schools, it may also be important to evaluate how schools are identified for this level of work and how other facility needs are addressed.

Question 5. How is the scope of work determined for a school, once assessed?

The current Rev/Ex approach is generally a cost-effective way to address all the identified needs of a school in one project. Council staff suggests that this is the case in large part because the expectation is that all or most of the educational specifications will be met by the modernized building, and that all facility issues, major and minor, will be addressed as part of the project.

If the full range of educational and facility specifications are to be addressed in one project, cost, design flexibility, and community preference are among the factors that lead to preference for reconstruction over renovation.

- **Cost:** The MCPS cost analysis of a modernization typically results in the cost for reconstruction and the cost for renovation being comparable, or even that the reconstruction is less. Working new designs into old materials is more challenging than building new.
- **Design flexibility:** The project also gains more flexibility with new construction. Features can be added differently and the footprint can be altered.
- **Community interest in amenities and features of a new building:** Parents and other members of the school community will typically prefer a newer building with more features and design elements rather than working within older space.

Many schools will still require this full scope approach due to the severity of their educational, facility, or capacity conditions. For schools with this level of need and deficiency, Council staff agrees that the modernization approach will be cost effective and necessary.

As noted earlier, facilities have traditionally been identified for the Rev/Ex project scope by virtue of their age. If MCPS undertakes a broader facility assessment process, a more tiered approach may be warranted with some schools being fully reconstructed and some undergoing more limited renovation. The OLO report highlights other jurisdictions that assess a large number of facilities and then prioritize full reconstruction for schools with the greatest number of

deficiencies. Some counties use more limited renovations to target fewer deficiencies in buildings that are viewed as having longer useful life.

Question 6. Should the universe of schools to be reconstructed be more limited to those schools with the most severe design (i.e. Educational Specification) deficiencies?

As the OLO report highlights, educational design issues range from large structural issues, such as undersized core space or insufficient visitor control access, to aspects that could be addressed through smaller projects or additions, such as poor resource support areas. Are some educational design standards more important to resolve than others that can be mitigated through other means? Is a reduced project scope that accomplishes work on the most critical aspects but leaves in place or repairs others acceptable?

Council staff notes that given the fiscal pressures discussed above, many schools function now with educational designs that do not meet current standards. A future assessment approach may need to prioritize educational specifications across all schools to determine which require a Rev/Ex scope of work and which could manage with less or no remediation.

E. Policy Discussion: Information Available to the Public

OLO reported that unlike many other jurisdictions, MCPS does not currently make public detailed information on school building conditions. The questions below address alternative means of informing the public about school building conditions and planned school-specific capital improvements.

Question 7. What information can MCPS make publicly available regarding the school-specific facility condition assessments? What could be the optimal way to present the assessments to best meet the needs of all interested parties?

When the 2011 FACT assessments were completed, MCPS made publicly available the total FACT score and facility condition report for each of the 53 assessed schools. While MCPS currently publishes the total FACT score in the Educational Facilities Master Plan, the school-specific reports are no longer publicly available. Access to the written FACT assessment reports were requested as part of the OLO report on the MCPS Rev/Ex Program.

As published in 2011, the facility condition reports included building and site information (i.e. construction and renovation history), scores for evaluated criteria, and bulleted lists detailing educational and physical infrastructure deficiencies. However, the reports did not show how individual deficiencies were scored and totaled for each assessed criteria.

In comparison, other jurisdictions not only post the most recent assessments (regardless of completion date), but also present the information in a manner that permits users to compare conditions across all schools within the district.

Question 8. What facility condition information should be made available to the public beyond publication of the overall FACT score and rank? How can this information be presented to best meet the needs of interested parties? Are there opportunities to present school to school comparison data?

The following is an overview of publicly available facility assessment reports found in four other school systems, including Fairfax County Public Schools, Dallas Independent School District, Baltimore County Public Schools, and Anne Arundel County Public Schools.

Each school system posts current facility assessments and building scores on their website. Reports are available for the most recent assessment, regardless of when the assessment occurred. (The last assessment for Fairfax County Public Schools occurred in 2008). While the information presented is similar to the written FACT reports, the school systems also demonstrate how points were awarded and totaled for individual deficiencies. In addition, while varying in degree of interactivity, each school system presents the facility assessments in a manner that allows for a system-wide comparison.

Fairfax County Public Schools (FCPS). FCPS conducted school facility assessments of 63 schools (all constructed before 1992) in 2008. FCPS publishes the school-specific scoresheet, total score, and rank for each assessed school. The scoresheets include educational and facility condition assessment criteria, discovered deficiencies, compliance/condition scores for each assessed area, and total score calculations. Additionally, FCPS provides a brief overview of the assessment methodology.

For system-wide comparisons, FCPS hosts an interactive facility dashboard. The dashboard has two relevant components detailed on the following page. For each component, there are separate dashboards for elementary, middle, and high schools. The dashboards allow users to compare individual schools to FCPS averages and view key data points for every school in the system.

- **Facility and Site.** School information includes comparisons of building square feet, current enrollment, square feet per student, site acreage, year constructed and renovated, and number of portable classrooms in use.
- **Capacity and Enrollment.** The dashboard presents information on current and projected enrollment, design and program capacity, building utilization, student migration, and enrollment by grade and class size. FCPS also provides capacity and utilization definitions and methodology.

The FCPS score sheets and interactive dashboards are available at (access through Internet Explorer):

- Score Sheets - <http://www.fcps.edu/fts/designconst/facilityevaluations/index.shtml>
- Dashboard - <http://www.fcps.edu/fts/dashboard/14-15dashboard.html>

Dallas Independent School District (Dallas ISD). Dallas ISD conducted system-wide facility assessments in 2013. Through the Dallas ISD website, users can search by school and view planned renovation projects, including a construction timeline and project highlights. In

addition, users are able to download the facility assessment report. This report details building/site deficiencies, repair costs, and current replacement value. Dallas ISD conducted separate assessments on the building core, additions, and modular classrooms, with deficiencies and repair costs detailed for each segment of the building.

An Example of the Dallas ISD school-specific renovation summary and facility condition reports is available at:

- Renovation Summary for Stephen C. Foster Elementary School
http://dallasisd2008bond.org/index.php/schools/detail/Stephen_C._Foster_Elementary_School/
- Facility Condition Report for Stephen C. Foster Elementary School
<http://dallasisd2008bond.org/images/uploads/docs/145%20FOSTER%20ES.pdf>

Baltimore County Public Schools (BCPS). BCPS completed system-wide assessments in 2014. Available online, the complete assessment report contains the following information:

- Methodology and district renovation priorities;
- One-page school-specific condition assessments (including total score, score breakdown, building deficiencies, and past capital expenditures); and
- Detailed scoring for each school organized by evaluation criteria, estimated costs to correct deficiencies at each school, and system-wide ranking of schools based on total score.

The BCPS system-wide facility condition assessment report is available at:
<http://www.bcps.org/reports/121214-PFA.pdf>

Anne Arundel County Public Schools (AACPS). AACPS completed system-wide assessments in 2006. Available on the AACPS website are the system-wide facility condition report, a summary PowerPoint Presentation, and survey and focus group results. The PowerPoint presentation summarizes assessment methodology, findings, and a list of prioritized projects. The complete facility condition report provides further detail on methodology, school-specific scores for each school, findings by cluster/feeder zone, geographic mapping of scores and capacity, and recommendations by cluster/zone.

The AACPS facility condition assessment report and PowerPoint presentation are available at:
http://www.aacps.org/html/press/mgt_strategic.asp

Executive Summary

A REVIEW OF THE MCPS REVITALIZATION/EXPANSION PROGRAM

OLO Report Number 2015-12

July 28, 2015

The County Council directed the Office of Legislative Oversight (OLO) to prepare a report on the Montgomery County Public Schools (MCPS) "Revitalization/Expansion" program. Formerly known as the "Modernization" program, Revitalization/Expansion is the MCPS program to replace aging school buildings.

Program Description and Policies

In the early 1990s, MCPS developed a standardized system, known as "Facilities Assessment with Criteria and Testing (FACT)," to evaluate the condition of school buildings. MCPS updated the FACT methodology and conducted a new round of assessments in 2011. The 2011 FACT methodology included educational and infrastructure criteria (known as "parameters"). The educational parameters evaluated school building characteristics that directly influence student instruction while the infrastructure criteria evaluated the physical condition of the school buildings.

The FACT scoring system did not include a comparison of school enrollment with school capacity. As a result, capacity considerations did not affect whether or when a particular school is included in the Revitalization/Expansion program. Other MCPS capital programs, most notably building additions, are intended to address capacity needs. However, once a school is scheduled for the Revitalization/Expansion, MCPS may include capacity considerations in the project scope to accommodate projected enrollment.

When developing the scope of a Revitalization/Expansion project, MCPS conducts a feasibility study to determine the scope of the capital improvement project. Most often, this process results in the complete or near complete reconstruction of the building. MCPS has concluded that building reconstruction frequently costs less than building renovation or rehabilitation.

The MCPS Educational Facilities Master Plan indicates that all schools assessed in 2011 eventually will be reconstructed in the order of their ranking in the Revitalization/Expansion program queue. MCPS has not re-assessed the schools in the Revitalization/Expansion program queue since 2011 nor does the school system plan to reassess the condition of these buildings in the future.

Age and Location of School Buildings and Reconstructions

MCPS school buildings (elementary, middle, and high schools) have an average age of 25.1 years. The oldest school buildings include reopened, special program, and holding schools.

OLO found that a geographic disparity, but not a bias, exists in the location of school reconstruction projects. School reconstructions track the MCPS construction history; the highest concentration of reconstructions have occurred in areas of the County with the oldest school buildings (Downcounty Consortium and Southwest Quad Cluster). This trend will start to shift in upcoming years as planned future reconstruction projects are focused in the Northwest and Northeast Quad Clusters.

Over the past several decades, the average age of an MCPS school at the time of reconstruction has increased from 32 years to 51 years. The CIP anticipates the 21 school Revitalization/Expansion projects programmed for 2016 through 2023 will have an average age of 46 years when completed. However, any changes to the planned schedule between 2016 and 2023 would alter the average age.

Executive Summary

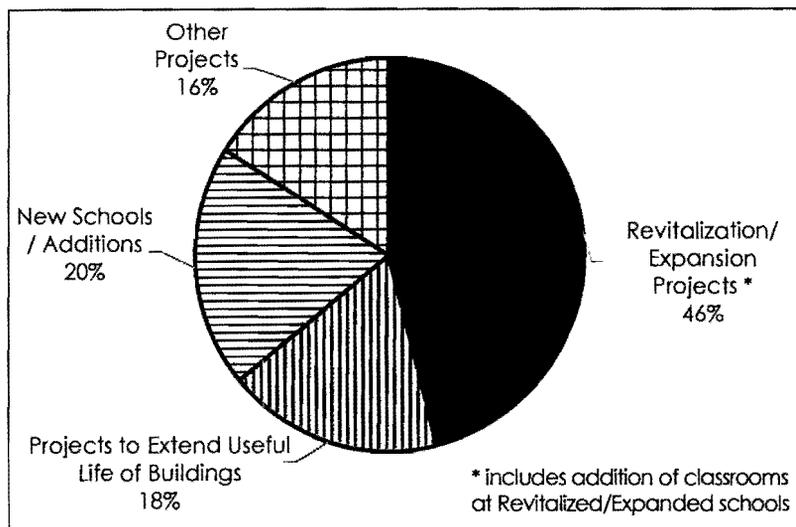
Capital Expenditures

In FY12-FY16, nearly half of all MCPS capital expenditures have been spent on the Revitalization/ Expansion capital program. The FY16 approved Capital Improvements Program (CIP) includes \$120.7 million for the Revitalization/ Expansion capital project. When a school undergoes improvements through the Revitalization/Expansion program, the capital project frequently includes the addition of classrooms and other space to accommodate projected enrollment.

The CIP also includes at least eleven projects to extend the useful life of schools through upgrade and replacement of major building systems (such as ventilation, fire suppression, and roofing).

For FY16, the CIP budgeted a total of \$49.8 million for these projects. Thus, the CIP assumes that MCPS will spend about two-and-a-half times as much in FY16 for school reconstructions (\$120.7 million) than it will spend for upgrades and improvements to major school building systems.

Allocation of MCPS Capital Expenditures, FY12-FY16



Analysis of 2011 FACT Assessment

OLO reviewed the 2011 FACT assessment methodology and scoring system that resulted in the current Revitalization/Expansion program queue. OLO found that the queue was determined through a quantitative process based on defined criteria. Moreover, OLO found no evidence of bias or subjective decision-making in the scoring of individual schools.

The educational program criteria identified deficiencies that would require significant structural and building design modifications to correct. As such, these criteria are pertinent in evaluating the need to reconstruct a building.

The physical infrastructure criteria addressed significant structural deficiencies in school buildings that are pertinent to a building reconstruction needs assessment. However, many of the physical infrastructure criteria involved methodologies that evaluated impermanent conditions. This approach is incompatible with establishment of a permanent queue that most frequently results in building reconstructions. For example, several schools in the reconstruction queue have undergone capital improvements to upgrade or replace key building systems. As the FACT assessments were a one-time undertaking, no mechanism exists to adjust scores to account for post-assessment capital improvements. In addition, the FACT methodology relied on one or two years of data to assign scores for measures that have the potential for significant annual variation (including utility consumption, maintenance costs, and community use). OLO found that FACT methodology did not survey a sufficient time span to correct for one-year data outliers or to identify shifting trends. OLO questions the use of measures that vary from year to year in establishing a queue that is intended to remain unchanged for at least two decades.

Further, OLO determined that the calculation of FACT scores included multiple mathematical errors. Correction of these errors would alter the results of the 2011 FACT assessments and the rankings of some schools in the reconstruction queue. Given the condensed range of scores, even a small change in FACT scoring could have a significant effect on the placement of a school in the queue.

Executive Summary

Modernizations in Other School Districts

OLO studied the school modernization practices in five other jurisdictions: Anne Arundel County, Baltimore County, Dallas, DeKalb County (GA), and Fairfax County. OLO selected school districts that have similar characteristics to Montgomery County in regard to public school enrollment and the age and number of school buildings. Similar to MCPS, each of the five school districts evaluate the physical condition and educational suitability of school buildings.

However, OLO observed significant differences between MCPS and the other districts. Each district employs a building evaluation process to assess the need for both school renovation and reconstruction. In these districts, the most common outcome of the assessment process is targeted renovations; only schools with the worst conditions are designated for reconstruction. Some school districts use a methodology called the Facility Condition Index to compare the cost of building renovation with the cost of building replacement. In comparison, MCPS Revitalization/ Expansion projects most frequently involve complete or near complete reconstruction of a school building.

Four of the five school districts studied include all school buildings – regardless of age – in their facility assessments. This practice allows for the development of a systemwide inventory of all school building deficiencies to be used for capital improvement planning purposes. In contrast, the FACT process employed by MCPS almost exclusively assessed buildings over a designated age.

MCPS has a longer planned duration for its school reconstruction queue than any school system studied by OLO. The current MCPS queue is intended to remain unchanged for at least two decades. The other school districts periodically (usually between five and ten years) re-assess the condition of their schools and revise their capital improvements plan accordingly.

Each of the other school districts make school building assessment reports available to the public via the internet. In 2011, MCPS posted the results of the FACT assessments on its website. At present, however, the school-specific FACT results are not available online.

Discussion Questions

Based on the findings of this report, OLO suggests that the Council discuss the following questions with MCPS representatives.

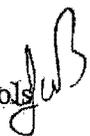
1. What should be the relationship between the Revitalization/Expansion program and other elements of the MCPS Capital Improvements Program including projects to extend the useful life of existing buildings (such as roof and HVAC replacements) and projects to address capacity issues (such as additions)?
2. What is the optimal relative allocation of capital dollars spent on school building reconstructions versus improvements that extend the useful life of school buildings?
3. What should be the planned useful life of a school building? Under what circumstances should a school building be fully reconstructed?
4. Should the 2011 FACT assessments be the basis for the sequencing of a school reconstruction queue that could extend for at least 20 years? Should MCPS periodically re-evaluate school conditions and their relative need for reconstruction?
5. What information about school building assessments should be made available to the public?

Office of the Superintendent of Schools
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

September 9, 2015.

MEMORANDUM

To: Members of the Board of Education

From: Larry A. Bowers, Interim Superintendent of Schools 

Subject: Revitalization/Expansion Program—Update

The purpose of this memorandum is to provide an update regarding the Montgomery County Public Schools (MCPS) Revitalization/Expansion Program.

On July 28, 2015, the Montgomery County Council Office of Legislative Oversight (OLO) released its study, *A Review of the MCPS Revitalization/ Expansion Program*. As with all OLO studies, MCPS was provided the opportunity to respond to the report's findings; Attachment A is my response to the OLO report.

My response acknowledges that two of the study's findings need to be addressed as we move forward with our revitalization/expansion program. These include the following:

- Errors found in the calculation of some school conditions that, when corrected, would change the Facilities Assessment and Criteria Testing (FACT) scores for schools and could change the order in the queue for their revitalization/expansion project.
- The length of the queue of schools is estimated to take 20 to 30 years to complete. The OLO report noted that conditions change as schools age, and this may require periodic reassessments and scoring.

The current FACT methodology was developed in cooperation with a stakeholder advisory committee—referred to as the “FACT Review Committee”—to determine the parameters to be measured in school assessments and their relative weights in the calculation of school scores. This effort was facilitated by EMG, Inc., a consultant that has broad expertise in facility assessments. The current FACT methodology and the list of 53 schools to be assessed was adopted by the Board of Education on July 8, 2010. Following the completion of assessments in 2011, a rank ordering of schools based on their FACT scores was adopted by the Board in fall 2011 as part of the action on the Fiscal Year 2013 Capital Budget and the FY 2013–2018 Capital Improvements Program.

I believe a comparable process of stakeholder engagement, followed by Board action, is appropriate to update the FACT methodology and the revitalization/expansion program process. Therefore, Mr. James Song, director, Department of Facilities Management, will reconvene the FACT Review Committee to review the FACT methodology and consider changes to parameters

measured in FACT scoring. In addition, the FACT Review Committee will be directed to address the concern of changing conditions of schools in the queue over time. Attachment B provides a list of members of the 2010–2011 FACT Review Committee. Current representatives from these agencies, as well as other stakeholder groups, including the Montgomery County Council of Parent Teacher Associations, Inc. will convene in fall 2015.

At the completion of the FACT Review Committee process, I will forward my recommendation to the Board on the FACT methodology and how the queue of schools will be addressed over time. I anticipate my recommendation will be presented to the Board in spring 2016. Based on my recommendation and Board action, reassessment of schools using the updated FACT methodology could be required. No changes will be made to the revitalization/expansion project schedule of schools assessed in 1996 and 2000 using the previous methodology.

Attachment C includes Appendices E and F from the FY 2016 Educational Facilities Master Plan.

- Appendix E provides a list of schools in the queue for revitalization. Schools with four digit scores are those assessed in 1996 and 2000. Schools with scores in italics are those assessed with the current FACT methodology in 2011.
- Appendix F provides a review of school assessment history and the scores of schools assessed in 2011 with the current FACT methodology. Eight of the elementary schools assessed in 2011 now have scheduled completion dates and also appear in Appendix E.

This memorandum will be provided to all principals and PTA leaders of schools in the queue for revitalization/expansion projects. If you have any questions, please contact Dr. Andrew M. Zuckerman, chief operating officer, at 301-279-3627, or Mr. James Song, director, Department of Facilities Management, at 240-314-1064.

LAB:AMZ:JS:lmr

Attachments

Copy to:

Dr. Navarro
Dr. Statham
Dr. Zuckerman
Mr. Civin
Mr. Edwards
Ms. Turner-Little
Mr. Crispell
Mr. Shuman
Mr. Song
Mr. Ikhelela



MONTGOMERY COUNTY PUBLIC SCHOOLS
 MARYLAND
 www.montgomeryschoolsmd.org

July 22, 2015

Dr. Chris Cihlar, Director
 Montgomery County Office of Legislative Oversight
 Stella B. Werner Council Office Building
 100 Maryland Avenue
 Rockville, Maryland 20850



Dear Dr. Cihlar:

Montgomery County Public Schools (MCPS) appreciates the work of the Office of Legislative Oversight (OLO) and the collaborative manner in which the authors of the report, *A Review of the MCPS Revitalization/Expansion Program*, worked with our staff. As an organization committed to the Malcolm Baldrige principles of performance excellence and continuous improvement, we are constantly searching for ways to improve and this report provides very useful information. Our goal always is to spend the resources entrusted to us in the most effective and efficient way possible, and we believe that our capital improvements program delivers exceptional quality at an excellent cost to the community. We look forward to discussing our revitalization/expansion program and the discussion questions raised by OLO in the report; however, we are concerned that aspects of the report offer an incomplete perspective on the MCPS revitalization/expansion program. Our main concerns fall into two important areas—the condition of schools constructed during the 1960s and 1970s and the cost effectiveness of our revitalization/expansion projects.

Condition of Schools in the Revitalization/Expansion Queue

From our perspective, the OLO report falls short in describing the condition of MCPS' older schools. These conditions frequently make rebuilding these facilities the only feasible and cost-effective approach.

As we have informed the County Council in the past, our current revitalization/expansion program is addressing schools constructed in the 1960s and 1970s, when MCPS was responding to rapidly increasing enrollment caused by the Baby Boom. In a 20-year period from 1952 to 1972, enrollment increased by almost 100,000 students and MCPS opened 158 schools. Unfortunately, the pace of growth and limited funds resulted in poor construction quality. Major improvements to school construction methods have been in place since the mid-1980s.

Challenging conditions at older schools include low ceiling heights that make it impossible to install duct work and wiring that meet today's standards. Also, structural systems frequently consist of block bearing walls with wood trusses, making reconfiguration of spaces extremely difficult and expensive. In addition, new building codes and environmental requirements make salvaging portions of older facilities difficult, if not impossible.

Office of the Superintendent of Schools

850 Hungerford Drive, Room 122 ♦ Rockville, Maryland 20850 ♦ 301-279-3381

As enrollment grows in MCPS, there also is the need to add capacity at most older schools. Site constraints and environmental requirements make it nearly impossible to add capacity and space to single-level schools. That means that efforts to increase capacity in a more compact manner must be accomplished through multi-story structures. However, our older schools typically cannot support additional floors due to poor construction. All of these conditions support our rebuilding approach to revitalization and expansion projects at this time. As we begin revitalization/expansion projects in schools built in the 1980s, the quality of the construction will allow us to take a different approach and not likely require as much rebuilding.

The Focus on Cost Effectiveness

It is critically important to note that MCPS always pursues the most cost-effective approach to capital projects, including the revitalization/expansion of schools. Unfortunately, the OLO report leaves the impression that the share of capital expenditures for the revitalization/expansion program is out of proportion with funds spent on new schools, classroom additions, and systemic maintenance projects. Importantly, the revitalization/expansion program itself comprehensively *adds* capacity and addresses systemic maintenance issues. The program accomplishes these improvements in a more cost-effective manner than separate projects to build classrooms and replacing obsolete building systems one at a time. During the past five Fiscal Years (FY) (FY 2012 through FY 2016), 17 of the 19 completed revitalization/expansion projects have increased the capacity of the schools, adding 180 classrooms that provide more than 4,000 seats for students. In addition, these new buildings had more effective, efficient systems that reduced maintenance and utility costs and lessened the environmental impact of our schools.

Another important point overlooked in the OLO report has to do with the progress MCPS is making in bringing Baby Boom-era schools up to modern standards. MCPS now is nearly midway through the upgrading of these schools. Once these schools are brought up to modern standards, a longer life span can be expected. Thereafter, the share of capital funds in the revitalization/expansion program will become smaller and systemic maintenance projects that extend the useful life of schools will continue to play a larger role.

The State of Maryland Public School Construction Program (PSCP) requires feasibility studies to determine the most cost-effective approach to upgrading aging facilities. The state guidelines define these projects as new construction, renovations, limited renovations, and replacements. In order to obtain state funding, Maryland requires school systems to provide a thorough cost analysis to justify replacement of a facility. All cost analyses submitted by MCPS for school replacements have been accepted by the state of Maryland and have served as justification for state funding—an important indicator that the state endorses our approach as the best course of action.

It also needs to be noted that not all revitalization/expansions completely rebuild schools. When the feasibility study conducted at the outset of the project indicates that it is cost effective to retain the existing structure, this approach is selected. In fact, over the past 15 years, about one-third of the district's 38 revitalization/expansion projects retained existing structures in lieu of a complete rebuild. This includes projects at Chevy Chase, Galway, Mill Creek Towne, Rock Creek Valley, and Wood Acres elementary schools; Montgomery Village, Parkland and Earle B. Wood middle schools; and Bethesda-Chevy Chase, Winston Churchill, Walter Johnson, and Rockville high schools. This likely will occur more frequently when MCPS begins revitalization/expansion projects on schools constructed in the 1980s.

Finally, the OLO report's effort to draw comparisons between the MCPS revitalization/expansion program and similar programs in other school districts ignores the additional local and state constraints that our projects must meet. For instance, MCPS is bound by the state of Maryland's Stormwater Management Program and the United States Green Building Council certification standards. These legislative requirements are designed to reduce runoff by limiting impervious surfaces and discourage large single-story footprint structures, including schools. These are worthy goals; however, they do increase the cost of our projects compared to other districts. For instance, Fairfax County Public Schools routinely builds additional square footage adjacent to existing buildings, which is something that MCPS frequently cannot do. Thus, these are not proper comparisons.

Summary

MCPS appreciates the issues raised in the report, although we are concerned that the OLO report does not adequately take into account how the original construction methods, and current enrollment levels, of aging schools make the MCPS revitalization/expansion program the most cost-effective and feasible approach. The OLO report does not recognize PSCP support for the MCPS revitalization/expansion program, as evidenced by its funding of schools that have been rebuilt. This is an important part of the discussion that we look forward to having in the future.

Our concerns notwithstanding, we welcome OLOs collaboration and review of our capital program. Two of the findings in the report will certainly assist our improvement efforts. First, the report identifies some errors made by a consultant in the scoring of schools using the FACT Assessment, and second, we will examine the issue of how conditions may change at schools between the time of their assessment and their revitalization/expansion. As the report notes, changes in condition are more likely the longer schools await revitalization/expansion—a likely outcome given recent funding levels. These are important findings for MCPS to consider, and they will be addressed in my *Recommended FY 2017 Capital Budget and FY 2017–2022 Capital Improvements Program*, which will be released in October 2015.

We look forward to continuing our conversations about this important topic with the County Council and our MCPS stakeholders.

Sincerely,



Larry A. Bowers
Interim Superintendent of Schools

LAB:AMZ:sln

Copy to:

Mr. Leggett	Mr. Crispell
Mr. Leventhal	Ms. Karamihas
Members of the Board of Education	Mr. Song
Dr. Navarro	Mr. Ikheloa
Dr. Statham	Ms. Bryant
Dr. Zuckerman	Mr. Trombka

FACT Review Committee Members

2010-2011

Mr. James Song	Chair/Director	MCPS Department of Facilities Management
Mr. Steve Augustino	CIP Chair	MCCPTA
Ms. Barbara Bice	Chief	MSDE, School Facilities Branch
Ms. Betsy R. Brown	Director	MCPS Department of Curriculum and Instruction
Ms. Cheryl A. Clark	Principal	Lois P. Rockwell Elementary School
Mr. Martin M. Creel	Director	MCPS Department of Enriched and Innovative Instruction
Mr. Bruce Crispell	Director	MCPS Division of Long-range Planning
Mr. Blaise De Fazio	Budget Analyst	Office of the Montgomery County Executive
Ms. Ginny Gong	Director	Interagency Coordinating Board
Mr. Robert B. Hellmuth	Director	MCPS Department of School Safety and Security
Mr. Roy L. Higgins	Director	MCPS Division of Maintenance
Ms. Joyce F. Jessell	Asst. to the Director	MCPS Division of Construction
Mrs. Dianne Jones	Director	MCPS Division of School Plant Operations
Ms. Adrienne L. Karamihas	Budget and Operations Manager	MCPS Department of Facilities Management
Mr. Keith Levchenko	Sr. Legislative Analyst	Montgomery County Council
Mr. Joseph Lavorgna	Former Acting Director	MCPS Department of Facilities Management
Ms. Essie McGuire	Legislative Analyst	Montgomery County Council
Mr. Steve Parker	Principal Architect	Grimm & Parker Architects
Mr. Richard Romer	Policy Analyst	Office of Montgomery County Council President Valerie Ervin
Ms. Kay Romero	Former President	MCCPTA
Mr. Gregg Stevens	Analyst	Department of Health and Human Services, Early Childhood
Ms. Deborah S. Szyfer	Senior Planner	MCPS Division of Long-range Planning
Ms. Kristin Tribble	President	MCCPTA
Mr. Todd M. Watkins	Director	MCPS Department of Transportation

Appendix E

Revitalization/Expansion Schedule for Assessed Schools

Schools	Year Built	Year Renovated	FACT Score	Schedule
Elementary				
Candlewood	1968		1489	1/2015
Rock Creek Forest	1950	1971	1492	1/2015
Wayside	1969		1502	8/2017
Brown Station	1969		1516	8/2017
Wheaton Woods	1952	1976	1525	8/2017
Potomac	1949	1976	1550	1/2020
Luxmanor	1966		1578	1/2020
Maryvale/Sandburg Learning Center	1969/1962		1578/414.05	1/2020
<i>Cold Spring</i>	<i>1972</i>		<i>382.04</i>	<i>8/2021</i>
<i>DuFief</i>	<i>1975</i>		<i>357.01</i>	<i>8/2021</i>
<i>Belmont</i>	<i>1974</i>		<i>349.28</i>	<i>8/2021</i>
<i>Stonegate</i>	<i>1971</i>		<i>334.95</i>	<i>8/2021</i>
<i>Damascus</i>	<i>1934</i>	<i>1980</i>	<i>331.89</i>	<i>1/2023</i>
<i>Twinbrook</i>	<i>1952</i>	<i>1986</i>	<i>330.58</i>	<i>1/2023</i>
<i>Summit Hall</i>	<i>1971</i>		<i>328.90</i>	<i>1/2023</i>
<i>Rosemary Hills</i>	<i>1956</i>	<i>1988</i>	<i>327.05</i>	<i>1/2023</i>
Middle				
William H. Farquhar	1968		1434	8/2016
Tilden/Rock Terrace School	1966/1950		1455/382.13	8/2020
Eastern	1951	1976	1472	8/2022
E. Brooke Lee	1966		1479	TBD
High				
Wheaton/ Thomas Edison	1954	1983	1220	1/2016 Building 8/2017 Building 8/2018 Site
Seneca Valley	1974		1254	8/2019 Building 8/2020 Site
Thomas S. Wootton	1970		1301	8/2021 Building 8/2022 Site
Poolesville	1953	1978	1362	8/2023 Building 8/2024 Site
Col. Zadok Magruder	1970		1471	TBD
Damascus	1950	1978	1496	TBD
Northwood	1956	2004	****	TBD

Note: Schools were assessed in 1992, 1996, and 1999. Assessments were completed on the remaining 34 elementary and 11 middle schools during December 2010 and June 2011. (These schools are listed above in italics.) Four holding centers, three Special Education Learning Centers, and one Alternative Program Center also were assessed during December 2010 and June 2011. Schools will be added to the revitalization/expansion list once planning and or construction expenditures are included in the six-year Capital Improvements Program. See Appendix F for a complete list of schools that were assessed in the 2010–2011 school year.

Projects that were assessed prior to December 2010 and do not have planning and/or construction expenditures in the Adopted FY 2016 Capital Budget and Amendments to the FY 2015–2020 CIP have completion dates to be determined (TBD). This TBD status will be revised in a future CIP.

Appendix F

Assessing Schools for Revitalization/Expansion (Formerly Known as Modernizations)

On December 7, 2010, the Board of Education adopted Policy FKB, *Sustaining and Modernizing Montgomery County Public Schools (MCPS) Facilities*. This policy updated Policy FKB, *Modernization/Renovation* that was adopted in 1992 and had never been updated by the Board of Education. The updated version of Policy FKB provides for a new emphasis on sustaining Montgomery County Public Schools (MCPS) facilities in good condition through systematic life-cycle asset replacement. At the same time, the policy recognizes the need to modernize schools as a facility reaches the end of its useful lifecycle.

As part of the Superintendent's Recommended FY 2015 Capital Budget and the FY 2015–2020 Capital Improvements Program, the name of “modernizations” was changed to “revitalizations/expansions” to accurately reflect the scope of work detailed in the MCPS educational specifications. In order to implement Policy FKB it was necessary to have an updated means of assessing and prioritizing schools for revitalization/expansion projects.

While a primary factor in the need to revitalize a school is the age of the facility, a number of other factors also are considered in assessing the condition of a school. When the MCPS modernization program began in the early 1990s, a methodology known as Facilities Assessment with Criteria and Testing (FACT) was developed. The original FACT methodology was applied to three groups of school assessments—the first group in FY 1993, the second in FY 1996 and the third in FY 2000. Through the 2011–2012 school year, these assessments resulted in the revitalization/expansion of 35 elementary schools, 8 middle schools, and 8 high schools. Another 12 elementary schools, 5 middle schools, and 9 high schools are now either under construction, in design, or are in the queue for revitalization/expansion. The list of these schools is provided in Appendix E. The list of elementary schools from this queue for revitalization/expansion is almost complete, with the last three elementary schools in the queue scheduled for completion in January 2019. As a result, it was necessary to assess additional elementary and secondary schools that are aging and in need of revitalization/expansion. A total of 53 facilities were identified for FACT assessments. The new list includes facilities that were built prior to the mid-1980s and had never been revitalized, although some of these schools may have had some renovation work performed.

Beginning in spring 2010, a process to update the FACT methodology was undertaken. A multi-stakeholder committee reviewed and prepared recommendations to update the methodology. The Board of Education supported the recommendations of the committee by adopting the updated FACT methodology on July 8, 2010. The updated FACT methodology describes the criteria to assess the condition of schools, the measures for each criterion, and the relative weights to apply to various criteria to obtain an overall score for each facility. Consultants EMG, Inc. provided technical expertise in the development of the detailed revised FACT methodology and the firm was responsible for conducting the assessments.

The old FACT methodology scoring system used a 2,000 point scale and schools in worse condition scored lower while schools in better condition received a higher score. In contrast, the new FACT methodology uses a 600 points scale in which the buildings in worse condition received higher scores and the buildings in better condition received lower scores. “Educational Program” parameters such as educational specifications, open plan schools, and controlled access were assigned 300 points and “Physical Infrastructure” parameters, such as facility design guidelines, utility and energy efficiency, maintenance cost, and community use of public facilities, were assigned 300 points. The final report of the assessments, including the facility scores, was presented to the Board of Education on October 11, 2011.

The table on the following page presents the scores for each school in rank order for elementary schools and secondary schools. As the current queue of schools scheduled for revitalization/expansion projects is completed (see Appendix E), schools on the following page will be placed in the revitalization/expansion queue according to their score. The movement of the newly assessed schools to the revitalization/expansion queue will occur as planning and construction funds are programmed in the six year CIP period. At that time a completion date for the revitalization/expansion project also will be provided. The purpose of the following list is to show the rank order and scores of all the schools that were recently assessed.

In addition to 34 elementary schools and 11 middle schools, the recent FACT assessments included three special education program centers—Stephen Knolls, Rock Terrace, and Carl Sandburg—the Blair G. Ewing Center, and the four elementary school holding centers. Stephen Knolls is placed in the

ATTACHMENT C

list of elementary schools on the following page and Rock Terrace and the Blair G. Ewing Center are placed in the list of secondary schools. The Carl Sandburg Learning Center is not included on the following table because of the adopted plan to collocate this school at Maryvale Elementary School as part of the revitalization/expansion project. Finally, the elementary school holding centers are not included on the following table because improvements to these facilities will be addressed through a separate capital project.

FACT* Scores

Rank	Elementary Schools	Total FACT Score Maximum Score = 600	Rank	Secondary Schools	Total FACT Score Maximum Score = 600
1	Cold Spring Elementary School	382.04	1	Rock Terrace School	382.13
2	DuFief Elementary School	357.01	2	Blair G. Ewing Center	380.99
3	Belmont Elementary School	349.28	3	Banneker Middle School	341.88
4	Stonegate Elementary School	334.95	4	Argyle Middle School	322.24
5	Damascus Elementary School	331.89	5	Newport Mill Middle School	315.72
6	Twinbrook Elementary School	330.58	6	Ridgeview Middle School	309.03
7	Summit Hall Elementary School	328.90	7	Silver Spring Intl. Middle School	301.37
8	Rosemary Hills Elementary School	327.05	8	Neelsville Middle School	291.74
9	Burnt Mills Elementary School	318.29	9	Baker Middle School	279.58
10	Poolesville Elementary School	314.42	10	Frost Middle School	255.22
11	Woodfield Elementary School	314.09	11	Loiederman Middle School	254.66
12	South Lake Elementary School	302.69	12	Redland Middle School	245.35
13	Cedar Grove Elementary School	302.46	13	North Bethesda Middle School	240.74
14	Greenwood Elementary School	300.47			
15	Piney Branch Elementary School	294.73			
16	Whetstone Elementary School	293.22			
17	Takoma Park Elementary School	292.86			
18	Gaithersburg Elementary School	290.88			
19	Strathmore Elementary School	289.46			
20	Diamond Elementary School	286.57			
21	Fox Chapel Elementary School	278.71			
22	Stephen Knolls School	276.56			
23	East Silver Spring Elementary School	276.41			
24	JoAnn Leleck Elementary School at Broad Acres	275.88			
25	Woodlin Elementary School	273.72			
26	Germantown Elementary School	272.61			
27	Fallsmead Elementary School	267.41			
28	Watkins Mill Elementary School	266.33			
29	Fields Road Elementary School	257.61			
30	Stedwick Elementary School	249.55			
31	Cloverly Elementary School	244.31			
32	Darnestown Elementary School	241.67			
33	Washington Grove Elementary School	227.68			
34	Bradley Hills Elementary School	212.04			
35	Sherwood Elementary School	210.92			

* FACT refers to the Facilities Assessment with Criteria and Testing methodology for evaluating and scoring the condition of schools. The higher the FACT score the worse the condition of a facility. These assessments were completed during the 2010-11 school year.