

UNDERSTANDING CLASS SIZE TRENDS IN MONTGOMERY COUNTY PUBLIC SCHOOLS



OFFICE OF LEGISLATIVE OVERSIGHT
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This Office of Legislative Oversight report examines the trends and costs associated with the Montgomery County Public Schools' Class Size Initiative. It reviews data on staffing, enrollment, and class size calculations; and compares data on actual class sizes to assumptions used in budget preparation and maximum class size guidelines adopted by the Board of Education.

Based on the information compiled and reviewed in this report, OLO recommends three areas for Council discussion with MCPS representatives:

- MCPS' goals and priorities regarding average class sizes;
- The short and long-term costs of implementing changes to class size; and
- The feasibility of providing the Council with additional class size information both for general education and special education.

THE COMPONENTS AND COST OF THE CLASS SIZE INITIATIVE

Between FY01 and FY08, MCPS' budgets, as approved by the Council, funded an additional 584 classroom teacher positions (FTEs) to implement the Class Size Initiative. The Initiative was structured to reduce class sizes across the school system and included the following components:

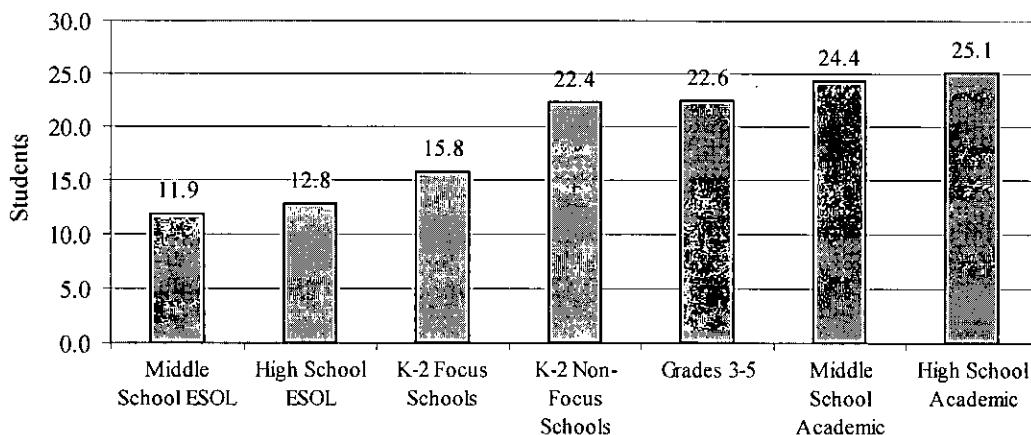
- 151 teachers to reduce elementary class sizes (\$8.2 million);
- 149.5 teachers to reduce secondary class sizes (\$7.4 million);
- 108 teachers to reduce special education class sizes (\$4.4 million);
- 9 teachers to eliminate combination classes (\$510K); and
- 166.5 teachers to reduce Grade K-2 class sizes in focus schools (\$7.5 million).

Since FY01, the cumulative cost of the Class Size Initiative has exceeded \$139 million. This calculation includes the \$28 million in new costs (itemized above) plus \$111 million in ongoing costs for continuing the positions added each year. This amount underestimates the total cost because it excludes the cost of employee benefits and does not adjust for annual compensation increases.

ELEMENTARY AND SECONDARY CLASS SIZE TRENDS

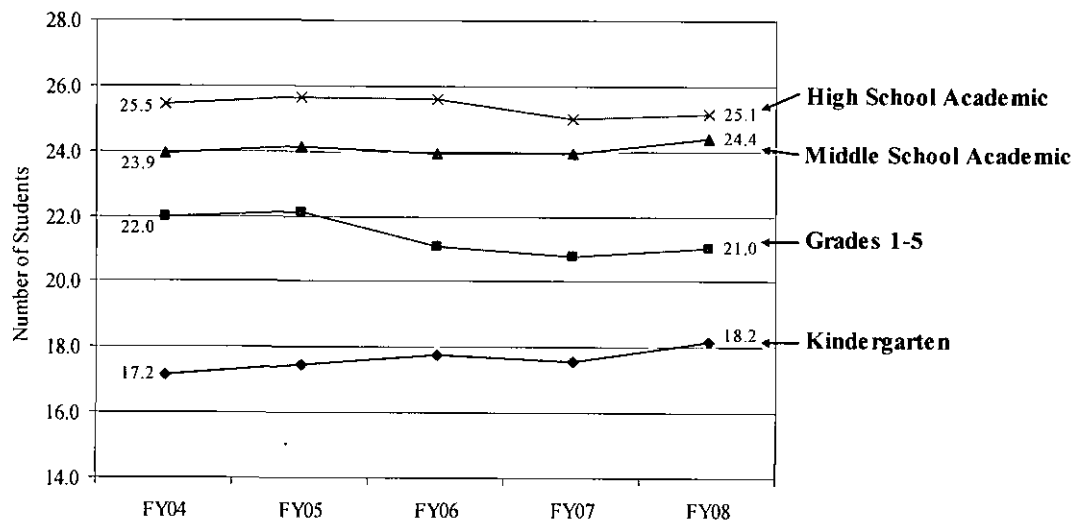
The exhibit below shows average class sizes for different school levels/programs in FY08. Comparatively, ESOL classes are the smallest and high school academic courses are the largest.

Average Elementary, Middle, and High School Class Sizes, FY08



Data for the most recent five-year period show only small fluctuations in average class sizes. The exhibit below shows the changes in average class sizes for Kindergarten, Grades 1-5, Middle School Academic, and High School Academic courses.

Trends in Average Elementary, Middle, and High School Class Sizes, FY04 - FY08



Focus vs. Non-Focus Schools. A key component of MCPS' Class Size Initiative has been to reduce Grade K-2 average class sizes in focus (high poverty) schools. Average class size data for the past five fiscal years show that the average Grades K-2 class sizes are consistently smaller in focus compared to non-focus schools. Specifically, between FY04 and FY08, when compared to non-focus school classes:

- Average Kindergarten classes in focus schools are smaller by 5-6 students;
- Average Grade 1 classes in focus schools are smaller by 6-7 students; and
- Average Grade 2 classes in focus schools are smaller by 7-8 students.

Elementary Student Re-groupings. When a support teacher (e.g., ESOL teacher, reading initiative teacher) works with a subset of students, the homeroom class size is temporarily reduced. Similarly, when students assigned to a special education teacher join a general education homeroom for part of the day, this temporarily increases the homeroom class size if a special educator is not assigned to co-teach that class. MCPS' Official Class Size Report for elementary grades rely solely on homeroom assignments, and do not capture the changes in teacher-to-student ratios that occur during the school day as a result of support teachers and special education inclusion.

OLO's site visits found that the impact of support teachers on class sizes was especially evident during reading and math blocks, the delivery of reading interventions to students below grade level and ESOL students, and with the inclusion of students with disabilities into general education classrooms. However, because this impact is not consistent throughout the school day, it is also true that homeroom teachers spend time with their full class as it is captured in MCPS' class size data.

Oversized Classes. Data on the percent of "oversized" classes (i.e., classes with enrollments exceeding the maximum class size guidelines) between FY06 and FY08 show that:

- The percent of oversized Grades K-5 classes ranges between 1.5% and 2.7% of all classes. Comparatively, Grade 3 consistently had the highest percent of oversized classes; in FY08, 4% (17 classes) of all Grade 3 classes had enrollments that exceeded the BOE's guidelines.

- The percent of oversized academic middle school classes ranged between 4.2% and 5.4% of all academic classes combined. Comparatively, Required English courses consistently had the largest percent of oversized classes. In FY08, 11.1% (132 classes) of all Required English classes in middle schools had enrollments that exceeded the BOE's guidelines.
- When combined, the percent of oversized high school classes ranged between 4% and 6.4%. Similar to middle school, Required English high school courses consistently had the largest percent of oversized classes: 16.3% (271 classes) of all Required English classes in FY08.

MCPS' Class Size Budget Assumptions and Guidelines. MCPS prepares its operating and capital budget requests based on assumptions of average class sizes across the school system. The data show that systemwide calculations of actual average class sizes closely align (within one student) with budgeted average class sizes for all grade levels. Further, the class size assumptions used to prepare MCPS' budget requests are consistently lower than the maximum class size guidelines adopted by the Board of Education.

COMPARING TEACHER STAFFING, ENROLLMENT, AND CLASS SIZE TRENDS

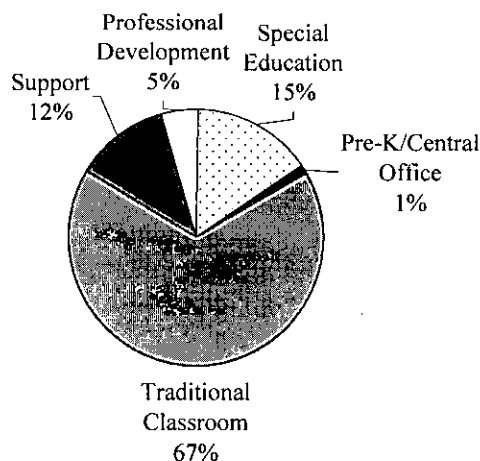
Between FY05-FY08, the total number of 10-month teachers increased by 5%. During this time, enrollment decreased 1% and average class sizes across grade levels declined by 2% (0.5 students).

The teachers "counted" for the Official Class Size Report represent approximately two-thirds of MCPS' 10-month classroom teacher workforce. For elementary schools, the calculations only "count" traditional classroom teachers; for secondary schools, they include most traditional classroom teachers and some support teachers. The types of teachers not included in MCPS' Official Class Size Report calculations include: professional development teachers; elementary school support teachers; special educators; Pre-K teachers; and teachers assigned to central office or field-based positions.

In recent years, the rate of growth in the number of traditional classroom teachers has been comparatively less than that among support and professional development teachers. Specifically, between FY05-FY08, the number of traditional classroom teachers increased 2.5%, while the number of support teachers increased 12% and the number of professional development teachers increased 7%.

All 10-Month Teaching Positions by Function, FY08

N=10,261 FTEs



OFFICE OF LEGISLATIVE OVERSIGHT REPORT 2008-8

Understanding Class Size Trends in Montgomery County Public Schools

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A	An Explanation of OLO's Class Size Calculations
B	FY08 and FY09 Staffing Allocation Memos to School Principals and Staffing Guidelines
C	Board of Education Policy FAA – Long-Range Educational Facilities Planning MCPS Regulation FAA-RA – Long-Range Educational Facilities Planning
D	Superintendent's Recommendation for Elementary School Capacity Calculations
E	"Oversized" Elementary Classes, FY04 – FY08
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G	Adopted FY08 Operating Budget and Personnel Complement, Excerpt from Chapter 1, K-12 Instruction
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This Appendix is available on on-line at: <http://www.montgomerycountymd.gov/olo>

CHAPTER I: Authority, Scope, and Organization

A. Authority

Council Resolution 16-260, *FY 2008 Work Program for the Office of Legislative Oversight*, adopted July 31, 2007.

B. Scope, Purpose, and Methodology

The purpose of this Office of Legislative Oversight (OLO) report is to improve the Council's understanding of the costs and trends associated with Montgomery County Public Schools' Class Size Initiative. Between FY01 and FY08, the approved MCPS budget funded the Class Size Initiative, which added 584 teaching positions for a cumulative cost of more than \$139 million. The Class Size Initiative was aimed at reducing class sizes throughout the school system, with particular attention to reducing elementary class sizes, especially in Grades K-2 in focus schools.

Annually, MCPS publishes an Official Class Size Report for the Board of Education. The Official Class Size Report provides annual class size data by school level and content area/grade level, and information on the number of oversized classes. This OLO report provides additional information on the costs and trends associated with the Class Size Initiative; it includes:

- A review of the costs and components of MCPS' Class Size Initiative;
- A description of MCPS' class size measures, assumptions, and guidelines;
- A comparison of systemwide data on average class size to patterns in six randomly selected schools;
- An analysis of how MCPS average class size patterns compare to the school system's budgeting assumptions and maximum class size guidelines; and
- A review of trends in teacher staffing, enrollment, and class size.

The report concludes with findings and recommendations for Council discussion to enhance the Council's oversight of County resources targeted at reducing MCPS class sizes.

Methodology: OLO Senior Legislative Analyst Elaine Bonner-Tompkins and Research Associate Sarah Downie prepared this report with production assistance from Teri Busch. OLO's method for developing this report included:

- Reviewing budget, appropriation, and expenditure data provided by MCPS;
- Consulting with key MCPS staff;
- Reviewing documents on County and State guidelines for optimal class sizes; and
- Site visits to two elementary schools to better understand the impact of support teachers and special education inclusion on average class sizes.

For Chapters IV and V on MCPS class size data, OLO obtained FY04 to FY08 data from MCPS to replicate their calculations of average class sizes and to provide more detail regarding MCPS class size data than presented in MCPS' Official Class Size Report. There are slight variations between the dataset MCPS used to calculate class size statistics and the dataset provided to OLO. As a result, OLO calculates a larger number of "oversized" secondary classes, which in turn results in slightly higher average class sizes than MCPS' calculations. The differences, described in Appendix A are minimal and do not substantially impact the analysis or findings.

C. Organization of Report

Chapter II, Background on MCPS' Class Size Initiative, describes trends in marginal and ongoing costs of teaching positions funded to support MCPS' class size initiative between FY01 and FY08.

Chapter III, MCPS Class Size Assumptions and Guidelines, describes the components of MCPS' operating and capital budgets that shape MCPS' class size trends.

Chapter IV, Elementary Class Size Data, describes how MCPS calculates elementary class sizes, trends in elementary average class sizes, comparisons between systemwide averages and two sample elementary schools, and comparisons of MCPS class sizes to its budget assumptions for average class sizes and maximum class size guidelines.

Chapter V, Secondary Class Size Data, describes how MCPS calculates secondary class sizes; trends in secondary average class sizes; comparisons between systemwide averages, two sample middle schools, and two sample high schools; and comparisons of MCPS class sizes to its budget assumptions for average class sizes and maximum class size guidelines.

Chapter VI, Staffing, Enrollment, and Class Size Calculations, describes MCPS staffing trends among budgeted "classroom" teacher positions as compared to changes in student enrollment and average class sizes during this time frame. This chapter also presents observations from two sample schools on the potential impact of support teachers and special education inclusion on elementary average class sizes during the school day.

Chapter VII, Summary of Findings, presents OLO's 12 project findings in four areas: background on MCPS' Class Size Initiative; class size budget assumptions, guidelines, and calculations; elementary and secondary class size trends; and comparisons between teacher staffing, student enrollment, and class size trends.

Chapter VIII, Recommended Discussion Issues, concludes this report with a set of recommended discussion issues aimed at improving the Council's understanding and oversight of funds aimed at reducing MCPS class sizes.

The **Appendix** includes MCPS' Official Class Size Report (FY04 – FY08), relevant Board of Education policies, and MCPS' budget staffing guidelines.

D. Acknowledgements

OLO received a high level of cooperation from everyone involved in this study. In particular, OLO thanks Larry Bowers, Chief Operating Officer, and Nicola Diamond Milwit, Assistant to the Chief Operating Officer. OLO also thanks the principals of Glenallan and Diamond Elementary Schools (Ronnie Fields and Carol Lange) and their staffs for providing their perspectives regarding the impact of support teachers on elementary school class sizes. We appreciate the time and effort everyone extended to OLO to improve our understanding of this complicated issue.

CHAPTER II: Background on MCPS' Class Size Initiative

This chapter provides some context for MCPS' average class size assumptions, guidelines, and trends that are described in later chapters. Part A describes MCPS' current Class Size Initiative that began in FY01; and Part B provides background on MCPS' class sizes in the 1990s.

Chapter Summary

- The Board of Education (BOE) and MCPS began efforts to reduce average class sizes in the 1990s as student enrollment and average class sizes increased across grade levels.
- In FY01, MCPS adopted its current Class Size Initiative to reduce elementary and secondary average class sizes in general education, eliminate combination classes, reduce special education class sizes, and reduce Grades K-2 class sizes in high poverty "focus" schools.
- Between FY01 and FY08, MCPS hired 584 new teachers at an initial cost of \$28 million to fund the Class Size Initiative. Assuming constant costs to continue new class size positions funded during this time frame, the cumulative cost of the Class Size Initiative has been more than \$139 million.
- The Board of Education's FY09 budget request proposes the funding of 16.3 additional classroom teachers at an initial cost of \$1.2 million to expand the number of focus schools and to reduce elementary class sizes impacted by special education inclusion.

A. MCPS' Class Size Initiative

MCPS' current Class Size Initiative encompasses five components implemented by MCPS since FY01. The five components were aimed collectively at reducing average class sizes throughout the school system; each included the hiring of additional teachers to reduce specific categories of class sizes as described below.

Elementary class size reduction: This component included the hiring of additional teachers for Grades K-6 to reduce average class sizes. Since FY06, elementary class size reductions also included hiring teachers to enable MCPS to reduce its maximum class size guidelines by two students, from 28 to 26 students in Grades 1-3, and from 30 to 28 students in Grades 4-5.

Secondary class size reduction: This component included the hiring of additional teachers for the secondary grades to reduce average class sizes and the number of "oversized" Required English classes (defined as classes with more than 28 students) and other "oversized" academic classes (defined as classes with more than 32 students), such as Mathematics and Science courses. It also included a middle school and 9th grade math initiative and additional staff for Downcounty Consortium high schools to reduce academic class sizes.

Elimination of combination classes: This component included the hiring of additional teachers to end the practice of offering combination classes for Grades 1 and 2, Grades 2 and 3, Grades 3 and 4, Grades 4 and 5, and Grades 5 and 6 (with the exception of some special programs with low enrollment).

Special education class size reduction: This component included the hiring of additional teachers to reduce average class sizes for special education classes.

Grades K-2 class size reduction: This component included the hiring of additional teachers in focus schools (i.e., high poverty schools)¹ to meet average class size ratios of 15:1 in Kindergarten and 17:1 in Grades 1 and 2.

A summary of new teacher positions and expenditures funded by the MCPS adopted budget to implement these five components of the Class Size Initiative from FY01 to FY08 follows:

- The FY01 budget included \$883K for 21.5 new positions to reduce secondary class sizes; and \$2.3 million for 57.0 new positions to reduce Grades K-2 class sizes in focus schools.
- The FY02 budget included \$1.1 million for 25 new positions to reduce elementary class sizes; \$2.85 million for 63 new positions to reduce secondary class sizes; \$1.9 million for 50 new positions to reduce special education class sizes; and \$4.0 million for 87.5 new positions to reduce Grades K-2 class sizes in focus schools.
- The FY03 budget included \$1.1 million for 22 new positions to further reduce Grades K-2 class sizes in focus schools.
- In FY04 and FY05, no new positions were funded to reduce MCPS class sizes.
- The FY06 budget included \$6.7 million for 120 new positions to reduce elementary class sizes; \$2.2 million for 40 new positions to reduce secondary class sizes; and \$510K for nine new positions to reduce the number of combination classes in the elementary grades.
- The FY07 budget included \$174K for three new positions to reduce elementary class sizes; \$1.45 million for 25 new positions to maintain secondary class sizes while increasing special education inclusion; and \$2.5 million for 58.2 new positions for special education classes.
- The FY08 budget included \$174K for three new positions for elementary art, music, and physical education teachers to reduce class sizes.

Exhibit 1 (page 6) compares new and ongoing class size costs for MCPS from FY01 to FY08; Table 1 (page 6) summarizes annual new positions and expenditures. In sum, MCPS hired 584.2 new teachers at an initial cost of \$28.1 million to fund the Class Size Initiative. Assuming constant costs to continue new class size positions funded during this time frame, the cumulative cost of the MCPS Class Size Initiative between FY01 and FY08 was \$138.9 million. Because this estimate does not include the annual increases in salaries or cost of employee benefits, it underestimates the actual cumulative cost of the MCPS Class Size Initiative from FY01 to FY08.

¹ Schools were identified as focus schools if the number of students eligible for Free and Reduced Price Meals System (FARMS) assistance exceeded the systemwide median.

Exhibit 1: New and Estimated Ongoing Funding for Class Size Initiative, FY01-FY08

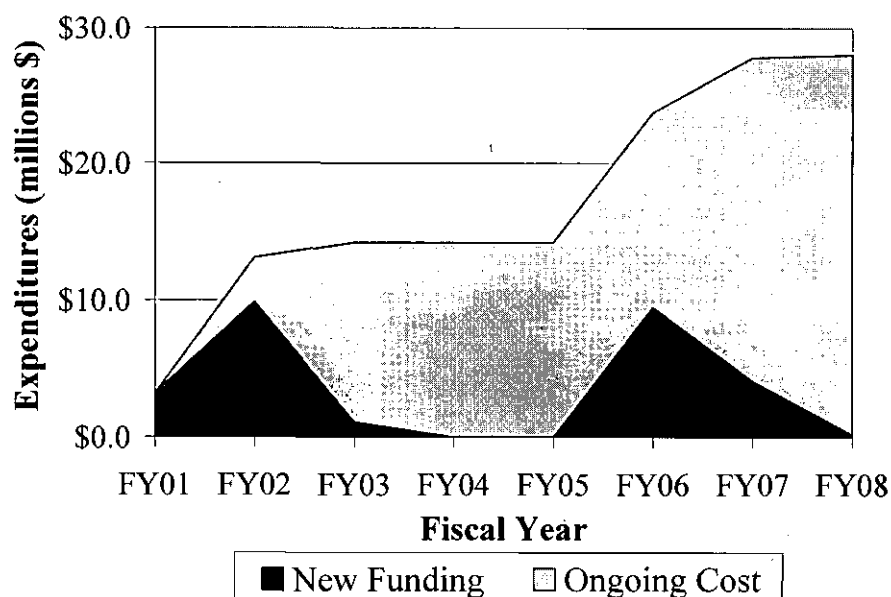


Table 1: Class Size Positions and New and Ongoing Expenditures, FY01 – FY08²

	FY01	FY02	FY03	FY04	FY05	FY06	FY07	FY08	Total
Number of New Class Size FTEs (i.e., teachers)									
Elementary		25.0				120.0	3.0	3.0	151.0
Secondary	21.5	63.0				40.0	25.0		149.5
Combination						9.0			9.0
Special Ed.		50.0					58.2		108.2
K-2 Focus	57.0	87.5	22.0						166.5
TOTAL	78.5	225.5	22.0	0.0	0.0	169.0	86.2	3.0	584.2
New Expenditures (\$ in millions, rounded)									
Elementary		\$1.1				\$6.7	\$0.2	\$0.2	\$8.2
Secondary	\$0.9	\$2.9				\$2.2	\$1.5		\$7.4
Combination						\$0.5			\$0.5
Special Ed.		\$1.9					\$2.5		\$4.4
K-2 Focus	\$2.3	\$4.0	\$1.1						\$7.5
Ongoing Expenditures (\$ in millions, rounded)									
New Costs	\$3.2	\$9.9	\$1.1			\$9.5	\$4.2	\$0.2	\$28.1
Same Service	\$0.0	\$3.2	\$13.1	\$14.3	\$14.3	\$14.3	\$23.8	\$27.9	\$110.8
Sum of Costs	\$3.2	\$13.1	\$14.3	\$14.3	\$14.3	\$23.8	\$27.9	\$28.1	\$138.9

Source: OLO analysis of MCPS budget data

² This information excludes the number of positions that MCPS reduced each year as a result of the agency's annual Program Efficiency, Abandonment, and Redirection (PEAR) process, some of which may have affected class sizes.

FY09 Recommended Operating Budget. The Board of Education's FY09 budget request includes adding positions to expand the number of focus schools to include three schools that experienced the greatest increase in poverty. Four schools that have had declines in poverty will continue to be focus schools but will each lose a 0.5 teacher position. This resulted in a net increase of 6.25 positions for focus schools. In addition, the budget includes an increase of 10.0 positions to reduce elementary class sizes impacted by including students with disabilities.

If the Council funds the BOE's request for these additional 16.3 teachers, MCPS will expend another \$1.2 million on the Class Size Initiative, as summarized in Table 2. This new expense would bring the total FY01-FY09 cost of the Class Size Initiative to at least \$168.2 million.

Table 2: Class Size Positions and Expenditures, FY01 – FY09

	FY01 – FY08 Total	BOE's Recommended FY09 Operating Budget*	FY01 – FY09 Total
Number of FTEs			
Class Size Initiative	584.2	16.3	610.5
Expenditures (\$ in millions, rounded)			
New Costs	\$28.1	\$1.2	\$29.3
Continuation of Service	\$110.8	\$28.1	\$138.9
Sum of Costs	\$138.9	\$29.3	\$168.2

Sources: OLO analysis of MCPS budget data and FY09 MCPS Recommended Operating Budget

* Adopted by the Board of Education, February 2008

B. Background on MCPS Class Sizes in the 1990s

During the 1990s, MCPS student enrollment mushroomed and average class sizes increased. As noted in Table 3, average elementary class sizes for regular education increased between FY91 and FY96 as student enrollment increased. More specifically, a 15% increase in Grade 1-6 enrollment was associated with a 4% increase in average class sizes.

Table 3: Elementary General Education Enrollment and Average Class Size, FY91 – FY96

	FY91	FY96	# Change	% Change
Kindergarten Enrollment	8,696	9,428	732	8.4%
Average Class Size	21.6	22.0	0.4	1.9%
Grade 1- 6 Enrollment	41,291	47,554	6,263	15.2%
Average Class Sizes				
Grade 1	23.2	24.0	0.8	3.4%
Grade 2	23.6	24.6	1.0	4.2%
Grade 3	24.3	25.4	1.1	4.5%
Grade 4	24.3	25.7	1.4	5.8%
Grade 5	25.4	26.0	0.6	2.4%
Grade 6	24.9	26.3	1.4	5.6%
Total 1-6 and Combination	24.1	25.1	1.0	4.1%

Source: MCPS Class Size Report, FY98; OLO 1998 Class Size Report; MCPS Division of Long-range Planning

In addition to enrollment increases, budget reductions in FY95 resulted in 123.8 fewer classroom teacher positions, a change which also contributed to increases in average class sizes. To minimize the number of oversized classes, MCPS supported and expanded a number of initiatives in the late 1990s to reduce average class sizes. More specifically:

- With the FY98 operating budget, the Board of Education adopted a three-year initiative to reduce the number of oversized classes by restoring the 123.8 teacher positions that were eliminated in FY95.³ The plan called for budgeting \$1.6 million in fiscal years 1998, 1999, and 2000 for additional classroom teachers. For the first year of the initiative, the Board's approved budget funded 41.2 additional classroom teachers.
- The FY99 budget included \$22.1 million for improvements that included funding to reduce class sizes in reading and mathematics. The initiative added 104 classroom teacher positions in elementary schools to reduce the maximum class size for reading instruction in Grades 1 and 2 to fifteen students for every teacher. At the secondary level, 33 teacher positions were added in middle schools and 59.8 positions in high schools to advance mathematics achievement and to reduce oversized classes. Additionally, the Board added 41.2 teachers to implement the second year of its three-year initiative to restore staffing to 1995 levels.

As a result of these initiatives, MCPS was able to lower average class sizes despite increases in student enrollment. As noted in Table 4, average elementary class sizes decreased by 8% from FY96 to FY01 compared to a 5.5% increase in student enrollment; and average secondary class sizes decreased by 2-3% despite a 17% increase in enrollment.

Table 4: General Education Enrollment and Average Class Size, FY96 – FY01

	FY96	FY98	FY01	FY96-FY01 Change	
				#	%
Elementary					
Enrollment	47,554	48,828	50,187	2,633	5.5%
Average Class Sizes					
Grade 1	24.0	23.8	20.8	-3.2	-13.3%
Grade 2	24.6	24.5	21.7	-2.9	-11.8%
Grade 3	25.4	25.3	23.9	-1.5	-5.9%
Grade 4	25.7	25.6	24.3	-1.4	-5.4%
Grade 5	26.0	25.3	24.7	-1.3	-5.0%
Grade 6	26.3	24.0	23.9	-2.4	-9.1%
Total 1-6 and Combination	25.1	24.8	23.0	-2.1	-8.4%
Secondary					
Enrollment	55,814	58,673	65,352	9,538	17.1%
Average Class Sizes					
Middle - English	23.9	24.1	23.3	-0.6	-2.5%
Middle - Other Academic	25.0	25.1	24.2	-0.8	-3.2%
High - English	25.1	25.4	24.7	-0.4	-1.6%
High - Other Academic	26.2	26.5	25.5	-0.7	-2.7%

Sources: MCPS Class Size Report, FY98; OLO 1998 Class Size Report; MCPS Division of Long-range Planning

³1998 OLO Class Size Report

CHAPTER III: MCPS Class Size Assumptions and Guidelines

This chapter provides an overview of MCPS' class size assumptions and guidelines that are published in the school system's two primary budget documents: the MCPS Operating Budget, and the MCPS Capital Improvements Program and Capital Budget.

- Part A reviews the class size assumptions and guidelines in MCPS' Operating Budget;
- Part B reviews the program capacity (student-to-classroom ratios) assumptions in the MCPS Capital Improvements Program and Capital Budget; and
- Part C compares the different measures of class size used in these documents.

Chapter Summary

- MCPS uses different but closely aligned assumptions of average class sizes to develop the school system's operating and capital budgets.
- MCPS' operating budget assumptions for average class sizes are based on budgeted average class size, projected student enrollment, and the Board of Education's maximum class size guidelines.
- MCPS' capital budget assumptions for average class sizes are based on recommended student to classroom ratios by grade level and program that MCPS uses to calculate program capacity.
- MCPS' allocation of staff to schools is based on the school system's operating budget assumptions for average class sizes and is intended to enable individual schools to stay within the maximum class size guidelines.

A. Class Size Assumptions and Guidelines in MCPS' Operating Budget

MCPS' Operating Budget calculates staffing requests based on a combination of projected enrollment, average class size assumptions, and the Board of Education's maximum class size guidelines. MCPS then allocates positions to individual schools based on staffing guidelines. This section reviews:

- Average class size assumptions that are used to develop the operating budget;
- Maximum class size guidelines that set a ceiling for maximum class sizes; and
- MCPS' staffing allocation guidelines.

1. Average Class Size Assumptions in the Operating Budget

MCPS builds its annual operating budget in part based on student enrollment projections and assumptions on average class sizes for general education. Students with disabilities included in general education classes are included in MCPS' average class size calculations.

Each September, MCPS' Division of Long-range Planning estimates projected student enrollment in general and special education for the following school year. These projections assist the Department of Management, Budget, and Planning to develop the Superintendent's Recommended Operating Budget for the upcoming fiscal year.

Annually, the Department of Management, Budget, and Planning also develops projections for average class sizes in general education for Grades K-12 that are used to determine the number of teachers included in the budget request. Since actual enrollment is not known until the school year begins, the extent to which actual average class sizes match the projected average (i.e., budgeted average) depends on the accuracy of MCPS' enrollment projections.

Table 5 describes budgeted average class sizes by grade level from FY05 to FY09 for general education. The FY09 data represent the numbers used in the Superintendent's Recommended FY09 Budget Request. The data show that:

- Budgeted average class sizes have remained relatively constant for Grades 1-5 and for secondary academic classes. Between FY05 and FY08, budgeted average class sizes ranged from 20.4 to 21.7 students for Grades 1-5, from 23.2 to 23.6 students for middle school academic classes, and from 25.4 to 26.0 students for high school academic classes.
- The FY09 budget request approved by the Board of Education in February 2008 holds budgeted average class size constant, except for Kindergarten, which increases by 0.1 student compared to FY08.

Table 5: Budgeted Average Class Sizes by Grade Level, FY05 – FY09

	FY05	FY06	FY07	FY08	FY09 BOE Request	FY05–FY08 Change	
						#	%
Kindergarten	17.5	17.4	17.4	18.0	18.1	0.5	2.9%
Grades 1-5	21.7	20.4	21.4	21.4	21.4	-0.3	-1.4%
MS Academic Classes	23.2	23.6	23.6	23.6	23.6	0.4	1.7%
HS Academic Classes	26.0	25.6	25.4	25.4	25.4	-0.6	-2.3%

Source: MCPS staff and Operating Budgets, FY05 – FY09

2. Maximum Class Size Guidelines

The Board of Education establishes maximum class size guidelines as recommended ceilings for class sizes by grade level. The Board most recently revised these guidelines in FY06. Table 6 lists the Board's current maximum class size guidelines; for comparison, the table also shows the guidelines before FY06. As shown below, in FY06 the BOE lowered the maximum class size guidelines for Grades 1-3 (from 28 to 26 students); and for Grades 4-5 (from 30 to 28 students).

Table 6: Maximum Class Size Guidelines adopted by the Board of Education

Level	Maximum Number of Students Per Class	
	Pre-FY06	FY06 – FY09
Kindergarten	25	25
Grades 1-3	28	26
Grades 4-5	30	28
Middle (Required English/Other Academic)	28/32	28/32
High (Required English/Other Academic)	28/32	28/32

Source: MCPS Official Class Size Report, FY08

In preparing the recommended operating budget, MCPS adds teaching positions to the budget specifically targeted to minimize the number of “oversized” classrooms, defined as classes with enrollment that exceeds the Board’s maximum class size guidelines. Table 7 shows the trends in budgeted teaching positions allocated to meet maximum class size goals.

Table 7: Budgeted Maximum Class Size Positions (FTEs), FY05 – FY09

	FY05	FY06	FY07	FY08	FY09 BOE Request	FY05 – FY08 Change	
						#	%
Elementary Schools	81.9	149.1	185.1	185.1	185.1	103.2	126.0%
Middle Schools	74.6	84.6	94.6	94.6	94.6	20.0	26.8%
High Schools	142.2	162.2	175.2	175.2	161.9	33.0	23.2%
Total	298.7	395.9	454.9	454.9	441.6	156.2	52.3%

Sources: MCPS staff and Operating Budgets, FY05 – FY09

The data show that, in FY08, MCPS allocated 454.9 teaching positions (185.1 to elementary schools, 94.6 to middle schools, and 175.2 to high schools) to minimize the number of oversized classes. Between FY05 and FY08, the number of teaching positions added systemwide to reduce the number of oversized classes increased by 156.2 positions, or 52.3%.

3. MCPS' Staffing Allocation Guidelines

MCPS allocates teaching staff to general education schools across three categories of teachers:

- Traditional classroom teachers;
- Support teachers, e.g., focus teachers, academic intervention teachers; and
- Professional development teachers, e.g., staff development teachers, reading specialists.

Staffing patterns across these three categories of teachers and their impacts on average class sizes are discussed in Chapter VI. Table 8 (page 13) summarizes the guidelines that MCPS uses to allocate traditional classroom teachers to schools.

MCPS allocates staff to enable individual schools to maintain classes within the maximum class size guidelines established by the Board of Education. Each spring, MCPS provides information to principals on the number of positions allocated to their schools based on projected enrollment and the anticipated operating budget. The principals use this information to determine scheduling, school operations, and actual class sizes in their schools.

To address staffing needs arising from differences in projected and actual enrollment, MCPS typically creates a reserve of teachers by initially allocating teachers to schools at a higher ratio than budgeted. For example, in FY08, MCPS budgeted for one Kindergarten teacher per 21.4 students in non-focus schools but initially allocated one Kindergarten teacher per 25 students in non-focus schools to create a reserve of Kindergarten teachers.

Reserve teachers are then assigned to schools in situations where actual enrollment exceeds projected enrollment and results in a class size that exceeds the maximum class size guidelines. For example, a non-focus school with a projected enrollment of 60 Kindergarten students would most likely be allocated three teachers to have three classes of 20 students each. If actual enrollment exceeds projected enrollment and a Kindergarten class size turns out to have more than 25 students, then another teacher would be allocated.

If a grade has lower enrollment than projected, class sizes will be smaller. MCPS does not usually remove teachers from a school once the school year has started, unless the difference is very significant.

While MCPS allocates staff to secondary schools based on assumptions of average class sizes, individual principals maintain significant discretion in determining the actual range of class sizes in their schools. This is especially the case in high schools where principals determine the number of course offerings, which in turn impacts actual class sizes. For example, if a principal chooses to run a small specialized class, then the principal indirectly also chooses to run a larger class elsewhere to balance out the school's staffing.

For additional details on staffing allocation guidance, Appendix B provides copies of the memorandums distributed to elementary, middle, and high school principals for FY08 and FY09.

Table 8: Current Elementary Classroom Teacher Staffing Guidelines, FY08 and FY09

Kindergarten Classroom Teachers	
Initial Student to Staff Ratio	<ul style="list-style-type: none"> • 17 to 1 in focus schools • 25 to 1 in non-focus schools
Additional Staff	<ul style="list-style-type: none"> • Additional positions when classes are larger than 25
Elementary School Classroom Teachers	
Initial Student to Staff Ratio	<ul style="list-style-type: none"> • Grades 1-2 in focus schools, 17 to 1 • Grades 1-3, 26 to 1 • Grades 4-5, 28 to 1
Additional Staff	<ul style="list-style-type: none"> • 185.1 positions to meet maximum class size guidelines in Grades 1-5 • 61 positions to reduce class sizes to 17 in Grades 1-2 in focus schools

Source: MCPS staff and Superintendent's Operating Budget, FY09

Table 9: Current Secondary Classroom Teacher Staffing Guidelines, FY08 and FY09

Middle School Classroom Teachers	
Initial Staffing Formula	<p><u>General Enrollment * 7 periods^a</u> $27 * 5 \text{ periods}^b$ + 0.4 release time for accelerated and enriched instruction support per non-phase I school</p> <ul style="list-style-type: none"> • Resource teachers are allocated separately so for each resource teacher, 0.8 is removed
Additional Staff	<ul style="list-style-type: none"> • 94.6 positions to address large class sizes; • 15.2 positions for 0.2 released periods to coordinate GT and Success for Every Student
High School Classroom Teachers	
Initial Staffing Formula	<p><u>General Enrollment * 7 periods</u> $28.5 * 5 \text{ periods}$ +0.2 release time for Student Service Learning</p> <p>0.8 of this calculation is removed for every resource teacher; 0.4 is removed for the athletic director allocation; 0.4 per school will be allocated to allow each Math and English resource teacher 2 release periods</p>
Additional Staff	<ul style="list-style-type: none"> • 162.2 positions to address large class sizes • 5.0 positions for release time for student service learning coordination • 25.0 positions to lower class size to support inclusion • 40.3 positions for special programs at Thomas Edison, Blair, and Poolesville

^a 7 Periods = The typical number of classes attended by each student per day.

^b 5 periods = The typical number of classes taught by each teacher per day.

Source: MCPS staff and Superintendent's Operating Budget, FY09

B. Class Size Assumptions and Guidelines in MCPS' Capital Budget

MCPS prepares its Capital Improvements Program and annual Capital Budget using "program capacity" calculations. Program capacity is calculated using recommended student-to-classroom ratios (i.e., class sizes) that reflect classroom capacities. Classroom capacities vary by grade level and program area, and generally align with the ratios that the State of Maryland uses for school capacity calculations.

In 2005, the Board of Education adopted a revision to the Long-range Educational Facilities Planning Policy (FAA) to separate policy requirements from regulations. In 2006, the Superintendent revised Regulation FAA-RA to conform to the Maryland Public School Construction Act of 2004, which reduced the student-to-classroom ratio for Grades 1-5 used to calculate elementary school capacities in the state. The new version of regulation FAA-RA also incorporated MCPS' Elementary School Class Size Initiative by setting lower ratios for Grades K-2 in focus (high poverty) schools.

As a result of these changes, MCPS' program capacity ratios became more closely aligned with staffing initiatives that MCPS was already implementing in schools. Although the new regulation notes that program capacity based on student to classroom ratios "should not be confused with staffing ratios as determined through the operating budget process,"¹ the Superintendent explained at the time that "MCPS capacity calculations need to accurately reflect how classrooms are programmed in a school" in order to plan for future construction needs.²

MCPS calculates program capacity as the product of the number of teaching stations in a school and the student-to-classroom ratio for each grade or program in each classroom.³ The Board of Education and MCPS use enrollment projections and program capacities in planning for capital projects, boundary changes, and geographic student choice assignment plans. In addition to informing the MCPS capital budget, MCPS program capacity calculations are also applied to the County's Annual Growth Policy to coordinate development approval with school capacity.

Table 10 (page 15) summarizes MCPS' current student-to-classroom ratios used to calculate program capacity. The student-to-classroom ratios reflect the Board of Education's recommended average class sizes that "support the continuous improvement of educational programs in schools."⁴ Policy FAA also codifies the State's school capacity calculations used to determine statewide school capacity and State budget eligibility for capital projects funded through the Public School Construction Program.

¹ See page 6 of Regulation FAA-RA, included in Appendix C of this report.

² See pages 4-5 of the Superintendent's Recommendation for Elementary School Capacity Calculations in the Board of Education's Requested FY06 Capital Budget and Amended FY05-10 CIP; included in Appendix D of this report. Includes more information on the relationship between program capacity calculations and staffing guidelines.

³ For example, in a non-focus elementary school with 4 classrooms per Grades K-5 (i.e., 24 teaching stations), MCPS program capacity would be calculated as follows: (4 classrooms * 22 students) + (20 classrooms * 23 students) = 548 students.

⁴ See Chapter 3 of current CIP.

State-rated capacity (SRC) is defined by the State of Maryland as the maximum number of students who can reasonably be accommodated in a facility without significantly hampering delivery of the given educational program. The SRC is calculated by multiplying the number of teaching stations in a school by the state determined student-to-classroom ratio, which is also described in Table 10. With the exception of lower class sizes for focus schools and higher MCPS utilization rate for high schools, MCPS program capacity calculations are the same as the State-rated capacity calculations for Grades K-12.

Table 10: Student to Classroom Ratios for Calculating MCPS Program Capacity and State-Rated Capacity, FY08

Level	MCPS Program Capacity	State-rated Capacity
Kindergarten	15 to 1 (focus schools)	22 to 1
	22 to 1 (non-focus schools)	
Grades 1-2	17 to 1 (focus schools)	23 to 1
Grades 1-5/6 Elementary	23 to 1	
Grades 6-8 Academic classes	25 to 1 (21.25 to 1)*	25 to 1 (21.25 to 1)*
Grades 9-12 Academic classes	25 to 1 (22.5 to 1)*	

* For middle schools, MCPS calculates program capacity with an assumed utilization rate of .85 or 21.25 students per classroom. For high school, the assumed utilization rate is .90 or 22.5 students per classroom. The utilization rate used by the State is .85.

Source: MCPS Operating and Capital Budgets, FY08 – FY09

Utilization Rates. As noted above, in addition to recommended student to classroom ratios, MCPS applies utilization rates to the calculation of program capacity for secondary facilities. The utilization rate is an additional factor applied to student-to-classroom ratios to minimize overcrowding in secondary schools and classrooms. This factor is applied in recognition that secondary classrooms serve multiple classes per day (as compared to elementary schools) and that scheduling requirements make it impossible to utilize every classroom throughout the day.

For middle schools, MCPS uses a utilization rate of .85 which means that a student to classroom ratio of 21.25 students per class is used to calculate middle school program capacity. State-rated capacity for secondary facilities is also calculated based on a .85 utilization rate. For high schools, MCPS uses a utilization rate of .90 which means that a student to classroom ratio of 22.5 students is used to calculate high school program capacity.

C. Comparison Among the Different Class Size Measures

Table 11 compares the student-to-classroom ratios for calculating MCPS program capacity (i.e., program capacity class sizes) to budgeted average class sizes and the Board of Education's maximum class size guidelines for FY08. The data show that:

- The student-to-classroom ratios used to calculate MCPS' program capacity generally align with budgeted average class sizes;
- At the elementary level, budgeted average class sizes generally fall between the program capacity class sizes for focus and non-focus schools; and
- At the secondary level, budgeted average class sizes are slightly higher than recommended program capacity class sizes.

Moreover, both program capacity and budgeted average class sizes for Grades K-12 are smaller than Board of Education's maximum class size guidelines.

Table 11: Comparing Program Capacity to Budgeted Average Class Sizes and Maximum Class Size Guidelines, FY08

Level	MCPS Program Capacity	Budgeted Average Class Sizes	Maximum Class Size Guidelines
Kindergarten	15:1 (focus schools)	18.1:1	25:1
	22:1 (non-focus schools)		
Grades 1-2	17:1 (focus schools)	21.4:1	26:1 (Gr. 1-3)
Grades 1-5/6 Elementary	23:1		28:1 (Gr. 4-5)
Grades 6-8 Academic classes	25:1 (21.25:1)*	23.6:1	28:1 (English) 32:1 (Other Academic)
Grades 9-12 Academic classes	25:1 (22.5:1)*	25.4:1	28:1 (English) 32:1 (Other Academic)

* The middle school utilization rate is .85; the high school utilization rate is .90.

Sources: MCPS Operating and Capital Budgets, FY08 – FY09

CHAPTER IV: Elementary School Class Size Data

In October of each year, MCPS collects class size data from elementary, middle, and high schools and compiles them in an Official Class Size Report for the Board of Education (BOE). This report includes data on average class sizes and the number of classes with enrollments that exceed the Board of Education's maximum class size guidelines.

OLO obtained FY04 to FY08 data from MCPS to replicate the school system's calculations of average class size and to provide more detail regarding MCPS class size data than presented in the Official Class Size Report. This chapter presents OLO's calculated average elementary class sizes, looks at actual class sizes in two elementary schools, and compares actual average class sizes to three class size measures used by MCPS in budget preparation.

- Part A describes how MCPS tracks and reports elementary school class size data;
- Part B contains average class size data for MCPS elementary schools from FY04–FY08;
- Part C compares FY08 class sizes in two elementary schools to systemwide averages; and
- Part D compares actual average elementary school class sizes to: MCPS' operating budget assumptions for average class sizes; the Board of Education's maximum class size guidelines; and MCPS' capital budget assumptions for program capacity class sizes.

Chapter Summary

- MCPS calculates elementary school class sizes by counting the number of students assigned to each general education homeroom teacher. This method does not capture the changes in teacher to student ratios that occur during the school day as a result of support teachers or special education inclusion.
- Between FY04 and FY08, there was a consistent pattern of smaller average class sizes for Grades K-2 compared to Grades 3-5. During this time: average Kindergarten class sizes increased by 5.8%; average class sizes in Grades 1-5 decreased by 4.3%.
- Average Grades K-2 class sizes in focus schools are consistently smaller than those in non-focus schools. For example, in FY08, the average Grades K-2 class size in focus schools had 6-7 fewer students than the average class size in non-focus schools.
- MCPS' actual average class sizes come very close (i.e., generally within one student) to the average class size assumptions used to prepare the operating budget and the program capacity class sizes used to prepare the capital budget.
- From FY06 to FY08, the number of Grade K-5 classes with enrollment that exceeded the maximum class size guidelines was consistently less than 3% of all classes. However, the number of "oversized" elementary classes did increase between FY07 and FY08.

A. How MCPS Tracks and Reports Elementary School Class Size Data

MCPS calculates elementary school class sizes by counting the number of students assigned to each general education homeroom teacher. The count includes all general education students and special education students who start their day in a general education homeroom. Students assigned to special education homeroom teachers are excluded from these calculations.

Because MCPS' Official Class Size Report counts the number of students in the classroom at the start of the school day, it does not capture the changes in teacher to student ratios that occur throughout the day as a result of support teachers and special education inclusion. Elementary students are often re-grouped for instruction. When a support teacher (e.g., ESOL teacher, reading initiative teacher) works with a subset of students, this temporarily reduces the homeroom class size. Similarly, when students assigned to a special education teacher join a general education homeroom for part of the day, this temporarily increases the homeroom class size. The role of support teachers and their impact on elementary class sizes during the school day is addressed in Chapter VI (see page 48).

OLO used MCPS' class size data for Grades K-5 to calculate average class sizes and the number of classes over the maximum class size guidelines for each grade level.¹ MCPS' Operating Budget and Official Class Size Report provide an average class size for Kindergarten and a combined average for Grades 1-5. OLO's average class size calculations, which are reported below, are equivalent to the average class sizes presented by MCPS in these documents, although the number of "oversized" classes differs slightly.²

B. Trends in Elementary School Average Class Sizes, FY04 – FY08

Exhibit 2 (page 19) shows systemwide average elementary class sizes by grade for the current school year. Table 12 (page 19) contains average elementary class size data by grade level from FY04 to FY08.

The data demonstrate a consistent pattern of smaller average class sizes for Grades K-2 compared to Grades 3-5. This reflects the BOE's lower maximum class size guidelines for the lower grades, and additional Grade K-2 staffing to MCPS focus schools, which are characterized by higher levels of poverty, student mobility, and limited English proficiency.

The data also show that the average Kindergarten class size went from 17.2 students in FY04 to 18.2 students in FY08, an increase of 5.8%. In contrast, average class sizes for Grades 1-5 went from 22.0 students in FY04 to 21.0 students in FY08, a reduction of 4.3%.

¹ There are also six 6th grade classes in elementary schools which are not included in most of the data presented in this report. All other 6th grade classes are in middle schools and are presented in the next chapter.

² See Appendix A for more detail on the dataset provided by MCPS and OLO's methodology.

Exhibit 2: Average Elementary School Class Sizes, FY08

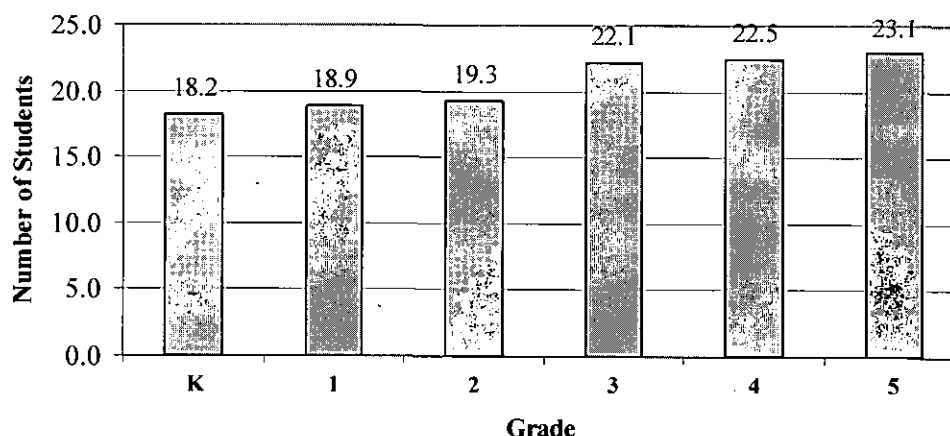


Table 12: Average Elementary Class Sizes, FY04 – FY08

Grade Level	Fiscal Year					2004-2008 Change*	
	2004	2005	2006	2007	2008	#	%
Kindergarten	17.2	17.5	17.7	17.6	18.2	1.0	5.8%
Grade 1	18.9	19.3	18.4	18.4	18.9	0.0	0.0%
Grade 2	19.7	19.7	19.1	18.8	19.3	-0.5	-2.4%
Grade 3	23.2	23.1	22.1	22.0	22.1	-1.1	-4.7%
Grade 4	24.6	24.5	23.1	22.6	22.5	-2.1	-8.5%
Grade 5	24.8	25.0	23.5	23.1	23.1	-1.7	-6.9%
Total 1-5	22.0	22.1	21.1	20.8	21.0	-0.9	-4.3%

Source: OLO calculations from MCPS data

*The "Change" columns were calculated without rounding, and, therefore, may differ slightly if calculated using the rounded averages presented here.

Table 13 (page 20) contains data on the average class size for Grades K-2 in the focus (high poverty) schools compared to non-focus schools from FY04 to FY08. The data show that, from FY04 to FY08:

- The average Grade K-2 class sizes in focus schools were smaller than those in non-focus schools. The average Kindergarten class was smaller by five to six students; in Grade 1, the difference was six to seven students; and in Grade 2, the difference was seven to eight students.
- The average non-focus school Kindergarten class size grew more than the average focus school Kindergarten class (3% compared to 6%).
- Grade 1 and 2 class sizes decreased on average in both focus and non-focus schools, with focus schools experiencing a slightly greater decrease.

Table 13: Comparison of Average Class Sizes in Focus and Non-Focus Elementary Schools, FY04 – FY08

	Fiscal Year					2004-2008 Change*	
	2004	2005	2006	2007	2008	#	%
Focus Schools							
Kindergarten	15.1	15.2	15.3	15.0	15.6	0.5	3.2%
Grade 1	16.2	16.3	15.6	15.8	15.8	-0.3	-2.1%
Grade 2	16.8	16.6	16.1	15.7	16.1	-0.7	-4.2%
Total K-2	16.0	16.0	15.7	15.5	15.8	-0.2	-1.1%
Non-Focus Schools							
Kindergarten	20.3	20.7	21.0	20.9	21.5	1.2	6.0%
Grade 1	22.8	23.4	22.0	21.6	22.7	-0.1	-0.6%
Grade 2	23.7	24.1	22.9	22.4	23.1	-0.6	-2.7%
Total K-2	22.3	22.7	21.9	21.6	22.4	0.1	0.6%

Source: OLO calculations from MCPS data

*The "Change" columns were calculated without rounding, and, therefore, may differ slightly if calculated using the rounded averages presented here.

C. Comparing Two Sample Elementary Schools to Systemwide Averages

As part of this project, OLO requested class size data for two elementary schools, two middle schools, and two high schools. The purpose was to compare actual class size data for these schools to the systemwide averages to provide some perspective on how individual school class sizes may differ from the published average class sizes. OLO randomly selected these six schools, choosing one focus and one non-focus school from the roster of all MCPS general education elementary, middle, and high schools.

The two elementary schools selected were Diamond Elementary School and Glenallan Elementary School. As the demographic data in Table 14 (page 21) shows, Glenallan ES (focus school) has a higher percent of FARMS-eligible students and English language learners compared to MCPS elementary schools overall. Comparatively, Diamond ES (non-focus school) has a lower percent of FARMS-eligible students and English language learners than MCPS elementary schools overall. The higher percent of students with disabilities at Diamond ES occurs because the school hosts two special education programs: a Home School Inclusion model for children with disabilities and a specialized program for children with Asperger's Syndrome.

**Table 14: Demographic Information for Glenallan and Diamond Elementary Schools
(Pre-K through Grade 6), 2007-2008 School Year**

	Percent Eligible for FARMS	Percent English Language Learners	Percent with Disabilities
Glenallan (focus school)	50.8%	36.2%	11.4%
Diamond (non-focus School)	13.5%	13.0%	13.0%
All MCPS Elementary Schools	30.5%	18.8%	10.5%

Source: MCPS Schools at a Glance, 2007-2008

The exhibit and table on the following page compare average Grade K-5 class sizes for Glenallan ES and Diamond ES to the systemwide averages for all MCPS elementary schools in FY08. The data show that, as of October 2007:

- Across all grades, the average class size at Glenallan ES was 17.7 students compared to 22.5 students at Diamond ES and 20.5 across all MCPS elementary schools. Both schools had 19 general education homeroom classes for K-5, even though Diamond had 91 more students in these classes.
- For all grades except Grade 3 (see next bullet), the average class size at Glenallan ES was smaller than the average class size at Diamond and smaller than the systemwide average. The largest difference was evidenced in Grade 2, where the average class size at Glenallan ES was 14.8 students compared to 24.7 students at Diamond ES.
- In Grade 3, Glenallan ES' average class size at the start of the school year exceeded both Diamond ES' and the systemwide average. Glenallan's average third grade class was 26.5 students, compared to Diamond's average of 23.7 students and a district average of 22.1 students. However, soon after the official class size data for FY08 was collected, MCPS allocated an additional teacher to Glenallan ES to reduce its third grade class sizes.

Exhibit 3: Average Class Sizes for Sample Elementary Schools Compared to Systemwide Averages by Grade Level, FY08

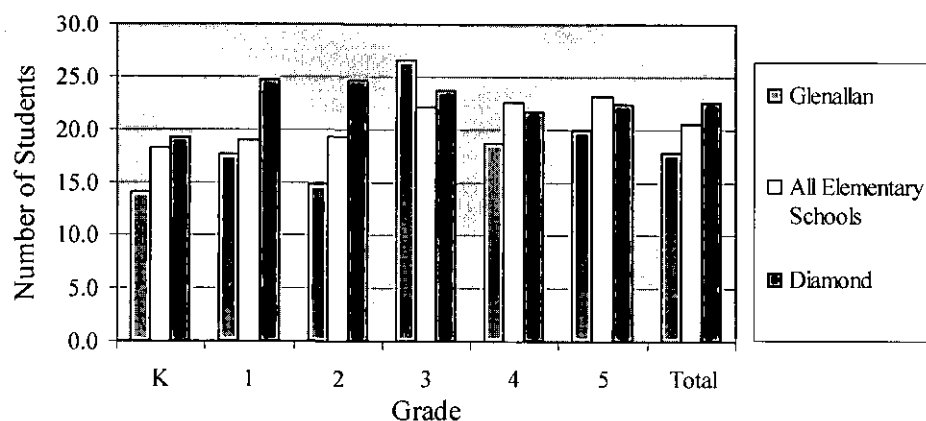


Table 15: Class Sizes for Glenallan and Diamond Elementary Schools Compared to All MCPS Elementary Schools, FY08

Grade	School	Enrollment	# of Classes	Average Class Size	Difference (School – County Avg.)
Kindergarten	Glenallan	56	4	14.0	-4.2
	Diamond	77	4	19.3	1.1
	All ES	9,606	529	18.2	
Grade 1	Glenallan	53	3	17.7	-1.2
	Diamond	74	3	24.7	5.8
	All ES	9,471	501	18.9	
Grade 2	Glenallan	59	4	14.8	-4.5
	Diamond	74	3	24.7	5.4
	All ES	9,669	502	19.3	
Grade 3	Glenallan	53	2	26.5	4.4
	Diamond	71	3	23.7	1.5
	All ES	9,478	428	22.1	
Grade 4	Glenallan	56	3	18.7	-3.8
	Diamond	65	3	21.7	-0.8
	All ES	9,508	423	22.5	
Grade 5	Glenallan	60	3	20.0	-3.1
	Diamond	67	3	22.3	-0.7
	All ES	9,661	419	23.1	
Total K-5	Glenallan	337	19	17.7	-2.7
	Diamond	428	19	22.5	2.0
	All ES	57,393	2802	20.5	

Source: MCPS class size data, October 2007 (OLO calculations)

D. Comparing Actual Elementary School Class Sizes to Class Size Assumptions Used in Budgeting

This section examines how, from FY06-FY08, actual average class sizes compared to the three MCPS measures of class size reviewed in the previous chapter:

- MCPS' operating budget assumptions for average class sizes;
- The Board of Education's adopted guidelines for maximum class sizes; and
- MCPS' capital budget assumptions for average class sizes related to program capacity.

1. Elementary School Average Class Sizes Compared to Operating Budget Assumptions

As described in Chapter III, one of the major assumptions used in preparing the annual operating budget is average class size. For the current school year (FY08 budget), the staffing request in MCPS' operating budget was calculated on the assumption of average kindergarten class sizes of 18.0 students and average Grade 1-6 classes of 21.4 students.

Another budget assumption is MCPS' projected student enrollment. Since actual enrollment is not known until the school year begins, the extent to which actual average class sizes match the budgeted average depends on the accuracy of MCPS' enrollment projections.

Table 16 compares actual average elementary school class sizes to budgeted average class sizes from FY06 to FY08. The data show that during this time period, actual average class sizes for kindergarten and Grades 1-6 came close to the average class size assumed in the operating budget. Specifically, actual class sizes consistently came within one student of the budgeted average class size numbers.

Table 16: Actual vs. Budgeted Average Class Sizes for Kindergarten and Grades 1-6, FY06 – FY08

	FY06	FY07	FY08
Kindergarten			
Actual Class Size	17.7	17.6	18.2
Budgeted Class Size	17.4	17.4	18.0
Actual vs. Budgeted	Larger by 0.3	Larger by 0.2	Larger by 0.2
Grades 1-6			
Actual Class Size	21.1	20.8	21.0
Budgeted Class Size	20.4	21.4	21.4
Actual vs. Budgeted	Larger by 0.7	Smaller by 0.6	Smaller by 0.4

Source: MCPS FY06-08 Operating Budget; OLO calculations from MCPS data

2. Elementary School Class Sizes Compared to the BOE's Maximum Class Size Guidelines

Comparing actual class sizes to the Board of Education's maximum class size guidelines offers a picture of the number and percent of "oversized" classes. As explained in Chapter III, the maximum class size guidelines adopted by the Board are considered an upper limit that individual class sizes should not exceed. The current elementary grade maximum class size guidelines are:

- 25 students for Kindergarten;
- 26 students for Grades 1-3, and
- 28 students for Grades 4-5.

It must be noted that the current maximum class size guidelines were adopted by the Board of Education in 2006.³ The two tables on the next page show the number and percent of all elementary classes over the maximum class size guidelines by grade level from FY06 through FY08. The data in these two tables show that:

- The number of "oversized" Grades K-5 classes was consistently less than 3% of all classes, going from 2.7% of all classes in FY06 to 2.5% of all classes in FY08. However, of the three years, the percentage was lowest in FY07, when only 1.5% of classes (or 45 classes) were over the maximum class size guidelines.
- Grade 3 consistently had the highest percent of "oversized" classes compared to the other grades. Grade 3 has a maximum class size guideline of 26 like Grades 1 and 2, but unlike those grades, is not targeted for class size reductions in focus schools. In FY08, 17 classes (4%) of Grade 3 students had enrollment over the maximum class size guideline for that grade. However, the number of oversized Grade 3 classes decreased from FY06 to FY08 by 39% (from 28 to 17 classes).
- Grade 1 experienced the greatest increase in the number of "oversized" classes, going from having only five oversized classes in FY06 to 14 in FY08.

³ Before 2006, the guidelines were higher with 28 students being the recommended cap for Grade 1-3 classes, and 30 students being the recommended cap for Grade 4-5 classes. The recommended cap for Kindergarten did not change.

Table 17: Number of Elementary School Classes over BOE Class Size Guidelines, FY06 – FY08

Grade Level/Guideline	FY06	FY07	FY08	2006-2008 Change	
				#	%
Kindergarten (over 25)	5	3	9	4	80%
Grade 1 (over 26)	5	1	14	9	180%
Grade 2 (over 26)	15	5	18	3	20%
Grade 3 (over 26)	28	17	17	-11	-39%
Grade 4 (over 28)	5	3	4	-1	-20%
Grade 5 (over 28)	17	12	7	-10	-59%
Total	75	41	69	-6	-8%

Source: OLO calculations from MCPS data

Table 18: Percent of Elementary School Classes over BOE Maximum Class Size Guidelines, FY06 – FY08

Grade Level/Guideline	FY06	FY07	FY08	2006-2008 Change
Kindergarten (over 25)	1.0%	0.6%	1.7%	0.7%
Grade 1 (over 26)	1.0%	0.2%	2.8%	1.8%
Grade 2 (over 26)	3.0%	1.0%	3.6%	0.6%
Grade 3 (over 26)	6.4%	3.9%	4.0%	-2.5%
Grade 4 (over 28)	1.2%	0.7%	0.9%	-0.2%
Grade 5 (over 28)	4.0%	2.8%	1.7%	-2.3%
Total	2.7%	1.5%	2.5%	-0.2%

Source: OLO calculations from MCPS data

Appendix E includes a table that compares class sizes back to FY04 to the more recently adopted guidelines. The data compiled in Appendix E show that after lowering the guidelines in FY06, the number of larger classes decreased.

3. Elementary School Average Class Sizes Compared to Capital Budget Assumptions

As described in Chapter III, MCPS prepares its capital budget using program capacity ratios that reflect recommended numbers of students per classroom. MCPS' program capacity class sizes generally align with the State of Maryland's school capacity calculations, which vary by grade level and program area.

Table 19 compares actual average elementary school class sizes to MCPS' current program capacity class sizes (adopted by the Board of Education in 2006) for FY06 to FY08. The MCPS program capacity class sizes (i.e., the recommended number of students per classroom) are shown in the second column. Unlike the budgeted average class sizes, the program capacity class sizes differ for focus and non-focus schools for Grades K-2.

The data show that during this time period, actual average class sizes for both focus and non-focus elementary schools came very close to the recommended program capacity class sizes. Specifically, actual class sizes were generally within one student of the program capacity number, more often being smaller (by an amount ranging from 0.1 to 1.4 students) and never being larger than 0.6 students more than the recommended number.

Table 19: Average Class Sizes Compared to Program Capacity Class Sizes, FY06 – FY08

School Type	Grade Level	Program Capacity Class Sizes	FY06		FY07		FY08	
			Average Class Size	Average vs. Capacity	Average Class Size	Average vs. Capacity	Average Class Size	Average vs. Capacity
Focus	K	15	15.3	Larger by 0.3	15.0	No difference	15.6	Larger by 0.6
	1	17	15.6	Smaller by 1.4	15.8	Smaller by 1.2	15.8	Smaller by 1.2
	2	17	16.1	Smaller by 0.9	15.7	Smaller by 1.3	16.1	Smaller by 0.9
Non-Focus	K	22	21.0	Smaller by 0.9	20.9	Smaller by 1.1	21.5	Smaller by 0.5
	1	23	22.0	Smaller by 1.0	21.6	Smaller by 1.4	22.7	Smaller by 0.3
	2	23	22.9	Smaller by 0.1	22.4	Smaller by 0.6	23.1	Larger by 0.1
All Schools	3	23	22.1	Smaller by 0.9	22.0	Smaller by 1.0	22.1	Smaller by 0.9
	4	23	23.1	Larger by 0.1	22.6	Smaller by 0.4	22.5	Smaller by 0.5
	5	23	23.5	Larger by 0.5	23.1	Larger by 0.1	23.1	Larger by 0.1

Source: MCPS' Amended FY05-10 CIP; MCPS' FY07-12 CIP; OLO calculations from MCPS data

CHAPTER V: Secondary School Class Size Data

In addition to class size data from elementary schools, MCPS collects class size data from middle and high schools for general education classes. These data, collected in October of each year, are included in MCPS' annual Official Class Size Report. The report includes information on average class sizes and the number of "oversized" classes, defined as classes with enrollments that exceed the Board of Education's maximum class size guidelines.

OLO obtained FY04 to FY08 data from MCPS to calculate average class sizes and to provide more detail regarding MCPS class size data than presented in the Official Class Size Report.¹

- Part A reviews middle school class size data; and
- Part B reviews high school class size data.

Chapter Summary

- From FY04 and FY08, middle school average class sizes for academic subjects increased by 2% (from 23.9 to 24.4 students) while high school average class sizes for academic subjects decreased by 1% (from 25.5 to 25.1 students).
- Compared to other academic courses, ESOL and Other English classes in both middle and high schools were consistently the smallest while Science and Social Studies were the largest.
- In FY08, 11% of Required English classes in middle school and 16% of Required English classes in high school had enrollments that exceeded the Board of Education's maximum class size guidelines, more than any other academic subject.
- Average class sizes at the secondary level come very close to MCPS class size assumptions for the operating budget (i.e., budgeted average class size) and capital budget (i.e., program capacity class sizes).

A. MCPS Middle School Class Size Data

The review of middle school class size data is presented in four sections:

- Section 1 explains how MCPS tracks and reports middle school class size data;
- Section 2 reviews trends in middle school average class sizes;
- Section 3 compares class size data from two middle schools to systemwide averages; and
- Section 4 compares actual middle school class sizes to class size assumptions used by MCPS in budget preparation.

¹ For more detail on the dataset provided by MCPS and OLO's methodology, see Appendix A.

1. How MCPS Tracks and Reports Middle School Class Size Data

MCPS calculates middle school class sizes by course type rather than by homeroom assignment. Middle school class size data do not include special education classes.

MCPS tracks and reports middle school class size data for academic courses in two primary categories:

- **Total Academic** subject areas include Required English, Other English, Foreign Language, Social Studies, Math, and Science courses. “Required English” refers to the English course that all students must take during each year of middle school, e.g., English 7. “Other English” refers to optional language courses such as Creative Writing as well as reading intervention courses such as Developmental Reading and Read 180, which are designed to assist students who are performing below grade level.
- **English for Speakers of Other Languages (ESOL)** courses at the secondary level refer to separate classes for ESOL students rather than to pull-out services.

In addition to class size averages for Total Academic and ESOL courses, MCPS’ Official Class Size Report for middle school has an attachment with combined summary data on non-academic courses such as physical education, arts, and occupational courses. These courses have a range of class sizes with no specific target, including some deliberately large classes such as Orchestra and Choir. OLO’s review below describes middle school class size data for Total Academic and ESOL courses and excludes data on these non-academic courses.

2. Trends in Middle School Average Class Sizes, FY04 – FY08

Exhibit 4 (page 29) shows middle school average class sizes by subject for FY08. Table 20 (page 29) contains average class size data by grade level from FY04 to FY08 based on OLO’s calculations of MCPS class size data.

With the exception of Other English classes, average class sizes in all seven academic subjects increased by a small percent from FY04 to FY08; the increases ranged from 0.3 to 1.0 student (1.3% to 3.8%). Average class sizes for Total Academic and ESOL classes increased by 0.5 and 0.2 students (both 1.9%) during this time frame.

ESOL consistently had smaller average class sizes than the academic courses, ranging from 11.0 to 11.9 students from FY04 to FY08. Other English courses had the second smallest average class sizes, ranging from 18.2 to 19.8 students. These results are not surprising given that ESOL classes and the Developmental Reading classes included in the Other English category are by design small classes, with class size targets of 15 students or fewer per class.

The data also indicate that Required English courses had larger average class sizes than Math. It should be noted that Required English courses have a lower maximum class size guideline than all other academic subjects: 28 compared to 32 students per class.

According to MCPS staff, the difference between the sizes of Required English and math classes reflects the school system's math initiative, which provided one additional math teacher in each middle school to support mathematics instruction and increase enrollment in Grade 8 Algebra. Across all academic courses, Science consistently had the largest average class sizes over this period, ranging from 26 students in FY04 to 27 students in FY08, an increase of 3.8%.

Exhibit 4: Average Middle School Class Sizes, FY08

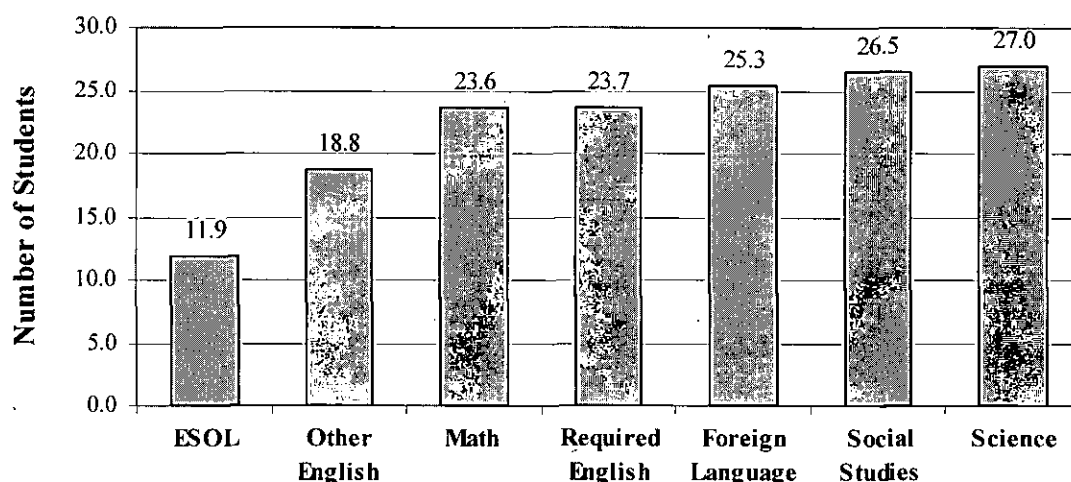


Table 20: Average Middle School Class Sizes, FY04 - FY08

Subject	Fiscal Year					2004-2008 Change*	
	2004	2005	2006	2007	2008	#	%
Total Academic	23.9	24.2	23.9	23.9	24.4	0.5	1.9%
Required English	23.4	23.6	23.5	23.3	23.7	0.3	1.3%
Other English	19.8	19.7	18.7	18.2	18.8	-1.0	-4.9%
Foreign Language	25.0	24.7	24.4	24.6	25.3	0.3	1.4%
Social Studies	25.7	26.0	26.2	26.3	26.5	0.8	3.3%
Math	22.9	22.9	22.4	23.1	23.6	0.7	3.0%
Science	26.0	26.7	26.6	26.4	27.0	1.0	3.8%
ESOL	11.6	11.0	11.2	11.6	11.9	0.2	1.9%

Source: OLO calculations from MCPS data

*The "Change" columns were calculated without rounding, and, therefore, may differ slightly if calculated using the rounded averages presented here.

3. Comparing Two Sample Middle Schools to Systemwide Averages

As explained in Chapter IV, OLO requested class size data from MCPS for two elementary schools, two middle schools, and two high schools. The purpose was to compare class size data for these schools to the systemwide averages to provide some perspective on how individual school class sizes may differ from the systemwide averages. OLO randomly selected these six schools, choosing two from each level, with one located in the “red zone” and one located in the “green zone.” MCPS does not have a class size reduction program for secondary schools that parallels the program for class size reduction in focus elementary schools.

The two middle schools randomly selected were Newport Mill and Westland. As Table 21 shows, Newport Mill (a “red zone” school) had a higher percent of FARMS-eligible students, English language learners, and students with disabilities compared to MCPS middle schools overall. Comparatively, Westland (a “green zone” school) had lower percentages of these student groups compared to MCPS middle schools overall.

Table 21: Demographic Information for Newport Mill, Westland, and All MCPS Middle Schools, FY08

	Percent Eligible for FARMS	Percent English Language Learners	Percent with Disabilities
Newport Mill Middle School	50.3%	8.6%	18.1%
Westland Middle School	11.8%	3.9%	9.3%
All MCPS Middle Schools	25.9%	5.9%	12.2%

Source: MCPS Schools at a Glance, 2007-2008

Exhibit 5 and Table 22 (page 31) compare average class sizes in Newport Mill and Westland to systemwide averages for FY08. The data demonstrate the following:

- Newport Mill had higher than average class sizes for some academic subjects and lower than average class sizes for others. Combined, Newport Mill’s academic subjects had average class sizes 0.2 students larger than the systemwide average.
- Westland had larger average class sizes for most of the academic subjects compared to the systemwide averages, with the largest gap being for Other English and Social Studies classes. Combined, Westland’s academic subjects had average class sizes that were one student larger than the systemwide average.
- Both Westland and Newport Mill had larger ESOL classes on average compared to the systemwide average. Newport Mill, with a *higher* percent of English language learners than average, had ESOL classes with an average of two students more than the systemwide average, while Westland Mill, with a *lower* percent of English language learners than average, had five more students than the systemwide average.

Exhibit 5: Average Class Sizes for Sample Middle Schools Compared to Systemwide Averages by Course Subject, FY08

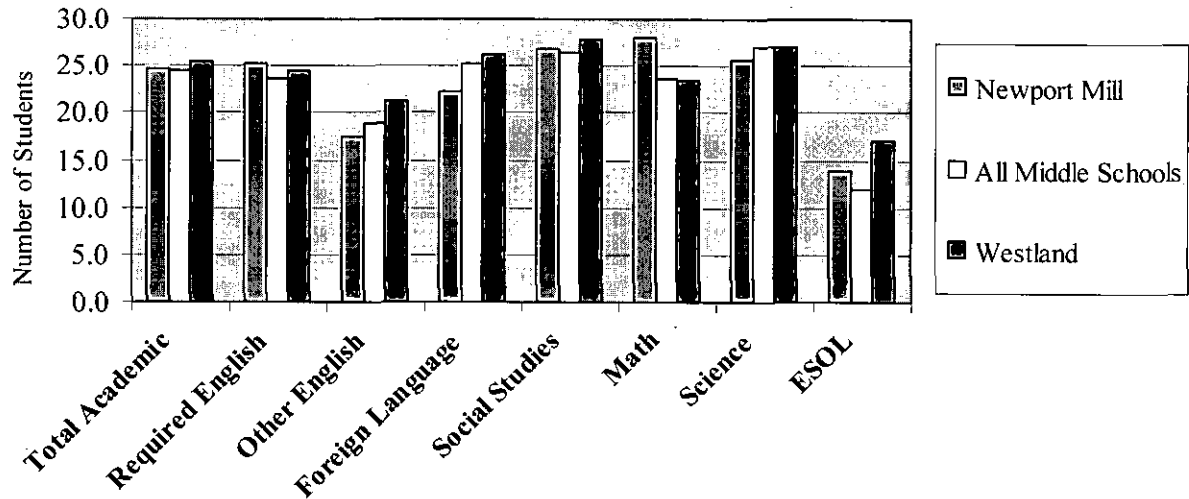


Table 22: Class Sizes in Newport Mill and Westland Compared to All MCPS Middle Schools, FY08

Subject	School	Total Class Enrollment	# of Classes	Average Class Size	Difference: Each School - All MS Avg.
Total Academic	Newport Mill	2,981	121	24.6	0.2
	Westland	5,089	200	25.4	1.0
	All MS	147,962	6,063	24.4	
Required English	Newport Mill	529	21	25.2	1.5
	Westland	974	40	24.4	0.7
	All MS	28,178	1,190	23.7	
Other English	Newport Mill	315	18	17.5	-1.3
	Westland	234	11	21.3	2.5
	All MS	13,469	717	18.8	
Foreign Language	Newport Mill	289	13	22.2	-3.1
	Westland	814	31	26.3	0.9
	All MS	15,755	622	25.3	
Social Studies	Newport Mill	616	23	26.8	0.3
	Westland	1,026	37	27.7	1.2
	All MS	29,625	1,118	26.5	
Math	Newport Mill	616	22	28.0	4.4
	Westland	1,011	43	23.5	-0.1
	All MS	30,076	1,275	23.6	
Science	Newport Mill	616	24	25.7	-1.4
	Westland	1,030	38	27.1	0.1
	All MS	30,859	1,141	27.0	
ESOL	Newport Mill	56	4	14.0	2.1
	Westland	34	2	17.0	5.1
	All MS	2,312	195	11.9	

Source: OLO calculation from MCPS data, October 2007

4. Comparing Actual Middle School Class Sizes to Class Size Assumptions Used in Budgeting

This section compares actual middle school average class sizes from FY06 to FY08 to:

- MCPS' operating budget assumptions for average class sizes;
- The Board of Education's maximum class size guidelines; and
- Capital budget assumptions for program capacity class sizes.

a) Middle School Average Class Sizes Compared to Operating Budget Assumptions

Each year, the middle school staffing request in MCPS' operating budget is calculated based on an average class size for all middle school academic classes combined. These average class sizes used to develop the operating budget are referred to as "budgeted average class sizes." Budgeted average class sizes for ESOL classes are not published in MCPS' operating budget. Since actual enrollment is not known until the school year begins, the extent to which actual average class sizes match the budgeted average depends on the accuracy of MCPS' enrollment projections.

Table 23 compares actual average academic class sizes to budgeted average class sizes from FY06 to FY08. The data show that the actual average class sizes for middle school academic courses were larger than the budgeted average class sizes by 0.3 students in FY06 and FY07, and by 0.8 students in FY08.

Table 23: Actual Average Class Sizes vs. Budgeted Average Class Sizes for Middle School Academic Courses, FY06 – FY08

	FY06	FY07	FY08
Actual Average Class Size	23.9	23.9	24.4
Budgeted Average Class Size	23.6	23.6	23.6
Actual vs. Budgeted Class Size	Larger by 0.3	Larger by 0.3	Larger by 0.8

Source: MCPS FY06-FY08 Operating Budget; OLO calculations from MCPS data

b) Middle School Class Sizes Compared to Maximum Class Size Guidelines

The current Board of Education maximum class size guidelines for middle school classes are:

- 28 students per class for Required English classes; and
- 32 students per class for all other academic subjects.

These guidelines did not change when the elementary guidelines changed in 2006. The BOE does not provide maximum class size guidelines for ESOL or non-academic courses.

Tables 24 and 25 (page 33) show the number and percent of middle school classes in each academic subject that exceeded the maximum class size guidelines from FY06 to FY08. The data show that:

- In FY08, 299 middle school academic classes (4.9%) were over the maximum class size guidelines. This is more than in FY07 (4.2%), but fewer than in FY06 (5.4%).
- Between FY06 and FY08, the number of oversized middle school classes declined in every subject area except for Foreign Language and Social Studies.
- From FY06 to FY08, Required English consistently had more classes over the maximum class size guidelines than other middle school academic subjects. However, over time, Required English classes experienced the largest drop in the number of oversized classes (40 classes) compared to other academic subjects.
- Other English consistently had the fewest classes over the maximum class size guidelines, followed by Math.

Table 24: Number of Middle School Classes Over BOE Maximum Class Size Guidelines, FY06 – FY08

Subject	FY06	FY07	FY08	FY06-FY08 Change	
				#	%
Total Academic	340	261	299	-41	-12.1%
Required English	172	112	132	-40	-23.3%
Other English	3	0	1	-2	-66.7%
Foreign Language	29	30	32	3	10.3%
Social Studies	55	50	62	7	12.7%
Math	24	19	18	-6	-25.0%
Science	57	50	54	-3	-5.3%

Source: OLO calculations from MCPS data

Table 25: Percent of Middle School Classes Over BOE Maximum Class Size Guidelines, FY06 - FY08

Subject	FY06	FY07	FY08	FY06-FY08 Change
Total Academic	5.4%	4.2%	4.9%	-0.5%
Required English	13.9%	9.1%	11.1%	-2.8%
Other English	0.4%	0.0%	0.1%	-0.3%
Foreign Language	4.4%	4.6%	5.1%	0.8%
Social Studies	4.7%	4.4%	5.5%	0.8%
Math	1.7%	1.4%	1.4%	-0.3%
Science	4.9%	4.3%	4.7%	-0.2%

Source: OLO calculations from MCPS data

c) Middle School Average Class Sizes Compared to Capital Budget Assumptions

MCPS prepares its capital budget using school capacity calculations that are based on recommended program capacity ratios (i.e., the number of students per classroom). MCPS' program capacity class sizes (adopted by the BOE in 2006) are 25 students per classroom for all middle school classes except ESOL classes, which have a recommended program capacity of 15 students per classroom.

Table 26 compares actual average middle school class sizes to MCPS' recommended program capacity. The data show that, from FY06 to FY08, average class sizes for all academic middle school classes combined were smaller than MCPS' recommended program capacity class sizes. During this time frame, average class sizes for ESOL were also smaller than the recommended program capacity. In FY08, all academic classes as a group were smaller, on average, by 0.6 students, compared to the recommended program capacity for middle schools, while ESOL classes were smaller, on average, by 3.1 students.

Table 26: Middle School Average Class Sizes vs. MCPS Program Capacity Ratios, FY06 – FY08

Subject	Program Capacity (Students per classroom)	FY06		FY07		FY08	
		Average Class Size	Average vs. Capacity	Average Class Size	Average vs. Capacity	Average Class Size	Average vs. Capacity
Total Academic	25	23.9	Smaller by 1.1	23.9	Smaller by 1.1	24.4	Smaller by 0.6
ESOL	15	11.2	Smaller by 3.8	11.6	Smaller by 3.4	11.9	Smaller by 3.1

Source: MCPS' Amended FY05-10 CIP; MCPS' FY07-12 CIP; OLO calculations from MCPS data

B. MCPS High School Class Size Data

The review of high school class size data is presented in four sections:

- Section 1 explains how MCPS tracks and reports high school class size data;
- Section 2 reviews trends in high school average class sizes, FY04 – FY08;
- Section 3 compares class size data from two high schools to systemwide averages; and
- Section 4 compares actual high school class sizes to class size assumptions used by MCPS in budget preparation.

1. How MCPS Tracks and Reports High School Class Size Data.

Similar to data collection for middle schools, MCPS tracks and reports high school class size data by academic subject (Required English, Other English, Foreign Language, Social Studies, Math, and Science) and ESOL. OLO's analysis below describes high school class size data for academic and ESOL courses.

Class size determination at the high school level differs from that in middle school because high school students have more course options. It can be difficult for schools to predict how many students will sign up for elective courses. Further, once students do sign up, the class sizes across courses may not be balanced, with some courses attracting many students leaving others with far fewer. As such, high schools experience greater variation in the actual class sizes than middle schools.

2. Trends in High School Average Class Sizes, FY04 – FY08

Exhibit 6 shows average high school class sizes by subject for the current school year. Table 27 (page 36) contains average class size data by grade level from FY04 to FY08 based on OLO's calculations of MCPS class size data.

From FY04 to FY08, average class sizes in MCPS' high schools decreased for academic subjects by 0.3 students overall. The largest decrease occurred for Other English classes (1.6 students), Foreign Language classes (1.3 students) and Science classes (0.4 students). During this time, class sizes in other subjects (Required English, Math, and Social Studies) remained fairly constant; and average ESOL class sizes decreased by 1.2 students.

As in middle schools, average ESOL classes were consistently smaller compared to other academic classes. For example, the average high school ESOL class had 12.8 students in FY08 compared to 25.1 students for combined academic subjects. Other English courses also had, on average, smaller classes than other academic subjects, while Social Studies and Science courses consistently had larger average class sizes compared to other subjects.

Exhibit 6: Average High School Class Sizes, FY08

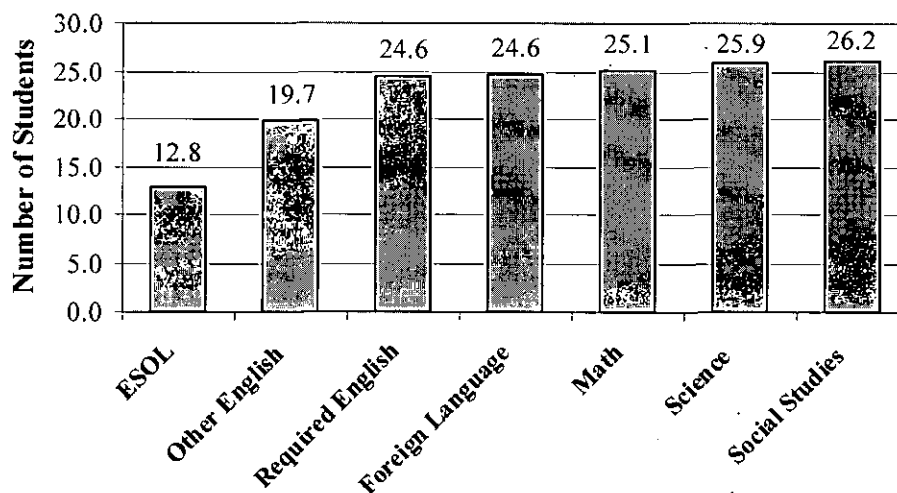


Table 27: Average High School Class Sizes, FY04 – FY08

Subject	Fiscal Year					2004-2008 Change	
	2004	2005	2006	2007	2008	#	%
Total Academic	25.5	25.6	25.6	25.0	25.1	-0.3	-1.3%
Required English	24.6	25.0	25.1	24.6	24.6	-0.1	-0.2%
Other English	21.4	21.7	22.2	20.7	19.7	-1.6	-7.6%
Foreign Language	25.9	25.5	25.0	24.3	24.6	-1.3	-4.8%
Social Studies	26.2	26.4	26.5	26.1	26.2	0.0	-0.2%
Math	25.0	25.6	25.5	24.8	25.1	0.1	0.5%
Science	26.3	26.1	26.1	25.6	25.9	-0.4	-1.5%
ESOL	13.9	14.7	13.4	14.2	12.8	-1.2	-8.5%

Source: OLO calculations from MCPS data

*The “Change” columns were calculated without rounding, and, therefore, may differ slightly if calculated using the rounded averages presented here.

3. Comparing Two Sample High Schools to Systemwide Averages

The two high schools randomly selected were Watkins Mill High School and Quince Orchard High School. As Table 28 shows, compared to the total MCPS high school population, Watkins Mill (a “red zone” school) had a higher percent of FARMs-eligible students, while Quince Orchard (a “green zone” school) had a lower percent of FARMs-eligible students. Both Watkins Mill and Quince Orchard had a higher percent of English language learners and students with disabilities than MCPS high schools overall.

Table 28: Demographic Information for Watkins Mill, Quince Orchard, and All MCPS High Schools, FY08

	Percent Eligible for FARMs	Percent English Language Learners	Percent with Disabilities
Watkins Mill High School	33.3%	9.4%	17.5%
Quince Orchard High School	16.0%	7.1%	12.4%
All MCPS High Schools	19.2%	5.9%	10.8%

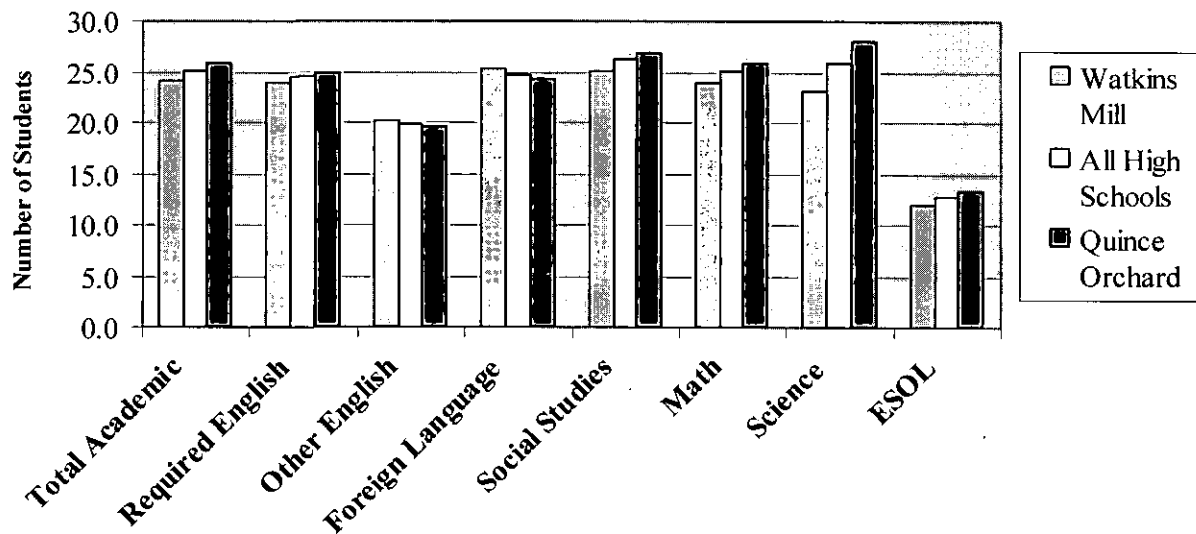
Source: MCPS Schools at a Glance, 2007-2008

Exhibit 7 (page 37) and Table 29 (page 38) compare average class sizes in Watkins Mill and Quince Orchard to systemwide averages for FY08. The data demonstrate the following:

- Compared to the systemwide average of 25.1 students per-academic class, Watkins Mill had slightly smaller academic class sizes (24.1 students per class) and Quince Orchard had slightly larger class sizes (25.9 students per class).

- The largest differences in average class sizes occurred among the Science classes, where compared to the systemwide average class size of 25.9, Watkins Mill had an average class size of 23.2 students while Quince Orchard had an average class size of 28.1 students.
- Conversely, Quince Orchard had smaller average class sizes for Foreign Language at 24.3 students per class compared to either Watkins Mill at 25.3 students or the systemwide average at 24.6 students per class. Quince Orchard's lower average class sizes for Foreign Language classes may have occurred in part due to the variety of foreign language options the school offers, some of which may attract fewer students compared to other academic courses. More specifically, Quince Orchard offers classes in five foreign languages (Spanish, French, Latin, Chinese, and American Sign Language), compared to only two options at Watkins Mill (Spanish and French).²

Exhibit 7: Average Class Sizes for Sample High Schools Compared to Systemwide Averages by Course Subject, FY08



²MCPS high school course offerings: <http://www.montgomeryschoolsmd.org/curriculum/coursebulletin/>. Last updated December 2007.

Table 29: Class Sizes in Watkins Mill and Quince Orchard Compared to All MCPS High Schools, FY08

Subject	School	Enrollment	Number of Classes	Average Class Size	Difference (School– All HS Avg.)
Total Academic	Watkins Mill	7,257	301	24.1	-1.0
	Quince Orchard	8,293	320	25.9	0.8
	<i>All HS</i>	209,785	8,350	25.1	
Required English	Watkins Mill	1,433	60	23.9	-0.7
	Quince Orchard	1,600	64	25.0	0.4
	<i>All HS</i>	40,783	1,661	24.6	
Other English	Watkins Mill	101	5	20.2	0.5
	Quince Orchard	235	12	19.6	-0.2
	<i>All HS</i>	6,319	320	19.7	
Foreign Language	Watkins Mill	859	34	25.3	0.6
	Quince Orchard	971	40	24.3	-0.4
	<i>All HS</i>	26,885	1,091	24.6	
Social Studies	Watkins Mill	1,728	69.0	25.0	-1.2
	Quince Orchard	1,860	69	27.0	0.8
	<i>All HS</i>	46,159	1,762	26.2	
Math	Watkins Mill	1,630	68	24.0	-1.1
	Quince Orchard	1,942	75	25.9	0.8
	<i>All HS</i>	45,911	1,828	25.1	
Science	Watkins Mill	1,506	65	23.2	-2.7
	Quince Orchard	1,685	60	28.1	2.2
	<i>All HS</i>	43,728	1,688	25.9	
ESOL	Watkins Mill	251	21	12.0	-0.8
	Quince Orchard	188	14	13.4	0.7
	<i>All HS</i>	3827	300	12.8	

Source: OLO calculation from MCPS data

4. Comparing High School Class Sizes to Class Size Assumptions Used in Budgeting

This section compares actual high school class sizes from FY06 to FY08 to:

- MCPS operating budget assumptions for average class sizes;
- The Board of Education's maximum class size guidelines; and
- Capital budget assumptions for program capacity class sizes.

a) High School Average Class Sizes Compared to Operating Budget Assumptions

Each year, the high school staffing request in MCPS' operating budget is calculated based on an average class size for all high school academic classes combined. These average class sizes used to develop the operating budget are referred to as "budgeted average class sizes." Budgeted average class sizes for ESOL classes are not published in MCPS' Operating Budget.

Table 30 compares the actual average academic class sizes to the budgeted average class sizes from FY06 to FY08. The data show that the actual average class sizes for high school academic courses were the same as the budgeted average class sizes in FY06, and slightly smaller (by 0.3 to 0.4 students) in FY07 and FY08.

Table 30: Actual vs. Budgeted Average High School Academic Class Sizes, FY06 – FY08

	FY06	FY07	FY08
Actual Average Class Size	25.6	25.0	25.1
Budgeted Average Class Size	25.6	25.4	25.4
Actual vs. Budgeted Class Size	Equal	Smaller by 0.4	Smaller by 0.3

Source: MCPS FY08 Operating Budget; OLO calculations from MCPS data

b) High School Actual Class Sizes Compared to Maximum Class Size Guidelines

The current Board of Education maximum class size guidelines for high school classes are the same as they are for middle school:

- 28 students per class for Required English classes; and
- 32 students per class for all other academic subjects.

The BOE does not provide maximum class size guidelines for ESOL or non-academic classes.

Tables 31 and 32 (page 40) show the number and percent of high school classes in each academic subject that exceeded the maximum class size guidelines. The data demonstrate that from FY06 to FY08:

- Overall, both the number and percent of oversized academic classes decreased between FY06 and FY08. In FY06, 529 classes were oversized (6.4% of all academic classes), compared to 438 classes in FY08 (5.2% of all academic classes).

- Similar to middle schools, Required English consistently had a higher percent and more classes over the maximum class size guidelines than any other academic subject. In FY08, 271 Required English classes were oversized, 16.3% of such classes.
- Other English consistently had the fewest classes over the guideline but not the lowest percent. In FY08, Foreign Language courses had the smallest percentage of oversized classes among subject areas at 4.9%.

Table 31: Number of High School Classes Over BOE Maximum Class Size Guidelines, FY06 – FY08

Subject	FY06	FY07	FY08	FY06-FY08 Change	
				#	%
Total Academic	529	337	438	-91	-17.2%
Required English	306	270	271	-35	-11.4%
Other English	17	15	18	1	5.9%
Foreign Language	61	46	54	-7	-11.5%
Social Studies	201	115	134	-67	-33.3%
Math	107	80	103	-4	-3.7%
Science	122	68	118	-4	-3.3%

Source: MCPS FY06 Operating Budget, OLO calculations from MCPS data

Table 32: Percentage of High School Classes Over BOE Maximum Class Size Guidelines, FY06 – FY08

Subject	FY06	FY07	FY08	FY06-FY08 Change
Total Academic	6.4%	4.0%	5.2%	-1.2%
Required English	18.9%	16.3%	16.3%	-2.6%
Other English	6.6%	5.1%	5.6%	-1.0%
Foreign Language	5.7%	4.1%	4.9%	-0.7%
Social Studies	11.5%	6.5%	7.6%	-3.9%
Math	5.7%	4.3%	5.6%	-0.1%
Science	7.3%	4.0%	7.0%	-0.3%

Source: MCPS FY06 Operating Budget, OLO calculations from MCPS data

c) High School Average Class Sizes Compared to Capital Budget Assumptions

As explained earlier, MCPS prepares its capital budget using school capacity calculations that are based on recommended program capacity ratios, i.e., the number of students per classroom. The current program capacity class sizes (adopted by the BOE in 2006) are 25 students per classroom for all high school classes except ESOL classes, which have a recommended program capacity of 15 students per classroom.

Table 33 compares actual average class sizes to MCPS' recommended program capacity class sizes for high school academic and ESOL classes from FY06 to FY08. The data show that average academic class sizes were larger than the program capacity class sizes by 0.6 students in FY06 and were essentially equal in FY07 and FY08. Average ESOL classes were smaller than the program capacity class sizes by one or two students each year.

Table 33: High School Average Class Sizes vs. MCPS Program Capacity Ratios for High School Classes, FY08

Subject	Program Capacity (Students per classroom)	FY06		FY07		FY08	
		Average Class Size	Average vs. Capacity	Average Class Size	Average vs. Capacity	Average Class Size	Average vs. Capacity
Total Academic	25	25.6	Larger by 0.6	25.0	Equal	25.1	Larger by 0.1
ESOL	15	13.4	Smaller by 1.6	14.2	Smaller by 0.8	12.8	Smaller by 2.2

Source: MCPS Amended FY05-10 CIP; OLO calculations from MCPS data

CHAPTER VI: Staffing, Enrollment, and Class Size Calculations

This chapter reviews a number of issues related to staffing, enrollment, and calculation of class size:

- Part A reviews the classroom teacher workforce and explains which teachers MCPS includes in calculations for the Official Class Size Report;
- Part B looks at trends in the number of 10-month teaching positions compared to student enrollment; and
- Part C provides two case studies that describe the impact of support teachers and special education inclusion on elementary class sizes during the school day.

Chapter Summary

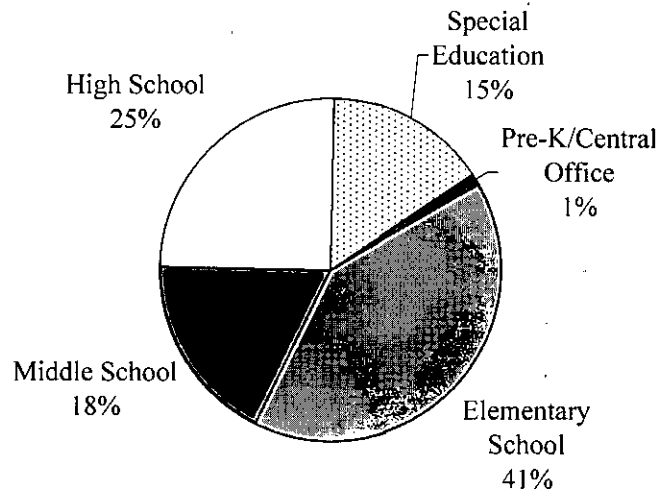
- The teachers “counted” for the Official Class Size Report represent approximately two-thirds of MCPS’ 10-month classroom teacher workforce. For elementary schools, the calculations only “count” traditional classroom teachers; for secondary schools, they include traditional classroom teachers and some support teachers.
- The types of teachers not included in MCPS’ Official Class Size Report calculations include: professional development teachers; elementary school support teachers; special educators; Pre-K teachers; and teachers assigned to central office or field-based positions.
- Between FY05 and FY08, the number of 10-month teaching positions increased by 5% while student enrollment declined by 1%.
- Between FY05 and FY08, the number of traditional classroom teachers increased by 3% while the number of support teachers increased by 12% and the number of professional development teachers increased by 7%.
- OLO’s site visits to two elementary schools suggest a significant impact of support and special education teachers on actual class sizes during parts of the school day.

A. Classroom Teacher Positions and MCPS’ Official Class Size Report.

MCPS’ Operating Budgets define “classroom teachers” as any 10-month teaching position. The FY08 budget includes 10,261.4 “classroom teacher” positions (FTEs). Exhibit 8 (page 43) depicts the allocation of these teacher positions: 84% to elementary, middle, and high schools; 15% to the Office of Special Education and Student Services,¹ and 1% to Pre-K teaching and central office or field based positions, e.g., consulting teachers.

¹ A majority of the special educators budgeted to the Office of Special Education and Student Services actually work in general education schools, but for budgeting purposes, are not assigned to schools.

Exhibit 8: All 10-Month Teaching Positions by Assignment, FY08
N=10,261 FTEs

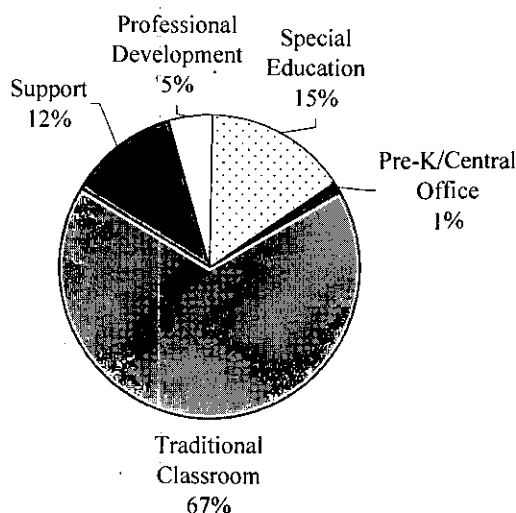


Among the teachers budgeted to general education elementary, middle, and high schools, there are three major categories of teachers by function:

- **Traditional classroom teachers** teach a homeroom class at the elementary school level and typically teach five academic or non-academic courses (out of a seven period day) at the secondary level. This category also includes Kindergarten teachers; ESOL teachers at the secondary level; alternative program teachers; vocational support teachers; career preparation teachers; 80% of the time of resource teachers, middle school team leaders and content specialists; and 60% of the time of athletic directors.
- **Support teachers** are teachers who provide specialized or intensive instruction to small groups of students. This category includes academic intervention teachers, special program support teachers, Reading Recovery teachers, focus teachers, elementary physical education, art, and music teachers, and 40% of the time of secondary athletic directors.
- **Professional development teachers** primarily work with other teachers in the school to improve instruction. Professional development teachers include staff development teachers, reading specialists, math content specialists, literacy coaches, and 20% of the time of secondary school resource teachers who serve as department chairs for one or two release periods per day.

Exhibit 9 (page 44) shows the distribution of all 10-month teaching positions by function in FY08. The data show that: 67% of all budgeted classroom teachers function as traditional classroom teachers in general education schools; 12% function as support teachers; 5% function as professional development teachers; and 15% function as special educators.

Exhibit 9: All 10-Month Teaching Positions by Function, FY08
N=10,261 FTEs



As a result of what is included and excluded from these calculations, FY08 data show that the teachers “counted” by MCPS class size data represent a maximum of two-thirds of the 10,261 budgeted classroom teacher positions.

At the elementary level, MCPS’ class size data calculations “count” only traditional classroom teachers who are assigned homerooms. Students are often re-grouped for instruction and may spend time with a support teacher or special education teacher, which temporarily reduces class sizes (see Part C of this chapter for a description of how support teachers impact class sizes). The class size data as currently reported do not capture the changes in class size that occur during the school day.

At the secondary level, identifying which teachers are included and excluded in MCPS’ class size data calculations is more complicated. In sum, at the secondary level class size data calculations “count” traditional classroom teachers and some support teachers.

The class size data for secondary schools track regular education classes. While almost all of these are taught by traditional classroom teachers, some are taught by support teachers. MCPS does not centrally collect data on the numbers of support teachers who are assigned regular education classes. (A “class” taught by a support teacher is counted if it includes six or more students.) In FY08, support teachers at the secondary level account for about 1% of all 10-month teaching positions.

MCPS class size data also exclude special education and professional development teachers not assigned a regular classroom and Pre-K teachers. In FY08, added together, these types of teachers account for 21% of all 10-month teaching positions.

Table 34 contains trend data on the increases in the numbers of teachers. Between FY05 and FY08, the number of traditional classroom teachers increased by 2.5%; the number of support teachers increased by 12.2%; the number of professional development teachers increased 6.7%; and the number of special educators, Pre-K teachers, and "other" teachers increased by 12.3%. A large percent (80%) of the increase in traditional classroom and support teacher positions occurred at the elementary level.

Table 34: Number of Classroom Teachers by Assignment and Function, FY05 – FY08²

	FY05	FY06	FY07	FY08	FY05 – FY08 Change	
					#	%
Traditional Classroom Teachers						
Elementary	2,711.5	2,857.7	2,874.7	2,830.1	118.6	4.4%
Middle	1,686.6	1676.5	1,663.5	1,647.3	-39.3	-2.3%
High	2,313.3	2,377.3	2,441.3	2,400.3	87.0	3.8%
Total	6,711.4	6,911.5	6,979.5	6,877.7	166.3	2.5%
Support Teachers						
Elementary*	949.3	985.0	1,019.1	1,069.0	119.7	12.6%
Middle	48.5	54.1	54.1	54.1	5.6	11.5%
High	86.8	87.4	90.3	94.3	7.5	8.6%
Total	1,084.6	1,126.5	1,163.5	1,217.4	132.8	12.2%
Professional Development Teachers						
Elementary	250.0	250.0	258.0	260.0	10.0	4.0%
Middle	132.2	138.8	138.8	146.8	14.6	11.0%
High	67.6	68.8	71.2	73.2	5.6	8.3%
Total	449.8	457.6	468.0	480.0	30.2	6.7%
Special Educators, Pre-K, and Other Teachers						
Special Education	1,383.0	1,424.9	1,525.2	1,562.9	179.9	13.0%
Pre K/Central Office	118.2	119.5	120.7	123.4	5.2	4.4%
Total	1,501.20	1,544.40	1,645.90	1,686.30	185.1	12.3%
All 10-Month Teachers						
Total	9,747.0	10,040.0	10,256.9	10,261.4	514.4	5.3%

* According to MCPS, of the 119.7 support positions added between FY05-FY08 at the elementary level, 53 FTEs were ESOL teachers and 39 FTEs were Title I and focus teachers.

Sources: OLO analysis of MCPS budgeted staffing data and FY05 Adopted Operating Budget

FY09 Board of Education Request: The Board of Education's FY09 Operating Budget Request, as adopted in February 2008, includes funding for an additional 141.7 classroom teacher positions (FTEs). Of these, 44.5 (31%) are traditional classroom teacher positions; 55.1 (39%) are support and professional development teacher positions; and 43.1 (30%) are special educator positions.

² MCPS reports a total of 9,767.85 classroom teachers in Table 5 of the FY05 adopted operating budget compared to the 9,747.0 positions identified by OLO. Had OLO used MCPS' figure, the FY05 to FY08 increase in classroom teachers would have been 5.1% with 493.55 FTEs rather than 5.3% with 514.4 FTEs.

Table 35: Budgeted Classroom Teacher Positions, FY08 – FY09

Budgeted Classroom Teacher Types	FY08 Budget	FY09 Request	FY08-FY09 Change
Traditional Classroom Teachers	6,877.7	6,922.2	44.5
Support Teachers	1,217.4	1,267.1	49.7
Professional Development Teachers	480.0	485.4	5.4
Special Educators	1,562.9	1,606.0	43.1
Pre K/Central Office	123.4	122.4	-1.0
All 10-Month Teachers	10,261.4	10,403.1	141.7

*FY09 Board of Education Operating Budget, adopted February 2008

Source: OLO calculations from MCPS data

B. Comparing Changes in 10 Month Teaching Positions to Student Enrollment

Table 36 contains trend data on the numbers of 10-month teaching positions by assignment compared to changes in student enrollment between FY05 and FY08. During the past four fiscal years, the total number of 10-month teaching positions grew by 5.3% while student enrollment declined 1.1%. The numbers of 10-month teaching positions increased at all levels except for middle school, which declined by 19 teachers or 1%.

Table 36: All 10-Month Teaching Positions and Student Enrollment Trends, FY05 – FY08

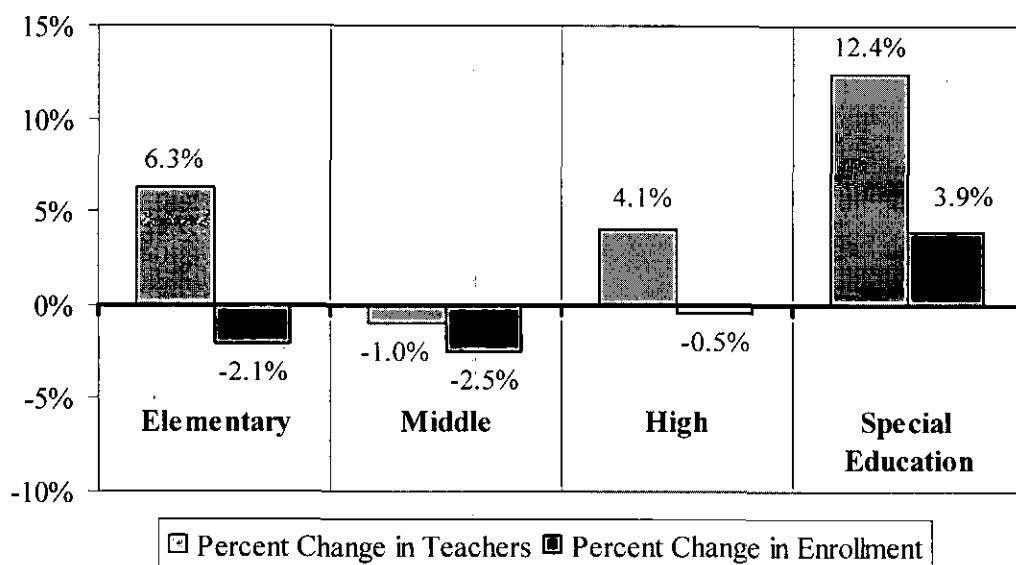
	FY05	FY06	FY07	FY08	FY05-FY08 Change	
					#	%
10-Month Teaching Positions by Assignment						
Elementary	3,910.8	4,092.7	4,151.8	4,159.1	248.3	6.3%
Middle	1,872.3	1,874.4	1,861.4	1,853.2	-19.1	-1.0%
High	2,467.7	2,533.5	2,602.8	2,567.8	100.1	4.1%
Special Education	1,344.4	1,380.4	1,479.7	1,511.4	167.0	12.4%
Pre K/Other	113.2	114.5	115.7	118.4	5.2	4.6%
Total	9,747.0	10,040.0	10,256.9	10,261.4	514.4	5.3%
Student Enrollment						
Elementary	57,620	57,266	56,266	56,575	-1,188	-2.1%
Middle	29,232	28,926	28,363	28,355	-734	-2.5%
High	41,323	41,838	41,470	41,116	-207	-0.5%
Special Education	8,461	8,657	8,888	8,853	333	3.9%
Pre K/Other ³	2,701	2,700	2,811	2,846	204	7.7%
Total	139,337	139,387	137,798	137,745	-1,592	-1.1%

Sources: OLO analysis of MCPS staffing data; FY05 -FY09 Recommended Operating Budgets

³About 80% of Pre-K/Other Enrollment reflects general education Pre-K enrollment, including Head Start, and the remainder reflects secondary student enrollment in Alternative Programs and Gateway to College.

Exhibit 10 compares the percent changes in the numbers of 10-month teaching positions between FY05 and FY08 to changes in student enrollment by grade level/program. As the graphic shows, except for Pre K, the growth in the number of 10-month teaching positions exceeded growth in the number of students for every grade level/program.

Exhibit 10: Change in Classroom Teachers Compared to Student Enrollment, FY05 – FY08



From FY05 to FY08, MCPS added 166.3 traditional classroom teachers to its roster (Table 34, p. 45) while general education enrollment declined by 2,129 students (Table 36). During this timeframe, MCPS reduced most average class sizes by grade and subject, for a combined average decrease of half a student (see Table 37).

Table 37: Average Class Size Weighted by Enrollment, FY05 - FY08

	FY05	FY06	FY07	FY08	Change	
					#	%
Grades K-5	21.2	20.5	20.2	20.5	-0.7	-3.3%
Grades 6-8 (Academic & ESOL)	23.8	23.6	23.6	24.0	0.2	0.8%
Grades 9-12 (Academic & ESOL)	25.3	25.2	24.6	24.7	-0.6	-2.4%
Weighted Average Class Size (All Grades)	23.1	22.7	22.4	22.7	-0.5	-2.0%

Source: OLO calculations from MCPS data

C. The Impact of Support Teachers and Special Education Inclusion on Class Sizes

As explained earlier, MCPS calculates average class sizes based on the number of students in homeroom classes; as a result, data on average class size do not capture the impact that support teachers, professional development teachers, or special education inclusion has on actual class sizes during the school day.

Table 38 describes the distribution of school-based teacher positions and demonstrates that in FY08 MCPS budgeted one support or professional development teacher for every two traditional classroom teachers in elementary schools.

Table 38: Distribution of School-Based Teacher Positions by Grade Level, FY08

	Elementary	Middle	High
Traditional Classroom Teachers	67.5%	88.8%	93.5%
Support Teachers	26.4%	2.9%	3.7%
Professional Development Teachers	6.1%	8.3%	2.8%
Ratio of Support and Professional Development Teachers to Traditional Classroom Teachers	2.08: 1	7.98:1	14.49:1

Source: OLO analysis of MCPS classroom teacher staffing data

To get a sense of how support, professional development, and special education teachers affect the ratio of teachers to students in elementary school classrooms, OLO conducted site visits to two elementary schools profiled in Chapter IV. This section reports the results of OLO's site visits in two parts:

- Part 1 describes FY08 staffing and the indirect impact of support and professional development teachers on class sizes at Glenallan Elementary. OLO randomly selected Glenallan from a roster of all focus ("red zone") elementary schools.
- Part 2 describes FY08 staffing and the indirect impact of support, professional development and special education teachers on class sizes at Diamond Elementary. OLO randomly selected Diamond from a roster of all non-focus ("green zone") elementary schools.

While additional observations and information would be needed to provide a complete and comprehensive picture, OLO's site visits to two elementary schools suggest that the non-traditional classroom teachers assigned to a school do have a substantial indirect impact on elementary class sizes at different times during the school day. However, it must be noted that because this impact is not consistent throughout the day, homeroom teachers do end up spending time with their full class as it is captured in MCPS Official Class Size data.

1. Glenallan Elementary School

As a focus school, Glenallan receives additional funding for targeted academic support to address high rates of student poverty. Compared to a non-focus school, Glenallan staff includes more support teachers, such as a math coach and half-time Reading Recovery teacher. And with 36.2 percent of Glenallan's enrollment having limited English proficiency, their roster includes more ESOL teachers as well.⁴

Based on Glenallan's FY08 teaching roster, Table 39 below lists the number of teacher positions (FTEs) by category: traditional classroom teachers, support teachers, professional development teachers, special educators, and Pre-K teachers.

Table 39: Teacher Staffing for Glenallan Elementary School, FY08

Teacher Category	Positions in Full Time Equivalents (FTEs)
Traditional classroom teachers	Kindergarten (4.0) Classroom (16.0)* 20.0 teachers
Support teachers	ESOL (2.9) Focus (Math Coach) (1.0) Reading Recovery (0.5) Literacy/Reading Coach (1.0) Physical Education (1.0) Art (1.0) Music (1.0) Instrumental Music (0.2) 8.6 teachers
Professional development teachers	Staff Development (1.0) Reading Specialist (1.0) 2.0 teachers
General Education Subtotal	30.6 Teachers
Special Education	Classroom (2.0) Resource Program (1.0)
Pre-K	Preschool (0.8)
Total	34.4 Teachers

* The additional 3rd grade teacher hired after the start of this school year is included among this number although this teacher does not have a separate homeroom.

Sources: March 6, 2008 OLO site visit and MCPS' Schools at Glance, 2007-2008

⁴ MCPS allocates one ESOL teacher per 44 English language learners in elementary schools.

The data indicate that more than one-third of Glenallan's K-5 general education teachers were either support or professional development teachers who did not have homerooms that contributed to the school's official average class size data. About one-third of these positions were allocated to art, music, and physical education teachers whose instructional time affords homeroom teachers (i.e., traditional elementary classroom teachers) daily release and planning time.

With the above as background, OLO conducted a site visit to Glenallan to better understand how the support and professional development teachers impact homeroom class sizes during the school day. A summary of findings based on OLO's site visit follows.

- Reading and Math Blocks: Much of the indirect impact that support and professional development teachers have on class sizes occurs during the delivery of small group instruction in reading and math in elementary schools.

To differentiate reading instruction, MCPS' elementary schools rely on daily 90-minute Reading Blocks to deliver small group instruction to groups of 15-17 students, which are then further divided into three smaller groups. Homeroom teachers work in partnership with literacy/reading recovery and other support teachers to reconfigure homeroom classes into these smaller "classes" of students.

Similarly, elementary schools often use Math Blocks to differentiate instruction for students. As such, a homeroom class of 25 students could be reduced to a class of 15 students for either a Reading or Math Block.

Glenallan utilizes both Reading and Math Blocks to provide small group instruction to students. For example, the focus teacher (i.e., Math Content Coach) pulls out 14 to 15 students in Grades 4 and 5 to teach them accelerated math several days a week. During these times, each of Glenallan's 4th and 5th grade classes reduces their class size by about five students. The Math Content Coach also comes into Grade 1 math classes to provide interventions for students performing below grade-level and into Grade 2 math classes to provide accelerated math; when the Math Content Coach is present, the regular classroom teacher has fewer students to teach.

- Reading Interventions for Students Performing Below Grade-Level: Both support and professional development teachers reduce elementary homeroom sizes when they pull out students performing below grade-level for intensive reading interventions. At Glenallan, this includes the half-time Reading Recovery teacher who pulls out four Grade 1 students for 30 minutes each day for intensive instruction, and the Reading Specialist who works with volunteers to provide reading tutoring via the Ruth Rales program and/or the SOAR reading program to students needing extra help. Additionally, both the Reading Specialist and Staff Development teacher provide 15 minutes of daily instruction to seven Kindergarten students as a pull-out program.

- **English for Speakers of Other Languages (ESOL):** At the elementary level, ESOL teachers also reduce homeroom class sizes when they pull out students for ESOL instruction. Glenallan has 2.9 ESOL teachers who provide pull-out instruction to students with limited English proficiency (except during the Math Block). With English language learners representing more than one-third of Glenallan's overall student population, the indirect impact of ESOL teachers on average elementary class sizes is significant.

In sum, both support and professional development teachers at Glenallan Elementary impact homeroom class sizes during the day by providing "plug-in" and "pull-out" instruction to small groups of students. As such, average homeroom class sizes during parts of the school day, particularly during the Math blocks, are probably 4-5 students smaller than what is reported for Glenallan in MCPS' Official Class Size Report.

2. Diamond Elementary School

As a non-focus school, Diamond's staff roster includes fewer support teachers than Glenallan's. However, because Diamond houses two special education programs – classes for students with high functioning autism (Asperger's syndrome) and an elementary home school inclusion model – Diamond employs more special education teachers than Glenallan.

Based on Diamond's FY08 teaching roster, Table 40 below lists the number of teacher positions (FTEs) by category.

Table 40: Teacher Staffing for Diamond Elementary School, FY08

Teacher Categories	Positions in Full Time Equivalents (FTEs)
Traditional Classroom	Kindergarten (4.0) Classroom (15.0) 19.0 teachers
Support	ESOL (1.0) Reading Initiative (1.0) Physical Education (1.0) Art (1.0) Music (1.0) Instrumental Music (0.3) 5.3 teachers
Professional Development	Staff Development (1.0) Reading Specialist (1.0) 5.0 teachers
General Education Subtotal	26.3 Teachers
Special Education	Classroom (4.0) Resource Program (1.0)
Pre-K	None
Total	31.3 Teachers

Sources: March 11, 2008 OLO site visit and MCPS' Schools at Glance, 2007-2008

The data indicate that Diamond has 2.0 support teacher FTEs to teach ESOL and improve reading; this compares to the 5.4 support FTEs that Glenallan has to teach ESOL and provide focused academic support in reading and mathematics. Diamond's roster includes 5.0 FTEs assigned to teach special education; this compares to 3.0 FTEs assigned to special education at Glenallan.

With the above as background, OLO conducted a site visit to Diamond to better understand how the school uses support, professional development, and special education positions to deliver instruction, and what indirect impact did they have on homeroom class sizes. Part of the answer at Diamond relies heavily on the role of special educators in supporting homeroom teachers, particularly through its home school inclusion model. A summary of findings based on OLO's site visit follows.

- Reading and Math Blocks: Diamond divides its 1.0 Reading Initiative FTE⁵ into two half-time positions to assist homeroom teachers in leading Reading Blocks. During these times, the homeroom classes are reconfigured into groups of 15-18 students to provide differentiated instruction. Other staff members, including special educators, are also tapped to provide instruction to smaller groups of students.

In second grade, smaller learning groups are also used to differentiate math instruction. In particular, special educators from the Asperger's classes and the Home School Inclusion Model deliver instruction to small groups of learners inclusive of students who do not have individualized education plans (IEPs).

- Reading Interventions for Students Performing Below Grade-Level. Like Glenallan, Diamond offers a number of interventions for below grade-level readers, i.e., SOAR, Wilson Reading. Diamond uses one of its home school inclusion special educators and its speech pathologists to provide intensive reading instruction to Kindergarten students who need extra assistance.

Through its Reading Block, Diamond also uses its Reading Initiative teachers and special educators to provide intensive instruction to students with disabilities and students performing below grade level who do not have IEPs. Additionally, the Reading Specialist provides 30 minutes of pull-out instruction to 3rd grade readers three times a week; and the speech pathologists also provides pull-out support to students with disabilities included in general education homerooms.

⁵MCPS allocates Reading Initiative positions to non-focus elementary schools to enable these schools to staff Grade 1-2 Reading Blocks.

- English for Speakers of Other Languages (ESOL): Diamond employs one ESOL teacher who delivers pull-out services to eligible students. The highest percentages of ESOL students are in Grades K-1, so the ESOL teacher works with these teacher teams to deliver services and in turn indirectly impacts that average class sizes during the day. Conversely, a Grade 3 teacher interviewed by OLO indicated that she has one student who received ESOL services four times per week. As such, her average class size is reduced by one student during these times.
- Special Education Inclusion: Diamond includes all students with disabilities in its home school inclusion model in general education homeroom classes at the start of the day. This means that most of Diamond's students with disabilities are included in the school's official average class size calculations.

Students in the high functioning autism classes are not included in general education homeroom counts, so their inclusion in classes such as accelerated math can increase general education class sizes during the day. However, Asperger's class teachers often co-teach classes that include these students, such that average class sizes are actually smaller with the inclusion of these students because these classes have two teachers rather than one.

Additionally, the home school inclusion teachers often co-teach general education classes that include students with disabilities in the home school program; the result is an increase in the ratio of teachers to students within some general education classes at various times during the day. For example, the home school special educator interviewed by OLO works with the Grade 2 team to deliver math instruction to small groups, co-teaches and provides parallel instruction for a social studies class, and assists Grades 1 and 2 teachers in writing instruction.

In sum, support and professional development teachers, as well as special educators and related service providers (e.g., speech pathologist) at Diamond Elementary impact homeroom class sizes during selected parts of the instructional day by providing "plug-in" and "pull-out" instruction to small groups of students. With its home school inclusion model, the plugging in of special educators into general education classes in particular increases the ratio of staff to students in general education classes during the day, and as such, reduces the actual class sizes experienced by students.

CHAPTER VII: Summary of Findings

The Office of Legislative Oversight conducted this project to provide the County Council with greater understanding of the trends and costs associated with the Montgomery County Public Schools' Class Size Initiative. This chapter summarizes OLO's findings in four parts:

- The components and cost of the Class Size Initiative;
- MCPS' class size budget assumptions, guidelines, and calculations;
- Elementary and secondary class size trends; and
- Comparing trends in teacher staffing, student enrollment, and class size.

THE COMPONENTS AND COST OF THE CLASS SIZE INITIATIVE

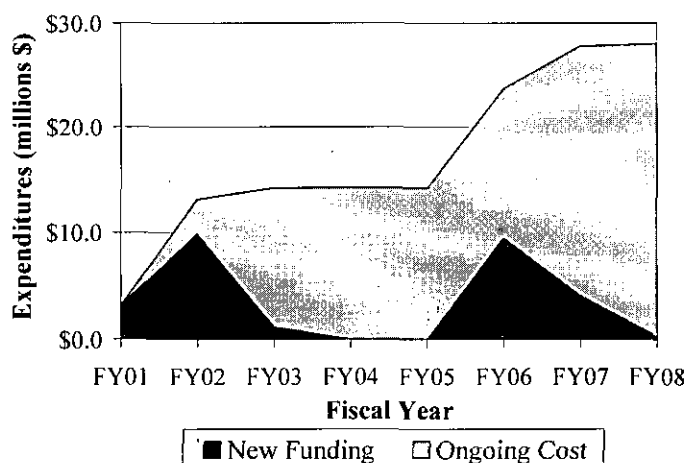
Finding #1: Since FY01, approved MCPS budgets have funded 584 additional teacher positions (FTEs) to implement the Class Size Initiative and reduce average class sizes across the school system.

MCPS' Class Size Initiative has funded different components aimed at reducing elementary, secondary, and special education classes, Grade K-2 class sizes in focus schools, and eliminating combination classes in elementary schools. Specifically, between FY01 and FY08, MCPS invested \$28 million to add:

- 151 teachers to reduce elementary class sizes (\$8.2 million);
- 149.5 teachers to reduce secondary class sizes (\$7.4 million);
- 108 teachers to reduce special education class sizes (\$4.4 million);
- 9 teachers to eliminate combination classes (\$510K); and
- 166.5 teachers to reduce Grade K-2 class sizes in focus schools (\$7.5 million).

Finding #2: Between FY01-FY08, the Class Size Initiative cost more than \$139 million.

Between FY01 and FY08, the cost of the MCPS Class Size Initiative, calculated in constant dollars, was \$139 million. The exhibit below depicts the \$28 million in new costs and \$111 million in ongoing costs for continuing the positions added each year. This calculation underestimates the total cost because it excludes the cost of employee benefits and the annual increases in employee compensation, e.g., cost-of-living increases and salary step increases.



MCPS' CLASS SIZE BUDGET ASSUMPTIONS, GUIDELINES, AND CALCULATIONS

Finding #3: Actual average class sizes come close to the average class size assumptions that MCPS uses to develop its operating and capital budgets.

MCPS uses budgeted average class size assumptions to develop its annual operating budget request, and recommended student-to-classroom ratios (program capacity class sizes) to develop its capital budget requests. Table 41 compares these two measures to actual average class size data for FY08 by grade level.

The data show that systemwide calculations of actual class sizes closely align (within one student) with budgeted average class sizes for all grade levels. The systemwide averages are also close to the program capacity assumptions that MCPS uses to develop its capital budget. Program capacity class sizes in focus (high poverty) elementary schools are smaller than in non-focus schools for Grades K-2; as a result, the systemwide class size averages are in-between the program capacity assumptions for focus and non-focus schools.

Table 41: MCPS Program Capacity Class Sizes Compared to Budgeted Average Class Sizes and Actual Average Class Sizes, FY08

Level	Program Capacity* Class Sizes	Budgeted Average Class Sizes	Systemwide Actual Average Class Sizes
Kindergarten	15.0 (focus schools)	18.1	18.2
	22.0 (non-focus schools)		
Grades 1-2	17.0 (focus schools)	21.4	21.0
Grades 1-5/6 Elementary	23.0		
Grades 6-8 Academic Classes	25.0	23.6	23.9
Grades 9-12 Academic Classes	25.0	25.4	24.7

* For middle schools, MCPS calculates program capacity with an assumed utilization rate of .85 or 21.25 students per classroom. For high school, the assumed utilization rate is .90 or 22.5 students per classroom.

Source: MCPS Operating and Capital Budgets, FY08

Finding #4: The class size assumptions used to prepare MCPS' budget requests are lower than the Board of Education's maximum class size guidelines.

The table below summarizes the current maximum class size guidelines, as adopted by the Board of Education in FY06. MCPS uses the term "oversized" to describe classes that have enrollments above these maximum class size guidelines.

While some "oversized" classrooms can be found at all grade levels (see Finding #8), a comparison among the different class size measures shows that MCPS' recommended program capacity class sizes, budgeted average class sizes, and actual average class sizes (systemwide) are all smaller than the maximum class size guidelines adopted by the BOE.

Table 42: Maximum Class Size Guidelines, adopted by the BOE in FY06

Grade Level	Students per Class
Kindergarten	25
Grades 1-3	26
Grades 4-5	28
Middle (Required English/Other Academic)	28/32
High (Required English/Other Academic)	28/32

Source: MCPS Official Class Size Report, FY08

ELEMENTARY AND SECONDARY CLASS SIZE TRENDS

Finding #5: Average class sizes in Grades K-2 are smaller in focus vs. non-focus schools.

A key component of MCPS' Class Size Initiative has been to reduce Grade K-2 average class sizes in focus (high poverty) schools. Between FY01 and FY08, MCPS added 166.5 teacher positions at an initial cost of \$7.5 million toward this goal.

Average class size data for the past five fiscal years (FY04 to FY08) show that the average Grades K-2 class sizes are consistently smaller in focus compared to non-focus schools. Specifically, when compared to non-focus school classes:

- Average Kindergarten classes in focus schools are smaller by 5-6 students;
- Average Grade 1 classes in focus schools are smaller by 6-7 students; and
- Average Grade 2 classes in focus schools are smaller by 7-8 students.

Finding #6: Between FY04 and FY08, average class sizes across the school system largely remained stable, with fluctuations generally within one student.

Based on data from the current school year, Exhibit 11 arrays average class sizes for different school levels/programs. The data show the smallest average class sizes were ESOL classes in middle and high schools (fewer than 13 students); and the largest average class sizes were academic courses in high schools (25.1 students).

Exhibit 12 shows the trends in average class sizes (systemwide) from FY04 to FY08 for Kindergarten, Grades 1-5, Middle School Academic, and High School Academic courses. The data demonstrate the relatively small fluctuations in average class sizes in recent years.

Exhibit 11: Average Elementary, Middle, and High School Class Sizes, FY08

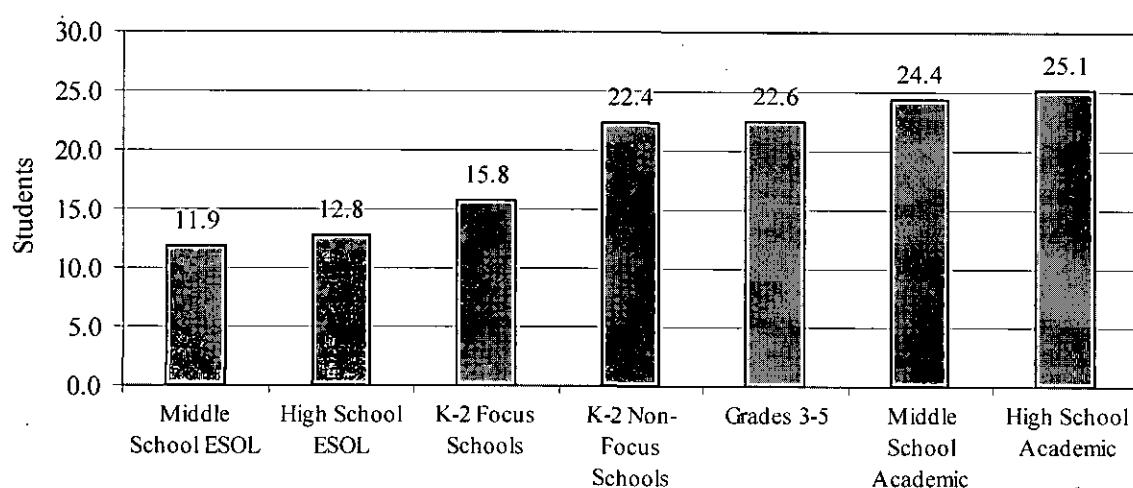
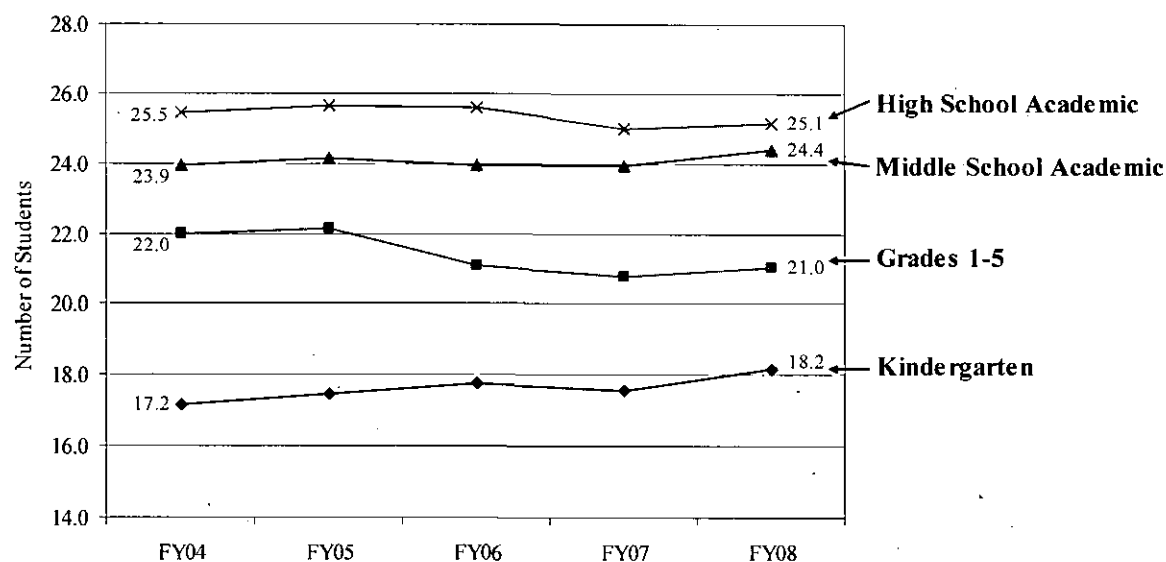


Exhibit 12: Trends in Average Elementary, Middle, and High School Class Sizes, FY04 - FY08



Finding #7: Between FY06 and FY08, there were consistently fewer “oversized classes” at the elementary school level compared to middle and high school.

MCPS defines “oversized classes” as those with enrollments that exceed the guidelines adopted by the Board of Education for maximum class size. The tables on page 59 contain data on the percent of oversized classes between FY06 and FY08 for elementary school, middle school academic, and high school academic courses. The data show that between FY06 and FY08:

- The percent of oversized Grade K-5 classes ranged between 1.5% and 2.7% of all classes. Comparatively, Grade 3 consistently had the highest percent of oversized classes; in FY08, 4% (17 classes) of all Grade 3 classes had enrollments that exceeded the BOE’s guidelines.
- The percent of oversized academic middle school classes ranged between 4.2% and 5.4% of all academic classes combined. Comparatively Required English courses consistently had the largest percent of oversized classes; in FY08, 11.1% (132 classes) of all Required English classes in middle schools had enrollments that exceeded the BOE’s guidelines.
- When combined, the percent of oversized academic high school classes ranged between 4% and 6.4%. Similar to middle school, Required English courses consistently had the largest percent of oversized classes; in FY08, 16.3% (271 classes) of all Required English classes in high schools had enrollments that exceeded the BOE’s guidelines.

COMPARING TRENDS IN TEACHER STAFFING, ENROLLMENT, AND CLASS SIZE

Finding #8: Between FY05 and FY08, the number of 10-month classroom teachers increased by 5% while student enrollment decreased 1%. During this time, average class sizes across grade levels declined by 2% (0.5 students).

Between FY05 and FY08, the number of budgeted classroom teachers grew by 5% (from 9,747 to 10,261.4 FTEs) while student enrollment declined by 1% (from 139,337 to 137,745 students). Exhibit 13 shows the relative increase in the number of teachers compared to changes in enrollment by grade level and for special education programs. During this time period, overall average class sizes across grade levels declined by 2% or 0.5 students. (For more details on this calculation, see Table 37, page 47.)

Exhibit 13: Change in Classroom Teachers Compared to Student Enrollment, FY05 - FY08

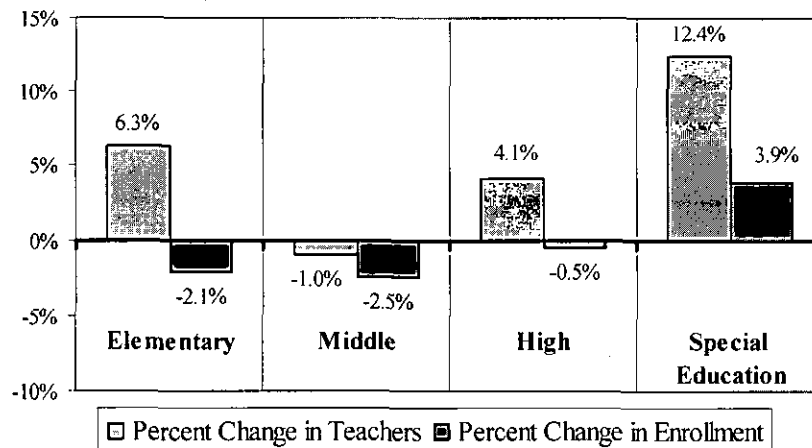


Table 43: Percent of Classes in Each Grade or Subject that are Oversized, FY06 – FY08

A: Elementary School Classes

Grade Level and Guideline	FY06	FY07	FY08	FY06 - FY08 Change
Total Number of ES Classes	2,816	2,815	2,802	-14
Total Oversized Classes	2.7%	1.5%	2.5%	-0.2%
Kindergarten (over 25)	1.0%	0.6%	1.7%	0.7%
Grade 1 (over 26)	1.0%	0.2%	2.8%	1.8%
Grade 2 (over 26)	3.0%	1.0%	3.6%	0.6%
Grade 3 (over 26)	6.4%	3.9%	4.0%	-2.5%
Grade 4 (over 28)	1.2%	0.7%	0.9%	-0.2%
Grade 5 (over 28)	4.0%	2.8%	1.7%	-2.3%

B: Middle School Classes

Subject and Guideline	FY06	FY07	FY08	FY06 – FY08 Change
Total Number of Academic Classes	6,282	6,233	6,063	-219
Oversized Academic Classes	5.4%	4.2%	4.9%	-0.5%
Required English (over 28)	13.9%	9.1%	11.1%	-2.8%
Other English (over 32)	0.4%	0.0%	0.1%	-0.3%
Foreign Language (over 32)	4.4%	4.6%	5.1%	0.8%
Social Studies (over 32)	4.7%	4.4%	5.5%	0.8%
Math (over 32)	1.7%	1.4%	1.4%	-0.3%
Science (over 32)	4.9%	4.3%	4.7%	-0.2%

C: High School Classes

Subject and Guideline	FY06	FY07	FY08	FY06 - FY08 Change
Total Number of Academic Classes	8,220	8,427	8,350	130
Total Academic Classes	6.4%	4.0%	5.2%	-1.2%
Required English (over 28)	18.9%	16.3%	16.3%	-2.6%
Other English (over 32)	6.6%	5.1%	5.6%	-1.0%
Foreign Language (over 32)	5.7%	4.1%	4.9%	-0.7%
Social Studies (over 32)	11.5%	6.5%	7.6%	-3.9%
Math (over 32)	5.7%	4.3%	5.6%	-0.1%
Science (over 32)	7.3%	4.0%	7.0%	-0.3%

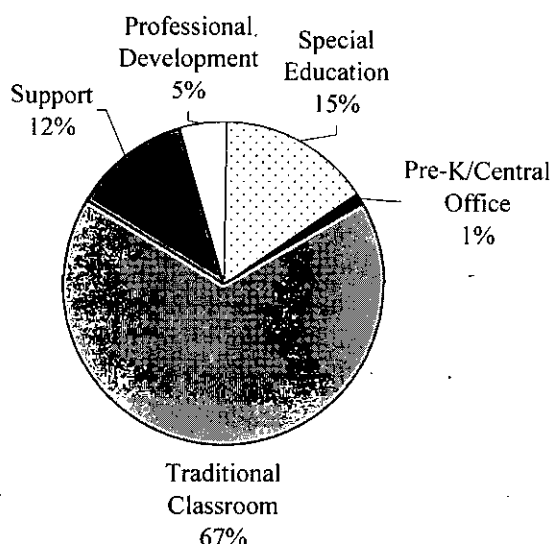
Source: OLO calculations from MCPS data

Finding #9: In FY08, only 2/3 of MCPS' 10-month teacher positions "counted" toward MCPS' calculations of average class size.

Exhibit 14 depicts the distribution of all 10-month teaching positions by function in FY08: 67% function as traditional classroom teachers, 12% function as support teachers, and 5% function as professional development teachers in general education schools. Another 15% teach special education and 1% are Pre-K teachers or based in central offices.

Only classes taught by traditional classroom teachers and some support teachers at the secondary level are "counted" toward MCPS' calculations of average class size. Courses taught by professional development teachers, most support teachers, special educators, and Pre-K teachers are excluded. As a result, in FY08, only 2/3 of MCPS' budgeted 10-month teaching positions were counted in MCPS' official class size data.

Exhibit 14: All 10-Month Teaching Positions by Function, FY08
N=10,261 FTEs



Finding #10: In recent years, the rate of growth in the number of traditional classroom teachers has been comparatively less than that among support, professional development, and special education teachers.

Table 44 (page 61) contains data on the number of budgeted 10-month classroom teachers by function from FY05 to FY08. During this time, the total number of 10-month teachers increased by 5.3%. The rate of increase among support, professional development, and special education teachers was higher than that of traditional classroom teachers. Specifically, the rate of increase for traditional classroom teachers was 2.5%. This compared to 12.2% for support teachers, 6.7% for professional development teachers, and 13% for special education teachers. A large percent (80%) of the increase in traditional classroom and support teacher positions occurred at the elementary level (for more details on staffing increases by grade level, see Table 34 on page 45).

Table 44: Budgeted Classroom Teacher by Function, FY05 – FY08

Budgeted Classroom Teacher Types	FY05	FY06	FY07	FY08	Change	
					#	%
Traditional Classroom Teachers	6,711.4	6,911.5	6,979.5	6,877.7	166.3	2.5%
Support Teachers	1,084.6	1,126.5	1,163.5	1,217.4	132.8	12.2%
Professional Development Teachers	449.8	457.6	468.0	480.0	30.2	6.7%
Special Educators	1,383.0	1,424.9	1,525.2	1,562.9	179.0	13.0%
Pre K/Central Office	118.2	119.5	120.7	123.4	5.2	4.4%
All 10-Month Teachers	9,747.0	10,040.0	10,256.9	10,261.4	514.4	5.3%

Sources: OLO Analysis of MCPS budgeted staffing data and FY05 Adopted Operating Budget

Finding #11: MCPS' average class size calculations for elementary schools do not capture the changes in student-to-teacher ratios that occur during the school day.

Because MCPS' Official Class Size Report for the elementary grades relies solely on homeroom assignments, the class counts do not capture the changes in teacher-to-student ratios that occur during the school day as a result of support teachers and special education inclusion.

Elementary students are often re-grouped for instruction. When a support teacher (e.g., ESOL teacher, reading initiative teacher) works with a subset of students, this temporarily reduces the homeroom class size. Similarly, when students assigned to a special education teacher join a general education homeroom for part of the day, this temporarily increases the homeroom class size if an additional teacher (e.g., special educator) is not assigned to co-teach that class.

OLO's site visits to two elementary schools confirmed that support and special education teachers affect general education class sizes during the school day. The impact of support teachers on class sizes was especially evident during reading and math blocks, the delivery of reading interventions to students below grade level and English for Speakers of Other Languages (ESOL), and with the inclusion of students with disabilities into general education classrooms. However, because this impact is not consistent throughout the school day, homeroom teachers do spend time with their full class as it is captured in MCPS' class size data.

CHAPTER VIII: Recommended Discussion Issues

The County Council asked the Office of Legislative Oversight (OLO) to undertake this project to improve the Council's understanding of the costs and trends associated with Montgomery County Public Schools' Class Size Initiative. This chapter outlines OLO's recommended discussion issues for County Council worksessions with MCPS representatives in three areas:

- MCPS' goals and priorities regarding average class sizes;
- The short and long-term costs of implementing changes to class size; and
- The feasibility of providing the Council with additional class size information both for general education and special education.

The intent of recommending these discussion issues is to enhance the Council's understanding and oversight of public funds appropriated to MCPS related to average class sizes.

Issue #1: MCPS' goals and priorities regarding average class sizes.

Understanding the intent behind MCPS' major systemwide initiatives is important for assessing their cost and evaluating their impact. OLO recommends the Council talk with MCPS representatives about the school system's goals for average class sizes, oversized classes, and anticipated impact of staffing additions/changes on class sizes. Specific discussion questions in these three areas are outlined below.

Class Size Goals/Priorities. As reviewed in this report, the assumptions on class sizes that MCPS uses to develop its operating and capital budget requests align closely with MCPS' actual average class sizes. In addition, the class size assumptions that MCPS uses to develop its operating and capital budget requests are lower than the maximum class size guidelines adopted by the Board of Education. OLO recommends the Council ask MCPS representatives to discuss:

- How does MCPS perceive the relationship among operating budget assumptions on class size, capital budget assumptions on class size (program capacity class sizes), and the BOE's maximum class size guidelines?
- What factors influence MCPS' decision to modify any of these assumptions or guidelines on class size?

Number of Oversized Classes. In 2006, the Board of Education adopted a set of revised maximum class size guidelines by grade level and subject matter. Between FY06 and FY08, MCPS reduced the number of oversized elementary, middle, and secondary classes overall, but some subjects, such as secondary Required English courses, still evidence higher rates of oversized classes. OLO recommends the following discussion questions:

- Is there an "acceptable range" of oversized classes that MCPS is trying to achieve?
- What strategies have been undertaken to reduce the number of oversized Required English classes?

Additional Classroom Teachers. Between FY05 and FY08, the number of 10-month classroom teachers increased by 5% while student enrollment declined by 1%. During this time, the rate of growth in the number of traditional classroom teachers was comparatively less than that among support and professional development teachers. OLO recommends the Council ask MCPS representatives to discuss:

- In addition to reducing class sizes, what were MCPS' other reasons for increasing the number of 10-month classroom teachers?
- How does MCPS determine the allocation of new 10-month classroom teacher positions among the different categories of teachers, e.g., traditional classroom teachers, support teachers, professional development teachers, special education teachers?
- If MCPS had allocated all of its recent growth in support and/or professional development positions to traditional classroom teacher positions, what would have been the impact on average class sizes in elementary, middle, and high school levels?

Issue #2: The multi-year costs of implementing changes to class size.

As the Council reviews and makes decisions on annual appropriations of funds to MCPS, it is important for the Council to understand both the short- and long-term fiscal implications of multi-year initiatives such as the Class Size Initiative.

The first-year cost of reducing average class sizes consists primarily of the new staff needed to instruct additional classes. The longer-term costs of reducing and/or maintaining average class sizes depend on the ongoing cost of classroom teachers plus the capital costs associated with increasing the number of classrooms to accommodate the smaller classes.

MCPS' annual operating budget identifies new staff spending associated with class size reduction, but the costs to continue class size reduction positions after one year move to the MCPS base budget. Further, there is not an automatic link between the decision to reduce class sizes and the future capital costs that will be required to implement it. Given this practice, it is difficult for the Council to track the ongoing costs of MCPS' Class Size Initiative.

This report contains OLO's estimates of the cumulative costs of the Class Size Initiative. However, as explained earlier, OLO's calculations underestimate the total cost of the Initiative because the estimates do not include the cost of employee benefits, the annual increases in employee compensation, or the increased capital costs.

Because of the importance of fully understanding the fiscal impact of the Class Size Initiative, OLO recommends the Council discuss the following two issues with MCPS representatives:

- What is the best way for the Council to assess and keep track of both the short- and longer-term costs of the Class Size Initiative?
- What assumptions does MCPS use when providing the Council with an estimate of what it will cost to either increase or reduce average class sizes by one student?

Issue #3: The feasibility of providing the Council with additional class size information both for general and special education.

MCPS' calculations for its Official Class Size Report do not track class size trends in special education, or describe the indirect impact of most support or professional development teachers on average class sizes during the school day. However, as noted in the report, support and professional development teachers do have an impact on the size of elementary classes during certain times of the day when "plug-in" or "pull-out" services are provided to students. Special education inclusion appears to impact class sizes during the school day as well.

To more fully understand MCPS class size trends, OLO recommends that the Council raise with MCPS representatives the following two sets of questions:

- What is the feasibility of collecting additional data from elementary schools regarding the impact of support and professional development teachers and special education inclusion on average class sizes during the school day?
- What information does MCPS collect on class sizes for special education classes and what would make sense to report to the Council in order to communicate the significant trends?

MCPS' responses to these questions could improve the Council's understanding of the full impact of teacher staffing (i.e., both direct and indirect) on average class size trends and also inform the Council on the progress that MCPS has achieved in lowering special education class sizes as part of its overall Class Size Initiative.

CHAPTER IX: Agency Comments

The Office of Legislative Oversight circulated a final draft of this report to MCPS staff for review. OLO's final report incorporates technical corrections and comments provided by MCPS. As always, OLO greatly appreciates the time taken by staff to review our draft report and provide feedback.

The written comments received from the Chief Operating Officer of MCPS, dated April 30, 2008, are included in their entirety, beginning on the following page.



April 30, 2008

Ms. Karen Orlansky, Director
Dr. Elaine Bonner-Tompkins, Senior Legislative Analyst
Office of Legislative Oversight
100 Maryland Avenue
Rockville, Maryland 20850

Dear Ms. Orlansky and Dr. Bonner-Tompkins:

Thank you for providing the Montgomery County Public Schools (MCPS) staff with the opportunity to review and provide input on the Office of Legislative Oversight (OLO) Report 2008-8, *Understanding Class Size Trends in Montgomery County Public Schools*. MCPS recognizes and appreciates the strong collaborative process that was used throughout the design, writing, and review of this report. After reviewing the draft report, it is evident that the feedback provided by the MCPS staff members throughout the preparation of the report was carefully considered and incorporated as appropriate.

This OLO class size report will be a useful tool in furthering the Montgomery County Council's understanding of how staffing allocations and school decisions impact class size throughout the county. In turn, the Council will now have more information to assist in making decisions concerning future MCPS budget requests targeted at impacting class sizes. Through participation in the gathering of the data, MCPS also has gained some insights about our reporting of class size data. As a result, we have started to identify some improvements to the way we report the data.

In our final review, the following comments are offered:

Fluctuations in average class size are often a result of actual enrollment compared to projections. The number of teacher positions in the MCPS operating budget is based on the projected enrollment and any budget initiatives. Therefore, any change in average class size over time is the result of both budget initiatives and the actual enrollment compared to the projection. If actual enrollment is the same as the projections and no new initiatives are funded, average class size will not change from year to year. In this situation, the number of oversized and undersized classes may vary, but the average class size will not change. However, if enrollment is greater than projected, average class size will increase and if enrollment is below the projection, average class size will be lower than budgeted.

This is an important distinction to consider when reviewing the OLO report since the year used to determine the trend is FY 2008 when MCPS actual enrollment exceeded the projected enrollment by almost 800 students. This means that trends showing increases in average class

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size are not a result of decisions made as part of the operating budget or allocation decisions but rather a result of actual enrollment as compared to the projection. If the report had used FY 2007 as the year to determine the trend, there would be decreases in many areas because overall enrollment was about 2000 students less than the projection.

An example can be seen when reviewing Kindergarten data. Between FY 2005 and FY 2007, actual enrollment was below the projected enrollment. The table below compares enrollment projections to actual enrollment numbers for Kindergarten.

Kindergarten Enrollment		
Fiscal Year	Projected Enrollment	Actual Enrollment
FY 2005	8964	8875
FY 2006	9430	9101
FY 2007	9400	8951
FY 2008	9400	9524

In FY 2008 when the projection was 9400 and the actual enrollment was 9524, class sizes were larger than expected. The 1.0 increase in average class size noted in the table on Page 19 is a direct result of this phenomenon. This increase of one student is not the result of a budget decision. Rather, it is a result of enrollment compared to the projection.

Elementary class size data includes homeroom class sizes and does not include the class sizes throughout the day. Those teachers identified as support teachers teach classes throughout the day but are not included in official class size data because they are not assigned a homeroom. As noted in the report, MCPS currently reports only homeroom class sizes for elementary schools. Since many of the teachers referred to as support teachers in the OLO report teach students throughout the day, it is important to recognize that the homeroom sections are only one part of the student day. For example, the increase of 163 support teachers between FY 2005 and FY 2008, identified in Table 34 on Page 45, includes mostly teachers who work with groups of students throughout the day. They do not have a homeroom and therefore are not included in homeroom class sizes, but they do teach students during the day.

Students are grouped and regrouped throughout the day for reading, mathematics, ESOL, art, music, and physical education. This regrouping is not broken down into periods as is done in secondary schools. Rather, it is done in blocks of time that function similarly to the secondary "period." It is this schedule that truly shows the size of student groups that teachers work with each day. Unfortunately, MCPS does not currently have a reporting mechanism to capture the size of each grouping. Efforts are under way to explore how this data can be gathered and reported.

The number of undersized and oversized classes in secondary schools is impacted by decisions made by the administration in each school. Although oversized classes cannot be avoided, our objective is to ensure when they do occur that they are a result of a deliberate decision made by the school. The report also noted class size in secondary schools is impacted by numerous decisions made at the school level. Although the overall class size averages are a result of the number of teachers allocated to each school (based on an enrollment driven formula), the number of undersized and oversized classes depends on the school schedule. Because students do not sign up for classes in groups of 32, schools must make decisions about how many sections of each course to offer. For example, when 34 students sign up for a class, the school must decide whether to run one section of 34 students, which would mean an oversized class, or two sections of 17 students each, which would represent undersized classes. Since school staffing results in average academic class sizes of approximately 24 students in middle schools (Page 29) and 25 students in high schools (Page 36), when schools make decisions to run undersized classes, it often results in oversized classes. Each of these decisions has a domino effect throughout the school schedule. Similarly, schools must make decisions about when not to run sections. When only 12 students sign up for a course, the school cannot run it without having larger classes somewhere in their schedule. It is the combination of these decisions that impact the number of oversized and undersized classes.

Increases in teacher-level staffing have been targeted to address specific needs of students. MCPS has made a concerted effort to meet the needs of our most vulnerable students. As a result, some initiatives have not been in the area of “traditional teachers.” The report notes that increases in traditional teachers are exceeded by increases in support teachers. Page 45 of the report describes an increase in classroom teachers of 2.5 percent while support teachers have increased 12.2 percent during the same period. This is to be expected since the category of support teachers includes ESOL, academic intervention, and focus teachers. MCPS has deliberately budgeted new positions in these areas to meet our objective of providing intense, targeted support to our neediest students. For example, the increase of 163 support teachers between FY 2005 and FY 2008 identified in Table 34 on Page 45 of the report includes 53 ESOL teachers, 39 Title 1 and focus teachers, and 20 academic intervention teachers. All of these teachers work with groups of students during the day. Similarly, the 55 teacher increase for FY 2009 (Table 35) includes 23 ESOL teachers; 11 art, music, and physical education teachers; 5 reading recovery teachers; and 11 focus teachers.

The Montgomery County Board of Education establishes priorities and provides guidelines, including maximum class size guidelines. These govern how decisions are made. Our objective is to continue to ensure that the number of classes that exceed class size guidelines is minimized so that these oversized classes only occur as a result of deliberate decisions by schools. We recognize that elimination of all oversized classes is not possible or fiscally responsible. It is not possible to eliminate oversized classes without significantly increasing the number of teachers.

Ms. Karen Orlansky
Dr. Elaine Bonner-Tompkins

4

April 30, 2008

MCPS will continue to improve processes so that the number of oversized classes is minimized. We welcome the opportunity to discuss with the Montgomery County Council how the school system's priorities and guidelines impact staffing allocations, school schedules, and other decisions associated with class size.

Thank you again for the opportunity to review the draft report.

Sincerely,

A handwritten signature in cursive script, appearing to read "Larry A. Bowers".

Larry A. Bowers
Chief Operating Officer

LAB:sz

Copy to:

Dr. Weast
Dr. Lacey

APPENDIX

UNDERSTANDING CLASS SIZE TRENDS IN MONTGOMERY COUNTY PUBLIC SCHOOLS

**Office of Legislative Oversight Report 2008-8
May 6, 2008**

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Appendix A: An Explanation of OLO's Class Size Calculations

OLO used class size data provided by MCPS' Department of Shared Accountability to calculate average class sizes and the number/percent of "oversized" classes, defined as classes with enrollments that exceeded the Board of Education's maximum class size guidelines. There are small differences between the dataset MCPS used to calculate class size statistics published in the Official Class Size Report and the dataset MCPS provided to OLO. The result is that OLO's and MCPS' calculations of average class sizes and number/percent of oversized classes at the middle and high school levels are not identical. The differences, which are further described below, are relatively minor.

Why are the datasets different? The data that MCPS provided to OLO came directly from MCPS' automated system for class size data; the dataset did not incorporate the manual corrections that MCPS staff make as they do their own calculations for the Official Class Size Report.

On an annual basis, schools submit their class size data to the central office by reporting enrollment in each course by course code. When it appears that schools may have made reporting errors (e.g., the report included an unusually large class), MCPS staff make manual corrections to the data based on telephone calls to the school to determine the cause of this anomaly. If the reported class size turns out to be inaccurate, MCPS corrects the data before calculating class size statistics.

The dataset MCPS provided to OLO was not corrected because MCPS does this work manually. OLO discarded all classes with 50 students or more¹ on the assumption that these were reporting errors, but even with this adjustment, OLO's data includes a larger number of "oversized" middle and high school classes than MCPS reports, which then translates into slightly larger average class sizes. OLO's data includes slightly different numbers of "oversized" elementary classes as well, but this did not impact the average class size calculations.

Examples of Reporting Errors. One type of reporting error is if a school uses the wrong course code. If a class is coded incorrectly as a course that MCPS does not include in its class size data, the class may be removed from the data set when it should be included. Another type of error occurs when there are special circumstances that may not be compatible with the automated system. For example, middle schools with block schedules – which means the school has seven class periods every two days rather than every day – must translate their data to a regular seven-period day. Sometimes the data appear to have one teacher teaching two classes at the same time, which gets counted as one large class, when in reality the teacher is teaching two classes on different days.

¹ From FY04 to FY08, the data contained 3 classes of 50 or more students at the middle school level and 39 classes of 50 or more students at the high school level.

Data Comparisons. Tables A-1 and A-2 show the differences between OLO's calculation of the number and percent of middle and high school classes with enrollments that exceed the maximum class size guidelines.

For the reason explained above, OLO's data consistently counts more classes over the maximum class size guidelines than MCPS at both the middle and high school levels. From FY06 to FY08, the difference between OLO's and MCPS' calculations at the middle school level ranges from 3 to 21 classes per year; at the high school level, the difference ranges from 7 to 34 classes. As a percent of total classes, the difference in the number of oversized classes was never more than two percentage points.

Table A-1: Number and Percent of Middle School Classes Over BOE Max Class Size Guidelines

OLO's Calculations		Number Over			Percent Over		
		FY06	FY07	FY08	FY06	FY07	FY08
	(Required) English	172	112	132	13.9%	9.1%	11.1%
	Other Academic	168	149	167	3.3%	3.0%	3.4%

Source: OLO calculation from MCPS data

MCPS' Calculations		Number Over			Percent Over		
		FY06	FY07	FY08	FY06	FY07	FY08
	(Required) English	169	97	116	13.7%	7.8%	9.7%
	Other Academic	153	128	156	3.0%	3.0%	3.2%

Source: MCPS Official Class Size Report

Table A-2: Number and Percent of High School Classes Over BOE Max Class Size Guidelines

OLO Calculations (Using MCPS data)		Number Over			Percent Over		
		FY06	FY07	FY08	FY06	FY07	FY08
	(Required) English	306	270	271	18.9%	16.3%	16.3%
	Other Academic	508	324	427	7.7%	4.8%	6.4%

Source: OLO calculations from MCPS data

MCPS' Calculations (from the Official Class Size Report)		Number Over			Percent Over		
		FY06	FY07	FY08	FY06	FY07	FY08
	(Required) English	292	236	251	18.1%	14.3%	15.2%
	Other Academic	487	293	420	7.4%	5.0%	6.3%

Source: MCPS Official Class Size Report

Tables A-3 and A-4 compare OLO's calculation of average class sizes for MCPS middle schools and high schools and MCPS' calculations. OLO's calculations are consistently higher than MCPS' calculations by a small amount ranging from 0.1 to 0.7 students.

Table A-3: Average Middle School Class Sizes

		FY04	FY05	FY06	FY07	FY08	Change FY04-08	
							#	%
OLO's Calculations	(Required) English	23.4	23.6	23.5	23.3	23.7	0.3	1.3%
	Other Academic	24.1	24.3	24.0	24.1	24.6	0.5	2.1%
Source: OLO calculation from MCPS data								
MCPS' Calculations	(Required) English	23.3	23.5	23.2	22.9	23	-0.3	-1.3%
	Other Academic	23.9	24.2	23.8	23.7	24.1	0.2	0.8%

Source: MCPS Official Class Size Report

Table A-4: Average High School Class Sizes

		FY04	FY05	FY06	FY07	FY08	Change FY04-08	
							#	%
OLO Calculations	(Required) English	24.6	25.0	25.1	24.6	24.6	0.1	0.2%
	Other Academic	25.7	25.8	25.7	25.1	25.3	-0.4	-1.5%
Source: OLO calculations from MCPS data								
MCPS' Calculations	(Required) English	24.5	24.8	24.7	24	24	-0.5	-2.0%
	Other Academic	25.5	25.6	25.5	24.7	24.9	-0.6	-2.4%

Source: MCPS Official Class Size Report

Appendix B:
FY08 and FY09 Staffing Allocation Memos and Guidelines

FY08

- Memo to Elementary School Principals ©5
- FY08 Elementary School Staffing Guidelines..... ©15

- Memo to Middle School Principals ©19
- FY08 Middle School Staffing Guidelines..... ©27

- Memo to High School Principals..... ©31
- FY08 High School Staffing Guidelines ©40

FY09

- Memo to Elementary School Principals ©44
- FY09 Elementary School Staffing Guidelines..... ©55

- Memo to Middle School Principals ©59
- FY09 Middle School Staffing Guidelines..... ©67

- Memo to High School Principals..... ©70
- FY09 High School Staffing Guidelines ©79

Office of School Performance
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

March 5, 2007

MEMORANDUM

To: Elementary School Principals

From: Donald H. Kress, Chief School Performance Officer
Stephen L. Bedford, Assistant Chief School Performance Officer *SLB*
Ursula A. Hermann, Community superintendent *UH*
Mark E. Kelsch, Community Superintendent *MEK*
LaVerne G. Kimball, Community Superintendent *LKG*
Heath E. Morrison, Community Superintendent *HEM*
Frank H. Stetson, Community Superintendent *FHS*
Adrian B. Talley, Community Superintendent *ABT*

Subject: Initial Staffing Allocations—FY 2008

The attached summary staffing grid and, as appropriate, special education, ESOL, and Title I Focus school grids reflect preliminary staffing allocations for your school for FY 2008. You should highlight staffing changes from the current school year grid (copy attached) to assist in identifying involuntary transfers. **Please maintain this and future updates of the FY 2008 grid information for easy reference throughout the staffing process.** Position job codes are included on the staffing grid with the position titles. The "Staffing Notes" section at the bottom of the grids identifies special staffing decisions for your school. These notes are clarifications of unique staffing allocations. The Office of School Performance (OSP), Office of Curriculum and Instructional Programs (OCIP), and the Office of Special Education and Student Services (OSSES) have worked closely throughout the staffing process to coordinate the allocation of resources. The FY 2008 School Staffing Guidelines are attached (*Attachment 1*). **Please keep in mind that all allocations are tentative, pending final Board of Education action in June 2007 on the operating budget.**

Classroom Teacher Positions

Kindergarten and Grades 1–6 classroom teacher allocations are based on revised enrollment projections from February 2007 by the Division of Long-Range Planning. With the exception of the kindergarten class-size initiative (58 focus schools initially staffed with a ratio of 15:1), kindergarten positions have been distributed on a formula of **one teacher for every 25 students**. Positions have been allocated to reduce class sizes in Grades 1 and 2 in 58 focus schools at a 17:1 ratio. Continuing in FY 2008, there are 149.1 teacher positions to support elementary Board of Education maximum class size guidelines at 26 in Grades 1–3 and 28 in Grades 4 and 5.

There are a limited number of reserve positions to be used to support schools that experience a significant enrollment increase during the summer. Also, principals can expect staffing to be pulled that is not supported by actual enrollment. Adjustments in position allocations will be based on actual enrollment numbers in the student database and enrollment trends in prior years. It is important that your enrollment database is maintained throughout the summer, including the withdrawal of students not returning for the 2007–2008 school year. This is critical in maintaining the integrity of our staffing decisions and will be monitored as you submit your school organizational plans.

When the deviation between the actual enrollment and the projected enrollment supports a change in the number of positions allocated (increase or decrease), please send a Request for Additional Staffing Form (*Attachment 2*) to your community superintendent. At least one plan for organizing the school also must be included. An organizational plan form is attached (*Attachment 3*). Please note that the organizational plan includes your Reading Initiative plan, information about inclusion of special education students into regular classes, and how you utilize other professional support (except counselors and staff development teachers). This additional information will assist us in reviewing your organizational plan and in considering additional staffing requests. An organizational plan based on actual enrollment is to be sent to your community superintendent **every month beginning on June 4**. Community superintendents will monitor deviations from projected enrollments throughout the staffing process. **In situations when the enrollment at your school is below the projection, please be prepared for staff allocation reductions.**

Organization of the Instructional Week

Each elementary school has the responsibility to organize each day and week to include instruction in reading/writing/language arts, mathematics, science, and social studies, pre-kindergarten to Grade 5. There are 1575 minutes of instructional time in a week or 315 minutes in a school day to accomplish this. The challenge to develop a master schedule that fulfills this responsibility and provides developmentally appropriate art, music, and physical education at each grade level varies from school to school. Given individual school considerations, there are instructional guidelines that maximize student learning, provide fidelity of curriculum implementation, and support school improvement goals. These guidelines can be found in the instructional guides for reading/writing/language arts, mathematics, science, and social studies. Art, music, and physical education guidelines are in Attachment 4. Community superintendents and directors of school performance are available if support is needed in developing your schedule.

Additional considerations include:

- Scheduling instruction at a time in the day most conducive to student learning
- Providing common planning time for grade level teams, ESOL teachers, and special education teachers
- Providing common planning time for vertical articulation

- Maximizing instructional time by minimizing the number of transitions and amount of time for transitions
- Maximizing use of support staff
- Daily reading/language arts, mathematics, science, and social studies instruction for kindergarten through Grade 5
- Daily reading and mathematics instruction for pre-kindergarten
- **The new negotiated agreement between MCPS and MCEA (effective July 1, 2007) specifies that each elementary teacher will have at least four hours and 15 minutes (255 minutes) per week of planning time during the student day. Appropriate use of this time includes individual planning and preparation, team planning, and individual professional development.**

Title I Focus Schools

For FY 2008, there are 23 focus schools receiving Title I federal funds. These 23 Title I schools receive a staffing allocation based on the Title I per-pupil allocation (PPA) that is calculated annually. The number of Free and Reduced-price Meals System (FARMS) students enrolled in the school as of October 31, 2006, is multiplied by the PPA to determine the funds available for teacher, paraeducator, or parent community coordinator positions. Remaining school based funds are allocated for instructional materials, school wide initiatives, or professional development, or additional funds are added to the central Title I allocations for family involvement or extended day programs. Schools currently on the Maryland State Department of Education watch list or in need of improvement must reserve 10 percent of their allocation for professional development. All Title I budgets are reviewed by the Division of Academic Support, Federal and State Programs and approved by the community superintendent.

Principals work closely with their community superintendent and the Division of Academic Support, Federal and State Programs (DASFSP), to develop a comprehensive plan, based upon scientifically-based research and Title I criteria, that details the use of staff to meet identified needs. Central Title I funds provide a 0.5 FTE Math Content Coach (MCC) and supplemental ESOL teacher(s). A Title I funded 0.5 FTE gifted and talented teacher is provided for 20 schoolwide Title I schools. As needed, school-based Title I funds are used to support a 0.5 FTE Reading Recovery teacher (or reading specialist in the four Reading First schools) and other Focus positions identified by the schools in collaboration with the community superintendent. The following options may be considered in filling remaining school-based Title I funded unspecified focus teacher allocations: additional MCC, gifted and talented, Reading Recovery, ESOL, reading, writing, or mathematics support, mentor, class size reduction in Grades 3-5, or other priorities as identified in the school improvement plan. Principals confer with their community superintendent and DASFSP on the use of the unspecified Title I focus positions and receive approval from their community superintendent before assigning individuals through the Department of Recruitment and Staffing. Please keep in mind that all professional staff in core academic areas must be highly qualified. In schoolwide programs, all paraeducators with

instructional duties must meet the highly qualified requirements. All paraeducators funded through Title I in targeted assistance programs must also meet these qualifications.

The Title I designation for the 23 schools is stated on the FY 2008 summary staffing grid in the "Staffing Notes" section at the bottom of the page. Staffing for the 23 Title I schools is included on the summary staffing grid as well as on the detailed Title I Focus school grid. Principals are required to complete the detailed grid with the name and employee identification number of the person assigned and return it to DASFSP by **April 30, 2007**. This will allow DASFSP time to ensure that assigned teachers and supporting services staff are correctly charged to the Title I grant, included in training, and complete the required programmatic evaluations, including reports on highly qualified staff. If a Title I focus position has not been assigned by this date, principals are to provide this information on monthly revisions of the detailed Title I Focus School grid sent to DASFSP.

Grades 1 and 2 Reading Initiative Teachers

Reading Initiative teacher positions have been reviewed and adjusted based on projected enrollment for the first and second grades in your school. The allocation is based on a formula that provides reading classes with an initial student/teacher ratio of 17:1 or below. In addition, the allocations take into account the need for appropriate planning time. Please remember that Reading Initiative allocations are not given to the Grades 1 and 2 in the 17:1 lower class-size initiative schools. As a reminder, the Reading Initiative positions must be used exclusively in Grades 1 and 2 during a daily uninterrupted block of 90 minutes of reading/language arts instruction.

Reading Initiative teachers are calculated by the following formula:

$$\text{FTE} = ((\# \text{ Grades 1 and 2 sections at 17:1 ratio}) - (\# \text{ Grades 1 and 2 classroom teachers})) / 2 \text{ classes} \times .5 \text{ FTE}$$

Academic Intervention Teachers

Academic Intervention teacher positions have been allocated to community superintendents based on a concentrated poverty formula. These positions are zero-based each year and are directed by your community superintendent. Allocations for these positions may not be reflected in the initial staffing grid sent to schools. As allocations of these positions are made, new grid will be sent to schools.

Art, Music, and Physical Education Teachers

Elementary schools have been allocated art, music, and physical education teacher positions based on the estimated number of classroom teacher stations, which includes regular classroom teachers, kindergarten sections, pre-kindergarten, and special education classes for students who

receive more than 18 hours of special education each week. The budgeted number of art, music, and physical education teacher positions has been increased by 1.0 each for FY 2008. The art, music, and physical education coordinators have reviewed the ranges to ensure that allocations will meet guidelines for instructional time.

Art, music, and physical education positions are allocated using the following revised table:

<u>Number of Teacher Stations</u>	<u>Allocation</u>	<u>Number of Teacher Stations</u>	<u>Allocation</u>
42+	1.8	24-25	1.0
40-41	1.7	21-23	1.0
37-39	1.6	19-20	0.8
35-36	1.5	16-18	0.7
33-34	1.4	14-15	0.6
31-32	1.3	12-13	0.5
28-30	1.2	10-11	0.4
26-27	1.1		

Schools participating in the original opera program receive an additional 0.1 FTE music teacher allocation, and those participating in the integrated arts pilot program receive an additional 0.1 FTE teacher allocation each for art, music, and physical education.

The Elementary Art, Music, and Physical Education Guidelines are included (*Attachment 4*) to help with scheduling. Each general/choral music schedule should include a chorus period scheduled within the instructional day, not during recess, plus one optional ancillary class such as a second chorus, Orff, or recorder class. **Keep in mind, a stipend payment of \$1,008 is available for every elementary school, based on time outside of normal duty hours required to conduct an extracurricular program.** If you have questions about unique scheduling situations in art, music, and physical education, please consult the appropriate art, music, and physical education coordinator for assistance. Once a school's schedule for art, music, and physical education teachers has been finalized in August, please submit a copy to the coordinators in the Office of Curriculum and Instructional Programs. These will be shared with the community superintendents and updated as staffing allocations change.

Instrumental Music

The coordinator of instrumental music monitors this program and works with principals, the Department of Recruitment and Staffing, and community superintendents for the best utilization of these positions. There are 37.2 FTE instrumental music teacher positions to provide instruction for students in Grades 4-5 in preparation for participation in a secondary band or orchestra program. If you have questions or concerns on scheduling instrumental music classes,

please contact Mr. Rick Penix, coordinator of instrumental music, Department of Curriculum and Instruction, at 301-279-3836 for assistance.

Team Leaders

As part of the initiative on building a skillful workforce and the recognition that there are leadership responsibilities in elementary schools, elementary team leaders will receive a salary supplement of \$1,500 and three days of summer employment. Elementary team leaders are expected to lead, manage, and facilitate team activities at the school level. Team leaders must be full-time, ten-month professional employees (e.g., K-5 classroom, art, music, physical education teachers, special education teachers, ESOL teachers, reading specialists, counselors). *Attachment 5* is a blank copy of the form you will receive to confirm or change team leader assignments. It is critical to make this decision by **June 15** to ensure appropriate compensation in FY 2008.

Special Education Positions

Special education staffing was completed through the collaboration of special education staff and community superintendents. A thorough analysis of teacher to student ratio was completed for each school in an effort to equalize staffing across the school system. Initial staffing for FY 2008 is based on the data from the monthly Special Education Data System (SEDS) reports that have been checked by principals and supervisors of special education, in conjunction with the information regarding students transitioning to kindergarten or sixth grade. Future SEDS will be reviewed through the end of the school year to confirm that staffing is appropriate for each school.

The Department of Special Education maintains a limited number of reserve positions to be allocated to support schools that experience a significant increase in special education enrollment during the summer; therefore, principals can expect staffing that is not supported by actual enrollment to be pulled. In order for staffing allocations to reflect the needs of the school, it is imperative that placement decisions made in July and August are processed immediately at the school level. Each new special education student needs to be enrolled in your school and their special education service entered on the Legacy Special Education Data System (Legacy SEDS) so the final special education staffing allocation reflects the actual needs of your school.

Requests for additional special education staffing due to over-enrollment should be submitted to your special education supervisor and community superintendent starting in April and continuing through July. The supervisor will work with the school to review students' Individualized Education Programs (IEPs) and evaluate current resources and scheduling to determine whether the need can be addressed with existing staff in the school or cluster. If the staffing need cannot be addressed, the supervisor will make a request for additional staffing to the director of the Division of School-Based Special Education Services or the director of the Division of Preschool Special Education and Related Services, as appropriate. The director of special education services, the director of special education operations, and the division directors will review these

requests during July and determine next steps, including referral to the associate superintendent for special education and student services for approval of additional staffing if necessary. Final staffing adjustments will be made by the end of July.

A very limited number of reserve positions will be available to address staffing concerns after school begins. However, requests for additional special education staffing should be submitted to your special education supervisor as the need arises throughout the year. Staffing requests submitted to special education supervisors will be reviewed by the director of special education services, the director of special education operations, and the associate superintendent for special education and student services each Monday throughout the school year.

The delivery of special education services may consist of a variety of instructional models, including inclusive services for students participating in the general education classroom or in a self-contained setting, based on the individual needs of the students. Students are instructed in the general education curriculum with differentiated instruction to accommodate various learning needs. Some students receive instruction in the Fundamental Life Skills curriculum, as appropriate to meet their needs.

Special education teachers and paraeducators are resources schools use to assist with the delivery of instruction to support the needs of students with disabilities in the general education setting, as well as self-contained settings. With staffing, professional development, scientifically research-based interventions, and technical assistance, you will be able to provide a continuum of special education services ranging from small group instruction to inclusion in co-taught general education classrooms. Schools implementing the Home School Model, delivering special education services in the general education environment, can also offer small group instruction if needed. When you allocate staff to support students with disabilities in an inclusive setting, assign special education teachers and paraeducators to the critical content areas of reading/language arts and mathematics first, to assist in the delivery of instruction in the least restrictive environment (LRE). In this setting, the materials used for general education student assignments are modified for the students receiving inclusive services. Paraeducators in a general education setting are responsible for supporting the class based upon the guidance provided by the general and special education teachers. Paraeducators assigned to self-contained settings provide support to students throughout the instructional day, including specials such as art, music, and physical education.

ESOL/METS Positions

ESOL/METS staffing was completed through collaboration between the community superintendents and the Division of ESOL/Bilingual Programs by analyzing needs and services required by legal mandates. Since prekindergarten students attend school for half a day, each student is counted as a .5 (half-time) student. Kindergarten-Grade 5 students are full day, therefore they are counted as one (full-time) student. The staffing ratio of 44:1 is calculated using the total number of these students. Note that in some circumstances this may result in

assigning a teacher to more than one school. In addition, **whenever an intern is assigned, this individual is counted against a budgeted allocation as a regularly assigned teacher.**

In developing the ESOL schedule, the first step should be to schedule ESOL students by grade band (i.e., prekindergarten, kindergarten, 1, 2, 3-5), then by proficiency level during the Reading/Language Arts block. Prekindergarten ESOL students should be served in the same manner as students in Grades K-5. ESOL instruction should not be scheduled during the students' guided reading group. Principals are to complete the ESOL allocation assignment sheet that accompanies the detailed ESOL grid, as explained on the form, and return the form to the ESOL office for review no later than **August 31, 2007.**

Elementary ESOL allocation adjustments will be based on the ESOL enrollment as of October 31. This date coincides with the enrollment increases resulting from summer registrations through the International Student Admissions Office and the identification of prekindergarten and kindergarten students eligible for ESOL services via the state-mandated English language proficiency test.

Questions regarding scheduling should be directed to Dr. Karen Woodson, director, ESOL/Bilingual Programs, at 301-230-0670, or to Mrs. Lois Wions, supervisor, ESOL instruction, at 301-279-3057.

Paraeducators and Lunch Hour Aides

The process to make paraeducator and lunch hour aide time more equitable has continued. As a result, some schools may see reduction adjustments in the number of hours of paraeducator or lunch aide time. The intent is to provide similar resources to schools of comparable enrollment. As in the past, OSP is maintaining a reserve to be allocated in September to help address specific class size issues. **Reminder:** When scheduling paraeducators, please consider providing reasonable and customary work breaks as noted in SEIU Local 500 Negotiated Agreement Article 13, Item J.

Building Service Workers

For FY 2008, the Division of School Plant Operations has made adjustments in the allocation of building service employees for some schools. These changes were made to accommodate expanded facility size. Questions concerning these allocations should be directed to Ms. Dianne Jones, director of school plant operations, at 240-314-1075.

Elementary School Copier Support

The FY 2008, central copying services will continue to be provided through Copy Plus. This includes the copying of certain unit assessments, formerly the responsibility of teachers. The teacher assistant positions originally allocated to support copying at the school level have been realigned to support Copy Plus.

Full-Time Equivalent Position

Positions are budgeted as full-time, 8 hours, but are frequently allocated in smaller increments. The following tables convert the equivalents of a full-time position (FTE) to hours:

Supporting Services		Professional	
<u>FTE Positions</u>	<u>Hours (Daily)</u>	<u>FTE Positions</u>	<u>Hours (Bi-Weekly)</u>
1.000	8	1.0	80
.875	7	.9	72
.750	6	.8	64
.625	5	.7	56
.500	4	.6	48
.375	3	.5	40
.250	2	.4	32
.125	1	.3	24
		.2	16
		.1	8

Less Than Full-Time Equivalent Positions

Beginning FY 2008, principals will grant seven hours of planning time per normal week, at least 4 hours and 15 minutes of which will be during the student day.

Guidelines for Elementary Teachers Employed Less than Full-Time

[1.0 FTE = 7.5 hours in building (including 30-minute lunch)
+ 1 hour @ home = 8 hours]

Allocation FTE	Number of Minutes In Building Per Week (excluding lunch)	Planning Minutes Per Week*
0.1	42 minutes per day x 5 days = 210 minutes	42 minutes
0.2	84 minutes per day x 5 days = 420 minutes	84 minutes
0.3	126 minutes per day x 5 days = 630 minutes	126 minutes
0.4	168 minutes per day x 5 days = 840 minutes	168 minutes
0.5	210 minutes per day x 5 days = 1,050 minutes	210 minutes
0.6	252 minutes per day x 5 days = 1,260 minutes	252 minutes
0.7	294 minutes per day x 5 days = 1,470 minutes	294 minutes
0.8	336 minutes per day x 5 days = 1,680 minutes	336 minutes
0.9	378 minutes per day x 5 days = 1,890 minutes	378 minutes

*Note that planning time is PER WEEK. The amount of planning time does not have to be the same each day of the week.

Positions Pending Budget Approval

The Board of Education FY 2008 operating budget includes additional positions. These positions will not be allocated to schools until they have been funded by the County Council in May and approved by the Board of Education in the final budget in June. These positions/allocation include:

- Additional IDA hours so each school has a minimum of 6 hours (.75 FTE) per day.
- Additional team leader allocation so that each school has a minimum of seven team leaders.
- Additional assistant principal positions to increase the number of schools with two administrators. These positions will be allocated to the schools with the largest projected enrollment and greatest number of professional staff members.

Staffing Procedures

Every school is assigned a staffing specialist to handle all staffing needs for that school. Principals should contact their assigned staffing specialist in the Department of Recruitment and Staffing (DRS) to discuss vacancies, filling vacancies, applicants, or any other staffing situation. Please refer to the staffing calendar for applicable dates. It is expected that scheduling is completed so that all classes are taught by teachers designated as highly qualified. *Attachment 6* provides staffing specialist cluster assignments.

The DRS is responsible for recruiting a high quality and well-diversified pool of applicants for teaching and supporting services positions. Recruitment and hiring are based on the staffing allocations and on the vacancies that are posted in the countywide Vacancy Database. The DRS ensures that only allocated positions are filled. **It will not be possible to process a staffing recommendation form for any position not included on the staffing grid or to compensate a person who begins an assignment without approval or an allocation for that assignment.**

The Human Resources Information System (HRIS) does not allow overhire situations, even for short periods of time. When such an issue arises, send a memorandum immediately to your community superintendent with copies to Ms. Jane Woodburn, director, DRS, and Ms. Nicola Diamond, executive assistant to the chief operating officer. Only rarely will these special exceptions be approved.

A summary of critical dates for elementary school staff is attached (*Attachment 7*), along with a copy of the instructional staffing (teachers/assistants) calendar (*Attachment 8*), to share with appropriate staff. If you have any questions or concerns regarding staffing allocations, please contact your community superintendent or the director of school performance in the Office of School Performance.

FY 2008 Elementary School Staffing Guidelines (as resources permit)

Decision Criteria for Staffing, Elementary Schools, Professional

Abbrev	Position	Decision Guide
Prin 0500	Principal	One per school
AP 0510	Assistant Principal	Staffing is based on enrollment and number of professional staff. Pending budget approval, 15 additional positions will be allocated.
Trn 0511	Principal Intern	Schools identified by community superintendents.
CRTchr 1001	Classroom Teacher*	These positions for Grades 1–5 are allocated based on enrollment projections for principals to organize the school with class sizes of 26 or less in Grades 1–3, 28 or less in Grades 4–5. Additional classroom teacher positions are provided to the highest educational load schools in order to fulfill the Grade 1–2 class size initiative at 17 students per class.
AcSpt 1001	Academic Intervention	Community superintendents will allocate these positions based on school needs.
CM 1001	Cluster Magnet Teacher	These positions are allocated to support strategic change efforts.
StfDev 1009	Staff Development Teacher	One per school.
Focus 1031	Focus Teacher	These positions are allocated to the high educational load schools. Focus teachers are locally and Title I funded.
RdgSpt 1012	Reading Initiative Teacher*	This staffing supports the Reading Initiative program. For schools receiving additional staffing for class size reduction in Grades 1 and 2, no additional allocations are authorized for the program.
PRK Tchr 1017	Pre-Kindergarten Teacher	Positions are allocated with a 0.5 teacher per 2.5 hour class.
ESL Tchr 1032	ESOL Teacher*	ESOL teacher allocations are based on a ratio of one teacher for every 44 ESOL students, including pre-K; METS teacher allocations are based on pupil/teacher ratio of 15:1.
Rdg 1033	Reading Specialist	One per school.
SpEd Tchr 1034	Special Education Teacher*	These positions are allocated to schools according to placement of programs and anticipated enrollments for each.
Spch Path 1035	Speech Pathologist	These positions are allocated to schools according to anticipated speech service needs at each school, as designated by Individual Educational Plans.

Kdg Tchr 1036	Kindergarten Teacher*	These positions are allocated on a ratio of one teacher for every 25 students and one for every 17 students at the Focus schools.
PE 1037, Art 1038, Mus 1039	Physical Education, Art, Music Teachers	These allocations are based on the estimated number of teacher stations initially allocated. The formula is based on one specialist being able to teach 5 or 6 classes per day at the recommended class times for each grade level. Pre-kindergarten, Head Start, and special education classes are included in the calculations and are adjusted by 1/3 for fewer minutes of instruction.
Inst Mus 1040	Instrumental Music Teacher	These 37.2 positions are allocated to schools based on the participation in instrumental music programs, Grades 4-5.
SpEd RRm 1046	Special Education Resource Room Teachers	These positions are allocated based on the school's projected enrollment.
Coun 1044	Counselor	One per school.
MedSp 1052	Media Specialist	One per school.
HdSt Tchr 1101	Head Start Teacher*	Allocations and programs are made through the Division of Early Childhood Education Programs with a 0.6 teacher assigned to a 3 hour, 15 minute class.
SpOth Tchr various	Special Education Other Teacher	These positions are allocated to supplement existing programs.
RR Tchr	Reading Recovery Teacher	These 12.0 positions provide support to schools who are identified to implement Reading Recovery.

* Note: Allocations based on a higher than budgeted ratio to assure a reserve to respond to situations where actual enrollments vary from projections.

FY 2008 Elementary School Staffing Guidelines

Decision Criteria for Staffing – Elementary Schools, Supporting Services

Abbrev	Position	Decision Guide
Adm Sec 4250	Administrative Secretary	One per school.
Sec 1 10 m 4210 4221	Secretary I, 10 months	One per school.
Md Ast 6620 6625	Media Assistant	These positions are allocated to schools using the guide: 1.0 media assistant to schools with projected enrollment above 450; .5 media assistant to schools with projected enrollment under 450.
Prt Spec 6500	Parent/ Community Coordinator	These positions are allocated to East Silver Spring and Rolling Terrace to coordinate community programs.
SpOt SS various	Special Education, Other Support Staff	These supporting services positions are assigned to specific programs.
IA Reg 6600	Paraeducator, Regular	The school's total hours for Grades 1–5 paraeducators are based on the following projected enrollments: <div style="text-align: right; margin-right: 50px;"> 700+ = 1.5 FTE 650-699 = 1.375 FTE 550-649 = 1.25 FTE 450-549 = 1.0 FTE 350-449 = 0.875 FTE Less than 350 = 0.75 FTE </div>
IA 123 6600	Paraeducator, Grades 1–3	These positions are allocated based on specific school program needs.
QIE IA 6600	Quality Integrated Education, Paraeducator	These 19.3 positions provide support to schools with high educational loads.
CM IA 6600	Cluster Magnet, Paraeducator	These 27.5 positions are allocated to schools identified as having cluster magnet programs or other special programs.
ESOL IA 6600	ESOL Paraeducator	These positions are allotted at 0.75 per METS class.
Pre-K IA 6600	Pre-Kindergarten Paraeducator	These positions are allocated at 0.375 FTE per 2.5 hour class.

HS IA 6700	Head Start, Paraeducator	These positions are allocated at .6 FTE per 3 hour 15 minute class.
Focus IA 6600	Focus Paraeducator	Title I schools are provided resources for paraeducator allocations. Locally funded focus paraeducators are allocated to schools with high educational loads and specific program needs.
Lu Hr 6490	Lunch Hour Aide	Allocations are based on the following projected student enrollments: 800+ = 1.875 FTE (15 hours) 750-799 = 1.75 FTE (14 hours) 700-749 = 1.625 FTE (13 hours) 650-699 = 1.5 FTE (12 hours) 575-649 = 1.375 FTE (11 hours) 500-574 = 1.25 FTE (10 hours) 425-499 = 1.125 FTE (9 hours) 350-424 = 1.0 FTE (8 hours) Less than 350 = 0.875 FTE (7 hours) Additional allocations will be provided by the community superintendent based on specific school needs.
DS 6870	Instructional Data Assistant	Allocations are based on a formula using projected student enrollment. Note: Pending budget approval, additional IDA allocations will be provided to schools so that each school has a minimum of 6 hours of IDA (.75 FTE).
SEIA 6550	Special Education Paraeducator	These positions are allocated according to guidelines established in building the operating budget.
BSM 7330	Building Service Manager	One per school.
Ldr 7270 7280	Building Service Leader	One per school.
Wkr 7210	Building Service Worker	These positions are allocated based on the school's square footage.

Office of School Performance
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

March 5, 2007

MEMORANDUM

To: Middle School Principals

From: Donald H. Kress, Chief School Performance Officer
Stephen L. Bedford, Assistant Chief School Performance Officer *SB*
Ursula A. Hermann, Community Superintendent *UH*
Mark E. Kelsch, Community Superintendent *MEK*
LaVerne G. Kimball, Community Superintendent *LK*
Heath E. Morrison, Community Superintendent *HEM*
Frank H. Stetson, Community Superintendent *FS*
Adrian B. Talley, Community Superintendent *AT*

Subject: Initial Staffing Allocations—FY 2008

The attached summary staffing grid and detailed special education and ESOL grids reflect preliminary staffing allocations for your school for FY 2008. You should highlight staffing changes from the current school year grid (copy attached) to assist in identifying involuntary transfers. **Please maintain this and future updates of the FY 2008 grid information for easy reference throughout the staffing process.** Position job codes are included on the staffing grid with the position titles. The "Staffing Notes" section at the bottom of the grids identifies special staffing decisions for your school. These notes are clarifications of unique staffing allocations. The Office of School Performance (OSP), Office of Curriculum and Instructional Programs (OCIP), Department of Special Education Operations (DSEO), and the Office of Special Education and Student Services (OSSES) have worked closely throughout the staffing process to coordinate the allocation of resources. The FY 2008 School Staffing Guidelines are attached (*Attachment 1*). **You must keep in mind that all allocations are tentative, pending final Board of Education action in June 2007 on the operating budget.**

Classroom Teacher Positions

Classroom teacher allocations are based on the revised enrollment projections from February 2007 by the Division of Long-Range Planning. Classroom teacher positions (adjusted for full-time resource teachers/interdisciplinary resource teachers) have been assigned according to the formula

$$\text{Classroom Teacher FTE} = \frac{\text{projected regular enrollment} \times 7}{5 \text{ periods a day} \times 27(\text{class size})} + .4(\text{AEIST})$$

The 27.0 ratio in the formula above is unchanged from FY 2007. Resource teachers and resource counselors are allocated as full-time equivalent (FTE) positions (1.0). Principals may provide additional released time to resource teachers/interdisciplinary resource teachers based on the size of their departments and responsibilities. However, the provision of additional released time

must not contribute to oversized classes or to the need for additional staff. Schools are expected to maintain Board of Education maximum class size guidelines that are: English class size at 28 or less; other academic classes at 32 or less; and all other classes at a level appropriate to the class. Principals are expected to review large class size issues with their community superintendent.

The .2 gifted and talented release teacher and the .2 Success for Every Student (SES) allocations have been combined to form a single .4 FTE release allocation for schools (*Attachment 2*). This position is intended to address student and staff needs as you continue your focus on increasing access to rigorous curriculum. The goals of the Accelerated and Enriched Instruction Support Teacher position are to:

- Increase student participation, particularly for African American and Hispanic students, in rigorous academic courses in middle school.
- Provide instructional, professional, and parental support for improvement of student achievement in rigorous academic courses.

For the five Phase I schools in the Middle School Reform initiative, this .4 FTE is included in the literacy and math content specialist positions. For all other schools, principals will indicate the teacher in this position on the Release Period Plan and will present their plan to use this allocation to the community superintendent for approval. Teachers are not to be assigned regular instructional periods during this release time. Principals may want to consider combining this allocation with the person's instructionally related activity period to extend the person's time for this responsibility.

Principals are required to complete the secondary school released period plan (*Attachment 3*). Also requested on this form is the name of the resource counselor and the number of students assigned as a regular caseload, as well as the names of the above-referenced gifted/talented and SES teachers. **This initial released period plan is due to OSP by May 8, 2007.**

Again this year, each middle school has been allocated a 1.0 mathematics support teacher position. The position must be used to reduce the size of mathematics classes. Principals should share their plans for use of this additional mathematics staffing with their community superintendent.

Master Schedule and Scheduling/Staffing Assumptions

Principals should be able to articulate how staffing plans support the school improvement goals. The staffing plan should target staffing to lower class size and ensure greater access to rigorous programming. The principals and the master scheduler should be able to articulate the school priorities and reflect on how those priorities are represented in the way staffing is used within the school. See *Attachment 4* for Scheduling Assumptions and a timeline of activities that should have occurred and will occur to meet a school's staffing and scheduling obligations. A copy of your master schedule is due to OSP as follows: 1) **August 6**, and 2) **September 10**.

A limited classroom teacher reserve will be used to support those schools which have a large number of classes that exceed the guidelines. **If the current allocation does not permit you to schedule your school without a large number of oversized classes, you should submit a written request highlighting the oversized classes on your staffing reconciliation spreadsheet to your community superintendent no later than May 8.** All requests for additional staff must include a cover memorandum with the specific request and rationale. The staffing spreadsheet and reconciliation sheet provided to schools also must be included. Decisions regarding the allocation of additional positions will be completed no later than May 14.

Deviations from projected enrollments will be monitored throughout the staffing process. **In situations of under-projected enrollment, please be prepared for staff allocation reductions.** It is important that the enrollment database is maintained throughout the summer, including the withdrawal of students who are not returning for the 2007–2008 school year. Each principal must submit both an updated staffing and reconciliation spreadsheet (*Attachment 5*) and released period plan to the appropriate community superintendent on **June 1 and July 20.**

Special Education Positions

Special education staffing was completed through the collaboration of special education staff and community superintendents. This year, staffing was budgeted to ensure that each middle school continues to have at least three special education teachers, including the resource room teacher. This supports middle schools that have smaller numbers of students with disabilities in providing adequate special education services at all three grade levels. In addition, this year, an hours-based staffing model will continue to be implemented at two middle schools that did not make adequate yearly progress because of the performance of special education students during FY 2006. The hours-based staffing model will be implemented in 10 additional middle schools during FY 2008. Special education cluster supervisors will assist these schools in implementing the model to improve student outcomes.

A thorough analysis of teacher to student ratio was completed for each school in an effort to equalize staffing across the school system. Initial staffing for FY 2008 is based on the data from the monthly Special Education Data System (SEDS) reports that have been checked by principals and supervisors of special education, in conjunction with the information regarding students transitioning to sixth grade or ninth grade. Future SEDS will be reviewed through the end of the school year to confirm that staffing is appropriate for each school.

The Department of Special Education maintains a limited number of reserve positions to be allocated to support schools that experience a significant increase in special education enrollment during the summer, so principals can expect staffing that is not supported by actual enrollment to be pulled. In order for staffing allocations to reflect the needs of the school, it is imperative that placement decisions made in July and August are processed immediately at the school level. Each new special education student needs to be enrolled in your school and their special education service entered on the Legacy Special Education Data System (Legacy SEDS) so the final special education staffing allocation reflects the actual needs of your school.

Requests for additional special education staffing due to over-enrollment should be submitted to your special education supervisor and community superintendent starting in April and continuing through July. The supervisor will work with the school to review students' Individualized Education Programs (IEPs) and evaluate current resources and scheduling to determine whether the need can be addressed with existing staff in the school or cluster. If the staffing need cannot be addressed, the supervisor will make a request for additional staffing to the director of the Division of School-Based Special Education Services. The director of special education services, the director of special education operations, and the division directors will review these requests during July and determine next steps, including referral to the associate superintendent for special education and student services for approval of additional staffing if necessary. Final staffing adjustments will be made by the end of July.

A very limited number of reserve positions will be available to address staffing concerns after school begins. For example, schools receiving rising Grade 6 former learning center students may submit requests for additional special education staffing to the special education supervisor if the need arises during the year. Staffing requests submitted to special education supervisors will be reviewed by the director of special education services, the director of special education operations, and the associate superintendent for special education and student services each Monday throughout the school year.

The delivery of special education services may consist of a variety of instructional models, including inclusive services for students participating in the general education classroom or in a self-contained setting, based on the individual needs of the students. Students are instructed in the general education curriculum with differentiated instruction to accommodate various learning needs. The materials used for general education student assignments are modified for the students receiving inclusive services. Some students receive instruction in the Fundamental Life Skills curriculum, as appropriate to meet their needs.

Special education teachers and paraeducators are resources schools use to assist with the delivery of instruction to support the needs of students with disabilities in the general education setting as well as self-contained settings. Given the proposed plan to transition rising Grade 6 learning center students to their home schools, consult with your special education supervisor to review and adjust your master schedule. This review will ensure that schedules will be developed to maximize the use of your staffing allocation, provide the necessary supports, and assist with the planning for all students with disabilities. With staffing, professional development, scientifically research-based interventions, and technical assistance, you will be able to provide a continuum of special education services ranging from small group instruction to inclusion in co-taught general education classrooms. When you allocate staff to support students with disabilities in an inclusive setting, first consider assigning special education teachers and paraeducators to the critical content areas of English and mathematics to assist in the delivery of instruction. Additionally, consideration should be given to assigning teachers for providing instruction in subjects for which they are highly qualified, as well as ensuring that special education teachers provide instruction in reading and mathematics interventions. Schools to the maximum extent possible should consider assigning special education teachers to one or more core content subject

areas by grade level, and facilitate within the master schedule, collaboration and planning between general and special education during grade level and team meetings.

Paraeducators in an inclusive setting are responsible for supporting the class based upon the guidance provided by the general and special education teachers. Paraeducators assigned to self-contained settings provide support to students throughout the instructional day, including the arts rotation periods.

ESOL/METS Positions

ESOL/METS staffing was completed in consultation with community superintendents, by analyzing needs and services required by legal mandates. ESOL teachers are assigned at a student/teacher ratio of 35:1. This staffing is included on the summary grid, as well as on the detailed ESOL grid. You are to complete the ESOL allocation assignment sheet that accompanies the detailed ESOL grid as explained on the form, and return it to the ESOL office for review no later than **August 31, 2007**.

Adjustments to middle school ESOL allocations will occur based on the ESOL enrollment as of September 30, 2007. This date is consistent with the official enrollment counts and will allow for increases resulting from summer registrations through the International Student Admissions Office.

Questions regarding allocations should be directed to Dr. Karen Woodson, director, ESOL/Bilingual Programs at 301-230-0670. Questions regarding scheduling should be directed to Mrs. Lois Wions, supervisor, ESOL instruction, at 301-279-3057.

Alternative Teacher Positions

Every middle school has been allocated a 1.0 alternative position. **This position is to be used to provide a Level 1 Alternative Program for students at your school.** Please refer to the attached materials (*Attachment 6A*) from the Office of Special Education and Student Services, Department of Alternative Programs (DAP). Level 1 Alternative Program plans (*Attachment 6B*) must be submitted Ms. Lauree Hemke, supervisor, DAP, no later than **June 1, 2007**. Continued allocation of the Level 1 Alternative Program staffing will be contingent on approval of your plan. Once plans are reviewed, they will be forwarded to the appropriate community superintendent for approval.

Academic Intervention Teachers

The academic intervention teacher positions have been allocated to community superintendents based on a concentrated poverty formula. These positions are zero-based each year and are directed by your community superintendent. Allocation of these positions may not be reflected in the initial staffing grid sent to schools. As allocations of these positions are made, new grids will be sent to schools.

Supporting Services Positions

An effort has been put in place to eliminate the USS tradeoffs and to make position allocations of supporting services positions more equitable. The intent is to provide similar resources to schools of comparable enrollment. As a result, schools will see increases in positions they had previously used as part of a trade and decreases in position that were not allocated equitably. Where possible, guidelines have been implemented to determine allocation for each of the positions. This process will be phased in over two years so that by FY 2009 all USS trades will be eliminated and allocation guidelines will be implemented.

Building Service Workers

For FY 2008, the Division of School Plant Operations has made adjustments in the allocation of building service employees for some schools. These changes were made to accommodate expanded facility size. Questions concerning these allocations should be directed to Ms. Dianne Jones, director of school plant operations, at 240-314-1075.

Full-Time Equivalent Positions

Positions are budgeted as full-time, 8 hours, but are frequently allocated in smaller increments. The following tables convert the equivalents of an FTE position to hours:

<u>Supporting Services</u>		<u>Professional</u>	
<u>FTE Positions</u>	<u>Hours (Daily)</u>	<u>FTE Positions</u>	<u>Hours (Bi-Weekly)</u>
1.000	8	1.0	80
.875	7	.9	72
.750	6	.8	64
.625	5	.7	56
.500	4	.6	48
.375	3	.5	40
.250	2	.4	32
.125	1	.3	24
		.2	16
		.1	8

Less Than Full-Time Equivalent Positions

Teacher-level positions may be allocated in increments of .1. However, beginning in FY 2008, "part-time teachers in secondary schools using a seven-period schedule will be allocated at least .2 FTE for each full class taught (5 standard periods per week or 10 standard periods per two weeks or the equivalent where there is an alternate schedule), not to exceed 1.0 FTE. This will apply whether the teacher is part-time in a single school or in a combination of schools" (see the MCEA contract, Article 17, Section G).

Guidelines for Middle School Teachers Employed Less than Full-Time
[1.0 FTE = 7.5 hours in building (including 30-minute lunch)
and 1 hour @ home = 8 hours]

Allocation FTE	Number of Minutes In Building Per Week (excluding lunch)
0.1	42 minutes per day x 5 days = 210 minutes
0.2	84 minutes per day x 5 days = 420 minutes
0.3	126 minutes per day x 5 days = 630 minutes
0.4	168 minutes per day x 5 days = 840 minutes
0.5	210 minutes per day x 5 days = 1,050 minutes
0.6	252 minutes per day x 5 days = 1,260 minutes
0.7	294 minutes per day x 5 days = 1,470 minutes
0.8	336 minutes per day x 5 days = 1,680 minutes
0.9	378 minutes per day x 5 days = 1,890 minutes

Positions Pending Budget Approval

The Board of Education FY 2008 operating budget includes additional positions. These positions will not be allocated to schools until they have been funded by the County Council in May and approved by the Board of Education in the final budget in June. These positions/allocation include:

- Additional IDA hours so that each school has a minimum of 7 hours (.875 FTE) per day.
- Additional counselor positions to lower the student to counselor ratio.

Staffing Procedures

Every school is assigned a staffing specialist to handle all staffing needs for that school. Principals should contact their assigned staffing specialist in the Department of Recruitment and Staffing (DRS) to discuss vacancies, filling vacancies, applicants, or any other staffing situation. Please refer to the staffing calendar for applicable dates. It is expected that scheduling is completed so that all core academic subjects are taught by teachers designated as highly qualified. *Attachment 7* provides the staffing specialist cluster assignments and phone numbers.

The DRS is responsible for recruiting the highest quality and well-diversified pool of applicants for teaching and supporting services positions. Recruitment and hiring are based on the staffing allocations and on the vacancies that are posted in the countywide Vacancy Database. The DRS ensures that only allocated positions are filled. **It will not be possible to process a staffing recommendation form for any position not included on the staffing grid. It will not be possible to compensate a person who begins an assignment without approval or an allocation for that assignment.**

The Human Resources Information System (HRIS) does not allow overhire situations, even for short periods of time. When such an issue arises, send a memorandum immediately to your community superintendent with copies to Ms. Jane Woodburn, director, DRS, and Ms. Nicola Diamond, executive assistant to the chief operating officer. Only rarely will these special exceptions be approved.

When reviewing and staying within the number of allocated positions in each position job code, exercise caution in scheduling one-period classes, for those assignments are difficult to match with another school and are difficult to fill.

A summary of critical dates for secondary school staff is attached (*Attachment 8*), along with a copy of the instructional staffing (teachers/assistants) calendar (*Attachment 9*), to share with appropriate staff. If you have any questions or concerns regarding staffing allocations, please contact your community superintendent or the director of school performance in the Office of School Performance.

ND:lmk

Attachments

Copy to:

Executive Staff

Directors of School Performance

Ms. Brown

Dr. Cohen

Mr. Creel

Ms. Cullison

Ms. Cuttitta

Ms. Ferrell

Ms. Hemke

Mrs. Jones

Mr. Lang

Ms. Mason

Dr. Newman

Ms. Strange

Mrs. Wions

Ms. Woodburn

Dr. Woodson

FY 2008 Middle School Staffing Guidelines (as resources permit)– Professional

Abbrev	Position	Decision Guide
Prin 0530	Principal	One per school.
AP 0531	Assistant Principal	Schools greater than 600 students receive 1.0; schools projected to have 900 or more students receive a second assistant principal (keep position until dropping below 810 students for two years). Every effort is made not to remove the second assistant principal one year and have to restore it the next year and maintain administrative stability.
Stu SSp 0642	Student Support Specialist	These positions are allocated (1) to schools without a first or second assistant principal, and (2) to schools larger than 1,000 students.
Mag Coord 0718 0719	Magnet/Special Program Coordinator	One each for cluster magnet/special programs at Eastern, Takoma Park, Clemente, Argyle, Loiederman, and Parkland middle schools.
CRTchr 1002	Classroom Teacher*	These positions are provided by formula ($\text{Enrollment} \times 7 / (27.0 \times 5) + 0.4$ per non-phase 1 school (released time for accelerated and enriched instruction support). For each resource teacher, 0.8 of this calculation is moved to the resource teacher allocation.
Ac Spt 1002	Academic Intervention Teacher	Allocations based on an approved proposal to improve student achievement.
Ma Spt 1002	Math Support Teacher	One per school to reduce math class sizes and support math acceleration.
Sp Prg 1002	Special Program Teachers	These 12.6 teacher positions are provided to support magnet/special programs at Eastern, Takoma Park, and Clemente; and the Middle Years programs at Julius West, Westland, Newport, and Silver Spring International.
Stf Dev 1009	Staff Development Teacher	One per school.
Alt 1020	Alternative Teacher	One per school. Principals must use these positions to staff a Level 1 Alternative Program.
ESL Tchr 1032	ESOL Teacher*	ESOL teacher allocations are based on a pupil/teacher ratio of 35:1. METS teacher allocations are based on the pupil/teacher ratio of 15:1.
Rdg 1033	Reading Teacher	One per school.
SpEd Tchr 1034	Special Education Teacher*	These positions are allocated to schools by the Department of Special Education according to placement of programs and anticipated enrollments for each.

Spch Path 1035	Speech Pathologist	These positions are allocated to schools by the Department of Special Education according to anticipated speech service needs at each school, as designated by Individual Educational Plans.
SpEd RRm 1046	Special Education Resource Room Teacher	These positions are allocated from the Department of Special Education based on the school's projected enrollment.
Coun 1051	Counselor	These positions are allocated to schools based on projected enrollment. Pending budget approval additional positions will be allocated to lower student-to-counselor ratios.
Med Sp 1052	Media Specialist	One per school.
Res 1054	Resource Teacher, Interdisciplinary Resource Teacher	These positions are allocated to schools based on projected enrollment.
RT SpEd 1054	Resource Teacher, Special Education	Schools with large special education programs are provided a .2 resource teacher to coordinate programs
Res Coun 1055	Resource Counselor	Schools with four or more counselors are provided a resource counselor to coordinate programs.
SpOth Tchr various	Special Education Other Teacher	These miscellaneous positions are allocated from the Department of Special Education to supplement existing programs.

* Note: Allocations based on a higher than budgeted ratio to assure a reserve to respond to situations where actual enrollments vary from projections

FY 2008 Middle School Staffing Guidelines (as resources permit) – Supporting Services

Abbrev	Position	Decision Guide
Adm Sec 4250	Administrative Secretary	1.0 per school.
Sec 1 10 m 4210	Secretary I, 10 months	1.0 per school. USS trades for these positions are being phased out over two years.
Sec 2 10 m 4230	Secretary II, 10 months	These 21.5 positions are allocated to the middle schools with the largest projected enrollment.
Guid 4231	Guidance Secretary	1.0 per school.
MST 6640	Media Services Technician	Eastern Middle School has 1.0 allocation to support magnet program.
Fin 4220	Financial Assistant	1.0 per school.
Md Ast 6620 6625	Media Assistant	Schools projected to have a student enrollment above 900 receive a 1.5 allocation; others a 1.0 allocation. USS trades for these positions are being phased out over two years.
TA Reg 6590	Teacher Assistant, Regular	These three positions are allocated to schools together so that the total FTE is based on projected enrollment: 1000+ = .875 (7 hours) 850 – 999 = .75 (6 hours) 700 – 849 = .625 (5 hours) Less than 700 = .6 (4 hours)
Cmp Lab 6860	Computer Lab	
IA Reg 6600	Paraeducator, Regular	
SpOt SS	Special Ed, Other Support	These miscellaneous positions are allocated by the Department of Special Education to specific school programs.
User Sp 5530	User Support Specialist	1.0 per school.
ESOL IA 6600	ESOL Paraeducator	These positions are allocated at .75 per METS class.
Sec Ast 5190	Security Assistant	Schools with a projected enrollment above 900 receive 2.0 security assistants, all others 1.0.
Lu Hr 6490	Lunch Hour Aide	.875 allocation (7 hours) per school. USS trades for these positions are being phased out over two years.
IDA 6870	Instructional Data Assistant	These allocations have not changed from FY07. Pending budget approval all schools will receive a .875 FTE (7 hours).

SEIA 6550	Special Education Paraeducator	These positions are allocated from the Department of Special Education according to guidelines established in building the operating budget. Generally, each teaching station includes an instructional assistant position.
BSM 7350	Building Service Manager	1.0 per school.
Ldr 7280	Building Service Leader	1.0 per school.
Wkr 7210	Building Service Worker	These positions, based on the school's square footage, are allocated from the Division of School Plant Operations.
PEO 7200	Plant Equipment Operator	1.0 per school.

Office of School Performance
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

March 5, 2007

MEMORANDUM

To: High School Principals

From: Donald H. Kress, Chief School Performance Officer
Stephen L. Bedford, Assistant Chief School Performance Officer *SB*
Ursula A. Hermann, Community Superintendent *UH*
Mark E. Kelsch, Community Superintendent *MEK*
LaVerne G. Kimball, Community Superintendent *LK*
Heath E. Morrison, Community Superintendent *HEM*
Frank H. Stetson, Community Superintendent *FHS*
Adrian B. Talley, Community Superintendent *AT*

Subject: Initial Staffing Allocations—FY 2008

The attached summary staffing grid and detailed special education and ESOL grids reflect preliminary staffing allocations for your school for FY 2008. You should highlight staffing changes from the current school year grid (copy attached) to assist in identifying involuntary transfers. **Please maintain this and future updates of the FY 2008 grid information for easy reference throughout the staffing process.** Position job codes are included on the staffing grid with the position titles. The "Staffing Notes" section at the bottom of the grids identifies special staffing decisions for your school. These notes are clarifications of unique staffing allocations and changes in staffing that occur throughout the year. The Office of School Performance (OSP), Office of Curriculum and Instructional Programs (OCIP), and the Office of Special Education and Student Services (OSSSES) have worked closely throughout the staffing process to coordinate the allocation of resources. The FY 2008 School Staffing Guidelines are attached (*Attachment 1*). **You must keep in mind that all allocations are tentative, pending final Board of Education action in June 2007 on the operating budget.**

Classroom Teacher Positions

Classroom teacher allocations are based on the revised enrollment projections from February 2007 by the Division of Long-Range Planning. Classroom teacher positions [(adjusted for full-time resource teacher (.8 FTE teacher) and athletic directors (.4 FTE teacher)] have been assigned according to the formula:

$$\text{Classroom Teacher FTE} = \frac{\text{projected regular enrollment} \times 7}{5 \text{ periods a day} \times 28.5(\text{class size})} + .2(\text{SSL})$$

The classroom teacher allocation includes 0.2 for the student service learning (SSL) coordinator. The 28.5 ratio in the formula above is unchanged from FY 2007. Schools are expected to maintain Board of Education maximum class size guidelines that are: English class size at 28 or

less, other academic classes at 32 or less, and all other classes at a level appropriate to the class. Principals are expected to review large class size issues with their community superintendent.

To ensure that each high school is treated equitably, reductions in the classroom teacher allocation have been made for students attending the Thomas Edison High School of Technology. Resource teachers (one release period), resource counselors, and athletic directors (three release periods), are allocated as FTE positions (1.0). Principals may provide additional release time for resource teachers and athletic directors based on the size of their departments and responsibilities. However, the provision of any additional released time must not contribute to oversized classes or to the need for additional staff. The Board of Education FY 2008 operating budget request includes a .4 FTE teacher position so that each school can provide math and English resource teachers with two release periods. These positions will not be allocated to schools until they have been funded by the County Council in May and approved by the Board of Education in the final budget in June.

Principals are required to complete the secondary school released period plan (*Attachment 2*) to help OSP monitor the use of released time for resource teachers and athletic directors in conjunction with the monitoring of oversized classes. Also requested on this form is the name of the resource counselor and the number of students assigned as a regular caseload. **The initial released period plan is due to OSP on May 8, 2007.**

Again this year, schools will be allocated math support teacher time. This allocation is based on feeder middle school data and should be used to reduce class size for mathematics classes. Principals should share their plans for use of this staffing with their community superintendent.

Master Schedule and Scheduling/Staffing Assumptions

Principals should be able to articulate how staffing plans support the school improvement goals. The staffing plan should target staffing to lower class size and ensure greater access to rigorous programming. The principals and the master scheduler should be able to articulate the school priorities and reflect on how those priorities are represented in the way staffing is used within the school. See *Attachment 3* for Scheduling Assumptions and an outline of activities that should occur to meet a school's staffing and scheduling obligations. A copy of your master schedule is due to OSP as follows: 1) **August 6**, and 2) **September 10**.

A limited classroom teacher reserve will be used to support those schools which have a large number of classes that exceed the guidelines. **If the current allocation does not permit you to schedule your school without a large number of oversized classes, submit a written request to your community superintendent no later than May 8.** All requests for additional staff must include a cover memorandum with the specific request and rationale. The staffing spreadsheet and reconciliation sheet provided to schedulers also must be included. Decisions regarding the allocation of additional positions will be completed no later than May 14.

Deviations from projected enrollments will be monitored throughout the staffing process. **In situations of under-projected enrollment, please be prepared for staff allocation reductions.**

It is important that the enrollment database is maintained throughout the summer, including the withdrawal of students who are not returning for the 2007–2008 school year so that staffing can be updated and class size maximums maintained. Each principal must submit both an updated staffing and reconciliation spreadsheet (*Attachment 4*) and released period plan to the appropriate community superintendent on **June 1 and July 20**.

Literacy Coaches

Literacy coaches will be allocated to each school. Literacy coaches are not to be assigned classes. The role of the literacy coach is to reinforce important reading strategies and concepts across all classes. The literacy coach will provide coaching, leadership, and coordination for school wide literacy intervention and support, interpret assessment data, plan and model literacy techniques, and provide professional development (in collaboration with the staff development teacher) to all staff. Each school receives a base allocation of .5 FTE literacy coach, with additional allocations based on enrollment, MSA results, and PSAT verbal results. **Any plan to assign any class(es) to your literacy coach must be approved by your community superintendent.**

Staff Development Teachers

Each high school is allocated 1.0 FTE for FY 2008. At least 0.4 of this allocation must be assigned to one individual who will serve as coordinating staff development teacher and attend all training.

Career and Technology Education (CTE) Positions

CTE teachers include vocational support (1021) and career prep (1022) positions. The vocational support position provides instruction and resource services to students in specified Maryland State Department of Education-approved CTE programs. The career prep position, formerly the Business Partnership/Work-based Learning Program Teacher, directly contacts business leaders, school administrators, teachers, parents, and students to identify, design, and deliver work-based learning experiences and activities to support student success, particularly in the areas of career awareness and school-to-career transition. Such program elements might include, but are not limited to, placing students with mentors, tutors, job shadowing experiences, internships, and other work-based learning experiences.

Questions regarding CTE allocations should be directed to Mrs. Shelley A. Johnson, director, Division of Career and Technology Education, at 301-279-3567.

Student Service Learning (SSL) Coordinator

The SSL coordinator, selected by the principal, is a .2 classroom teacher allocation. This position serves as the primary school contact for the Maryland State Department of Education SSL graduation requirement. The SSL coordinator must stay informed by attending countywide meetings; communicate MCPS SSL guidelines; promote opportunities to meet the requirement;

monitor awards programs; collaborate with administrators to address individual SSL issues; and use the Online Administrative Student Information System (OASIS) to maintain records of student progress.

Special Education Positions

Special education staffing was completed through the collaboration of special education staff and community superintendents. Initial staffing for FY 2008 is based on data from monthly Special Education Data System (SEDS) reports that have been checked by principals and supervisors of special education, in conjunction with the information regarding students transitioning to ninth grade and those exiting MCPS. Future SEDS will be reviewed through the end of the school year to confirm that staffing is appropriate for each school.

The Department of Special Education maintains a limited number of reserve positions to be allocated to support schools that experience a significant increase in special education enrollment during the summer. Principals can expect staffing that is not supported by actual enrollment to be pulled. In order for staffing allocations to reflect the needs of the school, it is imperative that placement decisions made in July and August are processed immediately at the school level. Each new special education student needs to be enrolled in your school and their special education service entered on the Legacy Special Education Data System (Legacy SEDS) so the final special education staffing allocation reflects the actual needs of your school.

Requests for additional special education staffing due to over-enrollment should be submitted to your special education supervisor and community superintendent starting in April and continuing through July. The supervisor will work with the school to review students' Individualized Education Programs (IEPs) and evaluate current resources and scheduling to determine whether the need can be addressed with existing staff in the school or cluster. If the staffing need cannot be addressed, the supervisor will make a request for additional staffing to the director of the Division of School-Based Special Education Services. The director of special education services, the director of special education operations, and the division directors will review these requests during July and determine next steps, including referral to the associate superintendent for special education and student services for approval of additional staffing if necessary. Final staffing adjustments will be made by the end of July.

A very limited number of reserve positions will be available to address staffing concerns after school begins. However, requests for additional special education staffing should be submitted to your special education supervisor as the need arises throughout the year. Staffing requests submitted to special education supervisors will be reviewed by the director of special education services, the director of special education operations, and the associate superintendent for special education and student services each Monday throughout the school year.

The delivery of special education services may consist of a variety of instructional models, including inclusive services for students participating in the general education classroom or in a self-contained setting, based on the individual needs of the students. Students are instructed in the general education curriculum with differentiated instruction to accommodate various learning

needs. The materials used for general education student assignments are modified for the students receiving inclusive services. Some students receive instruction in the Fundamental Life Skills curriculum, as appropriate to meet their needs.

Special education teachers and paraeducators are resources schools use to assist with the delivery of instruction to support the needs of students with disabilities in the general education setting as well as self-contained settings. With staffing, professional development, scientifically research-based interventions, and technical assistance, you will be able to provide a continuum of special education services ranging from small group instruction to inclusion in co-taught general education classrooms. When allocating staff to support students with disabilities in an inclusive setting, first consider assigning special education teachers and paraeducators to the critical content areas of English and mathematics to assist in the delivery of instruction. Additionally, consideration should be given to assigning teachers in courses for which they are highly qualified, as well as ensuring that special education teachers provide instruction in reading and mathematics interventions. Schools, to the maximum extent possible, should consider assigning special education teachers to one or more core content subject areas by grade level, and structure the master schedule to facilitate collaboration and planning between general and special educators during grade level and department meetings.

Paraeducators in an inclusive setting are responsible for supporting the class based upon the guidance provided by the general and special education teachers. Paraeducators assigned to self-contained settings provide support to students throughout the instructional day, including electives.

Selected high schools will continue to receive between 0.5 and 2.0 additional general education positions to support students with disabilities in general education classes. Schools selected to receive these positions have the lowest percentages of students with disabilities in the LRE, large numbers of special education students overall, or large numbers of students receiving LFI or SCB services. These positions have been identified in the "Staffing Notes" of each selected school's staffing grid. A brief explanation of why the school was selected and how the positions are to be used is on the Special Education Staffing allocations grid. Schools that have these positions must complete and submit the Assignment of General Education Teachers to Support Inclusion/LRE (*Attachment 4B*) to their community superintendent to indicate how each position is being used to support students with disabilities in English and Mathematics general education classes.

ESOL/METS Positions

ESOL/METS staffing was completed through collaboration between the community superintendents and the Division of ESOL/Bilingual Programs by analyzing needs and services required by legal mandates. ESOL teachers are assigned at a student/teacher ratio of 30:1. Note that in some circumstances this may result in assigning a teacher to more than one school. In addition, whenever an intern is assigned, this individual is counted against a budgeted allocation as a regularly assigned teacher.

This staffing is included on the summary grid, as well as on the detailed ESOL grid. Principals are to complete the ESOL allocation assignment sheet that accompanies the detailed ESOL grid as explained on the form, and return it to the ESOL office for review no later than **August 31, 2007**.

High school ESOL allocation adjustments will be based on the ESOL enrollment as of August 31 and September 28. These dates are consistent with the official enrollment counts and will allow for increases resulting from summer registrations through the International Student Admissions Office.

Questions regarding scheduling should be directed to Dr. Karen Woodson, director, ESOL/Bilingual Programs, at 301-230-0670, or to Mrs. Lois Wions, supervisor, ESOL instruction, at 301-279-3057.

Alternative Teacher Positions

Every high school has been allocated a 1.0 alternative position. **This position is to be used to provide a Level 1 Alternative Program for students at your school.** Please refer to the attached materials (*Attachment 5A*) from the Office of Special Education and Student Services (OSESS), Department of Alternative Programs (DAP). Level 1 Alternative Program plans (*Attachment 5B*) must be submitted to Ms. Lauree Hemke, supervisor, DAP, no later than **June 1, 2007**. Continued allocation of the Level 1 Alternative Program staffing will be contingent on approval of your plan. To ensure that all needed information is included, please use the attached FY 2008 Alternative Program Plan form. Approved plans will be forwarded to the appropriate community superintendent.

Academic Intervention Teachers

Academic intervention teacher positions have been allocated to community superintendents based on a concentrated poverty formula. These positions are zero-based each year, and are directed by your community superintendent. Allocation of these positions may not be reflected in the initial staffing grid sent to schools. As allocations of these positions are made, new grids will be sent to schools.

Supporting Services Positions

An effort has been put in place to eliminate the USS tradeoffs and to make position allocations of supporting services positions more equitable. The intent is to provide similar resources to schools of comparable enrollment. As a result, schools will see increases in positions they had previously used as part of a trade and decreases in positions that were not allocated equitably. Where possible, guidelines have been implemented to determine allocation for each of the positions. This process will be phased in over two years so that by FY 2009 all USS trades will be eliminated and allocation guidelines will be fully implemented.

Building Service Workers

For FY 2008, the Division of School Plant Operations has made adjustments in the allocation of building service employees for some schools. These changes were made to accommodate expanded facility size. Questions concerning these allocations should be directed to Ms. Dianne Jones, director of school plant operations, at 240-314-1075.

Full-Time Equivalent Position

Positions are budgeted as full-time, 8 hours, but are frequently allocated in smaller increments. The following tables convert the equivalents of a FTE to hours:

Supporting Services		Professional	
<u>FTE Positions</u>	<u>Hours (Daily)</u>	<u>FTE Positions</u>	<u>Hours (Bi-Weekly)</u>
1.000	8	1.0	80
.875	7	.9	72
.750	6	.8	64
.625	5	.7	56
.500	4	.6	48
.375	3	.5	40
.250	2	.4	32
.125	1	.3	24
		.2	16
		.1	8

Less Than Full-Time Equivalent Positions

Teacher-level positions may be allocated in increments of .1. However, beginning in FY 2008, "part-time teachers in secondary schools using a seven-period schedule will be allocated at least .2 FTE for each full class taught (5 standard periods per week or 10 standard periods per two weeks or the equivalent where there is an alternate schedule), not to exceed 1.0 FTE. This will apply whether the teacher is part-time in a single school or in a combination of schools" (see the MCEA contract, Article 17, Section G).

Guidelines for High School Teacher Level Positions

[1.0 FTE = 7.5 hours in building (including 30-minute lunch) and 1 hour @ home = 8 hours]

Allocation FTE	Number of Minutes In Building Per Week
0.1	42 minutes per day x 5 days = 210 minutes
0.2	84 minutes per day x 5 days = 420 minutes
0.3	126 minutes per day x 5 days = 630 minutes
0.4	168 minutes per day x 5 days = 840 minutes
0.5	210 minutes per day x 5 days = 1,050 minutes
0.6	252 minutes per day x 5 days = 1,260 minutes
0.7	294 minutes per day x 5 days = 1,470 minutes
0.8	336 minutes per day x 5 days = 1,680 minutes
0.9	378 minutes per day x 5 days = 1,890 minutes

Staffing Procedures

Every school is assigned a staffing specialist to handle all staffing needs for that school. Principals should contact their assigned staffing specialist in the Department of Recruitment and Staffing (DRS) to discuss vacancies, fill vacancies, review applicants, or address any other staffing situation. Please refer to the staffing calendar for applicable dates. It is expected that scheduling is completed so that all core academic subjects are taught by teachers designated as highly qualified. *Attachment 6* provides the staffing specialist cluster assignments and phone numbers.

The DRS is responsible for recruiting the highest quality and well-diversified pool of applicants for teaching and supporting services positions. Recruitment and hiring are based on the staffing allocations and on the vacancies that are posted in the countywide Vacancy Database. The DRS ensures that only allocated positions are filled. **It is not possible to process a staffing recommendation form for any position not included on the staffing grid or to compensate a person who begins an assignment without an allocation for that assignment.**

The Human Resources Information System (HRIS) does not allow overhire situations, even for short periods of time. When such an issue arises, immediately send a memorandum requesting exception to your community superintendent with copies to Ms. Jane Woodburn, director, DRS, and Ms. Nicola Diamond, executive assistant to the chief operating officer. Only rarely will these special exceptions be approved.

When reviewing and staying within the number of allocated positions in each position job code, exercise caution in scheduling one-period classes, because those assignments are difficult to match with another school and are difficult to fill.

A summary of critical dates for secondary school staff is attached (*Attachment 7*), along with a copy of the instructional staffing (teacher/assistant) calendar (*Attachment 8*), to share with appropriate staff. If you have any questions or concerns regarding staffing allocations, please contact your community superintendent or your director of school performance in the Office of School Performance.

ND:lmk

Attachments

Copy to:

Executive Staff

Directors of School Performance

Ms. Blum

Ms. Brown

Dr. Cohen

Ms. Cuttitta

Ms. Cullison

Ms. Hemke

Mrs. Jones

Mr. Lang

Ms. Mason

Dr. Newman

Ms. Strange

Ms. Wions

Ms. Woodburn

Dr. Woodson

FY 2008 High School Staffing Guidelines (as resources permit) –Professional

Abbrev	Position	Decision Guide
Prin 0550	Principal	One per school.
AP 0551	Assistant Principal	One per school: schools projected to have more than 900 students receive a second assistant principal and schools greater than 1,800 students receive a third assistant principal.
Stu SSp 0644	Student Support Specialist	These positions are allocated first to schools with less than three assistant principals and then to the largest schools.
Mag/Sp Prgm Cord	Magnet/Spec'l Prgm Coordinator	One each for countywide magnet program at Blair and Poolesville (0721) and the IB program at Richard Montgomery High School (0715).
CRTchr 1003	Classroom Teacher*	These positions are provided by formula: $(\text{Enrollment} * 7) / (28.5 * 5) + 0.2$ released time for Student Service Learning. A 0.8 of this calculation is removed for every resource teacher. A 0.4 of this calculation is removed for the athletic director allocation. Pending budget approval an additional .4 per school will be allocated to allow each mathematics and English resource teacher 2 release periods.
Ac Spt 1003	Academic Intervention Teacher	These positions are allocated based on an approved proposal to improve student achievement.
Ma Spt 1003	Math Support Teacher	These positions are allocated based on feeder middle school course completion data.
Sp Prg 1003	Special Program Teacher	These positions are allocated to schools with magnet, special, or signature programs.
Stf Dev 1009	Staff Development Teacher	1.0 per school.
Ath Dir 1018	Athletic Director	One per school (three released periods; teach two).
Alt 1020	Alternative Teacher	One per school. Principals must use these positions to staff a Level 1 Alternative Program.
Voc Spt 1021	Vocational Support Teacher	These 19.5 positions are to support implementation of career education and career development programs, including coordination of internships for all students.
Cr Prp 1022	Career Prep Teacher	These 20.0 positions are used to support implementation of career education and career development programs, including coordination of internships
ESL Tchr 1032	ESOL Teacher*	These allocations are based on a ratio of 1.0 teacher for every 30 students. METS teacher allocations are based on the pupil/teacher ratio of 15:1.
SpEd Tchr 1034	Special Education Teacher*	These positions are allocated to schools by the Department of Special Education according to placement of programs and anticipated enrollments for each.
Spch Path 1035	Speech Pathologist	These positions are allocated to schools by the Department of Special Education according to anticipated speech service needs at each school as designated by Individual Educational Plans.

SpEd RRm 1046	Special Education Resource Room Teacher	These positions are allocated from the Department of Special Education based on the school's projected enrollment.
Coun 1051	Counselor	These positions are allocated based on enrollment.
Med Sp 1052	Media Specialist	One per school; schools with more than 2,000 students receive a second media specialist.
Res 1054	Resource Teacher	The positions are allocated based on projected enrollment and specific school programs (one released; teach four).
RT SpEd 1054	Resource Teacher Special Education	Schools with large SE programs are provided a .2 resource teacher to coordinate programs
RT ESL 1054	ESOL Resource Teacher	Schools with large ESOL programs are provided a resource teacher to coordinate programs.
RsCn 1055	Resource Counselor	Schools with four or more counselors are provided a resource counselor to coordinate programs.
SpOth Tr various	Special Education Other Teacher	These miscellaneous positions are allocated from the Department of Special Education to supplement existing programs (see detail special education grid for job codes).

* Note: Allocations based on a higher than budgeted ratio to assure a reserve to respond to situations where actual enrollments vary from projections

FY 2008 High School Staffing Guidelines (as resources permit) –Supporting Services

Abbrev	Position	Decision Guide
Ad Sec 4250	Administrative Secretary	One per school.
Sec I 10 Months 4210	Secretary I, 10 months	<p>Ten-month secretary positions (I and II) are allocated according to the following projected enrollments:</p> <p>2550 – 2999 = 7.0 1900 – 2549 = 6.0 1800 – 1899 = 5.0 1650 – 1799 = 4.0 1600 – 1649 = 3.5 1300 – 1599 = 3.0 900 – 1299 = 2.0 Less than 900 = 1.0</p> <p>These guidelines provide the total number of positions to be divided between Secretary I and Secretary II positions.</p>
Sc2 10 months 4230	Secretary II, 10 months	
Sc2 12 months 4231	Secretary II, 12 months	1.0 each for magnet programs at Blair and Poolesville, and IB programs at Richard Montgomery high schools.
Guid 4231	Guidance Secretary	1.0 per school.
Rgst 4240	Registrar	1.0 per school.
Car Inf 6770	Career Information Assistant	1.0 per school.
Bus Mgr 5700	Business Manager	1.0 per school.
Fin Ast 4220	Financial Assistant	1.0 per school.
Md Ast 6620/6625	Media Assistant	<p>Allocations are made according to the following projected student enrollments:</p> <p>3000 + = 4.0 2550 – 2999 = 3.0 1750 – 2549 = 2.5 1500 – 1749 = 2.0 900 – 1499 = 1.5 Less than 900 = 1.0</p> <p>USS trades for these positions are being phased out over two years.</p>
TA Reg 6590	Teacher Assistant, Regular	<p>These two positions are allocated to schools together so that the total FTE is based on projected enrollment.</p> <p>USS trades for these positions are being phased out over two years.</p>
IA reg 6600	Paraeducator, Regular	
MST 6640	Media Services Technician	1.0 per school.
Scr Ldr 5130	Security Team Leader	1.0 per school
SpOt SS various	Special Ed, Other Support Staff	These miscellaneous positions are allocated by the Department of Special Education to specific school programs (see special education detail for job codes).

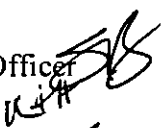






User Sp 5530	User Support Specialist	1.0 per school
Eng Cmp 6690	English Composition Assistant	Allocations are made according to the following: 39+ sections = 4.875 Up to 25 sections = 3.125 Up to 21 sections = 2.625 Up to 18 sections = 2.5 Up to 15 sections = 2.25 Up to 14 sections = 1.75 Less than 10 sections = 0.875
ESOL IA 6600	ESOL Paraeducator	These positions are allocated from the Division of ESOL/Bilingual Programs to specific school programs.
Scr Ast 5190	Security Assistant	This position is assigned based on enrollment, educational load, campus size, and renovation conditions.
Cmp Lab 6860	Computer Lab Assistant	Allocations for this positions remain the same as FY07. USS trades for these positions are being phased out over two years.
SEIA 6550	Special Education Paraeducator	These positions are allocated from the Department of Special Education according to guidelines established in building the operating budget. Generally, each teaching station includes an paraeducator position.
BSM 7350/ 7370/ 7390/ 7400	Building Service Manager	1.0 per school.
Ldr	Building Service Night Leader	1.0 per school.
WKR 7210	Building Service Worker	These positions, based on the school's square footage, are allocated from the Division of School Plant Operations.
PEO 7200	Plant Equipment Operator	1.0 per school.

Office of School Performance
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

March 6, 2008

MEMORANDUM

To: Elementary School Principals

From: Stephen L. Bedford, Chief School Performance Officer 
Ursula A. Hermann, Community superintendent 
LaVerne G. Kimball, Community Superintendent 
Sherry Liebes, Community Superintendent 
Heath E. Morrison, Community Superintendent 
Frank H. Stetson, Community Superintendent 
Adrian B. Talley, Community Superintendent 

Subject: Initial Staffing Allocations—FY 2009

The attached summary staffing grid and, as appropriate, special education and Title I Focus school grids reflect preliminary staffing allocations for your school for FY 2009. You should highlight staffing changes from the current school year grid (copy attached) to assist in identifying involuntary transfers. **Please maintain this and future updates of the FY 2009 grid information for easy reference throughout the staffing process.** Position job codes are included on the staffing grid with the position titles. Please note there are job code changes on the grids including academic intervention teachers, special program teachers, and some paraeducator positions. In mid-June you will be asked to identify anyone in these positions so that they can be moved into the correct positions in the HRIS system. The "Staffing Notes" section at the bottom of the grids identifies special staffing decisions for your school. These notes are clarifications of unique staffing allocations. The Office of School Performance (OSP), Office of Curriculum and Instructional Programs (OCIP), and the Office of Special Education and Student Services (OSSES) have worked closely throughout the staffing process to coordinate the allocation of resources. The FY 2009 School Staffing Guidelines are attached (*Attachment 1*). **Please keep in mind that all allocations are tentative, pending final Board of Education action in June 2008 on the operating budget.**

Final approval of the operating budget will not occur until June 2008. As a result, new positions that are part of operating budget initiatives will not be allocated to schools until they have been funded by the County Council and approved by the Board of Education in the final budget. Until positions are allocated, schools should make plans according to the allocations they receive in March. Then, if additional positions are approved, schedules and work assignments can be adjusted. Furthermore, given the current fiscal situation, if the County Council does not fund the entire MCPS same services budget, it may be necessary to reduce some positions that have already been allocated. Schools will be notified as soon as possible if further cuts are necessary. Our expectation is that this will not happen, but we need to be prepared if it does.

Classroom Teacher Positions

Kindergarten and Grades 1–6 classroom teacher allocations are based on revised enrollment projections from February 2008 by the Division of Long-Range Planning. With the exception of the kindergarten class-size initiative (58 focus schools initially staffed with a ratio of 16:1), kindergarten positions have been distributed on a formula of one teacher for every 25 students. Positions have been allocated to reduce class sizes in Grades 1 and 2 in 58 focus schools at a 17:1 ratio. Continuing in FY 2009, there are 149.1 teacher positions to support elementary Board of Education maximum class size guidelines at 26 in Grades 1–3 and 28 in Grades 4 and 5.

There are a limited number of reserve positions to be used to support schools that experience significant enrollment increases during the summer. Also, principals can expect staffing to be pulled that is not supported by actual enrollment. Adjustments in position allocations will be based on actual enrollment numbers in the student database. School schedule, student groupings throughout the day, and use of additional teaching staff including reading initiative and focus teachers will be considered when making staffing decisions. It is important that your enrollment database is maintained throughout the summer, including the withdrawal of students not returning for the 2008–2009 school year. This is critical in maintaining the integrity of our staffing decisions and will be monitored as you submit your master schedule.

In order to best take advantage of all of our resources and to provide all schools access to resources, decisions about additional positions will include a review of how all resources are currently being used. Also, not all staffing allocations will occur in 1.0 increments. Depending on needs, staffing may be allocated in smaller increments. Requests for additional teachers in Grades 1 and 2 in non-Focus schools will include a review of reading initiative schedules. Depending on availability of staffing, these positions may need to be reassigned.

When your schedule supports a change in the number of positions allocated (increase or decrease), please send a Request for Additional Staffing Form (*Attachment 2*) to your community superintendent. Your schedule for organizing the school also must be included. A form is attached (*Attachment 3*). You may use this form or another way to show your schedule. Please be sure your schedule includes class size and reading initiative information about when special education students are included and when they are self-contained, when ESOL students are pulled out, and how all the professional staff is being utilized to provide instruction. This additional information will assist us in reviewing your organizational plan and in considering additional staffing requests. Also, an organizational plan based on actual enrollment is to be sent to your community superintendent **every month beginning on June 2**. Community superintendents will monitor deviations from projected enrollments and school schedules throughout the staffing process. **In situations when the enrollment at your school is below the projection, please be prepared for staff allocation reductions.**

Organization of the Instructional Week

Each elementary school has the responsibility to organize each day and week to include instruction in reading/writing/language arts, mathematics, science, and social studies, pre-kindergarten to Grade 5. There are 1575 minutes of instructional time in a week or 315 minutes in a school day to accomplish this. The challenge to develop a master schedule that fulfills this responsibility and provides developmentally appropriate art, music, and physical education at each grade level varies from school to school. Given individual school considerations, there are instructional guidelines that maximize student learning, provide fidelity of curriculum implementation, and support school improvement goals. These guidelines can be found in the instructional guides for reading/writing/language arts, mathematics, science, and social studies. Art, music, and physical education guidelines are in Attachment 4. Community superintendents and directors of school performance are available if support is needed in developing your schedule.

Additional considerations include:

- Scheduling instruction at a time in the day most conducive to student learning
- Providing common planning time for grade level teams, ESOL teachers, and special education teachers
- Considering use of teachers across grade levels
- Considering when to heterogeneously group
- Providing common planning time for vertical articulation
- Maximizing instructional time by minimizing the number of transitions and amount of time for transitions
- Maximizing use of support staff
- Daily reading/language arts, mathematics, science, and social studies instruction for kindergarten through Grade 5
- Daily reading and mathematics instruction for pre-kindergarten
- The negotiated agreement between MCPS and MCEA (effective July 1, 2007) specifies that each elementary teacher will have at least four hours and 15 minutes (255 minutes) per week of planning time during the student day. Appropriate use of this time includes individual planning and preparation, team planning, and individual professional development.

Title I Schools

For FY 2009, there are 28 elementary schools receiving Title I federal funds. These schools receive a staffing allocation based on the Title I per-pupil allocation (PPA) that is calculated annually. The number of students enrolled in the school as of October 31, 2007, who qualify for the Free and Reduced-price Meals System (FARMS) is multiplied by the PPA to determine the allocation. These funds are available for teacher, paraeducator, or parent community coordinator positions. Once positions are determined, remaining school based funds may be allocated for instructional materials, school wide initiatives, extended day programs, professional

development, or additional funds are added to the central Title I allocation for family involvement. Schools currently on alert or in need of improvement based on the Maryland State Department of Education's Maryland School Assessment results must reserve 10 percent of their allocation for professional development until Adequate Yearly Progress (AYP) results are available. Funds can be reallocated if AYP is achieved.

All Title I budgets are reviewed by the Division of Title I Programs (DTP) and approved by the community superintendent. Principals work closely with their community superintendent and DTP to develop a comprehensive plan, based upon scientifically-based research and Title I criteria, that details the use of staff to meet identified needs. Central Title I funds provide a 0.5 FTE Math Content Coach (MCC) and supplemental ESOL support teacher(s). A Title I funded 0.5 FTE gifted and talented teacher is provided for schoolwide Title I schools. The 0.5 Reading Recovery teacher will be locally funded this year for all eligible Title I schools.

The following options may be considered in filling school-based Title I funded teacher positions: MCC, gifted and talented, Reading Recovery, ESOL, reading, writing, or mathematics support, mentor, class size reduction in Grades 3-5, or other priorities as identified in the school improvement plan. Principals confer with their community superintendent and DTP on the use of Title I positions and receive approval from their community superintendent before assigning individuals through the Department of Recruitment and Staffing.

All professional staff in core academic areas must be highly qualified. In schoolwide programs, all paraeducators with instructional duties must meet the highly qualified requirements. All paraeducators funded through Title I in targeted assistance programs must also meet these qualifications.

The Title I designation for the 28 schools is stated on the FY 2009 summary staffing grid in the "Staffing Notes" section at the bottom of the page. Staffing for the 28 Title I schools is included on the summary staffing grid as well as on the detailed Title I school grid. Principals are required to complete the detailed grid with the name and employee identification number of the person assigned and return it to DTP by **April 30, 2008**. This will allow DTP time to ensure that assigned teachers and supporting services staff are correctly charged to the Title I grant, included in training, and complete the required programmatic evaluations, including reports on highly qualified staff. If a Title I focus position has not been assigned by this date, principals are to provide this information on monthly revisions of the detailed Title I Focus School grid sent to DTP.

Grades 1 and 2 Reading Initiative Teachers

Reading Initiative teacher positions have been reviewed and adjusted based on projected enrollment for the first and second grades in your school. The allocation is based on a formula that provides reading classes with an initial student/teacher ratio of 17:1 or below. In addition, the allocations take into account the need for appropriate planning time. Please remember that

Reading Initiative allocations are not given to the Grades 1 and 2 in the 17:1 lower class-size initiative schools. As a reminder, the Reading Initiative positions must be used exclusively in Grades 1 and 2 during a daily uninterrupted block of 90 minutes of reading/language arts instruction. These positions are NOT to be used for other purposes.

Reading Initiative teachers are calculated by the following formula:

$$\text{FTE} = ((\# \text{ Grades 1 and 2 sections at 17:1 ratio}) - (\# \text{ Grades 1 and 2 classroom teachers})) \times .3$$

This formula has been adjusted from prior years to properly and equitably allocate positions and to address contractual requirements for planning time.

Academic Intervention Teachers

Academic Intervention teacher positions have been allocated to community superintendents based on a concentrated poverty formula. These positions are zero-based each year and are directed by your community superintendent. Allocations for these positions may not be reflected in the initial staffing grid sent to schools. As allocations of these positions are made, new grids will be sent to schools.

Art, Music, and Physical Education Teachers

Elementary schools have been allocated art, music, and physical education teacher positions based on the estimated number of classroom teacher stations, which includes regular classroom teachers, kindergarten sections, pre-kindergarten, and self-contained special education classes. The budgeted number of art, music, and physical education teacher positions has been increased by 3.7 each for FY 2009. The art, music, and physical education coordinators have reviewed the ranges to ensure that allocations will meet guidelines for instructional time. Schools are encouraged to be creative in their scheduling practices in order to meet the needs of all stakeholders.

Art, music, and physical education positions are allocated using the following revised table:

<u>Number of Teacher Stations</u>	<u>Allocation</u>	<u>Number of Teacher Stations</u>	<u>Allocation</u>
42+	1.8	24-25	1.0
40-41	1.7	21-23	1.0
37-39	1.6	19-20	0.8
35-36	1.5	16-18	0.7
33-34	1.4	14-15	0.6
31-32	1.3	12-13	0.5
28-30	1.2	10-11	0.4
26-27	1.1		

Schools participating in the original opera program will receive an additional 0.1 FTE music teacher allocation, and those participating in the integrated arts pilot program receive an additional 0.1 FTE teacher allocation each for art, music, and physical education. Since the integrated arts grant has ended these schools will no longer receive the .5 coordinator position which was funded by the grant. Also, the substitute days and funds for professional development for the integrated arts program will not be available for FY 2009.

The Elementary Art, Music, and Physical Education Guidelines are included (*Attachment 4*) to help with scheduling. For schools with 4th and 5th grades, each general/choral music schedule may include a chorus period scheduled within the instructional day, not during recess, plus one optional ancillary class such as a second chorus, Orff, or recorder class. For schools without a 4th and 5th grade, the music schedule may include an Orff or recorder class. Keep in mind, a chorus stipend payment of \$1,008 is available for every elementary school, based on time outside of normal duty hours required to conduct an extracurricular program. Once a school's schedule for art, music, and physical education teachers has been finalized in August, please submit a copy to the coordinators in the Office of Curriculum and Instructional Programs. These will be shared with the community superintendents and should be updated as staffing allocations change. If you have questions about unique scheduling situations in art, music, and physical education, please contact Miss Ebony Langford, director, Elementary School Instruction, at 301-517-5007 for assistance.

Instrumental Music

The coordinator of instrumental music monitors this program and works with principals, the Department of Recruitment and Staffing, and community superintendents for the best utilization of these positions. There are 37.2 FTE instrumental music teacher positions to provide instruction for students in Grades 4–5 in preparation for participation in a secondary band or orchestra program. To support the development of rotating instrumental music classes, OCIP staff will collect sample schedules during spring 2008 and collaborate with teachers and principals to identify strategies that schools may consider using in school year 2008-2009. If you have questions or concerns on scheduling instrumental music classes, please contact Mr. Rick Penix, coordinator of instrumental music, Department of Curriculum and Instruction, at 301-279-3836 for assistance.

Team Leaders

As part of the initiative on building a skillful workforce and the recognition that there are leadership responsibilities in elementary schools, elementary team leaders will receive a salary supplement of \$1,500 and three days of summer employment. Elementary team leaders are expected to lead, manage, and facilitate team activities at the school level. Team leaders must be full-time, ten-month professional employees (e.g., K–5 classroom, art, music, physical education teachers, special education teachers, ESOL teachers, reading specialists, counselors). You will

receive a form to fill out with your team leader information in May. It is critical to return this form by **June 13** to ensure appropriate compensation in FY 2009.

Special Education Positions

Special education staffing was completed through the collaboration of special education staff and community superintendents. A thorough analysis of teacher to student ratio was completed for each school in an effort to equalize staffing across the school system. Initial staffing for FY 2009 is based on the data from the Encore Web-based Individualized Education Program (IEP) System in conjunction with the information regarding students transitioning to kindergarten or sixth grade. Encore data will be reviewed through the end of the school year to confirm that staffing is appropriate for each school. Pending final board of Education action on the operating budget, an additional 10 teachers will be added to schools to support special education students in general education 80 percent of the day or greater. The assignment of these positions will be done in collaboration with the Office of Special Education and Student Services.

The Departments of Special Education Services and Operations maintain a limited number of reserve positions to be allocated to support schools that experience a significant increase in special education enrollment during the summer; therefore, principals can expect staffing that is not supported by actual enrollment to be pulled. In order for staffing allocations to reflect the needs of the school, it is imperative that placement decisions made in July and August are processed immediately at the school level. Each new special education student needs to be enrolled in your school and their special education service entered on the Encore so the final special education staffing allocation reflects the actual needs of your school.

Requests for additional special education staffing due to over-enrollment should be submitted to your special education supervisor and community superintendent starting in April and continuing through July. The supervisor will work with the school to review students' Individualized Education Programs (IEPs) and evaluate current resources and scheduling to determine whether the need can be addressed with existing staff in the school or cluster. If the staffing need cannot be addressed, the supervisor will make a request for additional staffing to the director of the Division of School-Based Special Education Services or the director of the Division of Preschool Special Education and Related Services, as appropriate. The director of special education services, the director of special education operations, and the division directors will review these requests during July and determine next steps, including referral to the associate superintendent for special education and student services for approval of additional staffing if necessary. Final staffing adjustments will be made by the end of July.

A very limited number of reserve positions will be available to address staffing concerns after school begins. However, requests for additional special education staffing should be submitted to your special education supervisor as the need arises throughout the year. Staffing requests submitted to special education supervisors will be reviewed by the director of Special Education Services, the director of Special Education Operations, and the associate superintendent for Special Education and Student Services each Monday throughout the school year.

The delivery of special education services may consist of a variety of instructional models, including inclusive services for students participating in the general education classroom or in a self-contained setting, based on the individual needs of the students. Students are instructed in the general education curriculum with differentiated instruction to accommodate various learning needs. Some students receive instruction in the Fundamental Life Skills curriculum, as appropriate to meet their needs.

Special education teachers and paraeducators are resources schools use to assist with the delivery of instruction to support the needs of students with disabilities in the general education setting, as well as self-contained settings. With staffing, professional development, scientifically research-based interventions, and technical assistance, you will be able to provide a continuum of special education services ranging from small group instruction to inclusion in co-taught general education classrooms. Schools implementing the Home School Model, delivering special education services in the general education environment, can also offer small group instruction if needed. When you allocate staff to support students with disabilities in an inclusive setting, assign special education teachers and paraeducators to the critical content areas of reading/language arts and mathematics first, to assist in the delivery of instruction in the least restrictive environment (LRE). Paraeducators in a general education setting are responsible for supporting the class based upon the guidance provided by the general and special education teachers. Paraeducators assigned to self-contained settings provide support to students throughout the instructional day, including specials such as art, music, and physical education.

ESOL Positions

ESOL/METS staffing was completed through collaboration between the community superintendents and the Division of ESOL/Bilingual Programs by analyzing needs and services required by legal mandates. The staffing ratio of 44:1 is calculated using the total number of students. METS students are not counted in the formula as they receive a separate teacher. **Note: Whenever an intern is assigned, this individual is counted against a budgeted allocation as a regularly assigned teacher.**

In developing the ESOL schedule, the first step should be to schedule ESOL students by proficiency level (i.e., beginning, intermediate, advanced) during the Reading/Language Arts block. Then, ESOL students should be served by grade level bands (i.e., prekindergarten, kindergarten, 1, 2, 3–5). Prekindergarten ESOL students should be served in the same manner as students in Grades K–5. ESOL instruction should not be scheduled during the students' guided reading group. Principals are to complete the ESOL allocation assignment sheet (*Attachment 5*) as explained on the form, and return the form to the ESOL office for review no later than **August 29, 2008**.

The following guidelines should be used to ensure that structured, consistent English language development is planned for all ESOL students:

- All prekindergarten and Head Start ESOL students (Levels 1–3) should receive a minimum of 20 minutes of ESOL instruction from the ESOL teacher four to five days per week.
- ESOL Level 1 students (beginners) must receive a minimum of 50 minutes of ESOL instruction from the ESOL teacher using the ESOL curriculum four to five days per week.
- ESOL Level 2 students (intermediate) must receive a minimum of 40 minutes of ESOL instruction from the ESOL teacher using the ESOL curriculum four to five days per week.
- ESOL Level 3 students (advanced) must receive a minimum of 40 minutes of ESOL instruction from the ESOL teacher using the ESOL curriculum two to three days per week

Elementary ESOL allocation adjustments will be done weekly through October 31 based on enrollment data entered into OASIS. This may result in small adjustments numerous times during the fall. Schools may decide to staff as allocations are received, or hold allocations until the end of the process and staff at that time.

Questions should be directed to Dr. Karen Woodson, director, ESOL/Bilingual Programs, at 301-230-0670.

Paraeducators and Lunch Hour Aides

The process to make paraeducator and lunch hour aide time more equitable has continued. As a result, some schools may see reduction adjustments in the number of hours of paraeducator or lunch aide time. The intent is to provide similar resources to schools of comparable enrollment. Also, as part of the budget process, the types of paraeducator positions have been decreased. We no longer have K12, QIE, and magnet paraeducators. Regular paraeducators will be allocated to all schools using the enrollment guidelines. In addition, special program paraeducators will be allocated to provide support for specific programs. **Reminder:** When scheduling paraeducators, please consider providing reasonable and customary work breaks as noted in SEIU Local 500 Negotiated Agreement Article 13, Item J.

Building Service Workers

The Division of School Plant Operations will send staffing for building service employees directly to schools by April 1, 2008. Questions concerning these allocations should be directed to Ms. Dianne Jones, director of school plant operations, at 240-314-1075.

Full-Time Equivalent Position

Positions are budgeted as full-time, 8 hours, but are frequently allocated in smaller increments. The following tables convert the equivalents of a full-time position (FTE) to hours:

Supporting Services		Professional	
FTE Positions	Hours (Daily)	FTE Positions	Hours (Bi-Weekly)
1.000	8	1.0	80
.875	7	.9	72
.750	6	.8	64
.625	5	.7	56
.500	4	.6	48
.375	3	.5	40
.250	2	.4	32
.125	1	.3	24
		.2	16
		.1	8

Less Than Full-Time Equivalent Positions

Beginning FY 2008, principals will grant seven hours of planning time per normal week, at least 4 hours and 15 minutes of which will be during the student day.

Guidelines for Elementary Teachers Employed Less than Full-Time
[1.0 FTE = 7.5 hours in building (including 30-minute lunch)
+ 1 hour @ home = 8 hours]

Allocation FTE	Number of Minutes In Building Per Week (excluding lunch)	Planning Minutes Per Week*
0.1	42 minutes per day x 5 days = 210 minutes	42 minutes
0.2	84 minutes per day x 5 days = 420 minutes	84 minutes
0.3	126 minutes per day x 5 days = 630 minutes	126 minutes
0.4	168 minutes per day x 5 days = 840 minutes	168 minutes
0.5	210 minutes per day x 5 days = 1,050 minutes	210 minutes
0.6	252 minutes per day x 5 days = 1,260 minutes	252 minutes
0.7	294 minutes per day x 5 days = 1,470 minutes	294 minutes
0.8	336 minutes per day x 5 days = 1,680 minutes	336 minutes
0.9	378 minutes per day x 5 days = 1,890 minutes	378 minutes

***Note that planning time is PER WEEK. The amount of planning time does not have to be the same each day of the week.**

Staffing Procedures

Every school is assigned a staffing specialist to handle all staffing needs for that school. Principals should contact their assigned staffing specialist in the Department of Recruitment and Staffing (DRS) to discuss vacancies, filling vacancies, applicants, or any other staffing situation.

Please refer to the staffing calendar for applicable dates. It is expected that scheduling is completed so that all classes are taught by teachers designated as highly qualified. *Attachment 6* provides staffing specialist cluster assignments.

The DRS is responsible for recruiting a high quality and well-diversified pool of applicants for teaching and supporting services positions. Recruitment and hiring are based on the staffing allocations and on the vacancies that are posted in the countywide Vacancy Database. The DRS ensures that only allocated positions are filled. **It will not be possible to process a staffing recommendation form for any position not included on the staffing grid or to compensate a person who begins an assignment without approval or an allocation for that assignment.**

The Human Resources Information System (HRIS) does not allow overhire situations, even for short periods of time. When such an issue arises, send a memorandum immediately to your community superintendent with copies to Ms. Jane Woodburn, director, DRS, and Ms. Nicola Diamond, executive assistant to the chief operating officer. Only rarely will these special exceptions be approved.

A copy of the instructional staffing (teachers/assistants) calendar (*Attachments 7 and 8*) is provided to share with appropriate staff. If you have any questions or concerns regarding staffing allocations, please contact your community superintendent or the director of school performance in the Office of School Performance.

ND:lmk

Attachments

Copy to:

Executive Staff
Directors of School Performance
Ms. Bacquie
Ms. Brown
Dr. Cohen
Mrs. Jones
Ms. Mason
Ms. Pattik
Mr. Penix
Ms. Richardson
Ms. Woodburn
Dr. Woodson
Ms. Cullison
Ms. Cuttitta
Dr. Newman

FY 2009 Elementary School Staffing Guidelines (as resources permit)

Decision Criteria for Staffing, Elementary Schools, Professional

Abbrev	Position	Decision Guide
Prin 0500	Principal	1.0 per school
AP 0510	Assistant Principal	Staffing is based on enrollment and number of professional staff. Pending budget approval, 10 additional positions will be allocated.
Tm 0511	Principal Intern	Schools identified by community superintendents.
CRTchr 1001	Classroom Teacher*	These positions for Grades 1–5 are allocated based on enrollment projections for principals to organize the school with class sizes of 26 or less in Grades 1–3, 28 or less in Grades 4–5. Additional classroom teacher positions are provided to the highest educational load schools in order to fulfill the Grade 1–2 class size initiative at 17 students per class.
AcSpt 1005	Academic Intervention	Community superintendents will allocate these positions based on school needs.
Special Program 1025	Special Program Teacher	These positions are allocated to support special programs in schools including immersion, PYIB, and magnet programs.
StfDev 1009	Staff Development Teacher	1.0 per school.
Focus 1031	Focus Teacher	These positions are allocated to the high educational load schools. Focus teachers are locally and Title I funded.
RdgSpt 1012	Reading Initiative Teacher*	This staffing supports the Reading Initiative program. For schools receiving additional staffing for class size reduction in Grades 1 and 2, no additional allocations are authorized for the program.
PRK Tchr 1017	Pre-Kindergarten Teacher	Positions are allocated with a 0.5 teacher per 2.5 hour class.
ESL Tchr 1032	ESOL Teacher*	ESOL teacher allocations are based on a ratio of one teacher for every 44 ESOL students, including pre-K; METS teacher allocations are based on pupil/teacher ratio of 15:1. METS students are not included in the ESOL teacher allocation.
Rdg 1033	Reading Specialist	1.0 per school.
SpEd Tchr 1034	Special Education Teacher*	These positions are allocated to schools according to placement of programs and anticipated enrollments for each.
Spch Path 1035	Speech Pathologist	These positions are allocated to schools according to anticipated speech service needs at each school, as designated by Individual Educational Plans.

Kdg Tchr 1036	Kindergarten Teacher*	These positions are allocated on a ratio of one teacher for every 25 students and one for every 16 students at the Focus schools.
PE 1037, Art 1038, Mus 1039	Physical Education, Art, Music Teachers	These allocations are based on the estimated number of teacher stations initially allocated. The formula is based on one specialist being able to teach 5 or 6 classes per day at the recommended class times for each grade level. Pre-kindergarten, Head Start, and special education classes are included in the calculations and are adjusted by 1/3 for fewer minutes of instruction.
Inst Mus 1040	Instrumental Music Teacher	These positions are allocated to schools based on the participation in instrumental music programs. Grades 4-5.
SpEd RRm 1046	Special Education Resource Room Teachers	These positions are allocated based on the school's projected enrollment.
Coun 1044	Counselor	One per school.
MedSp 1052	Media Specialist	One per school.
HdSt Tchr 1101	Head Start Teacher*	Allocations and programs are made through the Division of Early Childhood Education Programs with a 0.6 teacher assigned to a 3 hour, 15 minute class.
SpOth Tchr various	Special Education Other Teacher	These positions are allocated to supplement existing programs.
RR Tchr	Reading Recovery Teacher	These positions provide support to schools that are identified to implement Reading Recovery.

* Note: Allocations based on a higher than budgeted ratio to assure a reserve to respond to situations where actual enrollments vary from projections.

FY 2009 Elementary School Staffing Guidelines

Decision Criteria for Staffing – Elementary Schools, Supporting Services

Abbrev	Position	Decision Guide
Adm Sec 4250	Administrative Secretary	1.0 per school.
Sec 1 10 m 4210 4221	Secretary I, 10 months	1.0 per school.
Md Ast 6620 6625	Media Assistant	These positions are allocated to schools using the guide: 1.0 media assistant to schools with projected enrollment above 450; .5 media assistant to schools with projected enrollment under 450.
SpOt SS various	Special Education, Other Support Staff	These supporting services positions are assigned to specific programs.
Para Reg 6600	Paraeducator, Regular	The school's total hours for Grades 1–5 paraeducators are based on the following projected enrollments: <div style="margin-left: 40px;"> >850 = 2.125 FTE 800-849 = 2.0 FTE 750-799 = 1.875 FTE 700-749 = 1.75 FTE 650-699 = 1.625 FTE 600-649 = 1.5 FTE 550-599 = 1.375 FTE 500-549 = 1.25 FTE 450-499 = 1.125 FTE 400-449 = 1.0 FTE 350-399 = 0.875 FTE <350 = 0.7 FTE </div>
Special Program 6602	Special Programs, Paraeducator	These positions are allocated to schools identified as having cluster magnet programs or other special programs.
ESOL Para 6603	ESOL Paraeducator	These positions are allotted at 0.75 per METS class.
Pre-K Para 6605	Pre-Kindergarten Paraeducator	These positions are allocated at 0.375 FTE per 2.5 hour class.
HS Para 6700	Head Start, Paraeducator	These positions are allocated at .6 FTE per 3 hour 15 minute class.
Focus Para 6604	Focus Paraeducator	Title I schools are provided resources for paraeducator allocations. Locally funded focus paraeducators are allocated to schools with high educational loads and specific program needs.

Lu Hr 6490	Lunch Hour Aide	Allocations are based on the following calculation: FTE = 1 hour (.125) per 50 projected students.
DS 6870	Instructional Data Assistant	Allocations are based on a formula using projected student enrollment with a minimum of 6 hours (.75 FTE) of IDA.
SEIA 6550	Special Education Paraeducator	These positions are allocated according to guidelines established in building the operating budget.

Office of School Performance
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

March 6, 2008

MEMORANDUM

To: Middle School Principals

From: Stephen L. Bedford, Chief School Performance Officer *SLB*
Ursula A. Hermann, Community Superintendent *UAH*
LaVerne G. Kimball, Community Superintendent *LK*
Sherry Liebes, Community Superintendent *SL*
Heath E. Morrison, Community Superintendent *HEM*
Frank H. Stetson, Community Superintendent *FHS*
Adrian B. Talley, Community Superintendent *AT*

Subject: Initial Staffing Allocations—FY 2009

The attached summary staffing grid and detailed special education and ESOL grids reflect preliminary staffing allocations for your school for FY 2009. You should highlight staffing changes from the current school year grid (copy attached) to assist in identifying involuntary transfers. **Please maintain this and future updates of the FY 2009 grid information for easy reference throughout the staffing process.** Position job codes are included on the staffing grid with the position titles. Please note that there are job code changes on the grid including academic intervention and special program teachers. In mid-June you will be asked to identify anyone in these positions so that they can be moved into the correct positions in the HRIS system. The "Staffing Notes" section at the bottom of the grids identifies special staffing decisions for your school. These notes are clarifications of unique staffing allocations. The Office of School Performance (OSP), Office of Curriculum and Instructional Programs (OCIP), and the Office of Special Education and Student Services (OSESS) have worked closely throughout the staffing process to coordinate the allocation of resources. The FY 2009 School Staffing Guidelines are attached (*Attachment 1*). **You must keep in mind that all allocations are tentative, pending final Board of Education action in June 2008 on the operating budget.**

Final approval of the operating budget will not occur until June 2008. As a result, new positions that are part of operating budget initiatives will not be allocated to schools until they have been funded by the County Council and approved by the Board of Education in the final budget. Until positions are allocated, schools should make plans according to the allocations they receive in March. Then, if additional positions are approved, schedules and work assignments can be adjusted. Furthermore, given the current fiscal situation, if the County Council does not fund the entire MCPS same services budget, it may be necessary to reduce some positions that have already been allocated. Schools will be notified as soon as possible if further cuts are necessary. Our expectation is that this will not happen, but we need to be prepared if it does.

Classroom Teacher Positions

Classroom teacher allocations are based on the revised enrollment projections from February 2008 by the Division of Long-Range Planning. Classroom teacher positions (adjusted for full-time resource teachers/interdisciplinary resource teachers) have been assigned according to the formula

$$\text{Classroom Teacher FTE} = \frac{\text{projected regular enrollment} \times 7 (\text{classes a day})}{5 \text{ periods a day} \times 27 (\text{class size})} + .4(\text{AEIST}) + 1.0 \text{ math}$$

The 27.0 ratio in the formula above is unchanged from FY 2008. For Phase 1 middle school reform schools, formulas were adjusted by +.2 for ELO, -.4 AEIST to partially fund math content coach and literacy coach, and +.8 to provide additional staffing for reading sections. Phase 2 schools will not receive these adjustments until the County Council has completed budget action. Also, for the first time, the 1.0 math support teacher allocation is included as part of your classroom teacher allocation. Resource teachers and resource counselors are allocated as full-time equivalent (FTE) positions (1.0). Schools are expected to maintain Board of Education maximum class size guidelines that are: English class size at 28 or less; other academic classes at 32 or less; and all other classes at a level appropriate to the class. Principals are expected to review both small and large class size issues with their community superintendent.

For non-reform middle schools, the .2 gifted and talented release teacher and the .2 Success for Every Student (SES) allocations have been combined to form a single .4 FTE release allocation for schools (*Attachment 2*). This position is intended to address student and staff needs as you continue your focus on increasing access to rigorous curriculum. Principals will indicate the teacher in this position on the Release Period Plan and will present their plan to use this allocation to the community superintendent for approval. Teachers are not to be assigned regular instructional periods during this release time. Principals may want to consider combining this allocation with the person's instructionally related activity period to extend the person's time for this responsibility. For the five Phase I schools in the Middle School Reform initiative, this .4 FTE is included in the literacy and math content specialist positions.

Principals are required to complete the secondary school released period plan (*Attachment 3*) located in the FileMaker Pro application of the staffing spreadsheet. Also requested in this spreadsheet is the name of the resource counselor and the number of students assigned as a regular caseload, as well as the names of the above-referenced gifted/talented and SES teachers. A printout of this **initial released period plan is due to OSP by May 9, 2008.**

Again this year, each middle school has been allocated a 1.0 mathematics support teacher position. The position must be used to reduce the size of mathematics classes. This year the 1.0 FTE has been added into your classroom teacher allocation. Principals should share their plans for use of this additional mathematics staffing with their community superintendent.

Master Schedule and Scheduling/Staffing Assumptions

Principals should be able to articulate how staffing plans support the school improvement goals.

The staffing plan should target staffing to lower class size and ensure greater access to rigorous programming. The principals and the master scheduler should be able to articulate the school priorities and reflect on how those priorities are represented in the way staffing is used within the school. See *Attachment 4* for Scheduling Assumptions and a timeline of activities that should have occurred and will occur to meet a school's staffing and scheduling obligations. A copy of your master schedule is due to OSP as follows: 1) **August 8**, and 2) **September 12**.

A limited classroom teacher reserve will be used to support those schools which have a large number of classes that exceed the guidelines. **If the current allocation does not permit you to schedule your school without a large number of oversized classes, you should submit a written request highlighting the oversized classes on your FileMaker Pro staffing spreadsheet and describing the rationale for smaller classes to your community superintendent no later than May 9.** All requests for additional staff must include a cover memorandum with the specific request and rationale. In addition, the FileMaker Pro staffing application must be sent as an attachment in an e-mail to the community superintendent. Decisions regarding the allocation of additional positions will be completed no later than May 15.

Deviations from projected enrollments will be monitored throughout the staffing process. **In situations of under-projected enrollment, please be prepared for staff allocation reductions.** It is important that the enrollment database is maintained throughout the summer, including the withdrawal of students who are not returning for the 2008–2009 school year. Each principal must submit a FileMaker Pro staffing application (*Attachment 5*) as an attachment via e-mail to the appropriate community superintendent on **June 2 and July 21**.

Special Education Positions

Special education staffing was completed through the collaboration of special education staff and community superintendents. This year, an hours-based staffing model will continue to be implemented at 13 middle schools. Pending final Board of Education action on the operating budget, the hours-based staffing model will be implemented in three additional middle schools during FY 2009. Special education supervisors will continue to assist these schools in implementing the model to improve student outcomes.

A thorough analysis of teacher to student ratio was completed for each school in an effort to equalize staffing across the school system. Initial staffing for FY 2009 is based on the data from the Encore Web-based Individualized Education Program (IEP) Program system in conjunction with the information regarding students transitioning to sixth grade or ninth grade. Encore data will be reviewed through the end of the school year to confirm that staffing is appropriate for each school.

The Departments of Special Education Services and Operations maintain a limited number of reserve positions to be allocated to support schools that experience a significant increase in special education enrollment during the summer, so principals can expect staffing that is not supported by actual enrollment to be pulled. In order for staffing allocations to reflect the needs

of the school, it is imperative that placement decisions made in July and August are processed immediately at the school level. New special education students need to be enrolled in your school and their special education service entered on the Encore System so the final special education staffing allocation reflects the actual needs of your school.

Requests for additional special education staffing due to over-enrollment should be submitted to your special education supervisor and community superintendent starting in April and continuing through July. The supervisor will work with the school to review students' Individualized Education Programs (IEPs) and evaluate current resources and scheduling to determine whether the need can be addressed with existing staff in the school or cluster. If the staffing need cannot be addressed, the supervisor will make a request for additional staffing to the director of the Division of School-Based Special Education Services. The director of special education services, the director of special education operations, and the division directors will review these requests during July and determine next steps, including referral to the associate superintendent for special education and student services for approval of additional staffing if necessary. Final staffing adjustments will be made by the end of July.

A very limited number of reserve positions will be available to address staffing concerns after school begins. For example, schools receiving rising Grade 6 elementary learning center students may submit requests for additional special education staffing to the special education supervisor if the need arises during the year. Staffing requests submitted to special education supervisors will be reviewed by the director of special education services, the director of special education operations, and the associate superintendent for special education and student services each Monday throughout the school year.

The delivery of special education services may consist of a variety of instructional models, including inclusive services for students participating in the general education classroom or in a self-contained setting, based on the individual needs of the students. Students are instructed in the general education curriculum with differentiated instruction to accommodate various learning needs. Some students receive instruction in the *Fundamental Life Skills* curriculum, as appropriate to meet their needs.

Special education teachers and paraeducators are resources schools use to assist with the delivery of instruction to support the needs of students with disabilities in the general education setting as well as self-contained settings. Given the plan to transition rising Grade 6 learning center students to their home schools, consult with your special education supervisor to review and adjust your master schedule. This review will ensure that schedules will be developed to maximize the use of your staffing allocation, provide the necessary supports, and assist with the planning for all students with disabilities. With staffing, professional development, scientifically research-based interventions, and technical assistance, you will be able to provide a continuum of special education services ranging from small group instruction to inclusion in co-taught general education classrooms. When you allocate staff to support students with disabilities in an inclusive setting, first consider assigning special education teachers and paraeducators to the critical content areas of English and mathematics to assist in the delivery of instruction. Additionally, consideration should be given to assigning teachers for providing instruction in

subjects for which they are highly qualified, as well as ensuring that special education teachers provide instruction in reading and mathematics interventions. Schools to the maximum extent possible should consider assigning special education teachers to one core content subject area by grade level, within the master schedule, collaboration and planning between general and special education during content subject area and/or grade level and team meetings.

Paraeducators in an inclusive setting are responsible for supporting the class based upon the guidance provided by the general and special education teachers. Paraeducators assigned to self-contained settings provide support to students throughout the instructional day, including the arts rotation periods. Schools to the maximum extent possible should facilitate collaboration and planning between paraeducators and general education teachers.

Alternative Teacher Positions

Every middle school has been allocated a 1.0 alternative position. **This position is to be used to provide a Level 1 Alternative Program for students at your school.** The overall purpose is to provide academic, social/emotional, and behavior management instruction to students. Please refer to the attached materials (*Attachment 6A*) from the Department of Student Services, Alternative Programs (AP). Level 1 Alternative Program plans (*Attachment 6B*) must be submitted to Ms. Lauree Hemke, supervisor, AP, no later than **June 2, 2008**. **The plan should be submitted to Ms. Hemke via email, Lauree_Hemke@mcpsmd.org.** Continued allocation of the Level 1 Alternative Program staffing will be contingent on approval of your plan. Approved plans will be forwarded to the appropriate community superintendent. Questions regarding the plans should be directed to Ms. Hemke at 301-230-5404.

ESOL Positions

ESOL/METS staffing was completed through collaboration between the community superintendents and the Division of ESOL/Bilingual Programs by analyzing needs and services required by legal mandates. ESOL teachers are assigned at a student/teacher ratio of 35:1. In addition, **whenever an intern is assigned, this individual is counted against a budgeted allocation as a regularly assigned teacher.**

This staffing is included on the summary grid, and staffing notes will provide details about specific purposes of the positions. Principals are to complete the ESOL allocation assignment sheet (*Attachment 7*) that accompanies the grid as explained on the form, and return it to the ESOL office for review no later than **August 29, 2008**.

Adjustments to middle school ESOL allocations will occur based on the OASIS ESOL enrollment figures which will be reviewed weekly through September 30. These dates are consistent with the official enrollment counts and will allow for increases resulting from summer registrations through the International Student Admissions Office.

Questions regarding allocations should be directed to Dr. Karen Woodson, director, ESOL/Bilingual Programs at 301-230-0670.

Academic Intervention Teachers

The academic intervention teacher positions have been allocated to community superintendents based on a concentrated poverty formula. These positions are zero-based each year and are directed by your community superintendent. Allocation of these positions may not be reflected in the initial staffing grid sent to schools. As allocations of these positions are made, new grids will be sent to schools.

Supporting Services Positions

An effort has been put in place to make position allocations of supporting services positions more equitable. The intent is to provide similar resources to schools of comparable enrollment and programs. As a result, schools will see increases or decreases in positions that were not allocated equitably in the past. Where possible, guidelines have been implemented to determine allocation for each of the positions.

Building Service Workers

The Division of School Plant Operations will send staffing for building service employees directly to schools by April 1, 2008. Questions concerning these allocations should be directed to Ms. Dianne Jones, director of school plant operations, at 240-314-1075.

Full-Time Equivalent Positions

Positions are budgeted as full-time, 8 hours, but are frequently allocated in smaller increments. The following tables convert the equivalents of an FTE position to hours:

<u>Supporting Services</u>		<u>Professional</u>	
<u>FTE Positions</u>	<u>Hours (Daily)</u>	<u>FTE Positions</u>	<u>Hours (Bi-Weekly)</u>
1.000	8	1.0	80
.875	7	.9	72
.750	6	.8	64
.625	5	.7	56
.500	4	.6	48
.375	3	.5	40
.250	2	.4	32
.125	1	.3	24
		.2	16
		.1	8

Less Than Full-Time Equivalent Positions

Teacher-level positions may be allocated in increments of .1. However, beginning in FY 2008, "part-time teachers in secondary schools using a seven-period schedule will be allocated at least .2 FTE for each full class taught (5 standard periods per week or 10 standard periods per two

weeks or the equivalent where there is an alternate schedule), not to exceed 1.0 FTE. This will apply whether the teacher is part-time in a single school or in a combination of schools" (see the MCEA contract, Article 17, Section G).

Guidelines for Middle School Teachers Employed Less than Full-Time
[1.0 FTE = 7.5 hours in building (including 30-minute lunch)
and 1 hour @ home = 8 hours]

Allocation FTE	Number of Minutes In Building Per Week (excluding lunch)
0.1	42 minutes per day x 5 days = 210 minutes
0.2	84 minutes per day x 5 days = 420 minutes
0.3	126 minutes per day x 5 days = 630 minutes
0.4	168 minutes per day x 5 days = 840 minutes
0.5	210 minutes per day x 5 days = 1,050 minutes
0.6	252 minutes per day x 5 days = 1,260 minutes
0.7	294 minutes per day x 5 days = 1,470 minutes
0.8	336 minutes per day x 5 days = 1,680 minutes
0.9	378 minutes per day x 5 days = 1,890 minutes

Staffing Procedures

Every school is assigned a staffing specialist to handle all staffing needs for that school. Principals should contact their assigned staffing specialist in the Department of Recruitment and Staffing (DRS) to discuss vacancies, filling vacancies, applicants, or any other staffing situation. Please refer to the staffing calendar for applicable dates. It is expected that scheduling is completed so that all core academic subjects are taught by teachers designated as highly qualified. *Attachment 8* provides the staffing specialist cluster assignments and phone numbers.

The DRS is responsible for recruiting the highest quality and well-diversified pool of applicants for teaching and supporting services positions. Recruitment and hiring are based on the staffing allocations and on the vacancies that are posted in the countywide Vacancy Database. The DRS ensures that only allocated positions are filled. **It will not be possible to process a staffing recommendation form for any position not included on the staffing grid, or to compensate a person who begins an assignment without approval or an allocation for that assignment.**

The Human Resources Information System (HRIS) does not allow overhire situations, even for short periods of time. When such an issue arises, send a memorandum immediately to your community superintendent with copies to Ms. Jane Woodburn, director, DRS, and Ms. Nicola Diamond, executive assistant to the chief operating officer. Only rarely will these special exceptions be approved.

When reviewing and staying within the number of allocated positions in each position job code, exercise caution in scheduling one-period classes, for those assignments are difficult to match with another school and are difficult to fill.

A copy of the instructional staffing (teachers/assistants) calendar (*Attachment 9*) is provided to share with appropriate staff. If you have any questions or concerns regarding staffing allocations, please contact your community superintendent or the director of school performance in the Office of School Performance.

ND:lmk

Attachments

Copy to:

Executive Staff
Directors of School Performance
Ms. Brown
Dr. Cohen
Mr. Creel
Ms. Ferrell
Ms. Hemke
Mrs. Jones
Mr. Lang
Ms. Mason
Ms. Pattik
Ms. Woodburn
Dr. Woodson
Ms. Cullison
Ms. Cuttitta
Dr. Newman

FY 2009 Middle School Staffing Guidelines (as resources permit)– Professional

Abbrev	Position	Decision Guide
Prin 0530	Principal	1.0 per school.
AP 0531	Assistant Principal	Schools greater than 600 students receive 1.0; schools projected to have 900 or more students receive a second assistant principal. Every effort is made not to remove the second assistant principal one year and have to restore it the next year and maintain administrative stability.
Stu SSp 0642	Student Support Specialist	These positions are allocated (1) to schools without a first or second assistant principal, and (2) to schools larger than 1,000 students.
Mag Coord 0718 0719	Magnet/Special Program Coordinator	One each for cluster magnet/special programs at Eastern, Takoma Park, and Clemente middle schools.
CRTchr 1002	Classroom Teacher* 1002	These positions are provided by formula (Enrollment *7)/(27.0*5) + 0.4 per non-phase 1 school (released time for accelerated and enriched instruction support). For each resource teacher, 0.8 of this calculation is moved to the resource teacher allocation.
Ac Spt 1005	Academic Intervention Teacher	Allocations based on an approved proposal to improve student achievement.
Sp Prg 1025	Special Program Teachers	These teacher positions are provided to support magnet/special programs at Eastern, Takoma Park, and Clemente; and the Middle Years programs at Julius West, Westland, Newport, and Silver Spring International.
Stf Dev 1009	Staff Development Teacher	1.0 per school.
Alt 1020	Alternative Teacher	One per school. Principals must use these positions to staff a Level 1 Alternative Program.
ESL Tchr 1032	ESOL Teacher*	ESOL teacher allocations are based on a pupil/teacher ratio of 35:1. METS teacher allocations are based on the pupil/teacher ratio of 15:1. METS students are not included in the student count for the ESOL allocation.
Rdg 1033	Reading Teacher	1.0 per school.
SpEd Tchr 1034	Special Education Teacher*	These positions are allocated to schools by the Department of Special Education according to placement of programs and anticipated enrollments for each.

Spch Path 1035	Speech Pathologist	These positions are allocated to schools by the Department of Special Education according to anticipated speech service needs at each school, as designated by Individual Educational Plans.
SpEd RRm 1046	Special Education Resource Room Teacher	These positions are allocated from the Department of Special Education based on the school's projected enrollment.
Coun 1051	Counselor	These positions are allocated to schools based on projected enrollment.
Med Sp 1052	Media Specialist	1.0 per school.
RT SpEd 1054	Resource Teacher, Special Education	Schools with large special education programs are provided a .2 resource teacher to coordinate programs
Res Coun 1055	Resource Counselor	Schools with four or more counselors are provided a resource counselor to coordinate programs.
SpOth Tchr (various)	Special Education Other Teacher	These miscellaneous positions are allocated from the Department of Special Education to supplement existing programs.

* Note: Allocations based on a higher than budgeted ratio to assure a reserve to respond to situations where actual enrollments vary from projections

FY 2009 Middle School Staffing Guidelines (as resources permit) – Supporting Services








Abbrev	Position	Decision Guide
Adm Sec 4250	Administrative Secretary	1.0 per school.
Sec 1 10 m 4210	Secretary I, 10 months	1.0 per school.
Sec 2 10 m 4230	Secretary II, 10 months	These 21.5 positions are allocated to the middle schools with the largest projected enrollment.
Guid 4231	Guidance Secretary	1.0 per school.
Fin 4220	Financial Assistant	1.0 per school.
Md Ast 6620 6625	Media Assistant	Schools projected to have a student enrollment above 900 receive a 1.5 allocation; others a 1.0 allocation.
TA Reg 6590	Teacher Assistant, Regular	These two positions are allocated to schools together so that the total FTE is based on projected enrollment. Schools are allocated positions based on percent of projected school enrollment compared to total middle school enrollment. Note: The computer lab paraeducator positions were cut from the budget for FY09.
IA Reg 6600	Paraeducator, Regular	
SpOt SS	Special Ed, Other Support	These miscellaneous positions are allocated by the Department of Special Education to specific school programs.
User Sp 5530	User Support Specialist	1.0 per school.
ESOL Para 6603	ESOL Paraeducator	These positions are allocated at .75 per METS class.
Sec Ast 5190	Security Assistant	Schools with a projected enrollment above 900 receive 2.0 security assistants, all others 1.0.
Lu Hr 6490	Lunch Hour Aide	.875 allocation (7 hours) per school. USS trades for these positions are being phased out over two years.
IDA 6870	Instructional Data Assistant	All schools receive a .875 FTE (7 hours).
SELA 6550	Special Education Paraeducator	These positions are allocated from the Department of Special Education according to guidelines established in building the operating budget. Generally, each teaching station includes a paraeducator position.

Office of School Performance
MONTGOMERY COUNTY PUBLIC SCHOOLS
Rockville, Maryland

March 6, 2008

MEMORANDUM

To: High School Principals

From: Stephen L. Bedford, Chief School Performance Officer 
Ursula A. Hermann, Community Superintendent 
LaVerne G. Kimball, Community Superintendent 
Sherry Liebes, Community Superintendent 
Heath E. Morrison, Community Superintendent 
Frank H. Stetson, Community Superintendent 
Adrian B. Talley, Community Superintendent 

Subject: Initial Staffing Allocations—FY 2009

The attached summary staffing grid and detailed special education grids reflect preliminary staffing allocations for your school for FY 2009. You should highlight staffing changes from the current school year grid (copy attached) to assist in identifying involuntary transfers. **Please maintain this and future updates of the FY 2009 grid information for easy reference throughout the staffing process.** Position job codes are included on the staffing grid with the position titles. Please note there are new position job code changes on the grids including a new code for academic intervention, special program teachers, and special education resource teachers. In mid-June you will be asked to identify anyone in these positions so that they can be moved into the correct positions in the HRIS system. The "Staffing Notes" section at the bottom of the grids identifies special staffing decisions for your school. These notes are clarifications of unique staffing allocations and changes in staffing that occur throughout the year. The Office of School Performance (OSP), Office of Curriculum and Instructional Programs (OCIP), and the Office of Special Education and Student Services (OSESS) have worked closely throughout the staffing process to coordinate the allocation of resources. The FY 2009 School Staffing Guidelines are attached (*Attachment 1*). **You must keep in mind that all allocations are tentative, pending final Board of Education action in June 2008 on the operating budget.**

Final approval of the operating budget will not occur until June 2008. As a result, new positions that are part of operating budget initiatives will not be allocated to schools until they have been funded by the County Council and approved by the Board of Education in the final budget. Until positions are allocated, schools should make plans according to the allocations they receive in March. Then, if additional positions are approved, schedules and work assignments can be adjusted. Furthermore, given the current fiscal situation, if the County Council does not fund the entire MCPS same services budget, it may be necessary to reduce some positions that have already been allocated. Schools will be notified as soon as possible if further cuts are necessary. Our expectation is that this will not happen, but we need to be prepared if it does.

Classroom Teacher Positions

Classroom teacher allocations are based on the revised enrollment projections from February 2008 by the Division of Long-Range Planning. Classroom teacher positions [adjusted for full-time resource teachers (.6 for English and math and .8 for other content areas) and athletic directors (.4 FTE teacher)] have been assigned according to the formula:

$$\text{Classroom Teacher FTE} = \frac{\text{projected regular enrollment} \times 7(\text{classes a day})}{5(\text{periods a day}) \times 28.5(\text{class size})} + .2(\text{SSL}) + \text{math} + \text{LRE}$$

The classroom teacher allocation includes 0.2 for the student service learning (SSL) coordinator. The 28.5 ratio in the formula above is unchanged from FY 2008. Also, for the first time, math support teachers and LRE teachers are included in your classroom teacher allocation. Schools are expected to maintain Board of Education maximum class size guidelines that are: English class size at 28 or less, other academic classes at 32 or less, and all other classes at a level appropriate to the class. Principals are expected to review large class size issues with their community superintendent.

Again this year, schools will be allocated math support teacher time. This allocation is based on feeder middle school data and should be used to reduce class size for mathematics classes. Unlike past years, this allocation is included in your classroom teacher allocation and noted in staffing notes. Principals should share their plans for use of this staffing with their community superintendent.

To ensure that each high school is treated equitably, reductions in the classroom teacher allocation have been made for students attending the Thomas Edison High School of Technology. Resource teachers (two release periods for English and math), resource counselors, and athletic directors (three release periods), are allocated as FTE positions (1.0). Principals may provide additional release time for resource teachers based on the size of their departments and responsibilities. However, the provision of any additional released time must not contribute to oversized classes or to the need for additional staff.

Principals are required to complete the secondary school released period plan (*Attachment 2*), located in the FileMaker Pro application of the staffing spreadsheet, to help OSP monitor the use of released time for resource teachers and athletic directors in conjunction with the monitoring of oversized classes. Also requested on this form is the name of the resource counselor and the number of students assigned as a regular caseload. **A printout of this initial released period plan is due to OSP on May 9, 2008.**

Master Schedule and Scheduling/Staffing Assumptions

Principals should be able to articulate how staffing plans support the school improvement goals. The staffing plan should target staffing to lower class size and ensure greater access to rigorous programming. The principals and the master scheduler should be able to articulate the school priorities and reflect on how those priorities are represented in the way staffing is used within the school. See *Attachment 3* for Scheduling Assumptions and an outline of activities that should occur to meet a school's staffing and scheduling obligations. A copy of your master schedule is

due to OSP as follows: 1) **August 8**, and 2) **September 12**.

A limited classroom teacher reserve will be used to support those schools which have a large number of classes that exceed the guidelines. **If the current allocation does not permit you to schedule your school without a large number of oversized classes, submit a written request to your community superintendent no later than May 9.** All requests for additional staff must include a cover memorandum with the specific request and rationale. In addition, the FileMaker Pro staffing application (*Attachment 4*) must be sent as an attachment in an e-mail message to the community superintendent. The staffing spreadsheet and reconciliation sheet provided to schedulers also must be included. Decisions regarding the allocation of additional positions will be completed no later than May 15.

Deviations from projected enrollments will be monitored throughout the staffing process. **In situations of under-projected enrollment, please be prepared for staff allocation reductions.** It is important that the enrollment database is maintained throughout the summer, including the withdrawal of students who are not returning for the 2008–2009 school year so that staffing can be updated and class size maximums maintained. Each principal must submit a FileMaker Pro staffing application as an attachment via e-mail to the appropriate community superintendent on **June 2 and July 21.**

Read 180

Each school has been allocated student spaces for Read 180 classes. Scheduling a small double period class within a complex high school schedule can be difficult. In an effort to support schools with scheduling Read 180 sections, each school will be allocated a .2 classroom teacher position for Read 180 double period sections (only) put in the master schedule. A Read 180 request form is attached (*Attachment 5*) with a maximum request amount for your school. Note schools will only receive the allocation if the class is scheduled for a double period. Once the school schedule is complete, return the form and the allocation will be sent to you on your grid. If the schedule changes and the class can no longer be scheduled, the allocation will need to be pulled.

Literacy Coaches

Literacy coaches will be allocated to each school. The role of the literacy coach is to reinforce important reading strategies and concepts across all classes. The literacy coach will provide coaching, leadership, and coordination for school wide literacy intervention and support, interpret assessment data, plan and model literacy techniques, and provide professional development (in collaboration with the staff development teacher) to all staff. Each school receives an allocation based on enrollment and student results.

Staff Development Teachers

Each high school is allocated 1.0 FTE for FY 2009. At least 0.4 of this allocation must be assigned to one individual who will serve as coordinating staff development teacher and attend all training.

Career and Technology Education (CTE) Positions

CTE teachers include vocational support (1021) and career prep (1022) positions. The vocational support position provides instruction and resource services to students in specified Maryland State Department of Education-approved CTE programs. The career prep position, formerly the Business Partnership/Work-based Learning Program Teacher, directly contacts business leaders, school administrators, teachers, parents, and students to identify, design, and deliver work-based learning experiences and activities to support student success, particularly in the areas of career awareness and school-to-career transition. Such program elements might include, but are not limited to, placing students with mentors, tutors, job shadowing experiences, internships, and other work-based learning experiences.

Questions regarding CTE allocations should be directed to Mrs. Shelley A. Johnson, director, Division of Career and Technology Education, at 301-279-3567.

Student Service Learning (SSL) Coordinator

The SSL coordinator, selected by the principal, is a .2 classroom teacher allocation. This position serves as the primary school contact for the Maryland State Department of Education SSL graduation requirement. The SSL coordinator must stay informed by attending countywide meetings; communicate MCPS SSL guidelines; promote opportunities to meet the requirement; monitor awards programs; collaborate with administrators to address individual SSL issues; and use the Online Administrative Student Information System (OASIS) to maintain records of student progress.

Special Program Teachers

In an effort to provide consistency and transparency, special program teacher positions have been allocated using the attached guidelines (*Attachment 6*).

Special Education Positions

Special education staffing was completed through the collaboration of special education staff and community superintendents. Initial staffing for FY 2009 is based on data from the Encore Web-based Individualized Education Program (IEP) System in conjunction with the information regarding students transitioning to ninth grade and those exiting MCPS. Encore data will be reviewed through the end of the school year to confirm that staffing is appropriate for each school.

The Departments of Special Education Services and Operations maintain a limited number of reserve positions to be allocated to support schools that experience a significant increase in special education enrollment during the summer. Principals can expect staffing that is not supported by actual enrollment to be pulled. In order for staffing allocations to reflect the needs of the school, it is imperative that placement decisions made in July and August are processed immediately at the school level. New special education students need to be enrolled in your

school and their special education service entered on the Encore System so the final special education staffing allocation reflects the actual needs of your school.

Requests for additional special education staffing due to over-enrollment should be submitted to your special education supervisor and community superintendent starting in April and continuing through July. The supervisor will work with the school to review students' Individualized Education Programs (IEPs) and evaluate current resources and scheduling to determine whether the need can be addressed with existing staff in the school or cluster. If the staffing need cannot be addressed, the supervisor will make a request for additional staffing to the director of the Division of School-Based Special Education Services. The director of special education services, the director of special education operations, and the division directors will review these requests during July and determine next steps, including referral to the associate superintendent for special education and student services for approval of additional staffing if necessary. Final staffing adjustments will be made by the end of July.

After school begins, a very limited number of reserve positions will be available to address staffing concerns. Requests for additional special education staffing should be submitted to your special education supervisor as the need arises throughout the year. These staffing requests will be reviewed by the director of special education services, the director of special education operations, and the associate superintendent for special education and student services each Monday throughout the school year.

The delivery of special education services may consist of a variety of instructional models, including inclusive services for students participating in the general education classroom or in a self-contained setting, based on the individual needs of the students. Students are instructed in the general education curriculum with differentiated instruction to accommodate various learning needs. Some students receive instruction in the Fundamental Life Skills curriculum, as appropriate to meet their needs.

Given the plan to phase out secondary learning centers, special education teachers and paraeducators are resources schools use to assist with the delivery of instruction to support the needs of students with disabilities in the general education setting as well as self-contained settings. With staffing, professional development, scientifically research-based interventions, and technical assistance, you will be able to provide a continuum of special education services ranging from small group instruction to inclusion in co-taught general education classrooms. When allocating staff to support students with disabilities in an inclusive setting, first consider assigning special education teachers and paraeducators to the critical content areas of English and mathematics to assist in the delivery of instruction. Additionally, consideration should be given to assigning teachers in courses for which they are highly qualified, as well as ensuring that special education teachers provide instruction in reading and mathematics interventions. Schools, to the maximum extent possible, should consider assigning special education teachers to one or more core content subject areas by grade level, and structure the master schedule to facilitate collaboration and planning between general and special educators during content subject area and department meetings.

Paraeducators in an inclusive setting are responsible for supporting the class based upon the guidance provided by the general and special education teachers. Paraeducators assigned to self-contained settings provide support to students throughout the instructional day, including electives. Schools to the maximum extent possible should facilitate collaboration and planning between paraeducators and general and special education teachers.

Selected high schools will continue to receive between 0.5 and 2.0 additional general education positions to support students with disabilities in general education classes. Schools selected to receive these positions have the lowest percentages of students with disabilities in the LRE, large numbers of special education students overall, or large numbers of students receiving LFI or SCB services. These positions have been identified in the "Staffing Notes" of each selected school's staffing grid. A brief explanation of how the positions are to be used is on the Special Education Staffing allocations grid. Schools that have these positions must complete and submit the Assignment of General Education Teachers to Support Inclusion/LRE (*Attachment 4B*) to their community superintendent to indicate how each position is being used to support students with disabilities in English and Mathematics general education classes.

Alternative Teacher Positions

Every high school has been allocated a 1.0 alternative position. **This position is to be used to provide a Level 1 Alternative Program for students at your school.** The overall purpose is to provide direct academic, social/emotional and behavior management instruction to your students. Please refer to the attached materials (*Attachment 7A*) from the Department of Student Services, Alternative Programs (AP). Level 1 Alternative Program plans (*Attachment 7B*) must be submitted to Ms. Lauree Hemke, supervisor, AP, no later than **June 2, 2008**. **The plan should be submitted to Ms. Hemke via email, Lauree_Hemke@mcpsmd.org.** Continued allocation of the Level 1 Alternative Program staffing will be contingent on approval of your plan. Approved plans will be forwarded to the appropriate community superintendent. Questions regarding the plan should be directed to Ms. Hemke at 301-230-5404.

ESOL Positions

ESOL/METS staffing was completed through collaboration between the community superintendents and the Division of ESOL/Bilingual Programs by analyzing needs and services required by legal mandates. ESOL allocations are assigned at a student/teacher ratio of 30:1. In addition, **whenever an intern is assigned, this individual is counted against a budgeted allocation as a regularly assigned teacher.**

This staffing is included on the summary grid, and staffing notes will provide details about specific purposes of the positions. Principals are to complete the ESOL allocation assignment sheet (*Attachment 8*) that accompanies the grid as explained on the form, and return it to the ESOL office for review no later than **August 29, 2008**.

Adjustments to high school ESOL allocations will occur based on the OASIS ESOL enrollment counts which will be reviewed weekly through September 30. These dates are consistent with the official enrollment counts and will allow for increases resulting from summer registrations through the International Student Admissions Office.

Questions should be directed to Dr. Karen Woodson, director, ESOL/Bilingual Programs, at 301-230-0670.

Academic Intervention Teachers

Academic intervention teacher positions have been allocated to community superintendents based on a concentrated poverty formula. These positions are zero-based each year, and are directed by your community superintendent. Allocation of these positions may not be reflected in the initial staffing grid sent to schools. As allocations of these positions are made, new grids will be sent to schools.

Supporting Services Positions

An effort has been put in place to ensure consistency in the way positions are allocated so that allocations of supporting services positions are more equitable. The intent is to provide similar resources to schools of comparable enrollment and need. As a result, schools will see increases and decreases in positions that were not allocated equitably prior to this year. Where possible, guidelines have been implemented to determine allocation for each of the positions. This process has been phased in over two years so that now all USS trades have been eliminated and allocation guidelines are fully implemented.

Building Service Workers

The Division of School Plant Operations will send staffing for building service employees directly to schools by April 1, 2008. Questions concerning these allocations should be directed to Ms. Dianne Jones, director of school plant operations, at 240-314-1075.

Full-Time Equivalent Position

Positions are budgeted as full-time, 8 hours, but are frequently allocated in smaller increments. The following tables convert the equivalents of a FTE to hours:

Supporting Services		Professional	
<u>FTE Positions</u>	<u>Hours (Daily)</u>	<u>FTE Positions</u>	<u>Hours (Bi-Weekly)</u>
1.000	8	1.0	80
.875	7	.9	72
.750	6	.8	64
.625	5	.7	56
.500	4	.6	48
.375	3	.5	40
.250	2	.4	32
.125	1	.3	24
		.2	16
		.1	8

Less Than Full-Time Equivalent Positions

Teacher-level positions may be allocated in increments of .1. However, beginning in FY 2008, "part-time teachers in secondary schools using a seven-period schedule will be allocated at least .2 FTE for each full class taught (5 standard periods per week or 10 standard periods per two weeks or the equivalent where there is an alternate schedule), not to exceed 1.0 FTE. This will apply whether the teacher is part-time in a single school or in a combination of schools" (see the MCEA contract, Article 17, Section G). Please note this requirement refers only to part-time teachers. Full-time teachers who split responsibilities between classroom and other tasks can be assigned classes and other responsibilities according to minutes shown in the next table. For example, a 1.0 employee could be a .5 classroom teacher who teaches three classes and a .5 classroom support so long as the total number of minutes of responsibility does not exceed 1.0.

Guidelines for High School Teacher Level Positions

[1.0 FTE = 7.5 hours in building (including 30-minute lunch) and 1 hour @ home = 8 hours]

Allocation FTE	Number of Minutes In Building Per Week
0.1	42 minutes per day x 5 days = 210 minutes
0.2	84 minutes per day x 5 days = 420 minutes
0.3	126 minutes per day x 5 days = 630 minutes
0.4	168 minutes per day x 5 days = 840 minutes
0.5	210 minutes per day x 5 days = 1,050 minutes
0.6	252 minutes per day x 5 days = 1,260 minutes
0.7	294 minutes per day x 5 days = 1,470 minutes
0.8	336 minutes per day x 5 days = 1,680 minutes
0.9	378 minutes per day x 5 days = 1,890 minutes

Staffing Procedures

Every school is assigned a staffing specialist to handle all staffing needs for that school. Principals should contact their assigned staffing specialist in the Department of Recruitment and Staffing (DRS) to discuss vacancies, applicants, or any other staffing situation. Please refer to the staffing calendar for applicable dates. It is expected that scheduling is completed so that all core academic subjects are taught by teachers designated as highly qualified. *Attachment 9* provides the staffing specialist cluster assignments and phone numbers.

The DRS is responsible for recruiting the highest quality and well-diversified pool of applicants for teaching and supporting services positions. Recruitment and hiring are based on the staffing allocations and on the vacancies that are posted in the countywide Vacancy Database. The DRS ensures that only allocated positions are filled: **It is not possible to process a staffing recommendation form for any position not included on the staffing grid or to compensate a person who begins an assignment without approval or an allocation for that assignment.**

The Human Resources Information System (HRIS) does not allow overhire situations, even for short periods of time. When such an issue arises, immediately send a memorandum requesting exception to your community superintendent with copies to Ms. Jane Woodburn, director, DRS, and Ms. Nicola Diamond, executive assistant to the chief operating officer. Only rarely will these special exceptions be approved.

When reviewing and staying within the number of allocated positions in each position job code, exercise caution in scheduling one-period classes, because those assignments are difficult to match with another school and are difficult to fill.

A copy of the instructional staffing (teacher/assistant) calendar (*Attachment 10*) is provided to share with appropriate staff. If you have any questions or concerns regarding staffing allocations, please contact your community superintendent or your director of school performance in the Office of School Performance.

ND:lmk

Attachments

Copy to:

- Executive Staff
- Directors of School Performance
- Ms. Blum
- Ms. Brown
- Dr. Cohen
- Ms. Hemke
- Mrs. Jones
- Mr. Lang
- Ms. Mason
- Ms. Pattik
- Ms. Woodburn
- Dr. Woodson
- Ms. Cullison
- Ms. Cuttitta
- Dr. Newman

FY 2009 High School Staffing Guidelines (as resources permit) –Professional

Abbrev	Position	Decision Guide
Prin 0550	Principal	1.0 per school.
AP 0551	Assistant Principal	1.0 per school: schools projected to have more than 900 students receive a second assistant principal and schools greater than 1,800 students receive a third assistant principal.
Stu SSp 0644	Student Support Specialist	These positions are allocated first to schools with less than three assistant principals and then to the largest schools.
Mag/Sp Prgm Cord	Magnet/Spec'l Prgm Coordinator	One each for countywide magnet programs at Blair and Poolesville (0721) and the IB program at Richard Montgomery High School (0715).
CRTchr 1003	Classroom Teacher*	These positions are provided by formula: $(\text{Enrollment} * 7) / (28.5 * 5) + 0.2$ released time for Student Service Learning. A .6 of this calculation is removed for the athletic director allocation. A 0.4 of this allocation is removed for the math and English RT and a .8 is removed for each of the other RTs.
Ac Spt 1005	Academic Intervention Teacher	These positions are allocated based on an approved proposal to improve student achievement.
Sp Prg 1025	Special Program Teacher	These positions are allocated to schools with magnet, special, or signature programs.
Stf Dev 1009	Staff Development Teacher	1.0 per school.
Ath Dir 1018	Athletic Director	1.0 per school.
Alt 1020	Alternative Teacher	1.0 per school. Principals must use these positions to staff a Level 1 Alternative Program.
Voc Spt 1021	Vocational Support Teacher	These 19.5 positions are to support implementation of career education and career development programs, including coordination of internships for all students.
Cr Prp 1022	Career Prep Teacher	These 20.0 positions are used to support implementation of career education and career development programs, including coordination of internships.
ESL Tchr 1032	ESOL Teacher*	These allocations are based on a ratio of 1.0 teacher for every 30 students. METS teacher allocations are based on the pupil/teacher ratio of 15:1. METS students are not included in the ESOL allocation.
SpEd Tchr 1034	Special Education Teacher*	These positions are allocated to schools by the Department of Special Education according to placement of programs and anticipated enrollments for each.

Spch Path 1035	Speech Pathologist	These positions are allocated to schools by the Department of Special Education according to anticipated speech service needs at each school as designated by Individual Educational Plans.
SpEd RRm 1046	Special Education Resource Room Teacher	These positions are allocated from the Department of Special Education based on the school's projected enrollment.
Coun 1051	Counselor	These positions are allocated based on enrollment.
Med Sp 1052	Media Specialist	One per school; schools with more than 2,000 students receive a second media specialist.
Res	Resource Teacher	These positions are allocated based on projected enrollment and specific school programs (Math and English, two release, teach three; other one release, teach four).
RT SpEd 1060	Resource Teacher Special Education	Schools with large special education programs are provided a resource teacher to coordinate programs
RT ESL 1054	ESOL Resource Teacher	Schools with large ESOL programs are provided a resource teacher to coordinate programs.
RsCn 1055	Resource Counselor	Schools with four or more counselors are provided a resource counselor to coordinate programs.
SpOth Tr (various)	Special Education Other Teacher	These miscellaneous positions are allocated from the Department of Special Education to supplement existing programs (see detailed special education grid for job codes).

* Note: Allocations based on a higher than budgeted ratio to assure a reserve to respond to situations where actual enrollments vary from projections

FY 2009 High School Staffing Guidelines (as resources permit) –Supporting Services

Abbrev	Position	Decision Guide
Ad Sec 4250	Administrative Secretary	1.0 per school.
Sec I 10 Months 4210	Secretary I, 10 months	<p>Ten-month secretary positions (I and II) are allocated according to the following projected enrollments:</p> $2550 - 2999 = 7.0$ $1950 - 2549 = 6.0$ $1750 - 1949 = 5.0$ $1550 - 1749 = 4.0$ $1300 - 1549 = 3.0$ $900 - 1299 = 2.0$ <p>These guidelines provide the total number of positions to be divided between Secretary I and Secretary II positions.</p>
Sec2 10 months 4230	Secretary II, 10 months	
Sec2 12 months 4231	Secretary II, 12 months	1.0 each for programs at Blair, Poolesville, and Richard Montgomery high schools.
Guid 4231	Guidance Secretary	1.0 per school.
Rgst 4240	Registrar	1.0 per school.
Car Inf 6770	Career Information Assistant	1.0 per school.
Bus Mgr 5700	Business Manager	1.0 per school.
Fin Ast 4220	Financial Assistant	1.0 per school.
Md Ast 6620/6625	Media Assistant	<p>Allocations are made according to the following projected student enrollments:</p> $3000 + \quad = 4.0$ $2550 - 2999 = 3.0$ $1750 - 2549 = 2.5$ $1450 - 1749 = 2.0$ $1100 - 1449 = 1.5$ $\text{Less than } 110 = 1.0$
TA Reg 6590	Teacher Assistant, Regular	<p>These two positions are allocated to schools together so that the total FTE is based on the percent of projected enrollment for the school compared to the total projected enrollment for all high schools.</p> <p>Note: Computer lab paraeducators are no longer budgeted.</p>
Para Reg 6600	Paraeducator, Regular	
MST 6640	Media Services Technician	1.0 per school.
Scr Ldr 5130	Security Team Leader	1.0 per school
SpOt SS various	Special Ed, Other Support Staff	These miscellaneous positions are allocated by the Department of Special Education to specific school programs (see special education detail for job codes).

User Sp 5530	User Support Specialist	1.0 per school
Eng Cmp 6690	English Composition Assistant	Allocations are made according to the following formula: $\frac{\text{Projected Enrollment}}{90} \times .125$
ESOL Para 6603	ESOL Paraeducator	These positions are allocated from the Division of ESOL/Bilingual Programs to specific school programs.
Scr Ast 5190	Security Assistant	This position is assigned based on enrollment, educational load, campus size, and renovation conditions.
SEIA 6550	Special Education Paraeducator	These positions are allocated from the Department of Special Education according to guidelines established in building the operating budget. Generally, each teaching station includes a paraeducator position.

Appendix C:
Board of Education of Montgomery County Policy FAA and
Montgomery County Public Schools Regulation FAA-RA
Long-range Educational Facilities Planning

POLICY

BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries: ABA, ABC, ABC-RA, ACD, CFA, DNA, FAA-RA (pending), JEE, JEE-RA
Responsible Office: Chief Operating Officer
Planning and Capital Programming

Long-Range Educational Facilities Planning

A. PURPOSE

The Board of Education has a primary responsibility to plan for school facilities that address changing enrollment patterns and sustain high quality educational programs in accordance with the policies of the Board. The Board of Education fulfills this responsibility through the facilities planning process. Long-range educational facilities planning is essential to identify the infrastructure needed to ensure success for every student.

The Long-range Educational Facilities Planning (LREFP) policy guides the planning process. The process is designed to promote public understanding of planning for Montgomery County Public Schools (MCPS) and to ensure that there are sufficient opportunities for parents, students, staff, community members and organizations, local government agencies, and municipalities to identify and communicate their priorities and concerns to the superintendent and the Board. Long-range Educational Facilities Planning will be in accordance with all federal, state, local laws, and regulations.

B. ISSUE

Enrollment in MCPS is constantly changing. The fundamental goal of facilities planning is to provide a sound educational environment for changing enrollment. The number of students, their geographic distribution, and the demographic characteristics of this population all impact facilities planning. Net enrollment changes are driven by factors including birth rates, movement within the school system and into the school system from other parts of the United States and the world.

MCPS is among the largest school systems in the country in terms of enrollment and serves a county of approximately 500 square miles. The full range of population density, from rural to urban, is present in the county. Since 1984, enrollment has increased where new

communities have formed, as well as in established areas of the county where turnover of houses has altered the demographic composition of communities. In areas with affordable housing, there is often greater diversity in enrollment caused by immigration.

MCPS is challenged continually to anticipate and plan for facilities in an efficient and fiscally responsible way to meet the varied educational needs of students. The LREFP policy describes how the school system responds to educational and enrollment change, the rate of change, its geographic distribution, and the racial, ethnic, and socioeconomic diversification of enrollment.

School facilities also change. Aging of the physical plant requires a program of maintenance, renovation, and modernization. Acquiring new sites, designing new facilities, and modifying existing facilities to keep current with program needs is essential. This policy provides the framework to coordinate planning for capital improvements.

C. POSITION

The long-range facilities planning process will continue to:

1. Plan for utilization of schools in ways that are consistent with sound educational practice and consider the impact of facility changes on educational program and related operating budget requirements and on the community
2. Provide a constructive and collaborative advisory role through public hearings, position papers, written comments, and advisory committee memberships for parent organizations (such as the PTA) and other community groups in the capital improvements program. An advisory committee will be established for facilities planning activities listed below:
 - a) Selection of school sites
 - b) Facility design
 - c) Boundary changes
 - d) Geographic student choice assignment plans (such as consortia)
 - e) School closures and consolidations
3. Provide a six-year capital improvements program and educational facilities master plan which include enrollment projections, educational program needs, and available school capacity countywide, and identify:

- a) When new schools and additions will be needed to keep facilities current with enrollment levels and educational program needs
 - b) When to modernize older school buildings in order to continue their use on a cost-effective basis, and to keep facilities current with educational program needs
 - c) When school closures and consolidations are appropriate due to declining enrollment levels
 - d) Facility utilization levels, capacity calculations, school enrollment size guidelines, and school site size (adopted as part of the Board of Education review of the superintendent's recommended CIP)
4. Provide for the Board of Education to hold public hearings and solicit written testimony on the recommendations of the superintendent
5. Provide a process for facility design that ensures a safe and secure environment and is consistent with educational program needs and includes community input
6. Provide a process for changing school boundaries and establishing geographic student choice assignment plans that:
- a) Solicit input at the outset of the process by forming a community advisory committee
 - b) Consider four main factors in development of school boundaries and student choice assignment plans, including:
 - 1) Demographic characteristics of student population
 - 2) Geographic proximity of communities to schools
 - 3) Stability of school assignments over time
 - 4) Facility utilization
 - c) The Board of Education may, by majority vote, identify alternatives to the superintendent's recommendations for review

- d) The Board of Education will hold public hearings and solicit written testimony on the recommendations of the superintendent and Board identified alternatives
 - e) At such time as the Board of Education takes action on school boundaries or geographic student choice assignment plans, the Board has the discretion to adopt minor modifications to the superintendent's recommendation or Board identified alternatives if, by a majority vote, the Board has determined that such action will not have a significant impact on an option that has received public review
7. Provide a process for closing and consolidating schools that meets the requirements of COMAR (Chapter 13A)
8. Provide for articulation in school assignments by:
- a) Traditional Student Assignments
- Structuring high schools for Grades 9-12 and, where possible, creating straight articulation for clusters composed of one high school, and a sufficient number of elementary and middle schools, each of which sends its students, including special education and ESOL students, to the next higher level school in that cluster
- b) Student Choice Assignment Plans
- In cases where schools do not have boundaries and students participate in a student choice assignment plan (e.g., consortium) to identify the school they wish to attend, articulation patterns may vary from the straight articulation pattern that is desired in traditional student assignment
9. The superintendent will develop regulations with student, staff, community, and parental input to *guide implementation of this policy*

D. DESIRED OUTCOMES

A long-range educational facilities planning process that identifies the infrastructure necessary to deliver high quality educational facilities to all students and incorporates the input of parents, staff, and community and, as appropriate, students.

E. REVIEW AND REPORTING

1. The annual June publication of the Educational Facilities Master Plan will constitute the official reporting on facility planning. This document will reflect all facilities actions taken during the year by the Board of Education and approved by the County Council. The Master Plan will project the enrollment and utilization of each school, and identify schools and sites that may be involved in future planning activities.
2. This policy will be reviewed after its initial implementation, but no later than 2007, in accordance with the Board of Education's policy review process.

Policy History: Adopted by Resolution No. 257-86, April 28, 1986; amended by Resolution No. 271-87, May 12, 1987; amended by Resolution No. 831-93, November 22, 1993; amended by Resolution No. 679-95, October 10, 1995; amended by Resolution No. 581-99 September 14, 1999; updated office titles June 1, 2000; updated November 4, 2003; amended by Resolution No. 268-05, May 23, 2005.

REGULATION MONTGOMERY COUNTY PUBLIC SCHOOLS

Related Entries: ACD, CFA, DNA, FAA, JEE, JEE-RA
Responsible Office: Chief Operating Officer
 Planning and Capital Programming

Long-Range Educational Facilities Planning

I. PURPOSE

To implement the Board of Education Long-Range Educational Facilities Planning policy (FAA) to achieve success for every student by providing appropriately utilized, functional, and modern facilities. These regulations provide direction on how the planning process should be conducted.

II. BACKGROUND

Montgomery County Public Schools (MCPS) operates in a dynamic environment and is among the largest school systems in the country. Montgomery County is increasingly diverse, both in terms of population and types of communities encompassed within the county. This environment, combined with the needs of the physical infrastructure and fiscal realities, demands a planning process that incorporates the needs of our community and produces the physical foundation for an excellent school system.

III. DEFINITIONS

- A. The *Capital Improvements Program (CIP)* is a comprehensive six-year spending plan for capital improvements. The CIP focuses on the acquisition, construction, modernization, and renovation of public school facilities. The CIP is reviewed and approved through a biennial process that takes effect for the six-year period that begins in each odd-numbered fiscal year. For even-numbered fiscal years, only amendments are considered to the adopted CIP for changes needed in the second year of the six-year CIP period.
- B. The *Capital Budget* is the annual budget adopted for capital project appropriations.
- C. *Cluster* is a geographic grouping of schools within a defined attendance area that includes a high school and the elementary and middle schools that send students to that high school.

- D. *Community outreach*, for the purposes of Policy FAA: *Long-Range Educational Facilities Planning*, and this regulation means that reasonable and systematic efforts will be made to solicit input from stakeholders on decisions that impact them. These efforts may include, but are not limited to, postings to the MCPS Web site and related electronic media, notices published in local newspapers, newsletters, and/or notices sent to community representatives.
- E. *Consortium* is a grouping of high schools or middle schools within close proximity to one another that provide students the opportunity to express their preference for attending one of the schools based on a specific instructional program or emphasis.
- F. *Geographic Student Choice Assignment Plans* identify the geographic area(s) wherein students may express a preference for a school assignment, based on program offerings or emphasis. These geographic areas may include areas, known as "base areas," where students may be guaranteed attendance at the school under certain criteria; or, the area may be a single unified area with no base areas for individual schools.
- G. *Program Capacity* is the student capacity figure that reflects how a school facility is used based on the educational programs at the school. The MCPS program capacity is calculated as the product of the number of teaching stations in a school and the student-to-classroom ratio for each grade or program in each classroom. The MCPS program capacity is used for county capital budgeting and facility planning analyses for future capital project needs, boundary changes, and geographic student choice assignment plans.
- H. *Quad-cluster* is a grouping of geographically contiguous clusters that is overseen by a community superintendent.
- I. *State-rated Capacity (SRC)* is defined by the state of Maryland as the maximum number of students who can reasonably be accommodated in a facility without significantly hampering delivery of the given educational program. The SRC is calculated as the product of the number of teaching stations in a school and a state-determined student-to-classroom ratio. The SRC is used by the state to determine state budget eligibility for capital projects funded through the Public School Construction Program administered by the Interagency Committee on Public School Construction (IAC).

IV. PROCEDURES

The following procedures, criteria, or standards apply to the facilities planning process:

A. Capital Improvements Program (CIP)

1. On or about November 1 of each year, the superintendent will publish recommendations for an annual Capital Budget and a six-year CIP or amendments to the previously adopted CIP. Boundary change or geographic student choice assignment plan recommendations, if any, will be released by mid-October.
2. The six-year CIP will include:
 - a) Background information on the enrollment forecasting methodology
 - b) Current enrollment figures and demographic profiles of all schools including racial/ethnic composition, Free and Reduced-price Meals System (FARMS) program participation, English for Speakers of Other Languages (ESOL) enrollment, and school mobility rates
 - c) Enrollment forecasts for each of the next six years and long-term cluster, consortium, or base area forecasts for secondary schools for a period of 10 and 15 years
 - d) A profile of each school facility showing facility characteristics, capacity, and room use for programs, such as Head Start, prekindergarten, kindergarten, ESOL, special education, or other special use
 - e) A line item summary of Capital Budget appropriation requests by the Board of Education
 - f) Recommendations on the following guidelines for Board review and action:
 - (1) Preferred range of enrollment
 - (2) School capacity calculations
 - (3) Facility utilization
 - (4) School site size

- g) A summary of recommended actions that affect programs at schools or the service area of the schools. Supplements to the CIP may be published to provide more information on issues when deemed advisable by the superintendent
 - h) Project Description Forms (PDF), the official, county authorized budget forms used for all requested capital projects, are included in the Board adopted CIP request to the County Council
- 3. Copies of the superintendent's recommended CIP will be sent to MCPS executive staff, department and division directors, school principals, Montgomery County Council of Parent Teacher Associations (MCCPTA) cluster coordinators, local PTA presidents, and public libraries. The superintendent's recommended CIP also will be posted on the MCPS Web site. In addition, notification of the CIP's publication and availability will be sent to municipalities, civic groups registered with the Maryland-National Capital Park and Planning Commission, the Montgomery County Region of the Maryland Association of Student Councils, and the Montgomery County Junior Council. This notification will include the Board of Education schedule for work sessions, public hearings, and action on the CIP. Other interested parties may request a copy of the CIP document from the MCPS Division of Long-range Planning.
 - 4. The Board of Education timeline for review and action on the CIP consists of a work session in early November, followed by a public hearing in mid-November, and action in mid- to late November of each year. (See Section V of this regulation for the public hearing process and Section VII for the annual calendar.) The superintendent's recommendation on any deferred planning issues and/or amendments to the CIP is made in mid-February. The Board of Education timeline for these items consists of a work session in late February to early March, a public hearing in mid-March, and action in late March.
 - 5. After review and Board of Education action, the Board-adopted CIP is submitted to the County Council and county executive for their review and County Council action. The Board-adopted CIP also is sent for information to the Maryland-National Capital Park and Planning Commission, Maryland State Department of Education, State IAC, and municipalities.
 - 6. The county executive forwards his/her recommendations to the County Council in mid-January for inclusion in the overall county CIP. The County Council timeline for review and action on the Board-adopted CIP is from February to May.

7. The County Council, as required by county charter, adopts the biennial six-year CIP.

B. Master Plan

By June 30 of each year, the superintendent will publish a summary of all County Council-adopted capital and Board of Education-adopted non-capital facilities actions. This document, called the *Educational Facilities Master Plan*, is required under the rules and regulations of the State Public School Construction Program.

1. The facilities master plan will incorporate the projected impact of all capital projects approved for funding by the County Council and any non-capital facilities actions approved by the Board of Education.
2. The facilities master plan will show projected enrollment and utilization for schools for the next six years and for a period of 10 and 15 years for secondary schools. This information will reflect projections made the previous fall with an updated one-year projection in the spring, and any changes in enrollment or capacity projected that result from capital projects, boundary changes, geographic student choice assignment plans, or other changes authorized by the Board of Education.
3. The master plan will include demographic characteristics of school enrollments, facility characteristics, and program capacities of schools.
4. The master plan will include County Council-adopted PDFs that provide schedules, estimated costs, and funding sources.

C. Enrollment Forecasts

1. Each fall, enrollment forecasts for each school will be developed for a six-year period. In addition, long-term forecasts for a period of 10 and 15 years also will be developed for secondary schools. These forecasts will be the basis for evaluating facility space needs and initiating planning activities. The forecasts should be developed in coordination with the Montgomery County Department of Parks and Planning county population forecast and any other relevant planning sources.
2. On or about March 1, a revision to the enrollment forecast for the next school year will be developed to refine the forecast for all schools and to reflect any changes in service areas or programs.

3. The enrollment forecast methodology utilized will be identified in an Appendix in the CIP and Master Plan documents.

D. Preferred Range of Enrollment

Unless otherwise specified by Board action in the adopted CIP, the preferred ranges of enrollment for schools includes all students attending the school.

1. A preferred range of enrollment for schools is:
 - a) 300 to 750 students in elementary schools
 - b) 600 to 1,200 students in middle schools
 - c) 1,000 to 2,000 students in high schools
 - d) Special and alternative program centers will differ from the above ranges and generally be lower in enrollment
2. The preferred range of enrollment will be considered when planning new schools or changes to existing facilities. Departures from the preferred range may occur if an educational program justifies or requires it. Fiscal constraints also may require MCPS to operate schools of other sizes. If larger or smaller schools are built or created, alternative approaches to school construction, management, organization, or staffing will be considered in order to facilitate effective delivery of educational programs.

E. Capacity Calculations and Facility Utilization

1. Unless otherwise specified by Board action in the adopted CIP, the capacity of a facility is determined by the space needs of educational programs. The MCPS program capacity is based on the student-to-classroom ratios shown in the following table, and should not be confused with staffing ratios as determined through the operating budget process.

Level	Student-to-Classroom Ratios
Head Start & prekindergarten	40:1 (2 sessions per day)
Head Start & prekindergarten	20:1 (1 session per day)
Grade K full-day	22:1 (1 session per day)
Grade K-reduced class size full-day	15:1

Grades 1-2—reduced class size	17:1
Grades 1-5/6 Elementary	23:1
Grades 6-12 Secondary	
Grade: 6-8 Middle School	25.1*
Grades: 9-12 High School	25.1**
ESOL	15:1

* Program capacity differs at the middle school level in that the regular classroom capacity of 25 is multiplied by .85 to reflect the optimal utilization of a middle school facility (equivalent to 21.25 students per classroom).

** Program capacity differs at the high school level in that the regular classroom capacity of 25 is multiplied by .90 to reflect the optimal utilization of a high school facility (equivalent of 22.5 students per classroom).

Special education, some special programs, and class size reduction initiatives may require classroom ratios different from those listed.

2. Unless otherwise specified by Board action in the adopted CIP, elementary, middle, and high schools should operate in an efficient utilization range of 80 to 100 percent of program capacity. If a school is projected to be underutilized (less than 80 percent) or does not meet the preferred range of enrollment, or is overutilized (over 100 percent) or does not meet the preferred range of enrollment, a boundary study, non-capital action, or a capital project for facilities planning may be undertaken. In the case of overutilization, an effort to judge the long-term needs for permanent space should be made prior to planning for new construction. Underutilization of facilities also should be evaluated in the context of short-term and long-term enrollment forecasts.
3. Relocatable classrooms may be used on an interim basis to provide program space for enrollment growth and class-size reduction initiatives until the demonstrated need for permanent capacity is met. Relocatable classrooms also may be used to enable day care programs to be housed in schools, and may be used to accommodate such programs as:
 - a) Parent Resource Centers
 - b) Linkages to Learning

- c) College Connection Programs
- d) Judy Centers
- e) Baldrige Training Labs
- f) Career and Community Connections
- g) Other programs as appropriate

Relocatable classrooms should meet the same health and safety standards as other MCPS facilities.

F. School Site Size

Unless otherwise specified by Board action in the adopted CIP, preferred school site sizes are:

- 1. 12 usable acres for elementary schools
- 2. 20 usable acres for middle schools
- 3. 30 usable acres for high schools

Sites of these approximate sizes accommodate the instructional program including related outdoor activities. In some circumstances school sites may be smaller or larger than the preferred sizes. In these circumstances special efforts to accommodate outdoor activities may include the use of adjacent or nearby park properties or shared use of school fields. In some cases it may be necessary to acquire more than the standard acreage in order to accommodate environmental concerns, unusual topography, or surrounding street patterns.

V. GUIDELINES FOR FACILITY PLANNING

A. Evaluating Utilization of Facilities

- 1. By November 1 each year, after new enrollment forecasts are developed, utilization of all school facilities will be evaluated and incorporated into the superintendent's CIP recommendations. The effect of any proposed educational program changes, including prekindergarten programs, special education programs, ESOL programs and centers, or grade level reorganizations also will be evaluated. For schools that are projected to have

insufficient capacity, excess capacity, or other facility issues, the superintendent may recommend:

- a) A capital project
 - b) A non-capital action such as boundary change, geographic student choice assignment plan, school pairing, facility sharing, closing/consolidation, or any other similar action
 - c) No action or deferral pending further study of enrollment or other factors
- 2. Facility recommendations made by the superintendent will incorporate consideration of educational program impacts. As part of the process of developing facility plans, MCPS staff will work closely with appropriate program staff to identify program requirements for facility plans.
 - 3. Recommendations that relate to school boundary changes or geographic student choice assignment plans will be made after the superintendent receives advice from a school boundary or choice area advisory committee.
 - 4. The superintendent also may request advice from the community for other types of facility recommendations.

B. Development of School Boundaries and Geographic Student Choice Assignment Plans

In cases where the utilization of a new school, or the utilization of existing schools (including school pairings) are reviewed through a boundary study, or where revisions to geographic student choice assignment areas are reviewed through a study, the following factors should be considered by any advisory committee, the superintendent, and the Board of Education in the study process.

- 1. Facility
 - a) School boundary and geographic student choice assignment plans should result in school utilizations in the eighty percent to one-hundred percent efficient range whenever possible.
 - b) Plans should be fiscally responsible to minimize capital and operating costs whenever feasible. The geographic scope of the studies should be broad enough to realize economies in costs and provide long-range

plans to address facility issues while preserving as much stability in school assignments as possible.

- c) When special education programs are assigned to a facility, any required modifications to the facility will be made in accordance with the *Americans with Disabilities Act* (ADA).
- d) Shared use of a facility by more than one cluster may be the most feasible facility plan in some cases. In these cases, it is desirable for 25 percent or more of articulating enrollment to move on to each of the assigned upper level schools.

2. Population

- a) School boundary and geographic student choice assignment plans should consider the impact of various options on the affected school populations. A school population consists of students assigned from a specific geographic attendance area regardless of the school building itself.
- b) Where reasonable, school boundaries or geographic student choice assignment plans should be established to promote the creation of a diverse student body in each of the affected schools. Data showing the impact of various options shall be provided for the following factors:
 - (1) The socioeconomic background of students as measured by participation in the federal FARMS program
 - (2) The level of English language learners as measured by enrollment in the ESOL program
 - (3) Student mobility rates at schools
 - (4) The racial/ethnic composition in accordance with the Quality Integrated Education policy
 - (5) Other reliable demographic indicators, such as the mix of single family and multiple family dwellings, also may be considered where applicable

- (6) Special education programs (large special education programs in schools or proposed to be in new schools) should be considered

3. Geography

- a) In most cases, the geographic scope of elementary school boundary studies and geographic student choice assignment plan studies should be limited to the high school cluster area. For secondary schools, one or more clusters of schools may be studied.
- b) In accordance with MCPS emphasis on community involvement in schools, one of the goals of boundary and student choice area plans should be service areas that are, as much as practical, made up of contiguous communities surrounding the school. Walking access to the school should be maximized and transportation distances minimized when other factors do not require otherwise.

4. Stability

- a) Recognizing that, at times, changes to boundaries and student choice assignment plans may be necessary, plans should result in as long a period as possible of stable assignments.
- b) Recommendations for student reassignments should consider recent boundary or geographic student choice assignment area changes, and/or school closings and consolidations that may have affected the same students.

C. Cluster Comments

- 1. In May, cluster representatives should state in writing to the superintendent any proposals, priorities, or concerns that they have identified for their schools in consultation with local PTA leadership, principals, and the community.
- 2. Amendments to cluster comments may be submitted by September 1 in cases where preliminary fall enrollments or unusual events require them.
- 3. Cluster comments are to be considered in the development of facilities recommendations made by the superintendent in the CIP.

D. Public Hearing Process

1. Public hearings are held annually following publication of the superintendent's CIP recommendations.
 - a) The PTA cluster coordinators and/or PTA area vice presidents in consultation with the cluster PTA presidents will coordinate testimony at the hearing on behalf of cluster schools and are encouraged to ensure that diversity of opinions are accommodated when scheduling testimony. Testimony time for each cluster will be scheduled and organized by quad-cluster and/or consortium whenever possible..
 - b) Civic groups, municipalities, and countywide organizations should contact the Board of Education office to schedule testimony.
 - c) Public comments from individuals also will be heard by the Board of Education. Individuals should contact the Board Office to schedule testimony.
2. Written comments from the community will be accepted at any point, but in order to be considered, comments must reach the Board 48 hours before the time scheduled for action by the Board.
3. Public hearings also may be held on any CIP or facilities planning issues deferred from the fall. These hearings usually would occur in late February or early March. In unusual circumstances, public hearings may be called at other times to consider facility issues that do not fit into the fall or spring timetables.

VI. COMMUNITY INVOLVEMENT PROCESSES

A. Community Representation

School and community involvement in MCPS facility planning is important to the success of its plans. Parents, staff, and students are the primary stakeholders in the planning process.

1. Stakeholders and interested members of the community have several opportunities for input into the facilities planning process that may include: participation as members of advisory committees; submission of letters, alternative proposals, or other written material for consideration by the

superintendent and staff; and/or testimony in written or oral form before the Board of Education.

2. MCCPTA, local PTAs, or other parent or student representatives along with appropriate MCPS staff should be involved in the following planning processes:
 - a) Site selection
 - b) School boundary or geographic student choice assignment plans
 - c) Issue roundtables
 - d) School closings and consolidations
 - e) Facility planning (educational specifications, architect selection, and architectural design) for new schools, additions, and modernizations
3. Additionally, MCPS employees, municipalities, local government agencies, civic and homeowner associations, and countywide organizations contribute to the planning process. A civic or homeowner association must be registered with the Maryland-National Capital Park and Planning Commission. Countywide organizations are those with members throughout the county.
4. The Board will conduct public hearings for potentially affected school communities prior to actions affecting attendance and/or choice areas and the closure or consolidation of schools.
 - a) Public hearings will be conducted following publication of the superintendent's recommended Capital Budget and six-year CIP.
 - b) Public hearings also may be held in March for any boundary/choice assignment recommendations deferred in November or in cases where boundary/choice assignment and non-capital decisions must be made in March.
 - c) Written comments from the community will be accepted at any point but, in order to be considered, comments must reach the Board 48 hours before the time scheduled for action by the Board.

- B. The following sections describe the community involvement process in site selection, facility design, boundary changes, geographic student choice assignment plans, and school closures and consolidations. These sections refer to the formation and operation of advisory groups. In addition to these activities, all community members have opportunities to advise the superintendent and Board annually through cluster comments, written correspondence, and public testimony.

1. Site Selection

- a) MCPS staff will work with the Montgomery County Planning Board during the development of county land use master plans to identify future school site requirements based on existing and proposed residential development. General locations of sites are identified on master plan maps. As subdivision occurs, site dedications may be requested. If not identified for a specific school construction project, sites acquired through dedication or purchase are placed in the Board's sites inventory for future selection.
- b) Site selection for a specific school construction project begins when MCPS projections indicate a new facility is required in the six year CIP.
- c) MCPS staff works with MCCPTA area vice presidents, cluster coordinators, or PTA presidents to form a Site Selection Advisory Committee (SSAC) composed of MCPS staff; PTA representatives; appropriate municipal and county government agency officials. For a secondary school site, representatives of more than one cluster may be involved in the committee.
 - (1) MCPS staff work with the SSAC identifying and reviewing alternative site candidates from the Board's sites inventory and, in some cases, from private ownership for potential site purchase.
 - (2) The SSAC considers and compares the attributes of each candidate site, including but not limited to:
 - (a) The geographic location relative to existing and future student populations
 - (b) Environmental constraints
 - (c) Availability of utilities

- (d) Vehicular and pedestrian access
 - (e) Cost to acquire
 - (f) Cost to develop
 - (g) Ability to meet educational program requirements
 - (h) Compatibility with an educational environment
- (3) The SSAC reaches consensus and makes a recommendation to the superintendent.
- (a) The superintendent evaluates the recommendation and then makes his/her recommendation to the Board.
 - (b) The Board considers the committee and superintendent's recommendations before formally taking action to select a site for the specified school construction project.

2. Facility Design

- a) Parent representatives will serve with MCPS staff on facility advisory committees to modify, modernize/replace, or construct new facilities.
 - (1) Parent representatives will be identified by MCCPTA area vice presidents, cluster coordinators, or PTA presidents in collaboration with school principals.
 - (2) Student representatives at the high school level will be identified by the principal or chair of the committee to serve on the committee.
 - (3) Adjacent property owners are invited to serve on the advisory committee. Representatives of the neighborhood homeowner and/or civic association registered with the Maryland-National Capital Park and Planning Commission also may be invited to serve on the advisory committee.
- b) Educational specifications developed by MCPS staff will be reviewed in consultation with school-based administrators, staff, and PTA representatives, as needed.

- c) MCPS staff will involve the school administration, school staff, and PTA representatives in selection of an architect.
- d) Viewpoints of adjacent homeowners and registered homeowner and/or civic associations will be included in the review of architectural plans. Concerns of these groups should be considered at the design stage before architectural plans are finalized.

3. School Boundary Changes and Geographic Student Choice Assignment Plans

When directed by the Board of Education, MCPS staff will facilitate the process of community input on school boundary changes or geographic student choice assignment plans.

- a) When the Board of Education identifies the need for changes in school service areas and the geographic scope of a study, an advisory committee will be formed to evaluate boundary change options or geographic student choice assignment plan options developed by MCPS staff. The superintendent will develop the charge for the advisory committee. MCPS staff will organize and work directly with this group.
 - (1) Membership on school boundary or geographic student choice assignment plan advisory committees will consist of individuals who are familiar with the affected school communities. The advisory committee membership should be racially, ethnically, and socioeconomically diverse.
 - (2) The MCCPTA area vice president, cluster coordinator(s), or PTA presidents will identify parent representation from areas throughout the geographic scope of the study approved by the Board.
 - (3) The MCCPTA area vice president, cluster coordinator(s), or PTA presidents also may identify additional representatives from parent or student organizations who have knowledge of the schools involved.
 - (4) MCPS staff may call on other community resources such as civic and homeowner associations for input.

- b) At the outset of meetings, the committee will identify community criteria to assist staff in the development of options. In addition, the committee will consider factors outlined in the section of this regulation titled "*Development of School Boundaries and Geographic Student Choice Assignment Plans*" (Section V.B). MCPS staff will consider community criteria and factors included in this regulation in developing options. The superintendent and Board of Education also will consider community criteria and factors in this regulation in their review of boundary changes or geographic student choice assignment plans.
- c) Staff will develop and present approximately three to five viable options for the advisory committee to consider. The advisory committee may request development of additional options; however, the total number of options developed for the committee shall not exceed 10.
- d) MCPS staff will notify civic and homeowner associations registered with the Maryland-National Capital Park and Planning Commission in the potentially affected communities of proposed boundary changes or geographic student choice assignment plans being considered by MCPS in their area.
- e) Advisory committee representatives serve as the liaison between the committee and the community they represent. Representatives share committee discussions and options with their community through PTA meetings and other forums. Input received from the community is then presented by representatives at subsequent advisory committee meetings. Community input also is factored into committee member option evaluations and optional PTA or cluster position papers.
- f) An advisory committee report including evaluations of the options by committee representatives, and any individual PTA or cluster position papers submitted on the options, will be forwarded to the superintendent.
- g) The superintendent will develop a recommendation after considering staff advice, the advisory committee report, option evaluations and any PTA or cluster position papers, as well as input from other organizations and individuals who have provided comments. The superintendent will publish his/her recommendation in mid-October, or mid-February when necessary.

- h) Copies of the superintendent's recommendation are distributed to the affected schools and PTAs and posted to the MCPS Web site.
- i) The Board of Education will hold a work session and may request by majority vote that alternatives to the superintendent's recommendation be developed for Board consideration. Any significant modification to the superintendent's recommendation requires an alternative. Any modification that impacts any or all of a school community that has not previously been included in the superintendent's recommendation should be considered a significant modification.
- j) Recommendations from the superintendent and Board-identified alternatives will be the subject of a public hearing prior to final Board action.
- k) The Board has the discretion to adopt minor modifications to the superintendent's recommendation or Board-identified alternatives if this action will not have a significant impact on a plan that has received public review. To the greatest extent possible, additional alternatives will not be considered after the Board of Education alternatives work session without adequate notification and opportunity for comment by the affected communities.

4. School Closures and Consolidations

In cases where a school closure or consolidation is contemplated, the Board of Education, superintendent, and MCPS staff will follow requirements of the Maryland State Board of Education set forth in *COMAR* regulation (Chapter 13A) (www.dsd.state.md.us/comar/13a/13a.02.09.01.htm).

This regulation provides the procedures governing school closings that must be used by local school systems. The regulation also sets the timeline for announcing school closings, and the procedure for appealing a local Board decision to the State Board of Education.

VII. CALENDAR

The long-range facilities planning process will be conducted according to the county's biennial CIP process and will adhere to the following calendar adjusted annually to account for holidays and other anomalies.

MCPS staff meets with school principals, cluster coordinators, and PTA representatives to exchange information about the adopted CIP and consider issues in the upcoming CIP or amendments to the CIP	Summer
MCPS staff presents enrollment trends and planning issues to the Board of Education	Mid-October
County Council adopts Spending Affordability Guidelines (SAG) for the new CIP cycle. SAG sets limits on debt affordability	Early-October of odd numbered fiscal years
Superintendent publishes and sends to the Board of Education any recommendations for school boundary or geographic student choice assignment plans	Mid-October
Superintendent publishes and sends to the Board of Education recommendations for the annual Capital Budget and biennial six-year CIP or amendments to the CIP	November 1
Board of Education holds a work session to consider alternatives to superintendent recommended boundary changes or school choice assignment plans	Early-November
Board of Education holds a public hearing on the recommended CIP and boundary or school choice assignment plan recommendations and any alternatives identified by the Board at its work session	Mid-November
Board of Education acts on Capital Budget, CIP, amendments, and any boundary changes or geographic student choice assignment plans	Late November
County executive and County Council receive Board of Education adopted capital budget and CIP for review	December 1
County executive transmits his/her recommended Capital Budget and CIP or amendments to County Council	January 15
County Council may hold public hearings on CIP	February - March
County Council reviews Board of Education requested and County executive recommended Capital Budget and CIP	March - April
Superintendent recommendations on any deferred planning issues, boundary change or geographic student choice assignment plans, and/or recommended amendment(s) to the CIP are published for Board of Education review	Mid-February
Board holds work session and identifies any alternatives to boundary change or geographic student choice assignment plan recommendations	Late-February/early-March
Board holds public hearing (if needed)	Mid-March
Board acts on deferred CIP recommendations and/or boundary or geographic student choice assignment plans	Late-March
County Council approves Capital Budget and CIP	Late-May
Cluster PTA representatives submit comments to the superintendent about issues affecting their schools for the upcoming CIP or amendments to the CIP	May

Superintendent publishes a summary of all actions to date affecting schools (Educational Facilities Master Plan) and identifies future needs	June 30
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In the event the Board of Education determines that an unusual circumstance exists, the superintendent will establish a different and/or condensed time schedule for making recommendations to the Board, for scheduling public hearings on recommendations for alternatives not previously subject to public hearing and for Board action.

Regulation History: Interim Regulation, June 1, 2005; revised March 21, 2006; revised October 17, 2006.

Appendix D:
Superintendent's Recommendation for Elementary School Capacity Calculations

Excerpted from MCPS Board of Education's Requested FY06 Capital Budget and
Amended FY05-10 CIP (Appendix 3, Board of Education Approved Supplement A)

Superintendent's Recommendation for Elementary School Capacity Calculations

Background

During the 2004 session of the Maryland General Assembly, House Bill 1230, Public Schools Facilities Act of 2004, was approved by the legislature. The bill was signed into law by the governor on May 11, 2004. One of the effects of the legislation is to change the way the state calculates the capacities of elementary schools. Changing the State Rated Capacity (SRC) of schools has more to do with funding for school construction than it does with the way local school systems allocate teachers to implement educational programs through operating budget decisions, but there is a connection.

State-rated Capacity (SRC)

School capacity is defined by the state of Maryland as the maximum number of students that can reasonably be accommodated in a facility without significantly hampering delivery of the given educational program. The SRC is calculated as the product of the number of teaching stations in a school and an average class size for each grade (based generally on a student-to-classroom ratio). The SRC is used by the state to determine state budget eligibility for capital projects through the Public School Construction Program administered by the Interagency Committee on School Construction (IAC). The student-to-classroom ratios used to calculate SRC are outlined in the Capacity and Space Formula used by the IAC to fund school construction projects.

Montgomery County Public Schools (MCPS) Program Capacity

MCPS program capacity is outlined in the Board of Education Long-range Educational Facility Planning Policy, FAA, and is discussed further below. The MCPS program capacity ratios are intended to reflect how a school facility is used based on the educational programs at the school. It is important to note that the state-rated capacity (SRC) is used by the state to determine state budget eligibility for capital projects, whereas the MCPS program capacity is used for other purposes including county capital budgeting and facility planning analyses that support future capital project needs, boundary changes, and special program locations.

SRC compared to MCPS program capacity

The state of Maryland calculates elementary school SRC using slightly different student-to-classroom ratios than Montgomery County Public Schools (MCPS). The IAC Capacity and Space Formula uses the following ratios for SRC:

<u>Class/Grade</u>	<u>Student-to-classroom ratio</u>
Head Start and Prekindergarten	20:1 (for full or half-day programs)
Grade K	22:1 (for full or half-day programs)
Grades 1–6	25:1* (23:1 effective July 1, 2004)
Special Education	10:1 (for all programs)
ESOL	25:1

*The Public Schools Facility Act of 2004 changes the ratio for Grades 1–5 from 25 students per classroom to 23 students per classroom.

MCPS calculates elementary school program capacities in accordance with the Board of Education Long-range Educational Facilities Planning Policy, FAA, Section C.4.a) that outlines the student-to-classroom ratios for elementary school program capacity as follows:

<u>Class/Grade</u>	<u>Student-to-classroom ratio</u>
Head Start and Prekindergarten	40:1 (two sessions per day)
Head Start and Prekindergarten	20:1 (one session per day)
Grade K—1/2 day	44:1 (two sessions per day)
Grade K—full-day	22:1 (one session per day)
Grades 1–6	25:1
ESOL	15:1

Special education, some special programs, and class size reduction initiatives require classroom ratios different from those listed.

The SRC for all special education programs is 10 students per classroom regardless of the program. The MCPS program capacity for each special education classroom is based on a set student-to-classroom ratio for the program. Special education classroom capacities range from 6 students per classroom to 13 students per classroom at both the elementary and secondary level.

Currently, at the elementary school level, the SRC is based on full-time equivalent (FTE) enrollment, where students in half-day programs are counted as 0.5 students. MCPS uses head count enrollment where all students, whether in full- or half-day programs, are counted as 1.0 student. Because the state uses FTE enrollments for half-day programs, the SRC reflects smaller capacities for prekindergarten and kindergarten classrooms, and the SRC for elementary schools is lower than the MCPS program capacity for the same schools. For example, at a school with 88 half-day kindergarten students, the SRC for two classrooms is 44 students (22 to 1 per classroom). MCPS calculates the capacity for the same two classrooms at 88 students (44 to 1 per classroom). In 2007 when all schools in MCPS will have a full-day kindergarten program, this difference in capacity calculation will only exist in schools with half-day prekindergarten programs.

The differences between the way MCPS and the state calculate elementary school capacities are important, but need to be understood in the proper context. MCPS capacity calculations need to accurately reflect how classrooms are programmed in a school. The closer the capacity calculations reflect how MCPS facilities are used the better MCPS will be able to plan for and program future capital construction needs. The capacities published for schools must be reasonably close to how the community sees the schools being used. Publishing a CIP or Master Plan that shows a school has some remaining capacity while the school has three or four relocatable classrooms on site greatly diminishes the credibility of the school system. In contrast the SRC is not intended to reflect the local educational program operating in a school, but rather is a figure that is calculated by formula and used to determine eligibility for state school construction funding—essentially nothing more.

In the past, both the SRC and the MCPS program capacity calculated Grades 1–5 classrooms at a ratio of 25 students per classroom. However, the Public Schools Facilities Act of 2004 and corresponding changes to the IAC Capacity and Space Formula will create greater differences to the SRC and MCPS program capacity.

The Impact of Class-Size Reduction Initiatives on MCPS Program Capacity

Although MCPS has been using a student-to-classroom ratio of 25 to 1 to calculate capacities for regular Grades 1–5 classrooms, student-to-teacher ratios have been reduced below this figure to help to improve student performance. Beginning in FY 1998, the Board of Education began a multiyear effort to reduce class sizes at all elementary schools to levels below the student-to-classroom capacity ratio of 25 to 1.

In the 2000–2001 school year, the Board of Education began a more focused initiative to reduce class sizes in the primary grades of 56 schools most heavily impacted by poverty and language deficiency as a component of the *Early Success Performance Plan*. Over a three-year period, class size in Grades K–2 in the 56 focus schools have been reduced for the full instructional day to an average of 17 students per teacher in Grades 1–2 and 15 students per teacher in full-day kindergarten. Providing a full-day kindergarten program and reducing class sizes in Grades K–2 has had a dramatic impact on building utilization in elementary schools, creating the need for additional classrooms to accommodate the increased number of teaching positions. Since capacities are calculated using a fixed student-to-classroom ratio as stated in Board of Education policy FAA, the capacities for these schools have not been recalculated to reflect these staffing changes.

For the 2004–05 school year, the countywide average student-to-teacher staffing ratio is less than 25 to 1 in Grades 1–5, while capacity ratings for elementary schools published in the CIP continued to use the student-to-classroom capacity ratio of 25 to 1 as stated in Board of Education policy FAA. In a number of cases, schools that appear to be within capacity require relocatable classrooms to accommodate the teaching staff that is allocated using the improved student-to-teacher staffing ratios.

Issues

With the implementation of the Public Schools Facilities Act of 2004 and the success of its Early Success Performance Plan, MCPS needs to revise its program capacity calculations so that its planning documents can be more closely aligned with state funding formulas and its own staffing initiatives.

The fact that the state of Maryland and MCPS calculate capacities differently, albeit for different purposes, creates confusion with the community. In addition, using program capacities that do not reflect staffing practices creates additional confusion.

MCPS could adopt the SRC methodology for calculating capacities, but the SRC methodology is used primarily for construction funding decisions at the state level. MCPS program capacities published in the CIP and Master Plan documents, on the other hand, are used by county leaders to make decisions on many things, from boundary changes to relocatable classroom placements. Using the SRC as the MCPS program capacity would eliminate the confusion caused by publishing two capacities for one school. However, it would not accurately reflect how school facilities are utilized by MCPS and would not facilitate the local decision-making process.

Continuing to use the current MCPS student-to-classroom ratios, as stated in the Board of Education policy continues to reinforce the perception that the program capacities published by MCPS are not realistic. The perception regarding unrealistic program capacities is fostered when many elementary schools that appear to have space based on their MCPS program capacities often need relocatable classrooms to accommodate the programs operating in the school. The simplest explanation for this situation is that there are more teachers assigned to serve the students than the capacity formula is based on, and more teachers need more classrooms, but this is not an explanation the general public readily accepts.

As stated previously, current program capacity calculations are based on a student-to-classroom ratio of 25 to 1, whereas the current average student-to-teacher staffing ratio for the 2004–2005 school year is less than 25 to 1. The current program capacity will not support the number of teachers provided by the staffing ratio. For example, the program capacity of an elementary school with 20 classrooms would be 500 students (20 rooms x 25 students/room). If staffing is provided at a ratio of 22 teachers per student, then 22.7 (or 23) teachers would be allocated to the school (500 students/22 teachers per student=22.7 teachers). With 20 classrooms and 23 teachers, the school would need 3 relocatable classrooms for the same 500 students, while there would be no published space shortage for the school. At class-size reduction schools where staffing is far below 25 students per teacher, the impact of the improved staffing is even greater, creating a greater discrepancy between the current calculated program capacity and the number of teachers allocated to the school.

There are some other reasons that elementary schools may require relocatable classrooms when it appears that they have space available, including having an odd number of half-day kindergarten sessions and capping of class size. However, these instances are relatively few in number compared to the discrepancy caused by reducing class size and not adjusting program capacity accordingly.

Superintendent's Recommendation

I believe that the program capacities used by MCPS in its long-range planning documents should reflect, as close as possible, the way MCPS is using its schools. The dramatic improvements we have seen in the performance of students in our 56 focus elementary schools where class-size reduction initiatives have been implemented are a compelling reason to continue this rewarding effort and to have the MCPS CIP and Master Plan reflect appropriate program capacities.

I also support the direction taken in the Public School Facilities Act of 2004 to reduce the student-to-classroom ratios used for capacity calculations used for all schools in Grades 1–5. Our own practice supports this reduction, and I believe the MCPS elementary school program capacity calculations should be revised to reflect both the class-size reduction initiatives in our 56 focus schools and the general reduction to 23 students per classroom in all other elementary schools.

It is important to note that a change in calculating program capacity will not increase the number of relocatable classrooms needed in the system. In making these changes, the elementary school capacities that are published annually in the Capital Improvements Program, Educational Facilities Master Plan, and Schools at a Glance will more accurately reflect the actual utilization of an elementary school and whether a school has a deficit or space available to accommodate the student enrollment. The number of relocatable classrooms currently located at schools should more clearly correspond to the space deficit shown for those schools in the CIP.

The attached table shows the current enrollment and capacity for all elementary schools based on the program capacity outlined in policy FAA for the 2004–2005 school year and what the revised capacities would be using my recommended changes for the 2004–2005 school year. The 56 focus schools with class-size reduction initiatives also are identified.

In order to make these changes to the elementary school capacity calculation, the Board of Education will need to make technical changes to the Long-range Educational Facilities Planning Policy, FAA, to reflect the new student-to-classroom ratios for Grades K–5. The FAA policy would need to reflect the following student-to-classroom ratios (the recommended technical changes to the policy have been italicized):

<u>Head Start and Prekindergarten</u>	<u>40:1 (two sessions per day)</u>
Head Start and Prekindergarten	20:1 (one session per day)
Grade K—1/2 day	44:1
Grade K—full-day	22:1
<i>Grade K—reduced class size full-day</i>	<i>15:1</i>
<i>Grades 1–5/6</i>	<i>23:1</i>
<i>Grades 1–2—reduced class size</i>	<i>17:1</i>

If the Board of Education adopts the recommended technical changes in Policy FAA, the new capacities would be published in the FY 2006 Educational Facilities Master Plan in June 2005.

Appendix E:
“Oversized” Elementary Classes, FY04 – FY08

In FY06, the Board of Education lowered the maximum class size guidelines for Grades 1-5. The table below shows how the definition of an “oversized class” was changed in FY06. Specifically, the BOE reduced the maximum class size for Grades 1-3 from 28 to 26 students; and for Grades 4-5 from 30 to 28 students.

Table E--1: Maximum Class Size Guidelines Adopted by the Board of Education

Level	Maximum Number of Students Per Class	
	Pre-FY06	FY06 – FY09
Kindergarten	25	25
Grades 1-3	28	26
Grades 4-5	30	28

Source: MCPS staff and Official Class Size Report, FY06

Table E-2 and accompanying exhibit on the next page show the number of “oversized” classes in two ways:

Part A of the table shows the number of oversized classes according to the definition in place at the time; i.e., FY04 – FY05 are compared to the Pre-FY06 guidelines and FY06 – FY08 are compared to the revised guidelines.

The data show that MCPS had fewer “oversized” classes in 2004, when the maximum class size caps were higher and therefore easier to meet. When the maximum class size guidelines were lowered in 2006, the number of “oversized” Grade K-5 classes grew from 27 in FY05 to 75 in FY06.

Part B of the table compares all years, including FY04 – FY05, to the current guidelines. The data show that since the lowering of the maximum class size guideline, there have been fewer “oversized” classes. Applying the current guideline, the number of “oversized” Grade K-5 classes decreased by 119 classes between FY04 and FY08.

Table E-2 Table Number and Percent of Elementary School Classes over BOE Maximum Class Size Guidelines

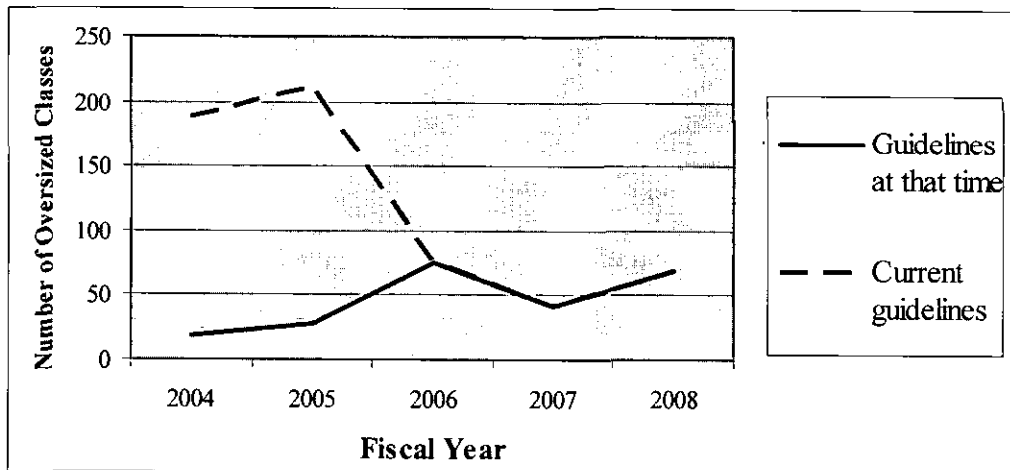
Grade	FY04	FY05	FY06	FY07	FY08	Change 2004-2008
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Part A: Guidelines in place at the time

Kindergarten	6	4	5	3	9	3
Grade 1	1	0	5	1	14	13
Grade 2	3	6	15	5	18	15
Grade 3	11	9	28	17	17	6
Grade 4	0	6	5	3	4	4
Grade 5	3	6	17	12	7	4
Total	18	27	75	41	69	51

Part B: All years compared to current guidelines

Kindergarten	6	4	5	3	9	3
Grade 1	16	28	5	1	14	-2
Grade 2	33	35	15	5	18	-15
Grade 3	58	47	28	17	17	-41
Grade 4	33	39	5	3	4	-29
Grade 5	42	59	17	12	7	-35
Total	188	212	75	41	69	-119



Appendix F:
MCPS Official Class Size Reports for the Board of Education, FY04 – FY08


- Official Class Size Report FY04..... ©119
- Official Class Size Report FY05..... ©132
- Official Class Size Report FY06..... ©146
- Official Class Size Report FY07..... ©158
- Official Class Size Report FY08..... ©167

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

December 10, 2003

MEMORANDUM

To: Members of the Board of Education

From: Jerry D. Weast, Superintendent of Schools 

Subject: Official Class Size Report—School Year 2003 – 2004

Attached are reports that reflect the status of class sizes throughout Montgomery County Public Schools (MCPS) as of October 31, 2003. The average class size chart below shows that the efforts taken over the last few years by the Board of Education and County Council to reduce elementary average class sizes have brought about a substantial decline in average class sizes.

Average Class Sizes By Level

Grade/Subject	1999- 2000	2000- 2001	2001- 2002	2002- 2003	2003- 2004
Elementary Schools					
Kindergarten	21.3	19.8	17.9	17.5	17.3
Grades 1-6	24.1	23.0	22.1	22.1	22.1
Middle Schools					
English	23.0	23.3	23.3	23.1	23.3
Other Academic	24.4	24.2	23.7	23.9	23.9
High Schools					
English	24.8	24.7	24.4	24.3	24.5
Other Academic	25.5	25.5	24.4	25.3	25.5

The following chart provides a summary of the number and percent of classes over the Board of Education maximum size guidelines for the past four years. At the secondary level, the number of classes that exceed the maximum class size guidelines is higher this year than last, largely due to the loss of reserve teacher positions from the FY 2004 operating budget. The number of K-12 large classes is similar to what was experienced in October 2000. For FY 2002, we were able to allocate additional positions because the fiscal situation was better. However, we have held positions in reserve this year and have not been able to make additional allocations as a result of the fiscal situation.

Number and Percent of Classes Over Board of Education Maximum Class Size Guidelines

Grade/Subject/Guideline	#Over 10/31/ 2000 (FY01)	#Over 10/31/ 2001 (FY02)	#Over 10/31/ 2002 (FY03)	#Over 10/31/ 2003 (FY04)	%Over 10/31/ 2000 (FY01)	%Over 10/31/ 2001 (FY02)	%Over 10/31/ 2002 (FY03)	%Over 10/31/ 2003 (FY04)
Elementary Schools								
Kindergarten (Over 28)	0	0	0	0	0%	0%	0%	0%
Grades 1-3 (Over 28)	13	9	27	13	1.0%	0.6%	1.9%	0.9%
Grades 4-6 (Over 30)	8	3	5	4	0.9%	0.4%	0.6%	0.5%
Middle Schools								
English (Over 28)	118	102	125	135	9.6%	8.1%	9.6%	10.6%
Other Academic (Over 32)	138	96	141	144	2.8%	1.8%	2.7%	2.7%
High Schools								
English (Over 28)	165	133	204	248	11.9%	9.1%	13.3%	15.8%
Other Academic (Over 32)	354	268	375	391	6.0%	4.3%	5.9%	6.0%

If you have any questions, please call Don Kress at 301-279-8715 or Larry Bowers at 301-279-3626.

JDW:lmk

Attachments

Copy to:

Executive Staff

School Performance Directors

STATISTICS ON ELEMENTARY AND SECONDARY CLASS SIZE

As of October 2003

INTRODUCTION

Average class size is only one of the criteria for evaluating staffing of schools for instructional purposes. The elementary classroom teacher is provided with the support of specialists in physical education, music, art, reading, and/or library services. This kind of support is not reflected in class size figures.

Elementary school class sizes are summarized by grade (Attachment A). Pie charts illustrating the distribution of class sizes in kindergarten, Grades 1-3, and Grades 4-6 also are provided (Attachment B). Statistics on secondary class size are reported by academic subjects and are summarized by middle and high school levels (Attachment C). Average elementary and secondary class sizes from 1993 through the current school year also are shown for comparison (Attachment D).

ATTACHMENT A

Grade	Total Number of Pupils and Classes	Average Class Size	Distribution of Number and Percent of Pupils in Classes of the Size Indicated, and of Number and Percent of Classes in Each Size Category											
			Below 16		16-20		21-26		27-28		29-30		Over 30	
			N	%	N	%	N	%	N	%	N	%	N	%
1	Pupils 9,504 Classes 502	18.9	1,625 115	17.1 22.9	3,614 208	38.0 41.4	3,879 165	40.8 32.9	357 13	3.8 2.6	29 1	0.3 0.2		
1-2 Comb.	Pupils 333 Classes 16	20.8	14 1	4.2 6.3	128 7	38.4 43.8	191 8	57.4 50.0						
2	Pupils 9,809 Classes 496	19.8	997 69	10.2 13.9	3,850 223	39.2 45.0	3,977 168	40.5 33.9	927 34	9.5 6.9	58 2	0.6 0.4		
2-3 Comb.	Pupils 64 Classes 3	21.3	20 1	31.3 33.3	44 2	68.8 66.7								
3	Pupils 9,967 Classes 427	23.3	87 6	0.9 1.4	1,144 60	11.5 14.1	7,063 301	70.9 70.5	1380 50	13.8 11.7	293 10	2.9 2.3		
3-4 Comb.	Pupils 184 Classes 8	23.0	13 1	7.1 12.5	144 6	78.3 75.0			27 1	14.7 12.5				
4	Pupils 9,582 Classes 390	24.6	58 4	0.6 1.0	494 26	5.2 6.7	6,007 252	62.7 64.6	2,030 74	21.2 19.0	993 34	10.4 8.7		
4-5 Comb.	Pupils 536 Classes 22	24.4	40 2	7.5 9.1	382 16	71.3 72.7			56 2	10.4 9.1	58 2	10.8 9.1		
5	Pupils 9,743 Classes 392	24.9	11 1	0.1 0.3	456 24	4.7 6.1	6,354 264	65.2 67.3	1,593 58	16.4 14.8	1,204 41	12.4 10.5	125 4	1.3 1.0
6	Pupils 156 Classes 6	26.0					102 4	65.4 66.7	54 2	34.6 33.3				
Not Section	Pupils 9 Classes 4	2.3	9 4	100.0 100.0										

COUNTY TOTALS

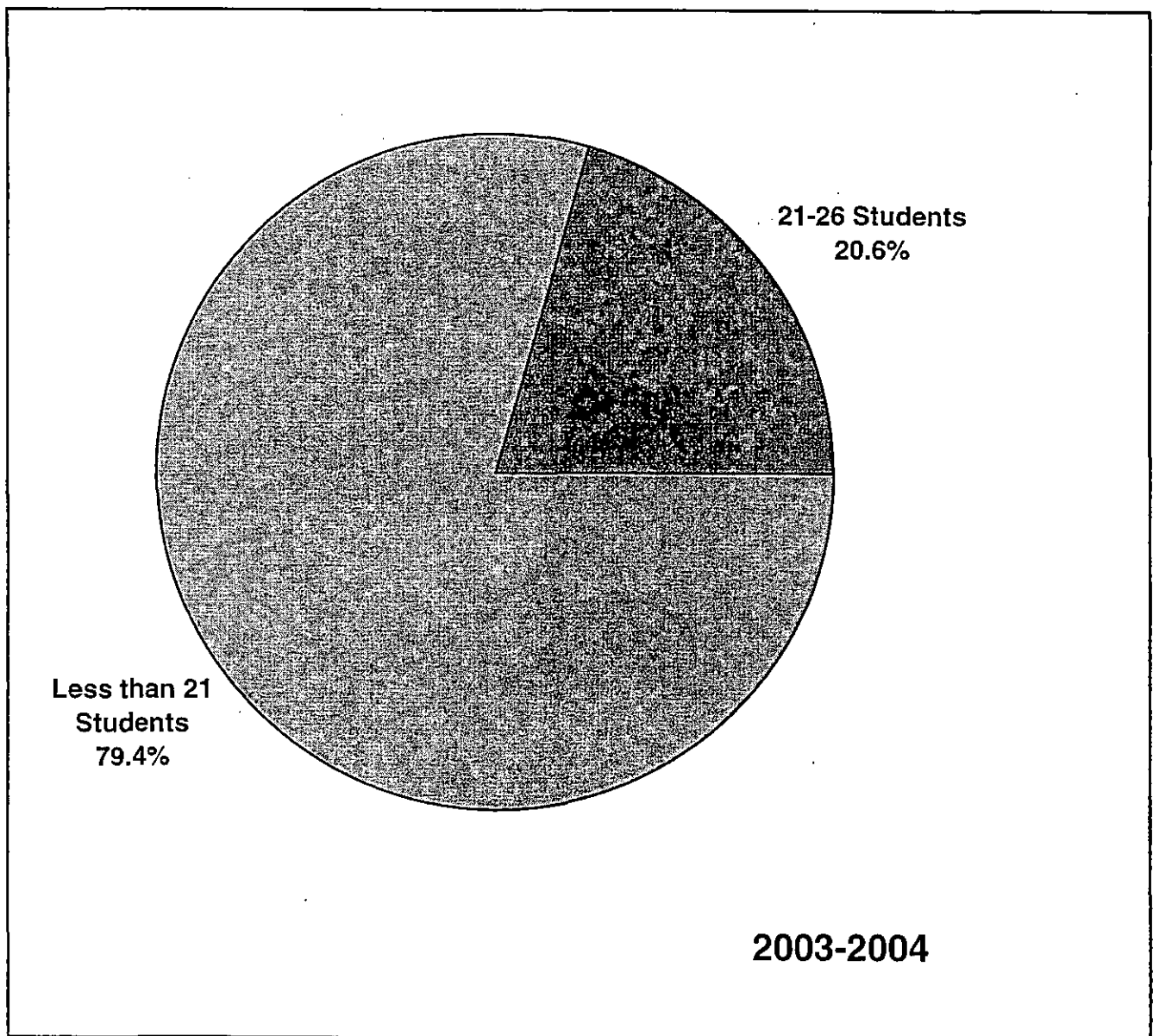
Grade	Total Number of Pupils and Classes	Average Class Size	Distribution of Number and Percent of Pupils in Classes of the Size Indicated, and of Number and Percent of Classes in Each Size Category											
			Below 16		16-20		21-26		27-28		29-30		Over 30	
			N	%	N	%	N	%	N	%	N	%	N	%
Total 1-3 & Comb.	Pupils 29,677 Classes 1,444	20.6	2,723	9.2	8,756	29.5	15,154	51.0	2,664	9.0	380	1.3		
			191	13.2	499	34.6	644	44.6	97	6.7	13	0.9		
Total 4-6 & Comb.	Pupils 20,201 Classes 818	24.7	82	0.4	990	4.9	12,989	64.3	3,760	18.6	2,255	11.2	125	0.6
			6	0.7	52	6.4	542	66.3	137	16.7	77	9.4	4	0.5
Total 1-6 & Comb.	Pupils 49,878 Classes 2,262	22.1	2,805	5.6	9,746	19.5	28,143	56.4	6,424	12.9	2,635	5.3	125	0.3
			197	8.7	551	24.4	1,186	52.4	234	10.3	90	4.0	4	0.2
Kindergarten	Pupils 8,955 Classes 519	17.3	2,913	32.5	3,561	39.8	2,481	27.7						
			208	40.1	204	39.3	107	20.6						
Total K-6 & Comb.	Pupils 58,833 Classes 2,781	21.2	5,718	9.7	13,307	22.6	30,624	52.1	6,424	10.9	2,635	4.5	125	0.2
			405	14.6	755	27.1	1,293	46.5	234	8.4	90	3.2	4	0.1
Special Ed.	Pupils 2,684 Classes 354	7.6	2,542	94.7	121	4.5	21	0.8						
			346	97.7	7	2.0	1	0.3						
Head Start & MCPS Pre-K	Pupils 2,302 Classes 117	19.7	70	3.0	1,980	86.0	252	10.9						
			5	4.3	100	85.5	12	10.3						
Grand Total	Pupils 63,828 Classes 3,256													

Distribution of Kindergarten Class Size Data

Year	Less than 21 Students		21-26 Students		27-28 Students		More than 28 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2003-2004	412	79.4%	107	20.6%	0	0.0%	0	0%	519	100%
2002-2003	412	78.9%	105	20.1%	5	1.0%	0	0%	522	100%

- Number of Classes

% - Percent of Classes

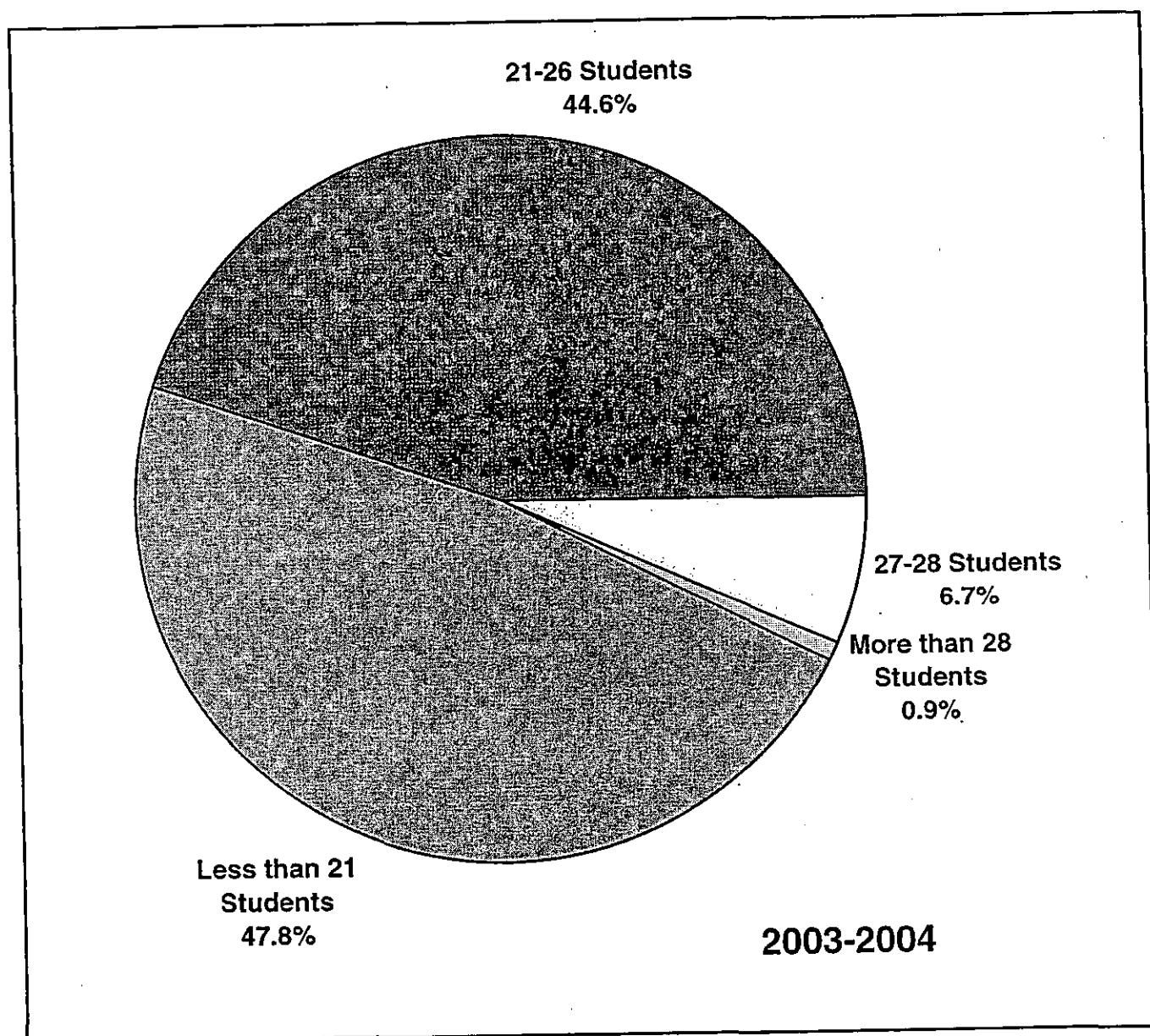


Distribution of Grades 1-3 Class Size Data

Year	Less than 21 Students		21-26 Students		27-28 Students		More than 28 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2003-2004	690	47.8%	644	44.6%	97	6.7%	13	0.9%	1444	100%
2002-2003	692	48.0%	632	43.8%	91	6.3%	27	1.9%	1442	100%

- Number of Classes

% - Percent of Classes



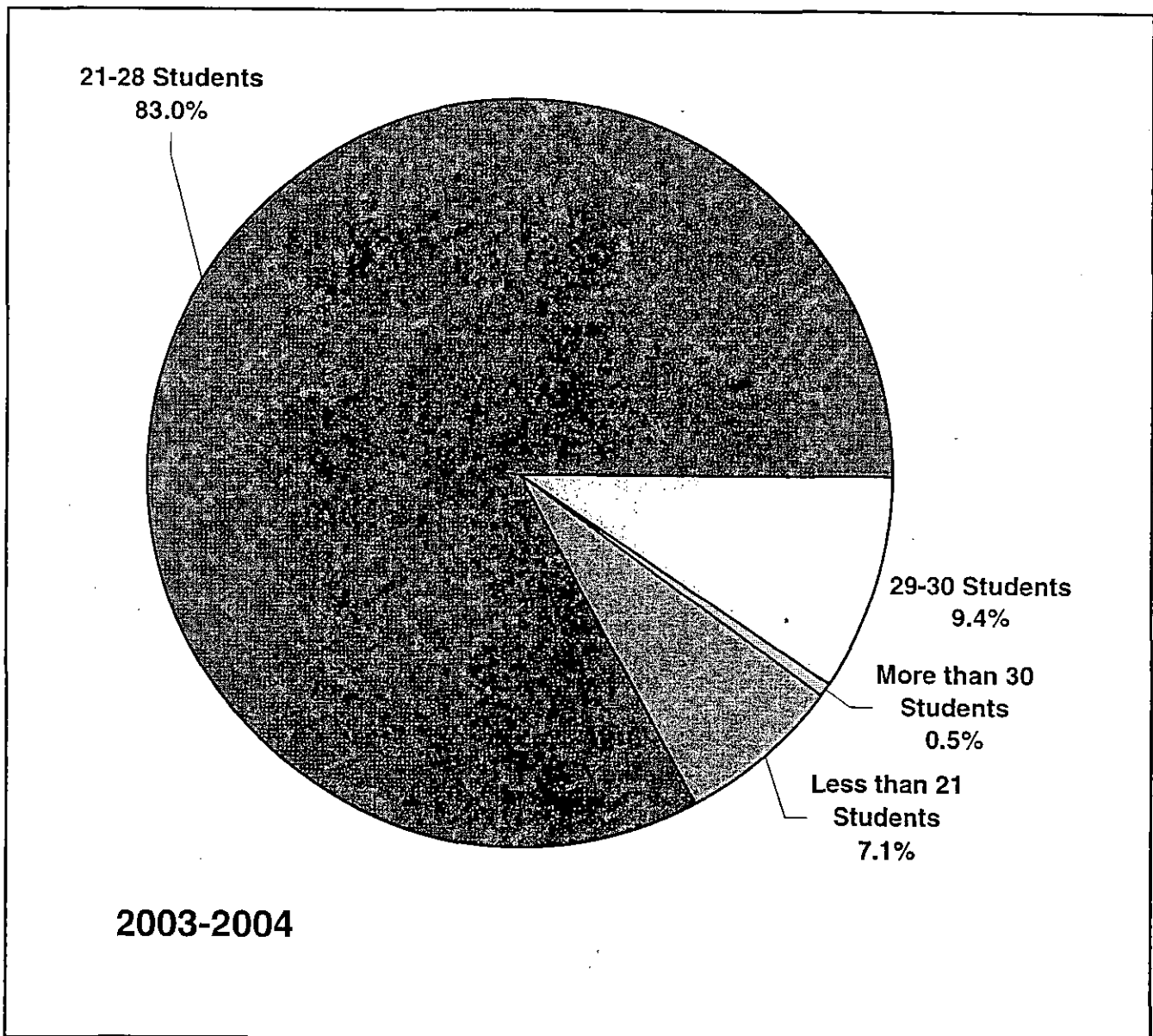
Distribution of Grades 4-6

Class Size Data

Year	Less than 21 Students		21-28 Students		29-30 Students		More than 30 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2003-2004	58	7.1%	679	83.0%	77	9.4%	4	0.5%	818	100%
2002-2003	66	7.8%	698	83.1%	71	8.5%	5	0.6%	840	100%

- Number of Classes

% - Percent of Classes



MCPS SECONDARY CLASS SIZE FOR SCHOOL YEAR 2003-2004
CLASS SIZE DISTRIBUTION: SUMMARY BY LEVEL
BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/31/03

REPORT NEW1S

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
LEVEL				N	%	N	%	N	%	N	%	N	%
MID	RQD ENG.	PUPILS	29591	4876	16.5	11594	39.2	9046	30.6	3804	12.9	271	.9
		CLASSES	1271	301	23.7	500	39.3	335	26.4	127	10.0	8	.6
	OTHR ENG	PUPILS	14601	4907	33.6	5288	36.2	3245	22.2	987	6.8	174	1.2
		CLASSES	742	354	47.7	229	30.9	121	16.3	33	4.4	5	.7
	FORGN LANG	PUPILS	15160	2097	13.8	4209	27.8	2944	19.4	4935	32.6	975	6.4
		CLASSES	608	126	20.7	182	29.9	109	17.9	162	26.6	29	4.8
	SOCIAL STUDY	PUPILS	30986	3188	10.3	7657	24.7	7717	24.9	10824	34.9	1600	5.2
		CLASSES	1220	200	16.4	330	27.0	286	23.4	356	29.2	48	3.9
	MATH	PUPILS	31658	7159	22.6	9971	31.5	7392	23.3	6234	19.7	902	2.8
		CLASSES	1390	449	32.3	433	31.2	274	19.7	207	14.9	27	1.9
	SCIENCE	PUPILS	33898	3251	9.6	8498	25.1	8003	23.6	12977	38.3	1169	3.4
		CLASSES	1320	196	14.8	366	27.7	296	22.4	427	32.3	35	2.7
	TOTAL ACAD*	PUPILS	155894	25478	16.3	47217	30.3	38347	24.6	39761	25.5	5091	3.3
		CLASSES	6551	1626	24.8	2040	31.1	1421	21.7	1312	20.0	152	2.3
	ESOL	PUPILS	1979	1797	90.8	156	7.9	26	1.3	0	0.0	0	0.0
		CLASSES	171	163	95.3	7	4.1	1	.6	0	0.0	0	0.0
	NON-ACAD	PUPILS	56471	3837	6.8	8395	14.9	9904	17.5	16504	29.2	17831	31.6
		CLASSES	2003	274	13.7	358	17.9	365	18.2	542	27.1	464	23.2

* INCLUDES REQUIRED ENGLISH AND OTHER ENGLISH (EXCLUDING ESOL),
SOCIAL STUDIES, MATH, SCIENCE AND FOREIGN LANGUAGES.

MCPs SECONDARY CLASS SIZE FOR SCHOOL YEAR 2003-2004
CLASS SIZE DISTRIBUTION: SUMMARY BY LEVEL
BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/31/03

REPORT NEW1S

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
				N	%	N	%	N	%	N	%	N	%
LEVEL													
SNR	RQD ENG.	38490 1571	24.5	4529	11.8	10489	27.3	16097	41.8	7206	18.7	169	.4
				280	17.8	451	28.7	592	37.7	243	15.5	5	.3
	OTHR ENG	5289 247	21.4	1431	27.1	1275	24.1	729	13.8	963	18.2	891	16.8
				108	43.7	55	22.3	27	10.9	32	13.0	25	10.1
	FORGN LANG	26106 1010	25.8	2656	10.2	6327	24.2	4771	18.3	10632	40.7	1720	6.6
				161	15.9	273	27.0	177	17.5	348	34.5	51	5.0
	SOCIAL STUDY	43534 1666	26.1	4848	11.1	7363	16.9	7916	18.2	19200	44.1	4207	9.7
				309	18.5	317	19.0	292	17.5	623	37.4	125	7.5
	MATH	45261 1823	24.8	7631	16.9	10855	24.0	7746	17.1	15815	34.9	3214	7.1
				451	24.7	472	25.9	287	15.7	517	28.4	96	5.3
	SCIENCE	46140 1782	25.9	4946	10.7	9292	20.1	9083	19.7	19670	42.6	3149	6.8
				310	17.4	400	22.4	336	18.9	642	36.0	94	5.3
	TOTAL ACAD*	204820 8099	25.3	26041	12.7	45601	22.3	46342	22.6	73486	35.9	13350	6.5
				1619	20.0	1968	24.3	1711	21.1	2405	29.7	396	4.9
	ESOL	3464 249	13.9	3128	90.3	309	8.9	27	.8	0	0.0	0	0.0
				234	94.0	14	5.6	1	.4	0	0.0	0	0.0
	NON-ACAD	69854 2592	26.9	7243	10.4	9050	13.0	11388	16.3	24900	35.6	17263	24.7
				506	19.5	390	15.0	419	16.2	815	31.4	462	17.8

MCPS SECONDARY CLASS SIZE FOR SCHOOL YEAR 2003-2004
 CLASS SIZE DISTRIBUTION: SUMMARY FOR ALGEBRA 1
 BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
				N	%	N	%	N	%	N	%	N	%
LEVEL SNR		388	20.4	210	54.1	178	45.9	0	0.0	0	0.0	0	0.0
	PUPILS CLASSES	19	.	11	57.9	8	42.1	0	0.0	0	0.0	0	0.0
G9 ALGI		1229	18.9	818	66.6	411	33.4	0	0.0	0	0.0	0	0.0
	PUPILS CLASSES	65	.	46	70.8	19	29.2	0	0.0	0	0.0	0	0.0
MIXED GRD ALG		4564	19.8	2134	46.8	1952	42.8	301	6.6	177	3.9	0	0.0
	PUPILS CLASSES	231	.	127	55.0	87	37.7	11	4.8	6	2.6	0	0.0
ALL ALG I		5793	19.6	2952	51.0	2363	40.8	301	5.2	177	3.1	0	0.0
	PUPILS CLASSES	296	.	173	58.4	106	35.8	11	3.7	6	2.0	0	0.0

MCPS SECONDARY CLASS SIZE FOR SCHOOL YEAR 2003-2004
 CLASS SIZE DISTRIBUTION: SUMMARY FOR 7TH GRADE MATH
 CLASSES WITH ONLY 7TH GRADE STUDENTS ARE INCLUDED
 BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/31/03

LEVEL	SUBJECT	BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/31/03												CLASSES	
		TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT. 32			
				N	%	N	%	N	%	N	%	N	%	N	%
MID	FUNC. SKILLS	PUPILS	230	17.7	138	60.0	66	28.7	26	11.3	0	0.0	0	0.0	
		CLASSES	13		9	69.2	3	23.1	1	7.7	0	0.0	0	0.0	
	MATH B	PUPILS	4944	20.6	1804	36.5	1858	37.6	867	17.5	415	8.4	0	0.0	
		CLASSES	240		112	46.7	82	34.2	32	13.3	14	5.8	0	0.0	
	MATH C	PUPILS	1061	24.1	250	23.6	282	26.6	161	15.2	269	25.4	99	9.3	
		CLASSES	44		14	31.8	12	27.3	6	13.6	9	20.5	3	6.8	
	MATH INV.	PUPILS	1156	24.6	200	17.3	229	19.8	384	33.2	240	20.8	103	8.9	
		CLASSES	47		12	25.5	10	21.3	14	29.8	8	17.0	3	6.4	
	ALG 1	PUPILS	1064	24.7	181	17.0	255	24.0	325	30.5	303	28.5	0	0.0	
		CLASSES	43		10	23.3	11	25.6	12	27.9	10	23.3	0	0.0	
	TOTAL	PUPILS	8455	21.8	2573	30.4	2690	31.8	1763	20.9	1227	14.5	202	2.4	
		CLASSES	387		157	40.6	118	30.5	65	16.8	41	10.6	6	1.6	

Average Class Sizes 1993-94 to 2003-04

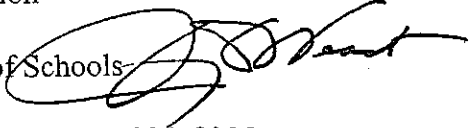
	93-94	94-95	95-96	96-97	97-98	98-99	99-2000	2000-01	2001-02	2002-03	2003-2004
Elementary											
Kindergarten	21.7	21.7	22.0	21.5	21.3	21.0	21.3	19.8	17.9	17.5	17.3
Grade 1	23.5	23.4	24.0	23.7	23.8	23.6	22.8	20.8	19.7	19.2	18.9
1-2 Combination	22.8	24.0	23.5	22.7	22.8	22.8	23.4	21.9	20.5	20.0	20.8
Grade 2	23.9	24.2	24.6	24.5	24.5	24.3	23.7	21.7	19.6	19.8	19.8
2-3 Combination	23.8	23.5	24.0	23.4	24.0	23.3	23.2	23.0	23.0	23.4	21.3
Grade 3	24.7	24.3	25.4	24.9	25.3	24.9	23.8	23.9	23.1	23.7	23.3
3-4 Combination	24.4	24.3	24.5	24.4	24.2	24.4	20.0	22.9	21.2	22.7	23.0
Grade 4	24.9	25.2	25.7	25.5	25.6	25.5	24.8	24.3	24.3	24.2	24.6
4-5 Combination	25.1	25.1	24.8	25.4	25.6	24.7	24.1	22.8	24.2	23.7	24.4
Grade 5	25.4	25.1	26.0	26.3	25.3	25.5	25.4	24.7	24.8	25.0	24.9
5-6 Combination	25.3	27.0	28.0	24.0	24.0	N/A	N/A	N/A	N/A	N/A	N/A
Grade 6	25.0	25.1	26.3	24.8	24.0	22.5	23.5	23.9	23.3	26.3	26.0
Total 1-6	24.5	24.4	25.1	24.9	24.8	24.7	24.1	23.0	22.1	22.1	22.1
Middle											
English	23.9	23.6	23.9	24.2	24.1	23.3	23.0	23.3	23.3	23.1	23.3
Other Academic	24.8	24.3	25.0	25.5	25.4	24.4	24.4	24.2	23.7	23.9	23.9
High											
English	24.4	24.4	25.1	25.0	25.4	24.8	24.8	24.7	24.4	24.3	24.5
Other Academic	25.4	25.7	26.2	26.7	26.8	25.8	25.5	25.5	25.4	25.3	25.5

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

December 17, 2004

MEMORANDUM

To: Members of the Board of Education

From: Jerry D. Weast, Superintendent of Schools 

Subject: Official Class Size Report—School Year 2004–2005

Attached are reports that reflect the status of class sizes throughout the Montgomery County Public Schools (MCPS) as of October 31, 2004. The average class size chart below shows that the efforts taken over the last few years by the Board of Education and County Council to reduce elementary class sizes have brought about a substantial decline in average elementary class sizes.

Average Class Sizes By Level

Grade/Subject	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
Elementary Schools						
Kindergarten	21.3	19.8	17.9	17.5	17.3	17.5
Grades 1-6	24.1	23.0	22.1	22.1	22.1	22.1
Middle Schools						
English	23.0	23.3	23.3	23.1	23.3	23.5
Other Academic	24.4	24.2	23.7	23.9	23.9	24.2
High Schools						
English	24.8	24.7	24.4	24.3	24.5	24.8
Other Academic	25.5	25.5	24.4	25.3	25.5	25.6

The following chart provides a summary of the number and percent of classes over the Board of Education maximum size guidelines for the past five years. At the high school level, the number of classes that exceed the maximum class size guidelines is higher this year than last year, and in kindergarten through Grade 8, the number of large classes is similar to what was experienced last year. It should be noted that 24 percent of middle school and nearly 20 percent of high school academic classes have 20 or fewer students this year. Many of these smaller classes, which are a result of scheduling decisions at the local school level, are intervention programs for students who are below grade level in reading and/or math or new advanced placement (AP) classes. As we increase rigor in our high schools and add more AP offerings, it often takes several years for these classes to reach full enrollment. Since middle schools have an average academic class size

of approximately 24 students, and high schools of nearly 25.5 students, having 20 percent of our classes with 20 or fewer students increases the percentage of classes that exceed class size guidelines. Class size initiatives in the proposed FY 2006 Operating Budget should enable us to significantly decrease the number of oversized classes at all levels.

Number and Percent of Classes Over Board of Education Maximum Class Size Guidelines

Grade/Subject/Guideline	#Over 10/31/ 2000 (FY01)	#Over 10/31/ 2001 (FY02)	#Over 10/31/ 2002 (FY03)	#Over 10/31/ 2003 (FY04)	#Over 10/31/ 2004 (FY05)	%Over 10/31/ 2000 (FY01)	%Over 10/31/ 2001 (FY02)	%Over 10/31/ 2002 (FY03)	%Over 10/31/ 2003 (FY04)	%Over 10/31/ 2004 (FY05)
Elementary Schools										
Kindergarten (Over 28)	0	0	0	0	0	0%	0%	0%	0%	0%
Grades 1-3 (Over 28)	13	9	27	13	15	1.0%	0.6%	1.9%	0.9%	1.1%
Grades 4-6 (Over 30)	8	3	5	4	12	0.9%	0.4%	0.6%	0.5%	1.4%
Middle Schools										
English (Over 28)	118	102	125	135	175	9.6%	8.1%	9.6%	10.6%	14.1%
Other Academic (Over 32)	138	96	141	144	109	2.8%	1.8%	2.7%	2.7%	2.2%
High Schools										
English (Over 28)	165	133	204	248	324	11.9%	9.1%	13.3%	15.8%	20.5%
Other Academic (Over 32)	354	268	375	391	457	6.0%	4.3%	5.9%	6.0%	7.1%

Please call Mr. Don Kress, at 301-279-8715, or Mr. Larry Bowers, at 301-279-3626, if you have any questions.

JDW:lmk

Attachments

Copy to:

Executive Staff

School Performance Directors

STATISTICS ON ELEMENTARY AND SECONDARY CLASS SIZE

As of October 2004

INTRODUCTION

Elementary school class sizes are summarized by grade in Attachment A. Pie charts illustrating the distribution of class sizes in Kindergarten, Grades 1–3, and Grades 4–6 also are provided (Attachment B). Statistics on secondary class size are reported by academic subjects and are summarized by middle and high school levels (Attachment C). The charts on C-3 and C-4 show the class sizes in Grade 7 math and high school Algebra 1, which are areas affected by reduced class size initiatives of the Board of Education. Average elementary and secondary class sizes from 1994 through the current school year also are shown in Attachment D. The list of elementary school combination classes is provided on Attachment E.

Although average class size is an important measure for assessing the level of staffing of schools for instructional purposes, the elementary ratios do not reflect the support that is provided by specialists in physical education, music, art, reading, and library services.

Office of Strategic Technologies and Accountability
Montgomery County Public Schools
Rockville, Maryland 20850

COUNTY TOTALS

Grade	Total Number of Pupils and Classes	Average Class Size	Distribution of Number and Percent of Pupils in Classes of the Size Indicated, and of Number and Percent of Classes in Each Size Category											
			Below 16		16-20		21-26		27-28		29-30		Over 30	
			N	%	N	%	N	%	N	%	N	%	N	%
1	Pupils 9,409 Classes 488	19.3	1,439 102	15.3 20.9	3,490 201	37.1 41.2	3,712 157	39.4 32.2	768 28	8.2 5.7				
1-2 Comb.	Pupils 316 Classes 15	21.1	25 2	7.9 13.3	71 4	22.5 26.7	193 8	61.1 53.3	27 1	8.5 6.7				
2	Pupils 9,412 Classes 478	19.7	1,168 81	12.4 17.0	3,566 206	37.9 43.1	3,710 156	39.4 32.6	790 29	8.4 6.1	116 4	1.2 0.8	62 2	0.7 0.4
2-3 Comb.	Pupils 120 Classes 5	24.0					120 5	100.0 100.0						
3	Pupils 9,814 Classes 424	23.1	50 4	0.5 0.9	1,187 62	12.1 14.6	7,274 311	74.1 73.4	1042 38	10.6 9.0	261 9	2.7 2.1		
3-4 Comb.	Pupils 115 Classes 5	23.0			20 1	17.4 20.0	68 3	59.1 60.0	27 1	23.5 20.0				
4	Pupils 9,833 Classes 401	24.5	28 2	0.3 0.5	921 49	9.4 12.2	5,339 224	54.3 55.9	2,391 87	24.3 21.7	966 33	9.8 8.2	188 6	1.9 1.5
4-5 Comb.	Pupils 361 Classes 16	22.6			73 4	20.2 25.0	232 10	64.3 62.4	27 1	7.5 6.3	29 1	8.0 6.3		
5	Pupils 9,737 Classes 389	25.0			327 17	3.3 4.4	5,693 241	58.5 62.0	1,973 72	20.3 18.5	1,557 53	16.0 13.6	187 6	1.9 1.5
6	Pupils 156 Classes 6	26.0					102 4	65.4 66.7	54 2	34.6 33.3				
Not Section	Pupils 8 Classes 8	1	8 8	100.0 100.0										

COUNTY TOTALS

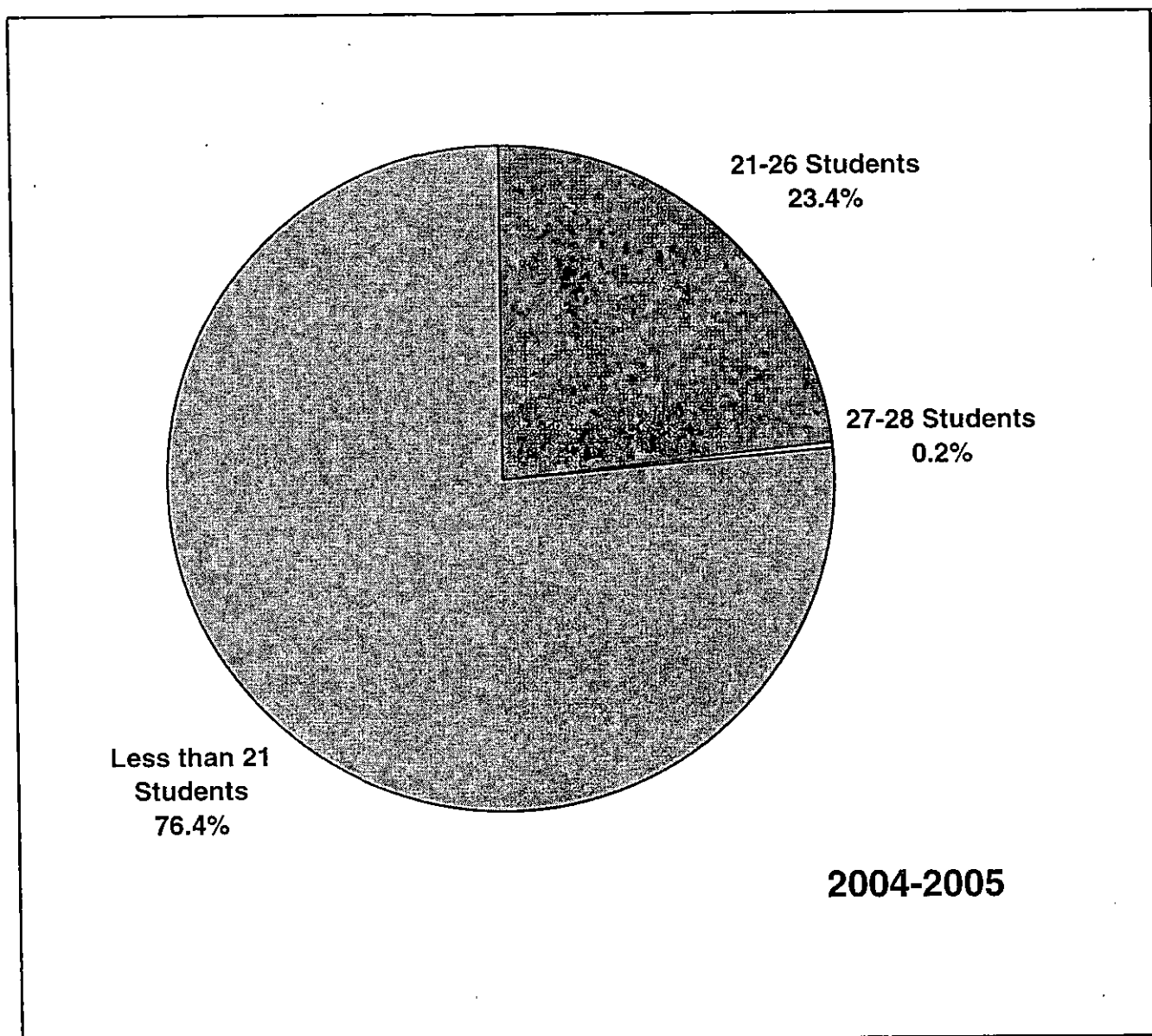
Grade	Total Number of Pupils and Classes	Average Class Size	Distribution of Number and Percent of Pupils in Classes of the Size Indicated, and of Number and Percent of Classes in Each Size Category											
			Below 16		16-20		21-26		27-28		29-30		Over 30	
			N	%	N	%	N	%	N	%	N	%	N	%
Total 1-3 & Comb.	Pupils 29,071 Classes 1,410	20.6	2,682 189	9.2 13.4	8,314 473	28.6 33.6	15,009 637	51.6 45.2	2,627 96	9.1 6.8	377 13	1.3 0.9	62 2	0.2 0.1
Total 4-6 & Comb.	Pupils 20,202 Classes 817	24.7	28 2	0.1 0.2	1,341 71	6.7 8.7	11,434 482	56.6 59.0	4,472 163	22.1 20.0	2,552 87	12.6 10.6	375 12	1.9 1.5
Total 1-6 & Comb.	Pupils 49,273 Classes 2,227	22.1	2,710 191	5.5 8.6	9,655 544	19.6 24.4	26,443 1,119	53.7 50.3	7,099 259	14.4 11.6	2,929 100	5.9 4.5	437 14	0.9 0.6
Kindergarten	Pupils 8,938 Classes 512	17.5	2,739 195	30.7 38.1	3,436 196	38.4 38.3	2,736 120	30.6 23.4	27 1	0.3 0.2				
Total K-6 & Comb.	Pupils 58,211 Classes 2,739	21.3	5,449 386	9.4 14.1	13,091 740	22.5 27.0	29,179 1,239	50.1 45.2	7,126 260	12.2 9.5	2,929 100	5.0 3.7	437 14	0.8 0.5
Special Ed.	Pupils 2,785 Classes 367	7.6	2,603 357	93.5 97.3	96 6	3.4 1.6	86 4	3.1 1.1						
Head Start & MCPS Pre-K	Pupils 2,475 Classes 130	19.0	235 17	9.5 13.1	1,344 71	54.3 54.6	896 42	36.2 32.3						
Grand Total	Pupils 63,479 Classes 3,244													

Distribution of Kindergarten Class Size Data

Year	Less than 21 Students		21-26 Students		27-28 Students		More than 28 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2004-2005	391	76.4%	120	23.4%	1	0.2%	0	0%	512	100%
2003-2004	412	79.4%	107	20.6%	0	0.0%	0	0%	519	100%

- Number of Classes

% - Percent of Classes



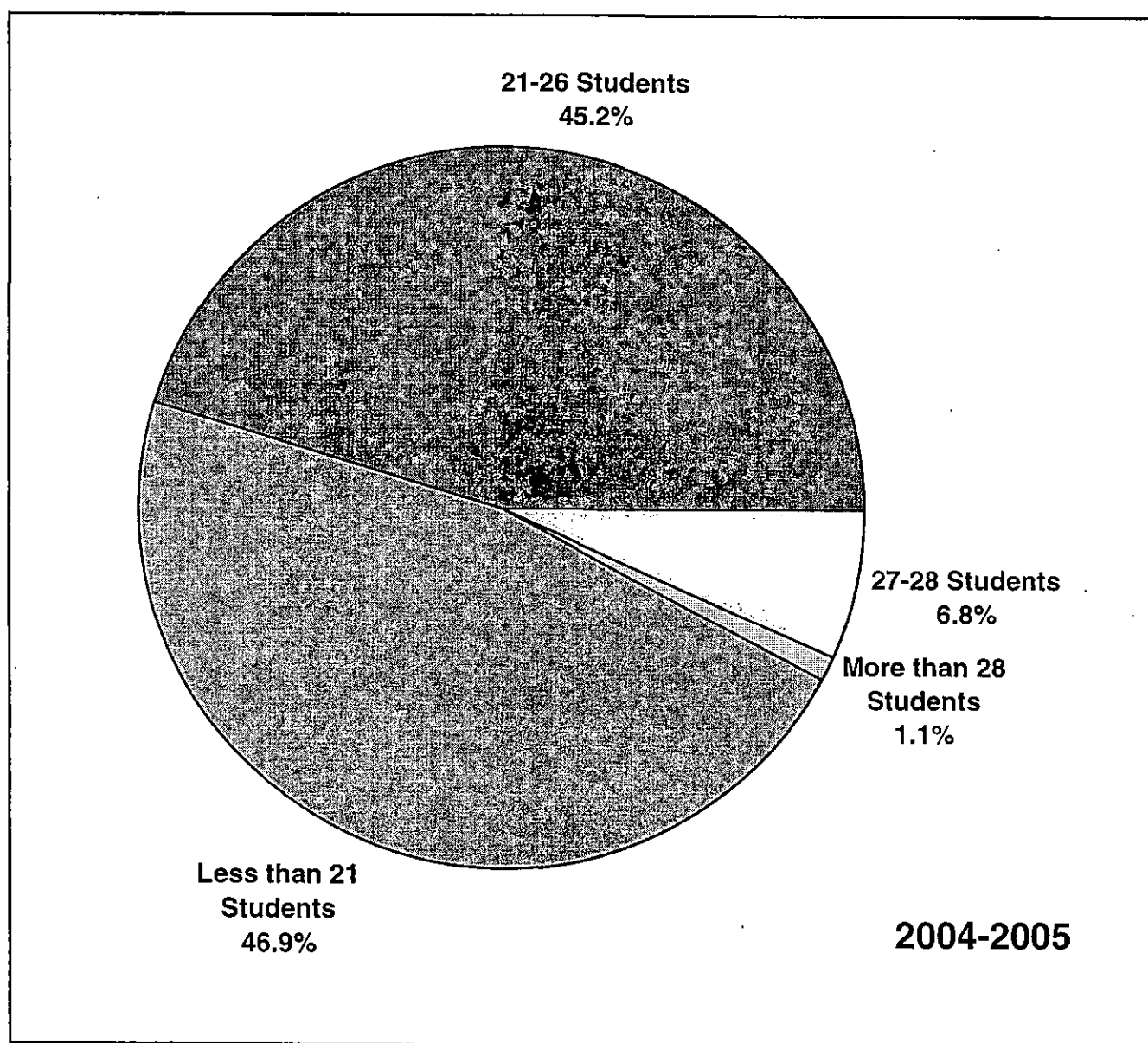
Distribution of Grades 1-3

Class Size Data

Year	Less than 21 Students		21-26 Students		27-28 Students		More than 28 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2004-2005	662	46.9%	637	45.2%	96	6.8%	15	1.1%	1410	100%
2003-2004	690	47.8%	644	44.6%	97	6.7%	13	0.9%	1444	100%

- Number of Classes

% - Percent of Classes



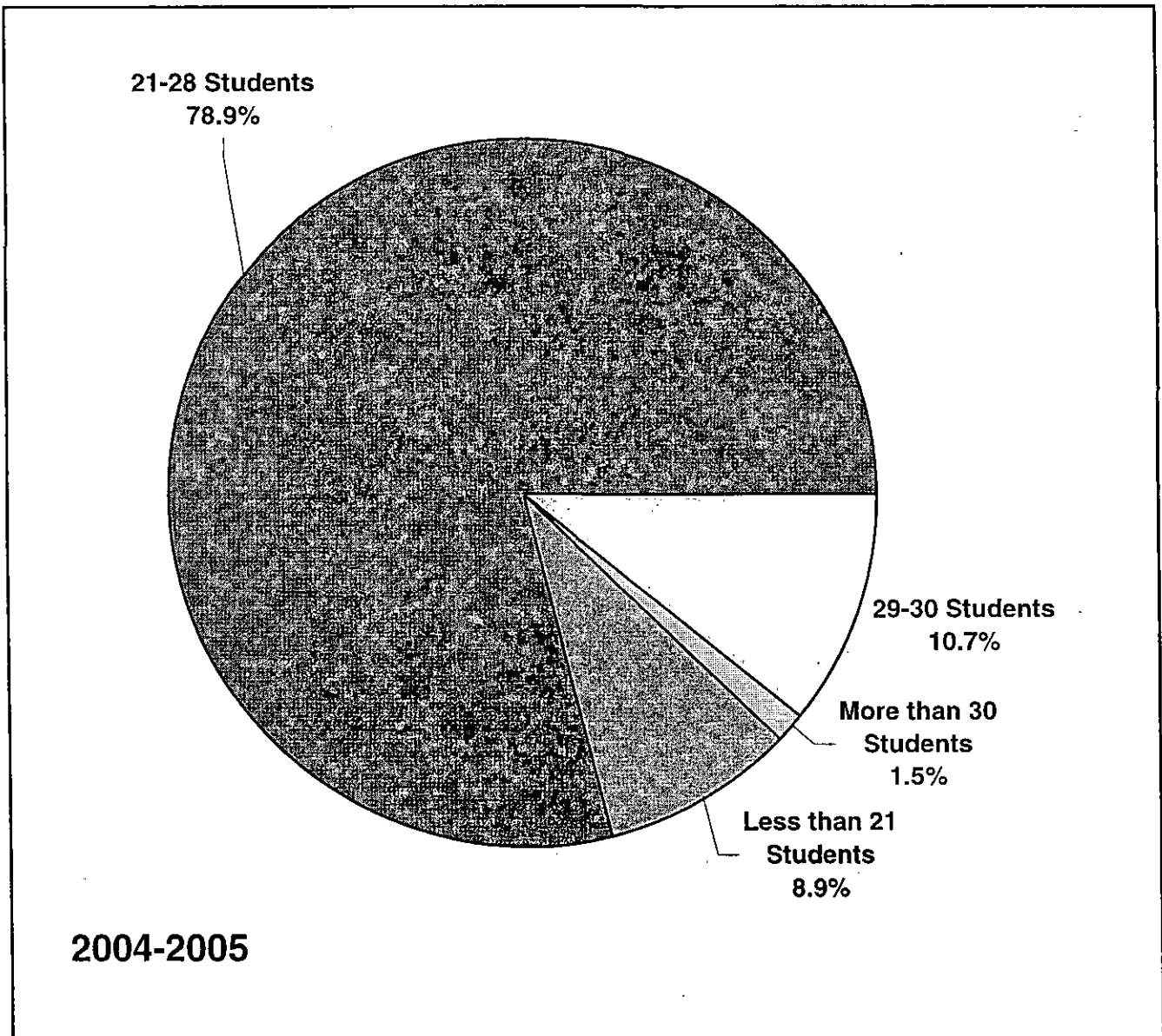
Distribution of Grades 4-6

Class Size Data

Year	Less than 21 Students		21-28 Students		29-30 Students		More than 30 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2004-2005	73	8.9%	645	78.9%	87	10.7%	12	1.5%	817	100%
2003-2004	58	7.1%	679	83.0%	77	9.4%	4	0.5%	818	100%

- Number of Classes

% - Percent of Classes



MCP5 SECONDARY CLASS SIZE FOR SCHOOL YEAR 2004-2005
CLASS SIZE DISTRIBUTION: SUMMARY BY LEVEL
BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/30/04

REPORT NEW15

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
LEVEL				N	%	N	%	N	%	N	%	N	%
MID	RQD ENG. PUPILS CLASSES	29148 1241	23.5	4498 287	15.4 23.1	10040 433	34.4 34.9	9351 346	32.1 27.9	4959 166	17.0 13.4	300 9	1.0 .7
		13270 674	19.7	4556 328	34.3 48.7	4327 188	32.6 27.9	3161 117	23.8 17.4	1159 39	8.7 5.8	67 2	.5 .3
	FORGN LANG PUPILS CLASSES	15518 630	24.6	2370 145	15.3 23.0	4041 174	26.0 27.6	3450 128	22.2 20.3	4741 156	30.6 24.8	916 27	5.9 4.3
		30336 1174	25.8	2852 180	9.4 15.3	6313 271	20.8 23.1	7268 269	24.0 22.9	12930 425	42.6 36.2	973 29	3.2 2.5
	MATH PUPILS CLASSES	31155 1363	22.9	6648 416	21.3 30.5	10581 458	34.0 33.6	7130 265	22.9 19.4	6324 210	20.3 15.4	472 14	1.5 1.0
		30524 1154	26.5	2294 142	7.5 12.3	5946 255	19.5 22.1	7369 272	24.1 23.6	13680 448	44.8 38.8	1235 37	4.0 3.2
	TOTAL ACAD* PUPILS CLASSES	149951 6236	24.0	23218 1498	15.5 24.0	41248 1779	27.5 28.5	37729 1397	25.2 22.4	43793 1444	29.2 23.2	3963 118	2.6 1.9
		1770 161	11.0	1727 159	97.6 98.8	43 2	2.4 1.2	0 0	0.0 0.0	0 0	0.0 0.0	0 0	0.0 0.0
	NON-ACAD PUPILS CLASSES	61930 2217	27.9	4774 324	7.7 14.6	8771 376	14.2 17.0	10877 401	17.6 18.1	18607 611	30.0 27.6	18901 505	30.5 22.8

* INCLUDES REQUIRED ENGLISH AND OTHER ENGLISH (EXCLUDING ESOL),
SOCIAL STUDIES, MATH, SCIENCE AND FOREIGN LANGUAGES.

MCPs SECONDARY CLASS SIZE FOR SCHOOL YEAR 2004-2005
CLASS SIZE DISTRIBUTION: SUMMARY BY LEVEL
BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/30/04

REPORT NEW1S

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32		
LEVEL				N	%	N	%	N	%	N	%	N	%	
SNR	ROD ENG.	PUPILS	39197	4262	10.9	9933	25.3	15355	39.2	9482	24.2	165	.4	
		CLASSES	1579	266	16.8	425	26.9	564	35.7	319	20.2	5	.3	
	OTHR ENG	PUPILS	5245	21.7	1490	28.4	1237	23.6	756	14.4	1128	21.5	634	12.1
		CLASSES	242		107	44.2	53	21.9	28	11.6	37	15.3	17	7.0
	FORGN LANG	PUPILS	26562	3324	12.5	6275	23.6	4744	17.9	9954	37.5	2265	8.5	
		CLASSES	1044	203	19.4	273	26.1	176	16.9	325	31.1	67	6.4	
	SOCIAL STUDY	PUPILS	44178	4995	11.3	7370	16.7	7912	17.9	19026	43.1	4875	11.0	
		CLASSES	1686	313	18.6	316	18.7	292	17.3	620	36.8	145	8.6	
	MATH	PUPILS	46317	6518	14.1	9363	20.2	8827	19.1	17065	36.8	4544	9.8	
		CLASSES	1828	406	22.2	407	22.3	326	17.8	554	30.3	135	7.4	
	SCIENCE	PUPILS	42407	4601	10.8	8478	20.0	8138	19.2	18052	42.6	3138	7.4	
		CLASSES	1637	290	17.7	365	22.3	301	18.4	588	35.9	93	5.7	
	TOTAL ACAD*	PUPILS	203906	25190	12.4	42656	20.9	45732	22.4	74707	36.6	15621	7.7	
		CLASSES	8016	1585	19.8	1839	22.9	1687	21.0	2443	30.5	462	5.8	
	ESOL	PUPILS	3801	3216	84.6	417	11.0	131	3.4	0	0.0	37	1.0	
		CLASSES	260	236	90.8	18	6.9	5	1.9	0	0.0	1	.4	
	NON-ACAD	PUPILS	76175	9179	12.0	10508	13.8	11428	15.0	27367	35.9	17693	23.2	
		CLASSES	2852	615	21.6	452	15.8	422	14.8	891	31.2	472	16.5	

* INCLUDES REQUIRED ENGLISH AND OTHER ENGLISH (EXCLUDING ESOL),
SOCIAL STUDIES, MATH, SCIENCE AND FOREIGN LANGUAGES.

MCPS SECONDARY CLASS SIZE FOR SCHOOL YEAR 2004-2005
CLASS SIZE DISTRIBUTION: SUMMARY FOR 7TH GRADE MATH
CLASSES WITH ONLY 7TH GRADE STUDENTS ARE INCLUDED
BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/30/04

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
				N	%	N	%	N	%	N	%	N	%
MID	FUNC. SKILLS	PUPILS CLASSES	167 11	77	46.1	64	38.3	26	15.6	0	0.0	0	0.0
				7	63.6	3	27.3	1	9.1	0	0.0	0	0.0
	MATH B	PUPILS CLASSES	5426 273	2089	38.5	2312	42.6	906	16.7	119	2.2	0	0.0
				134	49.1	101	37.0	34	12.5	4	1.5	0	0.0
	MATH C	PUPILS CLASSES	777 33	180 10	23.2 30.3	260 11	33.5 33.3	216 8	27.8 24.2	121 4	15.6 12.1	0	0.0
HIGH	MATH INV.	PUPILS CLASSES	1156 43	38 2	3.3 4.7	334 14	28.9 32.6	270 10	23.4 23.3	480 16	41.5 37.2	34 1	2.9 2.3
				136 7	22.2 28.0	162 7	26.4 28.0	161 6	26.3 24.0	121 4	19.7 16.0	33 1	5.4 4.0
	ALG 1	PUPILS CLASSES	613 25	2520 160	31.0 41.6	3132 136	38.5 35.3	1579 59	19.4 15.3	841 28	10.3 7.3	67 2	.8 .5
	TOTAL	PUPILS CLASSES	8139 385										

MCPS SECONDARY CLASS SIZE FOR SCHOOL YEAR 2004-2005
 CLASS SIZE DISTRIBUTION: SUMMARY FOR ALGEBRA 1
 BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/30/04

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
				N	%	N	%	N	%	N	%	N	%
SNR	G9 ALGI	1549	19.4	801	51.7	476	30.7	185	11.9	87	5.6	0	0.0
		80	.	49	61.2	21	26.2	7	8.7	3	3.7	0	0.0
	MIXED GRD ALG	4536	22.1	1022	22.5	1781	39.3	1153	25.4	512	11.3	68	1.5
ALL ALG I	PUPILS CLASSES	205	.	65	31.7	78	38.0	43	21.0	17	8.3	2	1.0
		6085	21.4	1823	30.0	2257	37.1	1338	22.0	599	9.8	68	1.1
		285	.	114	40.0	99	34.7	50	17.5	20	7.0	2	.7

Average Class Sizes 1994-95 to 2004-05

	94-95	95-96	96-97	97-98	98-99	99-2000	2000-01	2001-02	2002-03	2003-04	2004-05
Elementary											
Kindergarten	21.7	22.0	21.5	21.3	21.0	21.3	19.8	17.9	17.5	17.3	17.5
Grade 1	23.4	24.0	23.7	23.8	23.6	22.8	20.8	19.7	19.2	18.9	19.3
1-2 Combination	24.0	23.5	22.7	22.8	22.8	23.4	21.9	20.5	20.0	20.8	21.1
Grade 2	24.2	24.6	24.5	24.5	24.3	23.7	21.7	19.6	19.8	19.8	19.7
2-3 Combination	23.5	24.0	23.4	24.0	23.3	23.2	23.0	23.0	23.4	21.3	24.0
Grade 3	24.3	25.4	24.9	25.3	24.9	23.8	23.9	23.1	23.7	23.3	23.1
3-4 Combination	24.3	24.5	24.4	24.2	24.4	20.0	22.9	21.2	22.7	23.0	23.0
Grade 4	25.2	25.7	25.5	25.6	25.5	24.8	24.3	24.3	24.2	24.6	24.5
4-5 Combination	25.1	24.8	25.4	25.6	24.7	24.1	22.8	24.2	23.7	24.4	22.6
Grade 5	25.1	26.0	26.3	25.3	25.5	25.4	24.7	24.8	25.0	24.9	25.0
5-6 Combination	27.0	28.0	24.0	24.0	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Grade 6	25.1	26.3	24.8	24.0	22.5	23.5	23.9	23.3	26.3	26.0	26.0
Total 1-6	24.4	25.1	24.9	24.8	24.7	24.1	23.0	22.1	22.1	22.1	22.1
Middle											
English	23.6	23.9	24.2	24.1	23.3	23.0	23.3	23.3	23.1	23.3	23.5
Other Academic	24.3	25.0	25.5	25.4	24.4	24.4	24.2	23.7	23.9	23.9	24.2
High											
English	24.4	25.1	25.0	25.4	24.8	24.8	24.7	24.4	24.3	24.5	24.8
Other Academic	25.7	26.2	26.7	26.8	25.8	25.5	25.5	25.4	25.3	25.5	25.6

Elementary School Combination Classes


School	Grades	# Students	# Classes
Bells Mill	2-3	26	1
Belmont	1-2	24	1
Bethesda	1-2	26	1
Bradley Hills	2-3	25	1
Bradley Hills	4-5	23	1
Broad Acres	3-4	20	1
Broad Acres	4-5	35	2
Brookhaven	1-2	16	1
Brookhaven	3-4	22	1
Burtonsville	1-2	23	1
Burnt Mills	4-5	19	1
Carderock Springs	3-4	20	1
Cedar Grove	1-2	25	1
Clarksburg	4-5	22	1
Darnestown	2-3	22	1
Dr. Charles R. Drew	4-5	22	1
DuFief	1-2	26	1
Flower Hill	1-2	20	1
Forest Knolls	4-5	25	1
Fox Chapel	1-2	13	1
Fox Chapel	4-5	24	1
Gaithersburg	4-5	19	1
Georgian Forest	4-5	24	1
Jackson Road	1-2	17	1
Lake Seneca	3-4	21	1
Monocacy	2-3	21	1
Poolesville	1-2	27	1
Rock Creek Forest	4-5	56	2
Sally K. Ride	1-2	12	1
Sally K. Ride	4-5	23	1
Sligo Creek	3-4	27	1
Somerset	1-2	23	1
Stonegate	2-3	26	1
Strawberry Knoll	3-4	25	1
Thurgood Marshall	4-5	23	1
Travilah	1-2	18	1
Waters Landing	1-2	22	1
Westover	1-2	24	1
William Tyler Page	4-5	22	1
Wood Acres	4-5	24	1
Total		932	42

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

December 13, 2005

MEMORANDUM

To: Members of the Board of Education

From: Jerry D. Weast, Superintendent of Schools 

Subject: Official Class Size Report—School Year 2005–2006

The attached class size report reflects the status of class sizes throughout the Montgomery County Public Schools (MCPS) as of October 31, 2005. The average class size chart below shows that the Board of Education and the County Council's initiative to reduce class sizes for 2005–2006 has resulted in a decline in Grades 1–5 class sizes.

Average Class Sizes By Level

Grade/Subject	2002- 2003 (FY03)	2003- 2004 (FY04)	2004- 2005 (FY05)	2005- 2006 (FY06)
Elementary Schools				
Kindergarten	17.5	17.3	17.5	17.7
Grades 1–5	22.1	22.1	22.1	21.1
Middle Schools				
English	23.1	23.3	23.5	23.2
Other Academic	23.9	23.9	24.2	23.8
High Schools				
English	24.3	24.5	24.8	24.7
Other Academic	25.3	25.5	25.6	25.5

For FY 2006, the Board of Education took historic action by reducing elementary class size guidelines for Grades 1–5 for the first time in twenty years. This unprecedented class size initiative enabled the Board of Education to reduce maximum class size guidelines for all elementary schools by two students, from 28 to 26 in Grades 1–3 and from 30 to 28 in Grades 4 and 5. The Board of Education also approved additional positions to eliminate elementary school combination classes unless a school chose to retain a combination class for educational reasons or in exceptional cases including small schools. There are only seven combination classes in elementary schools this year with an average class size of 21 students. Data in the following chart provide a summary of the number and percent of classes over the Board of Education maximum size guidelines for the past four years. These data have been adjusted for the three previous years for the elementary level to reflect the new maximum class size guidelines.

Number and Percent of Classes Over Board of Education Maximum Class Size Guidelines

Grade/Subject/Guideline	#Over 10/31/ 2002 (FY03)	#Over 10/31/ 2003 (FY04)	#Over 10/31/ 2004 (FY05)	#Over 10/31/ 2005 (FY06)	%Over 10/31/ 2002 (FY03)	%Over 10/31/ 2003 (FY04)	%Over 10/31/ 2004 (FY05)	%Over 10/31/ 2005 (FY06)
Elementary Schools								
Kindergarten (Over 25)	0	0	0	5	0%	0%	0%	.97%
Grades 1-3 (Over 26)	119	111	112	49	8.2%	7.6%	7.9%	3.3%
Grades 4-5 (Over 28)	75	81	99	22	8.9%	10.0%	12.1%	2.5%
Middle Schools								
English (Over 28)	125	135	175	169	9.6%	10.6%	14.1%	13.7%
Other Academic (Over 32)	141	144	109	153	2.7%	2.7%	2.2%	3.0%
High Schools								
English (Over 28)	204	248	324	292	13.3%	15.8%	20.5%	18.1%
Other Academic (Over 32)	375	391	457	487	5.9%	6.0%	7.1%	7.4%

There is a significant reduction in the number of oversized classes this year from last year in Grades 1–3 [from 112 (7.9%) to 49 (3.3%)] and Grades 4–5 [from 99 (12.1%) to 22 (2.5%)]. The number of oversized middle and high school English classes also was reduced. However, at the middle and high school levels the number of other academic classes that exceed the maximum class size guidelines is slightly higher this year than last. It should be noted that 27 percent of middle school and 19 percent of high school academic classes have 20 or fewer students this year. Some of these smaller classes, which are a result of scheduling decisions at the local school level, are intervention programs for students who are below grade level in reading and/or math. Others are new advanced placement (AP) classes. As we increase rigor in our high schools and add more AP offerings, it often takes several years for these classes to reach full enrollment. Since middle schools have an average academic class size of approximately 23.7 students and high schools of nearly 25.4 students, having 22.8 percent of our classes with 20 or fewer students increases the percentage of classes that exceed class size guidelines. Also contributing to the number of high school classes exceeding guidelines is the use of PSAT data to move students to higher level classes during August and early September.

Please call Mr. Donald H. Kress, chief school performance officer, at 301-279-8715, or Mr. Larry A. Bowers, chief operating officer, at 301-279-3626, if you have any questions.

JDW:lmk

Attachments

Copy to:

Executive Staff

School Performance Directors

Principals and Program Directors

STATISTICS ON ELEMENTARY AND SECONDARY CLASS SIZE

As of October 31, 2005

INTRODUCTION

Elementary school class sizes are summarized by grade in Attachment A. Pie charts illustrating the distribution of class sizes in Kindergarten, Grades 1–3, and Grades 4–5 also are provided (Attachment B). Statistics on secondary class size are reported by academic subjects and are summarized by middle and high school levels (Attachment C). The charts on C-3 and C-4 show the class sizes in Grade 7 math and high school Algebra 1, which are areas affected by reduced class size initiatives of the Board of Education. Average elementary and secondary class sizes from 1995 through the current school year also are shown in Attachment D.

Although average class size is an important measure for assessing the level of staffing of schools for instructional purposes, the elementary ratios do not reflect the support that is provided by specialists in physical education, music, art, reading, and library services.

COUNTY TOTALS

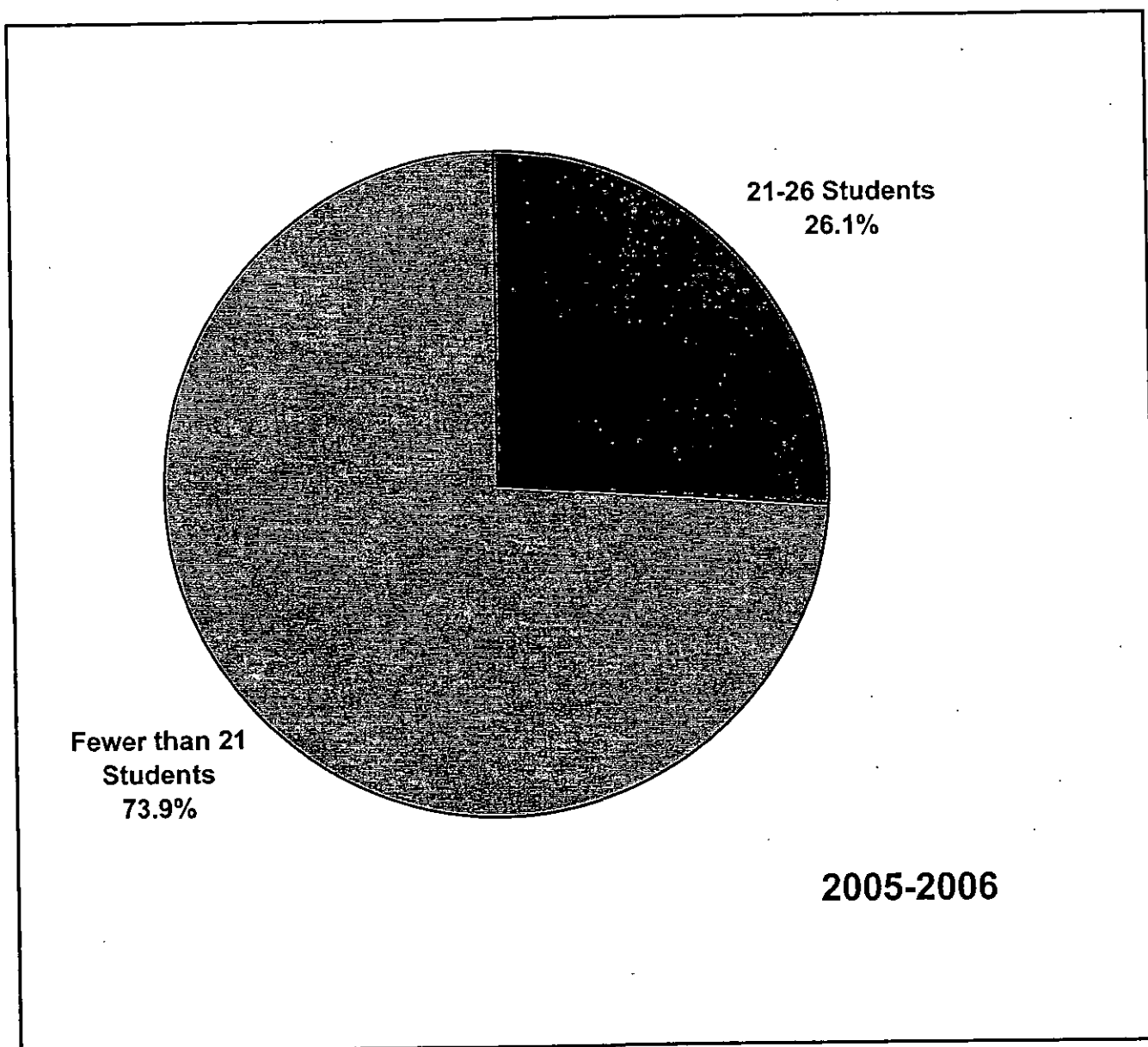
GRADE	TOTAL NUMBER OF PUPILS AND CLASSES	AVERAGE CLASS SIZE	DISTRIBUTION OF NUMBER AND PERCENT OF PUPILS IN CLASSES OF THE SIZE INDICATED, AND OF NUMBER AND PERCENT OF CLASSES IN EACH SIZE CATEGORY											
			BELOW			16-20			21-26			27-28		
			N	%	N	N	%	N	N	%	N	N	%	N
1	PUPILS 9413 CLASSES 511	18.4	2248	23.9	3251	34.5	3772	40.1	83	.9	59	.6		
1-2 COMB.	PUPILS 47 CLASSES 3	15.7	8	17.0	18	38.3	21	44.7						
2	PUPILS 9488 CLASSES 496	19.1	1374	14.5	3574	37.7	4103	43.2	437	4.6				
3	PUPILS 9612 CLASSES 435	22.1	58	.6	2504	26.1	6287	65.4	763	7.9				
4	PUPILS 9919 CLASSES 429	23.1	8	.1	1349	13.6	7107	71.7	1310	13.2	145	1.5		
4-5-COMB.	PUPILS 99 CLASSES 4	24.8	1	.2	70	16.3	305	71.1	48	11.2	30	30.3		
5	PUPILS 9978 CLASSES 425	23.5	36	.4	1193	12.0	6877	68.9	1406	14.1	466	4.7		
6	PUPILS 159 CLASSES 6	26.5	3	.7	62	14.6	293	68.9	51	12.0	16	3.8		
NOT SECTION	PUPILS 14 CLASSES 13	1.1	14	100.0										
TOTAL 1-3 & COMB.	PUPILS 28560 CLASSES 1445	19.8	3688	12.9	9347	32.7	14183	49.7	1283	4.5	59	.2		
TOTAL 4-6 & COMB.	PUPILS 20155 CLASSES 864	23.3	44	.2	2552	12.7	14109	70.0	2799	13.9	641	3.2		
TOTAL 1-6 & COMB.	PUPILS 48715 CLASSES 2309	21.1	3732	7.7	11909	24.4	28292	58.1	4082	8.4	700	1.4		
KINDER- GARTEN	PUPILS 9162 CLASSES 517	17.7	2521	27.5	3580	39.1	3061	33.4						
TOTAL K-6 & COMB.	PUPILS 57877 CLASSES 2826	20.5	6253	10.8	15489	26.8	31353	54.2	4082	7.1	700	1.2		
SPEC. ED.	PUPILS 2769 CLASSES 377	7.3	2589	93.5	150	5.4								
HEADSTART	PUPILS 2442 CLASSES 127	19.2	56	2.3	2322	95.1	64	2.6						
GRAND TOTAL	PUPILS 63102 CLASSES 3343		4	3.1	120	94.5	3	2.4						

Distribution of Kindergarten Class Size Data

Year	Fewer than 21 Students		21-26 Students		27-28 Students		More than 28 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2005-2006	382	73.9%	135	26.1%	0	0.0%	0	0%	517	100%
2004-2005	391	76.4%	120	23.4%	1	0.2%	0	0%	512	100%

- Number of Classes

% - Percent of Classes

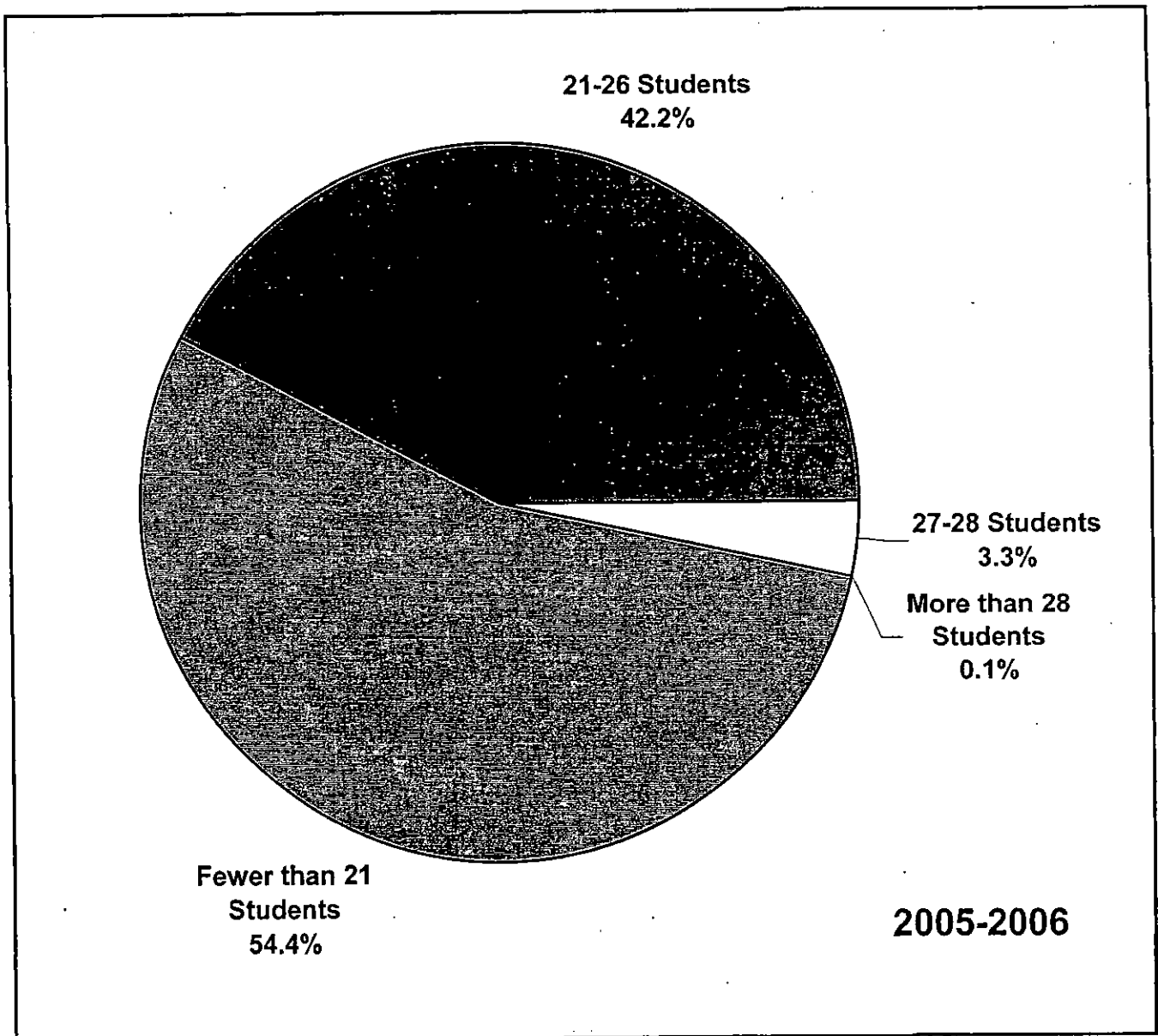


Distribution of Grades 1-3 Class Size Data

Year	Fewer than 21 Students		21-26 Students		27-28 Students		More than 28 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2005-2006	786	54.4%	610	42.2%	47	3.3%	2	0.1%	1445	100%
2004-2005	662	46.9%	637	45.2%	96	6.8%	15	1.1%	1410	100%

- Number of Classes

% - Percent of Classes

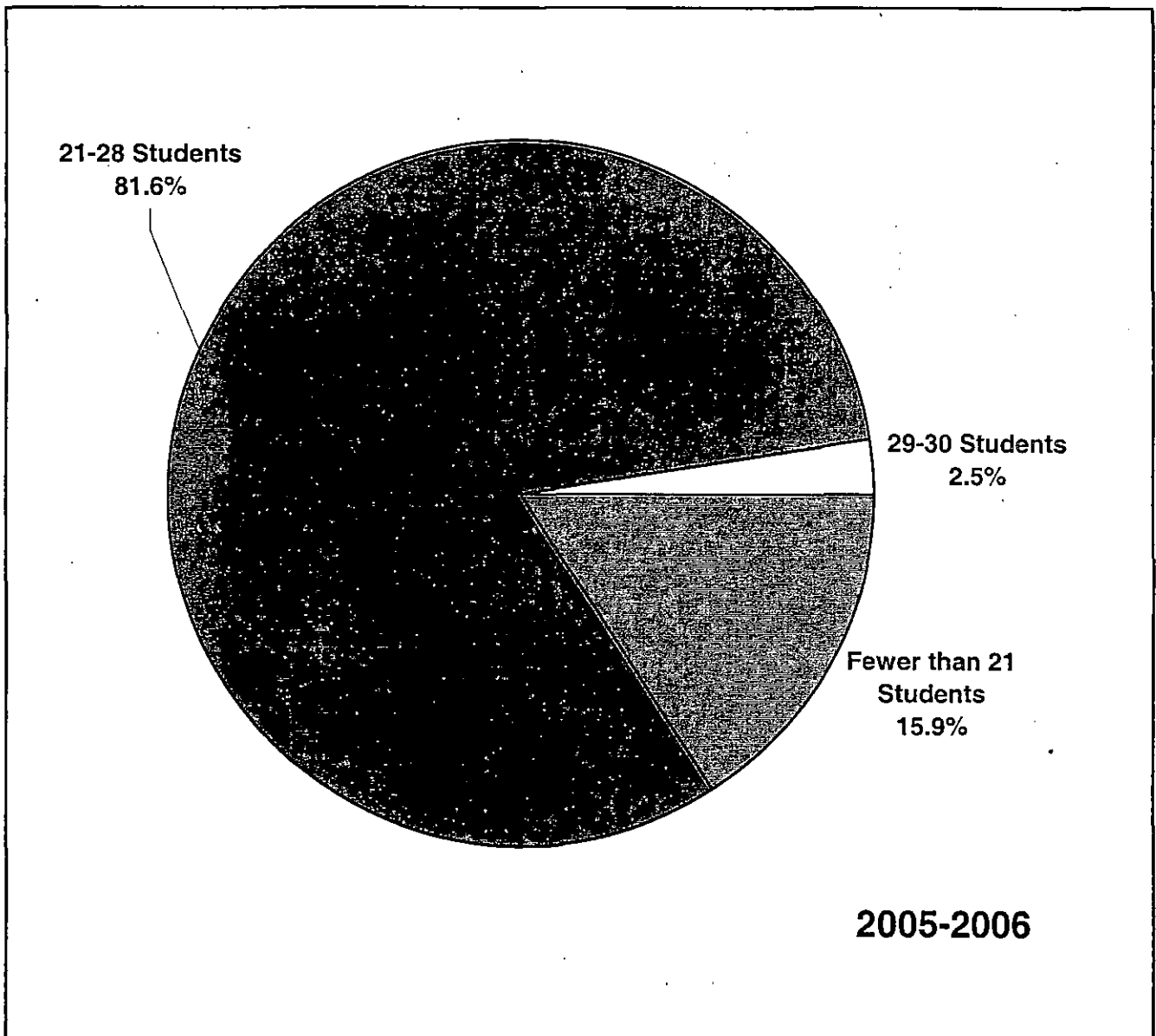


Distribution of Grades 4-5 Class Size Data

Year	Fewer than 21 Students		21-28 Students		29-30 Students		More than 30 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2005-2006	137	15.9%	705	81.6%	22	2.5%	0	0.0%	864	100%
2004-2005	73	8.9%	645	78.9%	87	10.7%	12	1.5%	817	100%

- Number of Classes

% - Percent of Classes



REPORT NEW15

MCPS SECONDARY CLASS SIZE FOR SCHOOL YEAR 2005-2006
 CLASS SIZE DISTRIBUTION: SUMMARY BY LEVEL
 BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/28/05

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
				N	%	N	%	N	%	N	%	N	%
MID	RQD ENG.	28714	23.2	5223	18.2	9211	32.1	9190	32.0	4724	16.5	366	1.3
		1237		331	26.8	397	32.1	340	27.5	158	12.8	11	.9
	OTHR ENG	12573	18.5	5438	43.3	3171	25.2	2430	19.3	1433	11.4	101	.8
		680		401	59.0	138	20.3	90	13.2	48	7.1	3	.4
	FORGN LANG	16153	24.4	2821	17.5	4008	24.8	3582	22.2	4817	29.8	925	5.7
		661		170	25.7	173	26.2	133	20.1	158	23.9	27	4.1
	SOCIAL STUDY	30063	25.9	2764	9.2	6796	22.6	7226	24.0	11565	38.5	1712	5.7
		1162		174	15.0	291	25.0	266	22.9	380	32.7	51	4.4
	MATH	30515	22.2	7901	25.9	10586	34.7	5233	17.1	6096	20.0	699	2.3
		1375		501	36.4	458	33.3	194	14.1	201	14.6	21	1.5
	SCIENCE	30762	26.4	2423	7.9	6335	20.6	6997	22.7	13303	43.2	1704	5.5
		1166		147	12.6	272	23.3	259	22.2	437	37.5	51	4.4
	TOTAL ACAD*	148780	23.7	26570	17.9	40107	27.0	34658	23.3	41938	28.2	5507	3.7
		6281		1724	27.4	1729	27.5	1282	20.4	1382	22.0	164	2.6
	ESOL	1735	11.2	1657	95.5	0	0.0	78	4.5	0	0.0	0	0.0
		155		152	98.1	0	0.0	3	1.9	0	0.0	0	0.0
	NON-ACAD	60684	27.7	4802	7.9	9838	16.2	10926	18.0	17099	28.2	18019	29.7
		2189		321	14.7	422	19.3	405	18.5	563	25.7	478	21.8

* INCLUDES REQUIRED ENGLISH AND OTHER ENGLISH (EXCLUDING ESOL),
 SOCIAL STUDIES, MATH, SCIENCE AND FOREIGN LANGUAGES.

MCPS SECONDARY CLASS SIZE FOR SCHOOL YEAR 2005-2006
 CLASS SIZE DISTRIBUTION: SUMMARY BY LEVEL
 BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/28/05

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
				N	%	N	%	N	%	N	%	N	%
LEVEL	SNR	PUPILS CLASSES	39876 1613	4355 270	10.9 16.7	11497 491	28.8 30.4	15247 560	38.2 34.7	8150 273	20.4 16.9	627 19	1.6 1.2
	OTHR ENG	PUPILS CLASSES	5730 258	1257 92	21.9 35.7	1663 72	29.0 27.9	1064 40	18.6 15.5	1139 37	19.9 14.3	607 17	10.6 6.6
	FORGN LANG	PUPILS CLASSES	26719 1070	4015 247	15.0 23.1	5963 259	22.3 24.2	5260 195	19.7 18.2	9424 308	35.3 28.8	2057 61	7.7 5.7
	SOCIAL STUDY	PUPILS CLASSES	45736 1739	4543 293	9.9 16.8	8350 360	18.3 20.7	7860 291	17.2 16.7	18539 603	40.5 34.7	6444 192	14.1 11.0
	MATH	PUPILS CLASSES	46880 1851	6050 373	12.9 20.2	10752 463	22.9 25.0	9388 347	20.0 18.7	17352 569	37.0 30.7	3338 99	7.1 5.3
	SCIENCE	PUPILS CLASSES	42953 1659	4782 294	11.1 17.7	9388 406	21.9 24.5	7725 286	18.0 17.2	17055 555	39.7 33.5	4003 118	9.3 7.1
	TOTAL ACAD*	PUPILS CLASSES	207894 8190	25002 1569	12.0 19.2	47613 2051	22.9 25.0	46544 1719	22.4 21.0	71659 2345	34.5 28.6	17076 506	8.2 6.2
	ESOL	PUPILS CLASSES	3911 292	3397 271	86.9 92.8	339 15	8.7 5.1	82 3	2.1 1.0	93 3	2.4 1.0	0 0	0.0 0.0
	NON-ACAD	PUPILS CLASSES	77079 2944	9248 638	12.0 21.7	12381 535	16.1 18.2	12939 477	16.8 16.2	26517 867	34.4 29.4	15994 427	20.8 14.5

* INCLUDE REQUIRED ENGLISH AND OTHER ENGLISH (EXCLUDING ESOL),
 SOCIAL STUDIES, MATH, SCIENCE AND FOREIGN LANGUAGES.

MCPS SECONDARY CLASS SIZE FOR SCHOOL YEAR 2005-2006
 CLASS SIZE DISTRIBUTION: SUMMARY FOR 7TH GRADE MATH
 CLASSES WITH ONLY 7TH GRADE STUDENTS ARE INCLUDED
 BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/28/05

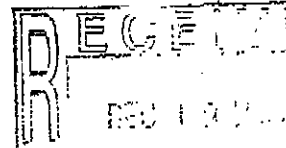
LEVEL	SUBJECT	PUPILS CLASSES	NUMBER AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
				N	%	N	%	N	%	N	%	N	%
MID	FUNC. SKILLS	PUPILS CLASSES	83 6	83	100	0	0.0	0	0.0	0	0.0	0	0.0
	MATH B	PUPILS CLASSES	4851 258	2586 162	53.3 62.8	1791 79	36.9 30.6	324 12	6.7 4.7	150 5	3.1 1.9	0 0	0.0 0.0
	MATH C	PUPILS CLASSES	788 32	92 5	11.7 15.6	377 16	47.8 50.0	163 6	20.7 18.8	123 4	15.6 12.5	33 1	4.2 3.1
	MATH INV.	PUPILS CLASSES	1204 46	128 7	10.6 15.2	227 10	18.9 21.7	356 13	29.6 28.3	460 15	38.2 32.6	33 1	2.7 2.2
	ALG 1	PUPILS CLASSES	548 21	66 4	12.0 19.0	97 4	17.7 19.0	135 5	24.6 23.8	217 7	39.6 33.3	33 1	6.0 4.8
TOTAL		PUPILS CLASSES	7474 363	2955 184	39.5 50.7	2492 109	33.3 30.0	978 36	13.1 9.9	950 31	12.7 8.5	99 3	1.3 .8

MCPS SECONDARY CLASS SIZE FOR SCHOOL YEAR 2005-2006
 CLASS SIZE DISTRIBUTION: SUMMARY FOR ALGEBRA 1
 BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/28/05.

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
LEVEL				N	%	N	%	N	%	N	%	N	%
SNR	G9 ALGI	PUPILS CLASSES	1366 61	384	28.1	409	29.9	356	26.1	184	13.5	33	2.4
				23	37.7	18	29.5	13	21.3	6	9.8	1	1.6
	MIXED GRD ALG	PUPILS CLASSES	4669 203	950	20.3	1603	34.3	1400	30.0	683	14.6	33	.7
				59	29.1	68	33.5	52	25.6	23	11.3	1	.5
	ALL ALG I	PUPILS CLASSES	6035 264	1334	22.1	2012	33.3	1756	29.1	867	14.4	66	1.1
				82	31.1	86	32.6	65	24.6	29	11.0	2	.8

Average Class Sizes 1995-96 to 2005-06

	95-96	96-97	97-98	98-99	99-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
Elementary											
Kindergarten	22.0	21.5	21.3	21.0	21.3	19.8	17.9	17.5	17.3	17.5	17.7
Grade 1	24.0	23.7	23.8	23.6	22.8	20.8	19.7	19.2	18.9	19.3	18.4
1-2 Combination	23.5	22.7	22.8	22.8	23.4	21.9	20.5	20.0	20.8	21.1	15.7
Grade 2	24.6	24.5	24.5	24.3	23.7	21.7	19.6	19.8	19.8	19.7	19.1
2-3 Combination	24.0	23.4	24.0	23.3	23.2	23.0	23.0	23.4	21.3	24.0	N/A
Grade 3	25.4	24.9	25.3	24.9	23.8	23.9	23.1	23.7	23.3	23.1	22.1
3-4 Combination	24.5	24.4	24.2	24.4	20.0	22.9	21.2	22.7	23.0	23.0	N/A
Grade 4	25.7	25.5	25.6	25.5	24.8	24.3	24.3	24.2	24.6	24.5	23.1
4-5 Combination	24.8	25.4	25.6	24.7	24.1	22.8	24.2	23.7	24.4	22.6	24.8
Grade 5	26.0	26.3	25.3	25.5	25.4	24.7	24.8	25.0	24.9	25.0	23.5
5-6 Combination	28.0	24.0	24.0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Grade 6	26.3	24.8	24.0	22.5	23.5	23.9	23.3	26.3	26.0	26.0	26.5
Total 1-6	25.1	24.9	24.8	24.7	24.1	23.0	22.1	22.1	22.1	22.1	21.1
Middle											
English	23.9	24.2	24.1	23.3	23.0	23.3	23.3	23.1	23.3	23.5	23.2
Other Academic	25.0	25.5	25.4	24.4	24.4	24.2	23.7	23.9	23.9	24.2	23.8
High											
English	25.1	25.0	25.4	24.8	24.8	24.7	24.4	24.3	24.5	24.8	24.7
Other Academic	26.2	26.7	26.8	25.8	25.5	25.5	25.4	25.3	25.5	25.6	25.5




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

December 18, 2006

MEMORANDUM

To: Members of the Board of Education

From: Jerry D. Weast, Superintendent of Schools 

Subject: Official Class Size Report—School Year 2006–2007

The attached class size report reflects the status of class sizes throughout the Montgomery County Public Schools (MCPS) as of October 31, 2006. The report demonstrates the ongoing impact of efforts by the Board of Education to provide appropriate staffing to reduce class sizes throughout the school system over the past several years, especially this year. This effort includes specific strategies to reduce the number of over-sized classes in secondary schools and eliminate combination classes in elementary schools.

The average class size chart below shows that average class sizes for 2006–2007 are lower than the previous year at all grade levels and are at an all-time low at all grade levels except kindergarten, primarily because enrollment is about 2,000 students below projection this year. Since this year's enrollment deviations occurred across all grade levels and at schools throughout the county, changes in personnel deployment were minimized after the third or fourth week of school to avoid being too disruptive.

Average Class Sizes by Level

Grade/Subject	2002–2003 (FY 2003)	2003–2004 (FY 2004)	2004–2005 (FY 2005)	2005–2006 (FY 2006)	2006–2007 (FY 2007)
Elementary Schools					
Kindergarten	17.5	17.3	17.5	17.7	17.6
Grades 1–5	22.1	22.1	22.1	21.1	20.8
Middle Schools					
English	23.1	23.3	23.5	23.2	22.9
Other Academic Classes	23.9	23.9	24.2	23.8	23.7
High Schools					
English	24.3	24.5	24.8	24.7	24.0
Other Academic Classes	25.3	25.5	25.6	25.5	24.7

On February 8, 2005, the Board of Education adopted guidelines to reduce elementary class sizes for Grades 1–5. This class size initiative resulted in a reduction of maximum class size guidelines for all elementary schools by 2 students, from 28 to 26 students in Grades 1–3, and from 30 to 28 students in Grades 4 and 5. The Board of Education also approved additional positions to eliminate elementary school combination classes. MCPS has continued to use the Board of Education guidelines to maintain low class sizes. The only new class size initiative for FY 2007 was the addition of 25 high school teachers in general education to assist with the inclusion of special education students. These additional positions helped to reduce class sizes at the high school level this year.

Data in the following chart provide a summary of the number and percent of classes over the Board of Education maximum class size guidelines for the past four years. These data have been adjusted for FY 2004 and FY 2005 for the elementary level to reflect the new maximum class size guidelines.

Number and Percent of Classes Over Board of Education Maximum Class Size Guidelines

Grade/Subject/Guideline	10/31/03 (FY 2004)	10/31/04 (FY 2005)	10/31/05 (FY 2006)	10/31/06 (FY 2007)
Elementary Schools				
Kindergarten (over 25)	0 (0%)	0 (0%)	5 (.97%)	3 (1.0%)
Grades 1–3 (over 26)	111 (7.6%)	112 (7.9%)	49 (3.3%)	24 (1.6%)
Grades 4–5+ (over 28)	81 (10.0%)	99 (12.1%)	22 (2.5%)	16 (1.8%)
Middle Schools				
English (over 28)	135 (10.6%)	175 (14.1%)	169 (13.7%)	97 (7.8%)
Other Academic (over 32)	144 (2.7%)	109 (2.2%)	153 (3.0%)	128 (2.5%)
High Schools				
English (over 28)	248 (15.8%)	324 (20.5%)	292 (18.1%)	236 (14.3%)
Other Academic (over 32)	391 (6.0%)	457 (7.1%)	487 (7.4%)	293 (4.3%)

There is a significant reduction in the number of oversized classes in elementary schools this year from last year—in Grades 1–3, from 49 (3.3 percent) to 24 (1.6 percent); and in Grades 4–5, from 22 (2.5 percent) to 16 (1.8 percent). The number and percentage of oversized middle and high school English classes and other academic classes that exceed the maximum class size guidelines are lower this year than last year. It should be noted that 27.5 percent of middle school and 23.5 percent of high school academic classes have 20 or fewer students this year. Some of these smaller classes, which are a result of scheduling decisions at the local school level, are intervention programs for students who are below grade level in reading and/or mathematics. Other smaller classes are new Advanced Placement (AP) classes. As we increase rigor in our high schools and add more AP offerings, it often takes several years for these classes to reach full enrollment.

Members of the Board of Education

3

December 18, 2006

Middle schools have an average academic class size of approximately 23.5 students and high schools have an average of 24.6 students; therefore, having many of our classes with 20 or fewer students increases the likelihood that some classes will exceed class size guidelines. We will continue to work with staff at our schools to ensure that classes are scheduled by using the Board of Education class size guidelines while quality programs for students are maintained.

Additional data for class sizes are attached for your information. Attachment A reflects the changes that have resulted from Board of Education class size reduction initiatives since the adoption of *Our Call to Action: Pursuit of Excellence*, the MCPS Strategic Plan. The class sizes have been reduced at the elementary level, on average by 3.5 to 4.0 students, since the 1998-1999 school year. Attachment B shows the range of class sizes and how many classes are below the Board's class size guidelines. Information about secondary class size is reported by academic subjects for middle schools and high schools in Attachment C.

If you have any questions, please call Mr. Donald H. Kress, chief school performance officer, at 301-279-8715 or Mr. Larry A. Bowers, chief operating officer, at 301-279-3626.

JDW:vnb

Attachments

Copy to:

Executive Staff

Directors of School Performance

Principals and Program Directors

Average Class Sizes 1996-97 to 2006-07

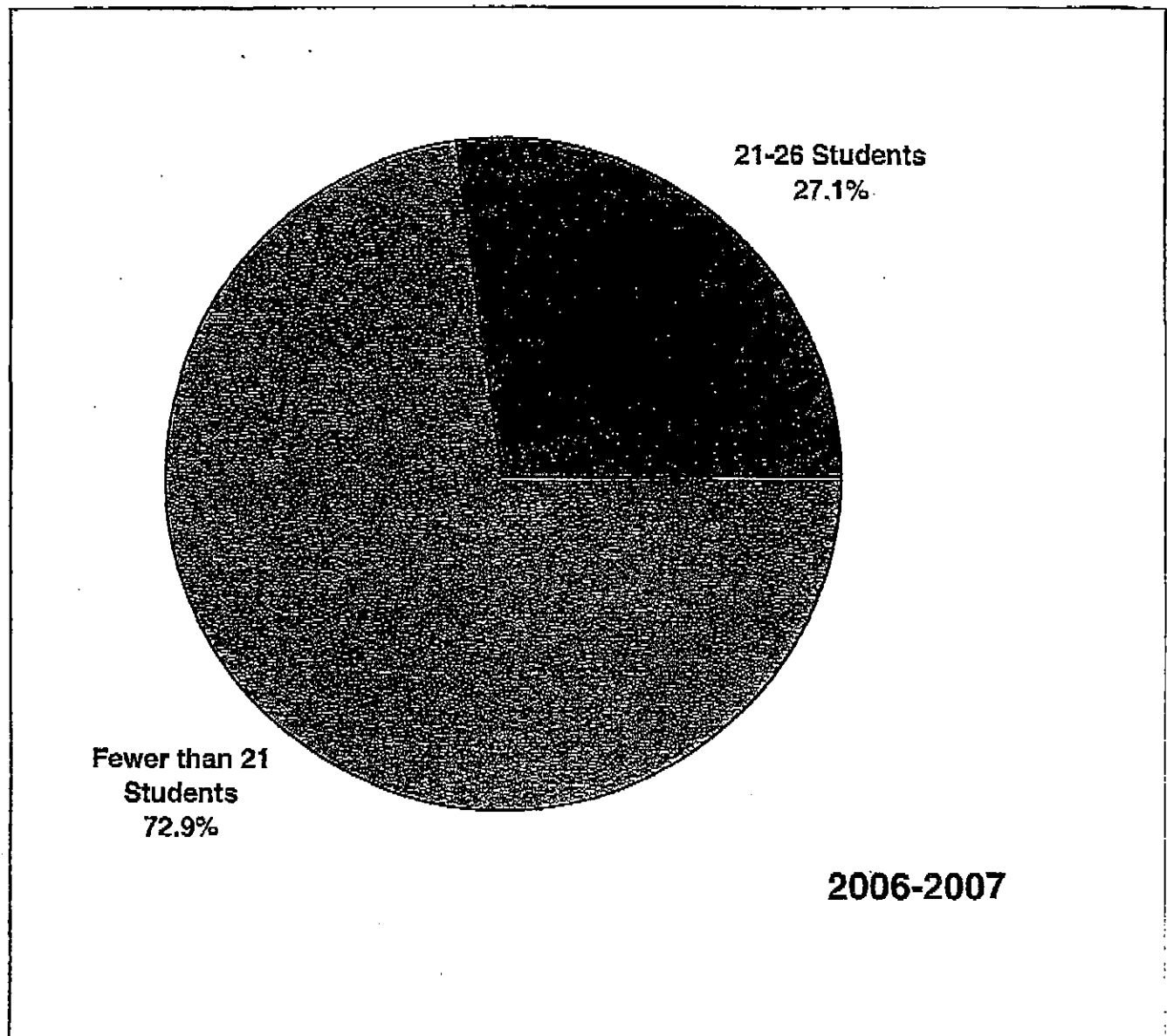
	96-97	97-98	98-99	99-2000	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
Elementary											
Kindergarten	21.5	21.3	21.0	21.3	19.8	17.9	17.5	17.3	17.5	17.7	17.6
Grade 1	23.7	23.8	23.6	22.8	20.8	19.7	19.2	18.9	19.3	18.4	18.4
1-2 Combination	22.7	22.8	22.8	23.4	21.9	20.5	20.0	20.8	21.1	15.7	N/A
Grade 2	24.5	24.5	24.3	23.7	21.7	19.6	19.8	19.8	19.7	19.1	18.8
2-3 Combination	23.4	24.0	23.3	23.2	23.0	23.0	23.4	21.3	24.0	N/A	N/A
Grade 3	24.9	25.3	24.9	23.8	23.9	23.1	23.7	23.3	23.1	22.1	22.0
3-4 Combination	24.4	24.2	24.4	20.0	22.9	21.2	22.7	23.0	23.0	N/A	N/A
Grade 4	25.5	25.6	25.5	24.8	24.3	24.3	24.2	24.6	24.5	23.1	22.5
4-5 Combination	25.4	25.6	24.7	24.1	22.8	24.2	23.7	24.4	22.6	24.8	N/A
Grade 5	26.3	25.3	25.5	25.4	24.7	24.8	25.0	24.9	25.0	23.5	23.1
5-6 Combination	24.0	24.0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Grade 6	24.8	24.0	22.5	23.5	23.9	23.3	26.3	26.0	26.0	26.5	24.0
Total 1-6	24.9	24.8	24.7	24.1	23.0	22.1	22.1	22.1	22.1	21.1	20.8
Middle											
English	24.2	24.1	23.3	23.0	23.3	23.3	23.1	23.3	23.5	23.2	22.9
Other Academic	25.5	25.4	24.4	24.4	24.2	23.7	23.9	23.9	24.2	23.8	23.7
High											
English	25.0	25.4	24.8	24.8	24.7	24.4	24.3	24.5	24.8	24.7	24.0
Other Academic	26.7	26.8	25.8	25.5	25.5	25.4	25.3	25.5	25.6	25.5	24.7

Distribution of Kindergarten Class Size Data

Year	Fewer than 21 Students		21-26 Students		27-28 Students		More than 28 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2006-2007	374	72.9%	139	27.1%	0	0.0%	0	0%	513	100%
2005-2006	382	73.9%	135	26.1%	0	0.0%	0	0%	517	100%

- Number of Classes

% - Percent of Classes

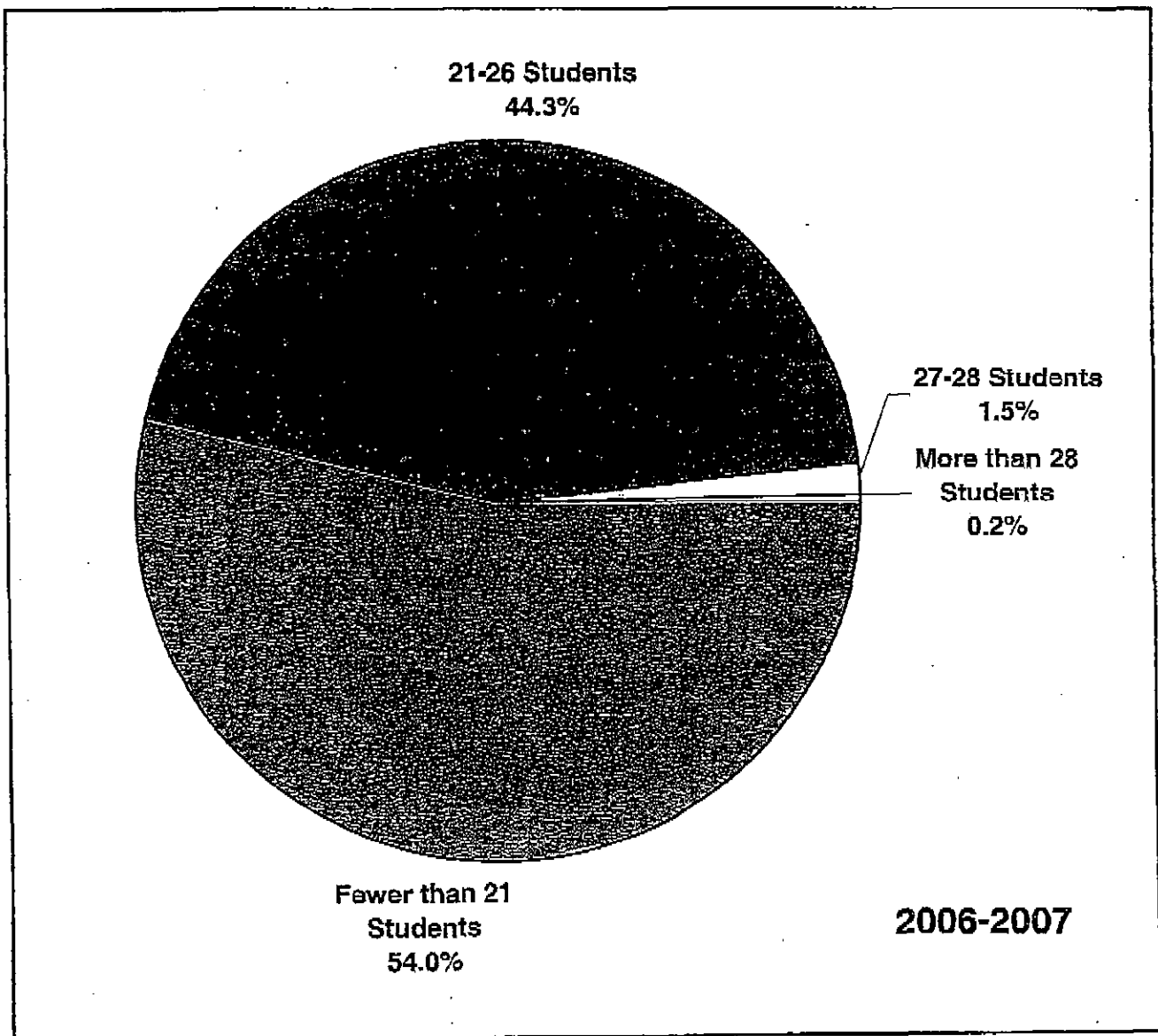


Distribution of Grades 1-3 Class Size Data

Year	Fewer than 21 Students		21-26 Students		27-28 Students		More than 28 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2006-2007	782	54.0%	642	44.3%	22	1.5%	2	0.2%	1448	100%
2005-2006	786	54.4%	610	42.2%	47	3.3%	2	0.1%	1445	100%

- Number of Classes

% - Percent of Classes

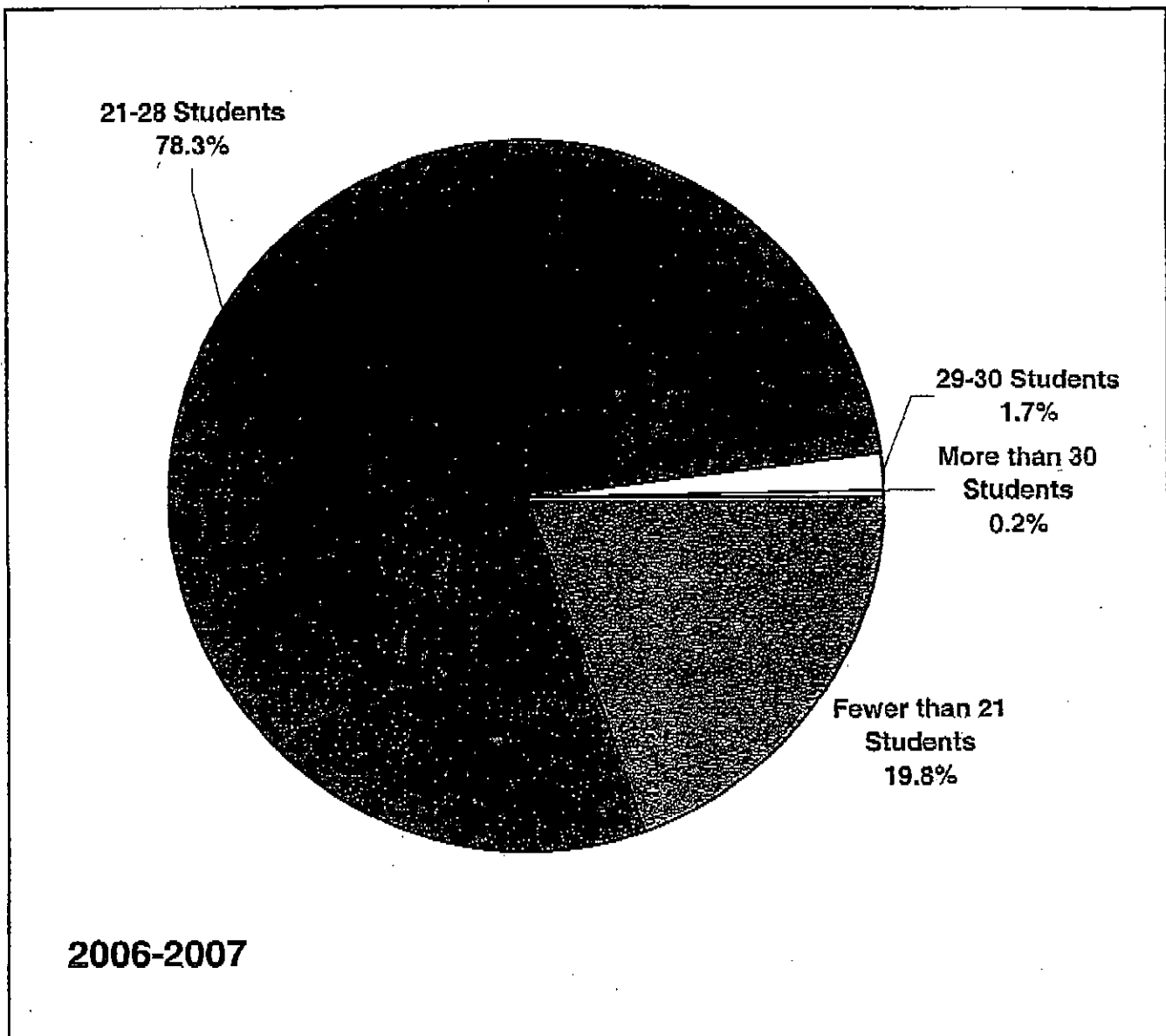


Distribution of Grades 4-5 Class Size Data

Year	Fewer than 21 Students		21-28 Students		29-30 Students		More than 30 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2006-2007	169	19.8%	669	78.3%	14	1.7%	2	0.2%	854	100%
2005-2006	137	15.9%	705	81.6%	22	2.5%	0	0.0%	864	100%

- Number of Classes

% - Percent of Classes



MCP'S SECONDARY CLASS SIZE FOR SCHOOL YEAR 2006-2007
CLASS SIZE DISTRIBUTION: SUMMARY BY LEVEL
BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/27/06

REPORT NEW15

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
				N	%	N	%	N	%	N	%	N	%
MID	ROD ENG.	PUPILS CLASSES	28117 1230	5590 339	19.8 27.6	11234 484	40.0 39.3	8394 310	29.9 25.2	2798 94	10.0 7.6	101 3	.4 .2
	DTHR ENG	PUPILS CLASSES	12854 716	8026 440	49.9 61.5	4004 175	31.1 24.4	1865 69	14.5 9.6	959 32	7.5 4.5	0 0	0.0 0.0
	FORGN LANG	PUPILS CLASSES	15952 648	2576 160	16.1 24.7	3735 160	23.4 24.7	3683 136	23.1 21.0	4877 163	31.2 25.2	980 29	6.1 4.5
	SOCIAL STUDY	PUPILS CLASSES	29415 1140	2866 173	9.7 15.2	6780 290	23.0 25.4	7414 274	25.2 24.0	11037 364	37.5 31.9	1318 39	4.5 3.4
	MATH	PUPILS CLASSES	30188 1334	7134 440	23.6 33.0	10307 447	34.1 33.5	6532 242	21.6 18.1	5714 190	18.9 14.2	501 15	1.7 1.1
	SCIENCE	PUPILS CLASSES	30147 1161	2688 164	8.9 14.1	6802 294	22.9 25.3	7947 294	26.4 25.3	11091 364	36.8 31.4	1519 45	5.0 3.9
	TOTAL ACAD*	PUPILS CLASSES	146673 6229	26880 1716	18.3 27.5	42883 1850	29.3 29.7	35835 1325	24.4 21.3	36576 1207	24.9 19.4	4419 131	3.0 2.1
	ESOL	PUPILS CLASSES	2122 184	1932 176	91.0 95.7	190 8	9.0 4.3	0 0	0.0 0.0	0 0	0.0 0.0	0 0	0.0 0.0
	NON-ACAD	PUPILS CLASSES	50138 2199	5654 378	9.4 17.2	9458 407	15.7 18.5	9821 363	16.3 16.5	18496 607	30.8 27.6	15709 444	27.8 20.2

* INCLUDES REQUIRED ENGLISH AND OTHER ENGLISH (EXCLUDING ESOL),
SOCIAL STUDIES, MATH, SCIENCE AND FOREIGN LANGUAGES.

MCPD SECONDARY CLASS SIZE FOR SCHOOL YEAR 2006-2007
 CLASS SIZE DISTRIBUTION: SUMMARY BY LEVEL
 BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/27/06

REPORT NEW15

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
LEVEL				N	%	N	%	N	%	N	%	N	%
SNR	RQD ENG.	PUPILS 39625 CLASSES 1648	24.0	5654	14.3	12437	31.4	14473	36.5	6791	17.1	270	.7
				346	21.0	533	32.3	533	32.3	228	13.8	8	.5
	OTHR ENG	PUPILS 8066 CLASSES 291	20.8	2067	34.1	1238	20.4	647	10.7	1527	25.2	586	9.7
				147	50.5	54	18.6	24	8.2	50	17.2	16	5.5
	FORGN LANG	PUPILS 27191 CLASSES 1119	24.3	4809	17.7	6413	23.6	5451	20.0	8100	33.5	1418	5.2
				297	26.5	279	24.9	202	18.1	299	26.7	42	3.8
	SOCIAL STUDY	PUPILS 45328 CLASSES 1765	25.7	5582	12.3	8501	18.8	9187	20.3	18484	40.8	3565	7.9
				351	19.9	366	20.7	340	19.3	603	34.2	105	5.9
	MATH	PUPILS 48644 CLASSES 1874	24.4	7287	16.0	11488	25.2	9574	21.0	14905	32.7	2390	5.2
				482	24.7	498	26.6	354	18.9	489	26.1	71	3.8
	SCIENCE	PUPILS 43128 CLASSES 1715	25.1	5973	13.8	9082	21.1	8642	20.0	17435	40.4	1995	4.6
				375	21.9	393	22.9	319	18.6	569	33.2	69	3.4
	TOTAL ACAD*	PUPILS 206983 CLASSES 8412	24.6	31382	15.2	49160	23.8	47974	23.2	68242	33.0	10225	4.9
				1978	23.5	2123	25.2	1772	21.1	2238	26.6	301	3.6
	ESOL	PUPILS 4082 CLASSES 288	14.2	3214	78.7	709	17.4	159	3.9	0	0.0	0	0.0
				250	86.8	32	11.1	6	2.1	0	0.0	0	0.0
	NON-ACAD	PUPILS 76422 CLASSES 2975	25.7	11266	14.7	11937	15.6	12151	15.9	25802	33.8	15288	20.0
				761	25.6	517	17.4	449	15.1	842	28.3	406	13.6

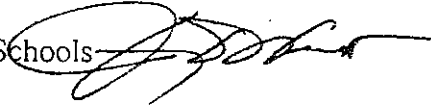
* INCLUDES REQUIRED ENGLISH AND OTHER ENGLISH (EXCLUDING ESOL),
 SOCIAL STUDIES, MATH, SCIENCE AND FOREIGN LANGUAGES.

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

December 18, 2007

MEMORANDUM

To: Members of the Board of Education

From: Jerry D. Weast, Superintendent of Schools 

Subject: Official Class Size Report—School Year 2007–2008

The attached class size report reflects the status of class sizes throughout the Montgomery County Public Schools (MCPS) as of October 31, 2007. In FY 2006, the Board of Education took historic action by reducing elementary class size guidelines for Grades 1–5 for the first time in 20 years. This class size initiative resulted in a reduction of maximum class size guidelines for all elementary schools by 2 students, from 28 to 26 students in Grades 1–3 and from 30 to 28 students in Grades 4 and 5. MCPS has continued to use the Board of Education guidelines to maintain small class sizes. Data in the following charts provide a summary of the average class size by level for the past six years and a summary of the number and percent of classes over the Board of Education recommended guidelines for the past four years. Additional attachments provide greater detail of this information.

Average Class Sizes by Level

Grade/Subject	2002– 2003 (FY 2003)	2003– 2004 (FY 2004)	2004– 2005 (FY 2005)	2005– 2006 (FY 2006)	2006– 2007 (FY 2007)	2007– 2008 (FY 2008)
Elementary Schools						
Kindergarten	17.5	17.3	17.5	17.7	17.6	18.2
Grades 1–5	22.1	22.1	22.1	21.1	20.8	21.0
Middle Schools						
English	23.1	23.3	23.5	23.2	22.9	23.0
Other Academic	23.9	23.9	24.2	23.8	23.7	24.1
High Schools						
English	24.3	24.5	24.8	24.7	24.0	24.0
Other Academic	25.3	25.5	25.6	25.5	24.7	24.9

**Number and Percent of Classes Over Board of Education
Maximum Class Size Guidelines as of October 31**

Grade/Subject/Guideline	# Over 2004 (FY 05)	# Over 2005 (FY 06)	# Over 2006 (FY 07)	# Over 2007 (FY 08)	% Over 2004 (FY 05)	% Over 2005 (FY 06)	% Over 2006 (FY 07)	% Over 2007 (FY 08)
Elementary Schools								
Kindergarten (over 25)	0	5	3	1	0%	0.97%	1.0%	0.2%
Grades 1-3 (over 26)	112	49	24	52	7.9%	3.3%	1.7%	3.7%
Grades 4-5 (over 28)	99	22	16	11	12.1%	2.5%	1.9%	1.3%
Middle Schools								
English (over 28)	175	169	97	116	14.1%	13.7%	7.8%	9.7%
Other Academic (over 32)	109	153	128	156	2.2%	3.0%	3.0%	3.2%
High Schools								
English (over 28)	324	292	236	251	20.5%	18.1%	14.3%	15.2%
Other Academic (over 32)	457	487	293	420	7.1%	7.4%	5.0%	6.3%

In FY 2008, kindergarten through Grade 12 enrollment is approximately 1,057 students more than projected. As a result, the average class size is larger and the number of classes exceeding the Board's maximum class size guidelines is greater than had been expected. In FY 2007, actual enrollment was 1,761 less than projected. Because schools were staffed for projected enrollment, actual class sizes were lower and the number of classes that exceeded the guidelines were fewer than expected. However, this year's average class size and the number and percent of oversized classes are comparable or less than previous years. It also is important to note that elementary class size averages and number of classes larger than the guidelines are based on homeroom class size. Students are grouped and regrouped throughout the day by using additional staff; e.g., reading initiative teachers, focus teachers, and academic intervention teachers. As a result, class sizes are often smaller than the numbers shown in the charts.

It should be noted that 26.3 percent of middle school and 24.2 percent of high school academic classes have 20 or fewer students this year. Some of these smaller classes, which are a result of scheduling decisions at the local school level, are intervention programs for students who are below grade level in reading and/or math. Others are new Advanced Placement (AP) classes and other special program courses. As we increase rigor in high schools and add more AP offerings, it often takes several years for these classes to reach full enrollment. Since middle schools have an average academic class size of approximately 23.9 students and high schools have an average academic class size of approximately 24.7 students, having many of our classes with 20 or fewer students increases the likelihood that some classes will exceed class size guidelines. We will continue to work with school staff to ensure that they use the Board of Education class size guidelines when scheduling, while maintaining quality programs for students.

Additional data for class sizes are attached for your information. Attachment A reflects the changes that have resulted from Board of Education class size reduction initiatives since the

adoption of *Our Call to Action: Pursuit of Excellence*, the MCPS Strategic Plan. The class sizes have been reduced at the elementary level on average by 3.5 to 4.0 students, since the 1998–1999 school year. Attachment B shows the range of class sizes and how many classes are below the Board's class size guidelines. Information about secondary class size is reported by academic subjects for middle schools and high schools in Attachment C.

Please call Mr. Stephen L. Bedford, chief school performance officer, at 301-517-8258, or Mr. Larry A. Bowers, chief operating officer, at 301-279-3626, if you have any questions.

JDW:vnb

Attachments

Copy to:

Executive Staff

Directors of School Performance

Principals and Program Directors

Average Class Sizes:
1997-1998 to 2007-2008

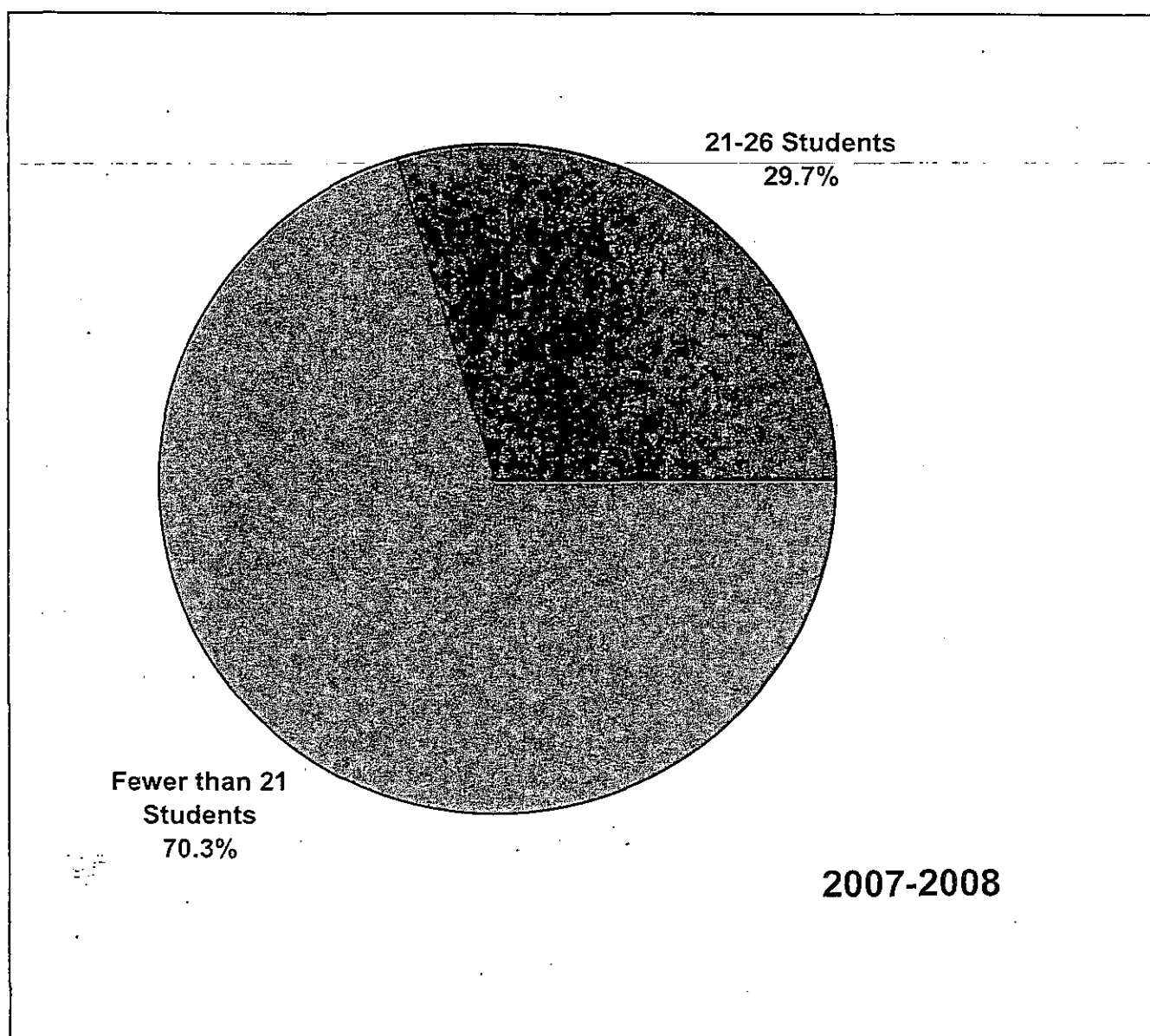
	1997-1998	1998-1999	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008
Elementary											
Kindergarten	21.3	21.0	21.3	19.8	17.9	17.5	17.3	17.5	17.7	17.6	18.2
Grade 1	23.8	23.6	22.8	20.8	19.7	19.2	18.9	19.3	18.4	18.4	18.9
1-2 Combination	22.8	22.8	23.4	21.9	20.5	20.0	20.8	21.1	15.7	N/A	N/A
Grade 2	24.5	24.3	23.7	21.7	19.6	19.8	19.8	19.7	19.1	18.8	19.3
2-3 Combination	24.0	23.3	23.2	23.0	23.0	23.4	21.3	24.0	N/A	N/A	N/A
Grade 3	25.3	24.9	23.8	23.9	23.1	23.7	23.3	23.1	22.1	22.0	22.2
3-4 Combination	24.2	24.4	20.0	22.9	21.2	22.7	23.0	23.0	N/A	N/A	22.5
Grade 4	25.6	25.5	24.8	24.3	24.3	24.2	24.6	24.5	23.1	22.5	22.5
4-5 Combination	25.6	24.7	24.1	22.8	24.2	23.7	24.4	22.6	24.8	N/A	19.0
Grade 5	25.3	25.5	25.4	24.7	24.8	25.0	24.9	25.0	23.5	23.1	23.1
5-6 Combination	24.0	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Grade 6	24.0	22.5	23.5	23.9	23.3	26.3	26.0	26.0	26.5	24.0	24.7
Total 1-6	24.8	24.7	24.1	23.0	22.1	22.1	22.1	22.1	21.1	20.8	21.0
Middle											
English	24.1	23.3	23.0	23.3	23.3	23.1	23.3	23.5	23.2	22.9	23.0
Other Academic	25.4	24.4	24.4	24.2	23.7	23.9	23.9	24.2	23.8	23.7	24.1
High											
English	25.4	24.8	24.8	24.7	24.4	24.3	24.5	24.8	24.7	24.0	24.0
Other Academic	26.8	25.8	25.5	25.5	25.4	25.3	25.5	25.6	25.5	24.7	24.9

Distribution of Kindergarten Class Size Data

Year	Fewer than 21 Students		21-26 Students		27-28 Students		More than 28 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2007-2008	372	70.3%	157	29.7%	0	0.0%	0	0.0%	529	100%
2006-2007	374	72.9%	139	27.1%	0	0.0%	0	0.0%	513	100%

- Number of Classes

% - Percent of Classes

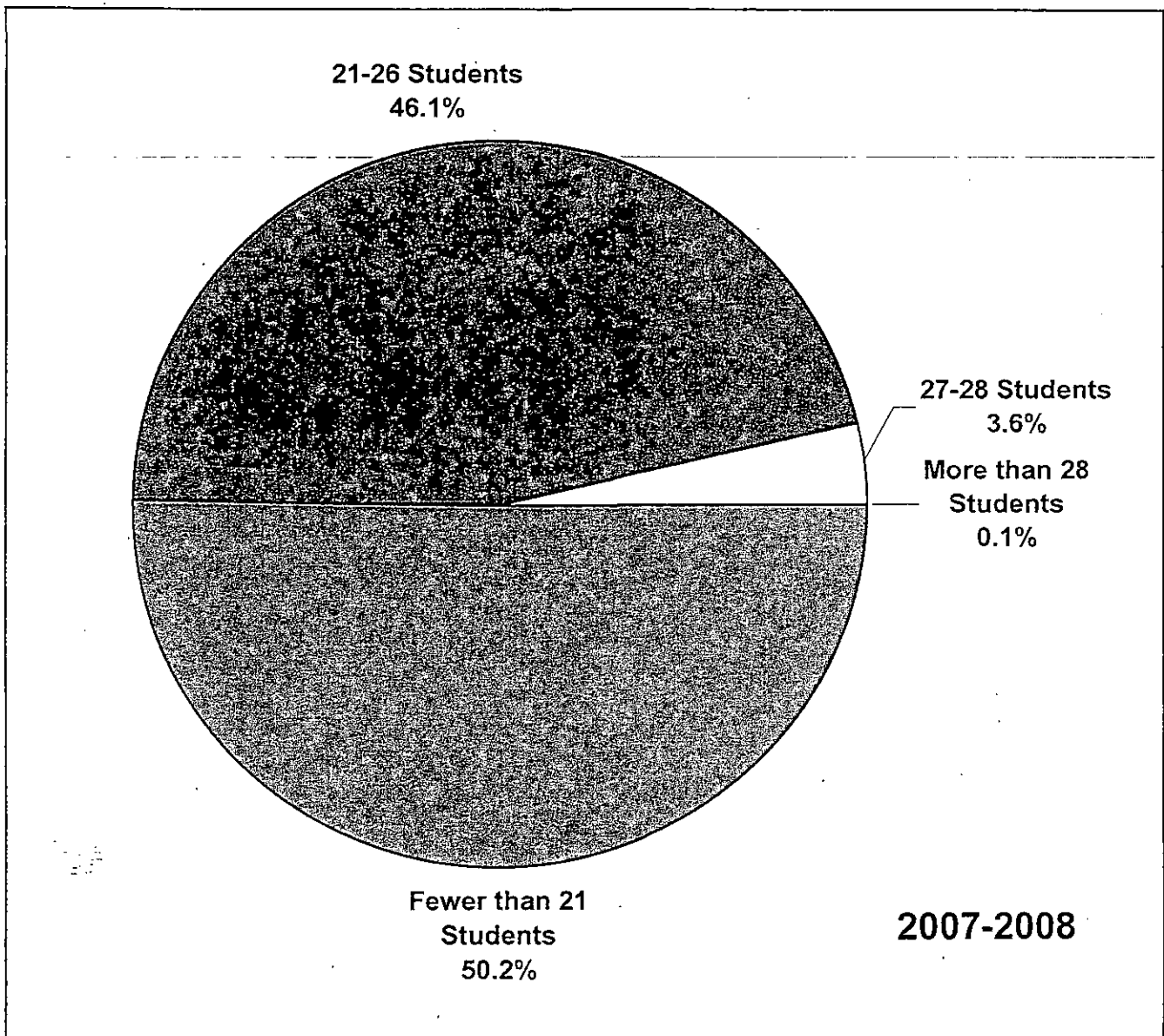


Distribution of Grades 1-3 Class Size Data

Year	Fewer than 21 Students		21-26 Students		27-28 Students		More than 28 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2007-2008	719	50.2%	661	46.1%	51	3.6%	1	0.1%	1432	100%
2006-2007	782	54.0%	642	44.3%	22	1.5%	2	0.2%	1448	100%

- Number of Classes

% - Percent of Classes



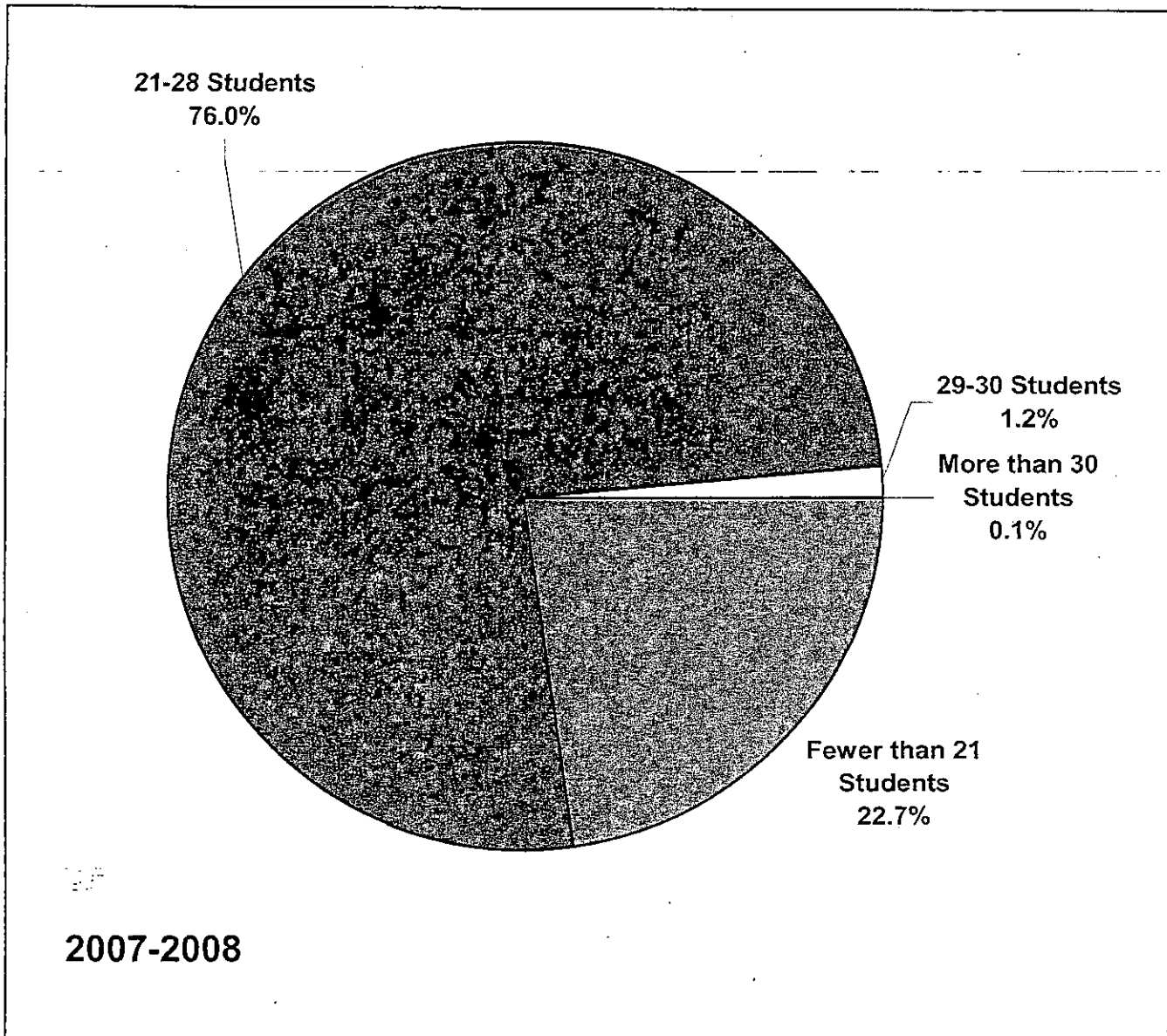
Distribution of Grades 4-5

Class Size Data

Year	Fewer than 21 Students		21-28 Students		29-30 Students		More than 30 Students		Total	
	#	%	#	%	#	%	#	%	#	%
2007-2008	191	22.7%	640	76.0%	10	1.2%	1	0.1%	842	100%
2006-2007	169	19.8%	669	78.3%	14	1.7%	2	0.2%	854	100%

- Number of Classes

% - Percent of Classes



MCPs SECONDARY CLASS SIZE FOR SCHOOL YEAR 2007-2008
CLASS SIZE DISTRIBUTION: SUMMARY BY LEVEL
BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/31/07

REPORT NEWIS

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
				N	%	N	%	N	%	N	%	N	%
SNR	ROD ENG.	39664	24.0	6831	17.2	9759	24.6	15515	39.1	7184	18.1	375	.9
		1655		415	25.1	419	25.3	570	34.4	240	14.5	11	.7
	OTHR ENG	6337	19.7	2296	36.2	1273	20.1	800	12.6	1305	20.6	663	10.5
		321		175	54.5	55	17.1	30	9.3	43	13.4	18	5.6
	FORGN LANG	26916	24.7	4130	15.3	6863	25.5	5376	20.0	8698	32.3	1849	6.9
		1091		255	23.4	297	27.2	199	18.2	285	26.1	55	5.0
	SOCIAL STUDY	45180	25.7	5943	13.2	8562	19.0	7596	16.8	18579	41.1	4500	10.0
		1761		370	21.0	372	21.1	282	16.0	603	34.2	134	7.6
	MATH	45170	24.8	7137	15.8	10304	22.8	8439	18.7	15934	35.3	3356	7.4
		1825		452	24.8	443	24.3	312	17.1	518	28.4	100	5.5
	SCIENCE	42877	25.4	5587	13.0	9401	21.9	7155	16.7	16908	39.4	3826	8.9
		1688		352	20.9	408	24.2	265	15.7	550	32.6	113	6.7
	TOTAL ACAD*	206144	24.7	31924	15.5	46162	22.4	44881	21.8	68608	33.3	14569	7.1
		8341		2019	24.2	1994	23.9	1658	19.9	2239	26.8	431	5.2
	ESOL	3855	12.8	3723	96.6	132	3.4	0	0.0	0	0.0	0	0.0
		302		296	98.0	6	2.0	0	0.0	0	0.0	0	0.0
	NON-ACAD	76225	25.8	11050	14.5	11227	14.7	10668	14.0	27141	35.6	16139	21.2
		2953		755	25.6	488	16.5	395	13.4	883	29.9	432	14.6

* INCLUDES REQUIRED ENGLISH AND OTHER ENGLISH (EXCLUDING ESOL),
SOCIAL STUDIES, MATH, SCIENCE AND FOREIGN LANGUAGES.

MCPS SECONDARY CLASS SIZE FOR SCHOOL YEAR 2007-2008
CLASS SIZE DISTRIBUTION: SUMMARY BY LEVEL
BASED ON REPORT CARD ADMINISTRATIVE EXTRACT OF 10/31/07

REPORT NEW15

LEVEL	SUBJECT	TOTAL NUMBER	AVG. SIZE	CLASSES LT 21		CLASSES 21-25		CLASSES 26-28		CLASSES 29-32		CLASSES GT 32	
				N	%	N	%	N	%	N	%	N	%
MID LEVEL	ROD ENG.	PUPILS	27409	5217	19.0	9515	34.7	9203	33.6	3407	12.4	67	.2
		CLASSES	1190	326	27.4	409	34.4	339	28.5	114	9.6	2	.2
	OTHR ENG	PUPILS	13350	6168	46.2	3594	26.9	1968	14.7	1586	11.9	34	.3
		CLASSES	717	434	60.5	156	21.8	73	10.2	53	7.4	1	.1
	FORGN LANG	PUPILS	15829	1812	11.4	4188	26.5	3975	25.1	4777	30.2	1077	6.8
		CLASSES	624	109	17.5	180	28.8	147	23.6	156	25.0	32	5.1
	SOCIAL STUDY	PUPILS	28919	2828	9.8	6313	21.8	6602	22.8	11271	39.0	1905	6.6
		CLASSES	1118	174	15.6	273	24.4	244	21.8	370	33.1	57	5.1
	MATH	PUPILS	29434	6485	22.0	8965	30.5	6039	20.5	7339	24.9	606	2.1
		CLASSES	1274	402	31.6	388	30.5	224	17.6	242	19.0	18	1.4
	SCIENCE	PUPILS	30098	2548	8.5	6132	20.4	7117	23.6	12706	42.2	1595	5.3
		CLASSES	1141	152	13.3	262	23.0	263	23.0	416	36.5	48	4.2
	TOTAL ACAD*	PUPILS	145039	25058	17.3	38707	26.7	34904	24.1	41086	28.3	5284	3.6
		CLASSES	6064	1597	26.3	1668	27.5	1290	21.3	1351	22.3	158	2.6
	ESOL	PUPILS	2318	2254	97.2	64	2.8	0	0.0	0	0.0	0	0.0
		CLASSES	195	192	98.5	3	1.5	0	0.0	0	0.0	0	0.0
	NON-ACAD	PUPILS	59249	5067	8.6	7722	13.0	9158	15.5	18814	31.8	18488	31.2
		CLASSES	2113	335	15.9	333	15.8	338	16.0	616	29.2	491	23.2

* INCLUDES REQUIRED ENGLISH AND OTHER ENGLISH (EXCLUDING ESOL),
SOCIAL STUDIES, MATH, SCIENCE AND FOREIGN LANGUAGES.

Appendix G:
Adopted FY08 Operating Budget and Personnel Complement

Excerpts from Chapter 1, K-12 Instruction:
Selected Program Support Information for Elementary, Middle, and High Schools

Elementary Schools—121/126/998

Dr. Frieda K. Lacey, Deputy Superintendent of Schools

301-279-3127

Selected Program Support Information FY 2008

Student Enrollment

FY 2008 change is 9/06

projection to 9/07 projection

	Actual 9/30/06	Projected 9/30/06	Projected 9/30/07	Comments
Kindergarten	8,951	9,400	9,400	FY 2008 change — 0
Grades 1-6	<u>47,122</u>	<u>47,837</u>	<u>46,572</u>	FY 2008 change — (1,265)
Subtotal	56,073	57,237	55,972	
Head Start*	584	584	584	FY 2008 change — 0
Prekindergarten*	1,828	1,925	1,925	FY 2008 change — 0
Special Education Special Classes*	<u>2,742</u>	<u>2,893</u>	<u>2,739</u>	FY 2008 change — (154)
Total Elementary Schools	61,227	62,639	61,220	FY 2008 change — (1,419)

Average Class Size

Average class sizes are used to meet the Board's maximum class size guidelines

	Actual 9/30/06	Projected 9/30/06	Projected 9/30/07	Comments
Kindergarten	17.6	17.4	18.0	25 without an aide, 26 with an aide 124 full-day schools; 58 at 15:1 and 66 at 25:1
Grades 1-6	20.8	21.4	21.4	Grades 1-3, 26; Grades 4-5, 28

Student/Teacher Ratio

Physical Education, Art,

General Music

	Actual 9/30/06	Projected 9/30/06	Projected 9/30/07	Comments
	462:1	472:1	458:1	Allows for teacher planning time as negotiated and to reflect FY 1991 staffing standards

Additional Support

Maximum Class Size Guidelines**

Class Size Initiative**

	Budgeted FY 2007	Budgeted FY 2008	Comments
Maximum Class Size Guidelines**	185.1	185.1	
Class Size Initiative**	161.0	161.0	

Expense Standards Per Student

	Budgeted FY 2007	Budgeted FY 2008	Comments
Textbooks—Kindergarten	\$17.80	\$18.33	3% increase for inflation
Textbooks—Grades 1-6	46.31	47.70	3% increase for inflation
Materials of Instruction	62.40	64.27	3% increase for inflation
Media Center Materials	14.88	15.33	3% increase for inflation

*Head Start and Prekindergarten student enrollment and staffing are shown in Chapter 3. Special Education enrollment and staffing are shown in Chapter 4.

**These classroom teacher positions, part of the A-D teacher lines in the Personnel Complement, fill specially designated purposes, as indicated. Teacher staffing formula on page E-2.

Middle Schools—131/136

Dr. Frieda K. Lacey, Deputy Superintendent of Schools

301-279-3127

Selected Program Support Information FY 2008

Student Enrollment

FY 2008 change is 9/06

projection to 9/07 projection

	Actual 9/30/06	Projected 9/30/06	Projected 9/30/07	Comments
Grade 6–8	28,556	28,823	28,220	FY 2008 change — (603)
Special Education Special Classes*	<u>2,493</u>	<u>2,401</u>	<u>2,037</u>	FY 2008 change — (364)
Total Middle Schools	31,049	31,068	30,257	FY 2008 change — (967)

Average Class Size

Average class sizes are used to meet the Board's maximum class size guidelines

	Actual 9/30/06	Projected 9/30/06	Projected 9/30/07	Comments
	23.5	23.6	23.6	28 in English, 32 in other academic subjects

	Actual 9/30/06	Projected 9/30/06	Projected 9/30/07	Comments
Average Student/Counselor Ratio				
Middle School	244:1	245:1	210:1	The goal is for all schools to have a ratio of 250:1.

	Budgeted FY 2007	Budgeted FY 2008	Comments
Additional Support			
Released time for Acceleration and Enriched Instruction Teachers	15.2	15.2	Provides 0.4 positions per school
Additional teacher positions to meet maximum class size guidelines**	94.6	94.6	
Math Support Teachers**	38.0	38.0	Provides 1.0 positions for schools to reduce Grade 7 math class size and increase enrollment in Grade 8 Algebra 1

	Budgeted FY 2007	Budgeted FY 2008	Comments
Special Programs			
Eastern Humanities/Communicative Arts (Grades 6–8)	2.5	2.5	
Takoma Park Science/Math/Computer Science	2.5	2.5	
Middle Years International Baccalaureate Support	4.0	4.0	
Roberto Clemente Middle School Special Center	3.6	3.6	

	Budgeted FY 2007	Budgeted FY 2008	Comments
Expense Standards Per Student			
Textbooks	\$66.04	\$64.17	3% increase for inflation
Materials of Instruction	106.08	109.26	3% increase for inflation
Media Center Materials	19.05	19.62	3% increase for inflation

*Special Education enrollment and staffing are shown in Chapter 4.

**These classroom teacher positions, part of the A–D teacher lines in the Personnel Complement, fill specially designated purposes, as indicated. Teacher staffing formula on page E-2.

High Schools—141/142/143/147/148/151/152/163

Dr. Frieda K. Lacey, Deputy Superintendent of Schools

301-279-3127

Selected Program Support Information FY 2008

Student Enrollment

FY 2008 change is 9/06

<i>projection to 9/07 projection</i>	Actual 9/30/06	Projected 9/30/06	Projected 9/30/07	Comments
Grade 9-12	41,470	41,780	40,646	FY 2008 change — (1,134)
Special Education Special Classes*	<u>3,069</u>	<u>3,124</u>	<u>3,586</u>	FY 2008 change — <u>462</u>
Total High Schools	44,539	44,904	44,232	FY 2008 change — (672)

Average Class Size

Average class sizes are used to meet the Board's maximum class size guidelines

	Actual 9/30/06	Projected 9/30/06	Projected 9/30/07	Comments
	24.6	25.4	25.4	28 in English, 32 in other academic subjects

Student/Counselor Ratio

	Actual 9/30/06	Projected 9/30/06	Projected 9/30/07	Comments
High School	255:1	254:1	245:1	The goal is for all schools to have a ratio of 250:1.

Additional Support

	Budgeted FY 2007	Budgeted FY 2008	Comments
Additional teacher positions to meet maximum class size guidelines*	175.2	175.2	Reduce number of oversized classes
Additional teacher positions to lower class size for inclusion classes*	25.0	25.0	
Released time for coordination of Student Service Learning**	5.0	5.0	Provides 0.2 positions per school
Blair High School special support—teachers**	8.3	8.3	
Blair High School special support—counselors	1.0	1.0	
Northeast Consortium—counselors	1.0	1.0	
Poolesville High School*	5.0	5.0	
Math Support*	22.1	22.1	
Math and Reading Teachers*	12.0	12.0	Provides 2.0 positions each in six high-needs clusters
College Institute—Teachers*	4.0	4.0	
College Institute—Counselors	2.0	2.0	

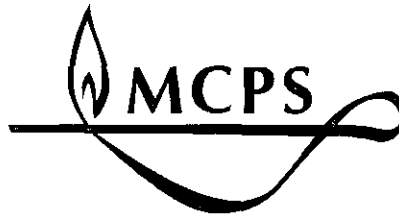
Special/Signature Programs	Budgeted FY 2007	Budgeted FY 2008	Comments
Blair Science/Math/Computer Science Magnet	9.5	9.5	
Poolesville Magnet	4.5	6.5	
Richard Montgomery International Baccalaureate	4.0	4.0	
Poolesville Global Ecology	1.2	1.2	
Northeast Consortium	7.4	7.4	
Downcounty Consortium	28.2	28.2	
Signature Programs/Schools	25.1	25.1	

Expense Standards Per Student	Budgeted FY 2007	Budgeted FY 2008	Comments
Textbooks	\$63.26	\$65.16	3% increase for inflation
Materials of Instruction	111.91	115.27	3% increase for inflation
Media Center Materials	21.18	21.82	3% increase for inflation

*Special Education enrollment and staffing are shown in Chapter 4.

**These classroom teacher positions, part of the A-D teacher lines in the Personnel Complement, fill specially designated purposes, as indicated. Teacher staffing formula on page E-2.

Superintendent's Recommended FY 2009 Capital Budget and the FY 2009–2014 Capital Improvements Program



**Montgomery County Public Schools
Rockville, Maryland**

Editorial, Graphics & Publishing Services

Appendix Q

Capacity Calculations

School capacity is defined by the State of Maryland as the maximum number of students that can reasonably be accommodated in a facility without significantly hampering delivery of the given educational program. School capacity is the product of the number of teaching stations at a school and the average class size for each program (based generally on the student-to-teacher ratio). The state of Maryland and MCPS rate capacities using slightly different student-to-teacher ratios.

MCPS Program Capacity

Class size for regular and supplemental programs, such as English for Speakers of Other Languages (ESOL), is based on MCPS policy, regulation, and budget guidelines. Most jurisdictions in Maryland, including Montgomery County, are striving to reduce class sizes. State and federal regulations mandate a maximum class size limit for preschool programs.

The current standard student-to-classroom ratios used to calculate school capacities as stated in the Board of Education Long-range Educational Facilities Regulation (FAA-RA) are as follows:

Head Start and prekindergarten—2 sessions	40:1
Head Start and prekindergarten—1 session	20:1
Grade K—full-day	22:1
Grade K—reduced class size full-day	15:1
Grades 1–2—Reduced class size	17:1
Grades 1–5/6 Elementary	23:1
Grades 6–8 Middle	25:1*
Grades 9–12 High	25:1**
ESOL (secondary)	15:1

*Program capacity differs at the middle school level in that the regular classroom capacity of 25 is multiplied by .85 to reflect the optimal utilization of a secondary facility (equivalent to 21.25 students per classroom.)

**Program capacity differs at the high school in that the regular classroom capacity of 25 is multiplied by .9 to reflect the optimal utilization of a secondary facility (equivalent to 22.5 students per classroom.)

Many schools that appear to have space based on their calculated program capacity often need relocatable classrooms to accommodate the programs operating in the school. There are several explanations for this situation.

- **Staffing Ratio:** Capacity calculations for elementary schools are based on a student-to-classroom ratio of 23:1; however, staffing (student-to-teacher ratio) is not always provided at the same ratio. When the student-to-teacher ratio is less than the student-to-room ratio, the calculated capacity will not support the number of teachers provided by the staffing ratio in the facility.

For example, if staffing is provided at 22:1, and capacity is calculated at 23:1, then for a building with 20 classrooms the capacity would be 460 (20×23) students but there would be 21 teachers based on the staffing ratio ($460/22 = 20.9$), therefore one additional classroom would be needed to accommodate a 22:1 staffing ratio.

- **Combined Staffing:** Some schools are provided additional staffing to meet the needs of students in the school. For example, a school that has a large number of students impacted by poverty may be allocated an additional .5 teaching position to assist students and an additional .5 teaching position for Title 1 services. The school may decide to combine the allocated staff to create an additional classroom teaching position, thereby creating the need for an additional classroom. In this case, the enrollment has not increased and the calculated capacity has not changed, but the need for classrooms has increased.
- **Capping Class Size:** In schools that may have very large class sizes in certain grades, additional staff may be provided to reduce the oversized classes to keep them within Board of Education guidelines. For example, if a school has two second-grade classes each with 28 students and four more students enroll in second grade, adding the additional students to the two large classes would cause the two classes to exceed the maximum class size cap of 28 students in Grades 1–3. If there was no opportunity to create combination classes with other grades, an additional teacher would be provided, and the school would reorganize with three second-grade classes of 20 students each. The additional teacher could create the need for a relocatable classroom.

Small instructional spaces and specialized classrooms are provided for all schools and are allocated on the basis of enrollment size and the need for supplementary instructional activities, such as remedial reading, special education resource, speech, art, and music.

In situations where the educational program will not be adversely affected, MCPS leases space on an annual basis to appropriate outside organizations. In most cases, these organizations are referred to as “joint occupants” and are usually day-care providers. Before and after school programs also are provided in many MCPS schools. Spaces used by day-care providers on MCPS sites range from shared use of multipurpose rooms before and after school, to relocatable classrooms on a school site that are financed by the provider and operated for the school community. If space is available, one or more classrooms can be leased for full-day programs.

State-rated Capacity

State-rated capacity, used to determine state funding, is calculated using the following calculations. These calculations make MCPS and state capacity ratings differ. See appendix J for a comparison of capacity ratings for all schools.

Head Start and prekindergarten—1 session	20:1
Grade K—full-day	22:1
Grades 1–5/6 Elementary	23:1
Grades 6–12 Secondary	25:1*
Special Education	10:1

*Program capacity differs at the secondary level in that regular classroom capacity in the regular classroom capacity of 25 is multiplied by .85 to reflect the optimal utilization of a secondary school (equivalent to 21.25 students per classroom).

ERRATA SHEET

UNDERSTANDING CLASS SIZE TRENDS IN MONTGOMERY COUNTY PUBLIC SCHOOLS

Office of Legislative Oversight

Report No. 2008-8

- Executive Summary, p. iii, second bullet, first sentence: “When combined, the percent of oversized high school classes ranged between **7.0%** and **9.9%.**”
- Page 39, last sentence: “In FY06, **814** classes were oversized (**9.9%** of all academic classes), compared to **698** classes in FY08 (**8.4%** of all academic classes).”
- Page 40:

Table 31: Number of High School Classes Over BOE Maximum Class Size Guidelines, FY06 – FY08

Subject	FY06	FY07	FY08	FY06-FY08 Change	
				#	%
Total Academic	814	594	698	-116	-14.3%

Table 32: Percentage of High School Classes Over BOE Maximum Class Size Guidelines, FY06 – FY08

Subject	FY06	FY07	FY08	FY06-FY08 Change
Total Academic	9.9%	7.0%	8.4%	-1.5%

- Page 58, third bullet, first sentence: “When combined, the percent of oversized academic high school classes ranged between **7.0%** and **9.9%.**”
- Page 59:

Table 43: Percent of Classes in Each Grade or Subject that are Oversized, FY06 – FY08
C: High School Classes

Subject and Guideline	FY06	FY07	FY08	FY06 - FY08 Change
Total Number of Academic Classes	8,220	8,427	8,350	130
Total Academic Classes	9.9%	7.0%	8.4%	-1.5%