

ED COMMITTEE #1  
February 10, 2014

**MEMORANDUM**

February 7, 2014

TO: Education Committee

FROM: *HL* Keith Levchenko, Senior Legislative Analyst  
Essie McGuire, Senior Legislative Analyst *EMG*

SUBJECT: **FY15-20 Montgomery County Public Schools (MCPS) Capital Improvements Program (CIP) Meeting #1: Overview**

**Meeting Agenda**

- School Enrollment/Demographics Presentation – by Bruce Crispell, Director of Long Range Planning, MCPS
- Overview of the Board of Education's FY15-20 CIP Request and County Executive's Recommendations – by Council Staff

The following officials and staff are expected to participate in this meeting:

**MCPS**

Philip Kauffman, Board of Education President

Michael Durso, Board of Education Member

Joshua Starr, Superintendent of Schools

Larry Bowers, Chief Operating Officer

James Song, Director, Department of Facilities Management

Bruce Crispell, Director of Long Range Planning, Department of Facilities Management

Adrienne Karamihas, Budget and Operations Manager, Department of Facilities Management

**County Government**

Blaise Defazio, Office of Management and Budget

Jane Mukira, Office of Management and Budget

## **FY15-20 CIP Schedule**

The Board of Education's FY15-20 Proposed CIP was transmitted to the Council on December 2, 2013 (transmittal letter attached on ©1-7). The County Executive's Recommended CIP was transmitted on January 15, 2014 (budget excerpt attached on ©16-28).

The Council held public hearings on the FY15-20 CIP on February 5 and 6, 2014.

In addition to this February 10 overview discussion, the Education Committee has three dates scheduled for review of the FY15-20 MCPS CIP: March 3, March 10, and March 17.

### **PART I: ENROLLMENT AND DEMOGRAPHIC TRENDS**

#### **Enrollment**

Enrollment changes are one of the biggest drivers of both the Operating Budget and CIP for MCPS. From a CIP perspective, enrollment increases drive the need for additional classrooms as well as core space improvements.

Bruce Crispell, Director of Long-Range Planning for MCPS, will provide the Committee with a presentation (slides attached beginning on ©30) on enrollment and demographic trends and forecasts. Some summary information is noted below:

- Official enrollment for the 2011-12 schoolyear is 151,289 students. This is 2,510 students more than 2012-13 official enrollment and extremely close (+6 students) to the number projected for 2013-14 at this time last year.
- Enrollment is expected to climb across elementary, middle, and high school throughout the six-year period, although greatest at the middle and high school levels. Birth rates have remained at historically high levels over the past 10 years (13,064 in 2012) and are a major reason for the sustained increases in elementary school enrollment and the expected large jumps in middle and high school enrollment over the next six years.
- Overall enrollment is expected to climb to 162,255 (nearly 10,600 more students) through FY20.

This continued growth in enrollment is causing significant projected space needs throughout the County over the next six years. Specific capacity issues and MCPS' requested projects to address these issues will be discussed at a later Committee worksession.

Also, MCPS is still working to address the capacity needs of programmatic initiatives (such as class size reduction and the expansion of Full-Day Kindergarten countywide). Many schools accommodated these programs initially with relocatable classrooms. As MCPS plans additions and modernizations, these programmatic needs are assumed to be addressed through permanent classroom space.

## Subdivision Staging Policy School Test

The school test within the Subdivision Staging Policy looks at projected enrollment and capacity at the beginning of the 6<sup>th</sup> schoolyear of the CIP period (August 2019 for the FY15-20 CIP) in 25 high school clusters at each school level (elementary, middle, and high school). For purposes of the test, the Northeast Consortium schools and the Downcounty Consortium schools are divided into the home high school areas.

There are three categories into which a cluster may fall within the school test:

- **Cluster utilization is at 105 percent or below at each of the three school levels:** The cluster passes the test.
- **Cluster utilization is between 105 percent and 120 percent at one or more school levels:** The Planning Board may approve a residential subdivision if the developer commits to paying a school facilities payment.
- **Cluster utilization is above 120 percent at one or more school levels:** The Planning Board must not approve a residential subdivision in that cluster during the upcoming fiscal year.

Currently, no school clusters are in moratorium. The Bethesda-Chevy Chase (B-CC) Cluster would have been in moratorium this year (for the August 2018 test done as part of the FY13-18 Amended CIP process) if the Council had not approved a high school “cluster solution”<sup>1</sup> project as part of the FY13-18 Amended CIP last May.

A number of school clusters fell within the “school payment” category within last year’s school test (see ©29).

With regard to the FY15-20 CIP period, which begins July 1, 2014, the summary chart on ©21 shows that no clusters would go into moratorium under the Board of Education’s Proposed CIP, although a number of clusters would fall within the “school payment” category.

## Diversity

Mr. Crispell’s presentation will also note how MCPS’ school enrollment continues to get more diverse racially/ethnically and economically.

- MCPS’ student population became a “majority minority” population in the 2000-01 schoolyear, almost a decade ahead of the County as a whole.

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<sup>1</sup> A “cluster solution” project is a placeholder with dollars for classroom space in the outyears of the CIP that provides sufficient capacity to keep a cluster below the 120 percent moratorium threshold. The Council utilizes placeholder projects only in cases where MCPS has the capability to add the required space within the window of the school test period. In the case of the B-CC cluster, MCPS included facility planning dollars in FY14 to develop a classroom addition project at B-CC High School, so assuming this new space could open by August 2018 was reasonable. This addition project is now proposed for inclusion in the FY15-20 CIP, with an opening date of August 2017.

- In the current schoolyear, the White (Non-Hispanic) population still makes up the largest single racial group but is less than 1/3 of the overall population (32.0 percent). The Hispanic population is second at 27.4 percent, followed by African American at 21.4 percent, and Asian at 14.4 percent. Other racial designations make up the final 4.6 percent.
- Over the past ten years, the Hispanic student population has grown the fastest, both in number and as a percentage of the overall student population (from 19.4 percent to 27.4 percent). The White population has been steadily declining in number and percentage over that same period. The Asian and African American populations have both increased in number over that time period, although their shares noted above are similar to ten years ago.
- English Speakers of Other Language (ESOL) participation has also steadily increased over the past 25 years at all school levels, with a 2013-14 estimate of 20,150 students. This is nearly a 5,000 student increase in just the last five years.
- While Montgomery County is considered a wealthy county by many measures, MCPS' Free and Reduced Meals (FARMS) rate has been increasing substantially over the past six years and is now up to 51,842 students (34.3 percent of the total student population) in the current year. MCPS' FARMS program has more students than many school systems' total student populations in the Washington Metropolitan area and in the State of Maryland.

These demographic trends make the school system of 2013-14 far different than it was even a decade ago, with MCPS continuing to adapt its programs and budget accordingly.

## **PART II: CIP OVERVIEW**

The December 2, 2013 transmittal memorandum from the Board of Education President is attached on ©1-7.

A list of projects in the Board's Requested CIP is included on ©8. A summary of the Board's recommendations by project and by school cluster, as well as for each countywide project, is attached on ©10-15. The major elements of the Board's request include:

- **Capacity Projects:**
  - The Board is requesting 14 new classroom addition projects, which would add approximately 3,234 seats.
  - The Approved CIP includes a number of addition projects already in design or construction, which in total would add more than 5,000 seats.
- **Modernizations:**
  - All secondary school modernizations are proposed to remain on schedule.
  - Elementary school modernizations (starting with Wayside Elementary School) are delayed one year. However, because of increases in construction costs and the inclusion of several large projects in the six-year period, six-year expenditures would increase by \$247.1 million (or 38 percent), even with the one-year delay of elementary schools.
  - Many modernizations also provide increased capacity.

- **Countywide/Systemic Projects:**
  - Large cost increase in the HVAC project (\$37.5 million over six years, +64 percent)
  - Technology Modernization project increase (\$21 million over six years, +15.8 percent)
- **Other:** New Project - Blair Ewing Center Improvements project (\$16.6 million total project cost)

Each of the above-noted recommended changes (as well as many other projects) will be discussed in more detail during the Committee's project-by-project review at a future worksession.

## Expenditures

The following chart presents six-year and annual totals for the latest (i.e., Amended) FY13-18 CIP, the FY15-20 Board request, and the FY15-20 CIP as recommended by the County Executive.

**Table 1:  
FY15-20 versus Amended FY13-18 Expenditures (in 000's)**

	Six-Year	FY13	FY14	FY15	FY16	FY17	FY18	FY19	FY20
<b>FY13-18 Amended</b>	<b>1,365,497</b>	<b>281,427</b>	<b>244,746</b>	<b>207,438</b>	<b>238,858</b>	<b>197,000</b>	<b>196,028</b>		
<b>FY15-20 Board Request</b>	<b>1,741,972</b>			<b>251,589</b>	<b>348,228</b>	<b>397,790</b>	<b>278,312</b>	<b>236,014</b>	<b>230,039</b>
change from amended	376,475	27.6%		44,151	109,370	200,790	82,284		
<b>FY15-20 CE Recommended</b>	<b>1,717,700</b>			<b>247,542</b>	<b>344,408</b>	<b>395,151</b>	<b>275,033</b>	<b>231,394</b>	<b>224,172</b>
change from amended	352,203	25.8%		40,104	105,550	198,151	79,005		
change from Board Request	(24,272)	-1.4%		(4,047)	(3,820)	(2,639)	(3,279)		

The Board's FY15-20 request totals over \$1.7 billion. This level of funding is \$376.5 million (or 27.6 percent) more than the Amended (latest) FY13-18 CIP of \$1.37 billion.

The County Executive's Recommended CIP supports most of the Board's request. He recommends about a \$24.3 million reduction over six years in current revenue funding for the Technology Modernization project. An excerpt of the County Executive's Recommended FY15-20 CIP for MCPS is attached (©16-28).

The Board's six-year request (and the County Executive's recommendation) is proposed to increase at a level far greater than the rest of the CIP. The table below shows the Board request and CE recommendation and what the Board request would be if the MCPS CIP maintained (no increase or decrease) its current share (31.1 percent) of the CIP in terms of expenditures. The "same share" level is more than \$344 million below the Board request and about \$320 million below the County Executive's recommendation.

**Table 2: MCPS CIP Compared to the Total CIP (in \$000s)**

	MCPS CIP	% Change From Latest CIP	Comparison w/BOE Request	Total CIP	MCPS Share
Latest FY13-18 CIP	1,365,497		(376,475)	4,388,501	31.1%
<b>Board Request</b>	<b>1,741,972</b>	<b>27.6%</b>		<b>4,491,538</b>	<b>38.8%</b>
CE Recommendation	1,717,700	25.8%	(24,272)	4,491,538	38.2%
MCPS CIP at Same Share	1,397,557	2.3%	(344,415)	4,491,538	31.1%

## Funding Sources

Expenditures by funding source are shown on the following table.

**Table 3:  
Amended FY13-18 & FY15-20 Board Request & CE Recommendation by Funding Source**

	Six-Year	FY13	FY14	FY15	FY16	FY17	FY18	FY19	FY20
<b>Amended CIP</b>	<b>1,361,675</b>	<b>250,338</b>	<b>223,990</b>	<b>228,814</b>	<b>269,280</b>	<b>215,210</b>	<b>174,043</b>		
Bonds	800,825	186,280	146,687	133,997	164,494	106,285	63,082		
Current Revenue	320,073	27,308	33,276	54,817	64,786	68,925	70,961		
State Aid	233,626	31,626	42,000	40,000	40,000	40,000	40,000		
Contributions	-	-	-	-	-	-	-		
Federal Aid	7,151	5,124	2,027	-	-	-	-		
<b>Board Request</b>	<b>1,741,972</b>			<b>251,589</b>	<b>348,228</b>	<b>397,790</b>	<b>278,312</b>	<b>236,014</b>	<b>230,039</b>
Bonds	1,287,316			153,422	248,419	295,377	176,368	210,476	203,254
Current Revenue	294,656			58,167	59,809	62,413	61,944	25,538	26,785
State Aid	160,000			40,000	40,000	40,000	40,000	-	-
School Financing Bonds	-			-	-	-	-	-	-
School Facilities Payment	-			-	-	-	-	-	-
<b>CE Recommendation</b>	<b>1,717,700</b>			<b>247,542</b>	<b>344,408</b>	<b>395,151</b>	<b>275,033</b>	<b>231,394</b>	<b>224,172</b>
Bonds	784,221			142,257	150,938	124,338	146,993	113,576	106,119
Current Revenue	462,258			65,285	80,949	81,813	78,340	77,818	78,053
State Aid	240,000			40,000	40,000	40,000	40,000	40,000	40,000
School Financing Bonds	230,700			-	72,000	149,000	9,700	-	-
School Facilities Payment	521			-	521	-	-	-	-

This chart shows that six-year bond funding would increase substantially under the Board of Education request, but would drop in the CE recommendation. However, the Board's request does not make assumptions about state aid, school impact taxes, or recordation taxes for FY19 and FY20. Therefore, those two years show higher bond totals than would otherwise be the case. For FY15-18, the Board assumes approved levels of funding for those same funding sources.

The Executive is recommending a slight decrease in bonds. This reduction is made up of technical funding switches, including:

- Assuming \$40 million annually in FY19 and FY20 and reducing bonds by the same amount in those years. State aid issues are discussed later in this memorandum.
- Revising school impact taxes and recordation taxes up for FY15-20, based on more recent assumptions, further offsetting bonds as well as general current revenue.
- Most significantly, the County Executive is recommending assuming \$230.4 million in new revenue from "School Financing Bonds" which would

offset an equal amount of bonds. This issue is discussed in more detail in the next section.

### **County Executive Assumptions**

Given the County Executive's MCPS CIP expenditure recommendation is quite close to the Board's request, it is important to consider the key assumptions underlying the County Executive's MCPS CIP recommendations. These include:

- **Assume \$40 million per year in state aid for school construction funding.** *While the County has met or exceeded this number on occasion in past years, in three of the past four years, the County has been awarded less than \$40 million. (See state aid discussion later in this memorandum.)*
- **Assume \$230.4 million in a new state aid source ("School Financing Bonds").** *The County is working with Baltimore County and Prince George's County to draft legislation creating this new source of funding. Under the program, qualifying counties would be able to leverage up to \$20 million in state funding with a 2-to-1 County match to finance public school construction. The bonds issued under this program would be state bonds that would not be subject to the County's bond limits. However, the details of how such a plan would work, how the County match would be calculated, etc. are not clear. (See further discussion below.)*
- **Revise impact tax and recordation tax assumptions upward by substantial amounts** *(see funding reconciliation project description form on ©27).* *Overall, bonds would be reduced by \$192.4 million as a result.*
- **Increase the County's spending affordability guidelines for bonds from \$295 million per year to \$324.5 million per year.** *This 10 percent increase to annual bond limits is the maximum the Council is allowed to do by law. On February 4, the Council approved this higher limit.*

Council Staff is particularly concerned about the \$230.4 million revenue assumed for school financing bonds. If the legislation ultimately fails to become law, or if the funding related to this new effort remains cloudy even after the close of the State Legislative Session, the Council will have a difficult time reconciling the MCPS CIP in the context of potentially \$230.4 million less in funding. The early May reconciliation process is intended to make more marginal adjustments to the CIP and not such massive changes.

**Council Staff recommends that the Education Committee review the MCPS CIP without the assumption of the new "School Financing Bonds" funding. This approach has the advantage of providing a more deliberate public review process for what will be very difficult choices if the state funding does not materialize.**

**Given the scale of the cuts required to balance the MCPS budget without the new state aid, Council Staff recommends that the Education Committee ask the Board of Education to review its FY15-20 Proposed CIP and develop a list of projects (in priority order by project or by group of projects) which, if all were removed and/or deferred,**

would offset the \$230.4 million reduction within the six-year period. In March, the Education Committee can discuss the list with the Board and MCPS staff. The list could then be used (as needed) to reconcile the MCPS CIP in early May when the Council will hopefully know whether and how much new state aid can be assumed in the CIP.

### State Aid Assumptions

The Executive recommends assuming \$40 million per year for each of the next six years. This annual total is the same as assumed in the Amended FY13-18 CIP.

**State Aid History:** Each year, MCPS submits a state aid request to the Interagency Committee for State Public School Construction (IAC). This request is for state aid for individual school projects, modernizations, roof, HVAC replacement, educational technology, relocatable classrooms, and other projects. The latest request is summarized on ©9. The following chart presents requested and approved state aid amounts over the past 8 years:

**Table #3:**  
**State Aid for School Construction**  
**FY06-FY15 (in millions)**

Fiscal Year	Statewide Requests	Statewide Allocation	MCPS Request	Approved	% of Statewide Allocation
FY05	\$384.0	\$125.9	\$59.7	\$9.0	7.1%
FY06	\$592.7	\$250.0	\$126.3	\$30.4	12.2%
FY07	\$730.4	\$320.5	\$125.2	\$40.1	12.5%
FY08	\$893.8	\$400.0	\$134.0	\$52.3	13.1%
FY09	\$871.4	\$340.0	\$132.8	\$46.3	13.6%
FY10	\$766.0	\$266.7	\$113.9	\$28.4	10.6%
FY11	\$729.1	\$263.7	\$139.1	\$30.2	11.5%
FY12*	\$612.3	\$311.6	\$163.5	\$42.0	13.5%
FY13	\$576.3	\$347.9	\$184.5	\$43.1	12.4%
FY14	\$684.0	\$320.8	\$149.2	\$35.1	10.9%
FY15**	\$643.1	\$250.0	\$162.9	TBD	TBD

\*For FY12, \$47.5 million in alcohol beverage sales and use tax proceeds (HB1213) is included in the statewide allocation totals. MCPS received an additional \$9.0 million from these proceeds.

\*\*For FY15 the total statewide allocation is based on preliminary assumptions as provided by the County's Office of Intergovernmental Relations.

As shown in the chart, approved aid ultimately falls far below MCPS' requested levels.

**FY15:** On November 19, 2013, the Council approved a resolution supporting MCPS' state aid request for school construction.

In December, the IAC made recommendations to the Board of Public Works for allocating \$187.5 million in state aid for school construction. This allocation represented 75 percent of the total assumed statewide allocation at the time of \$250 million. For Montgomery County, the IAC recommended \$22 million.



To meet the County Executive's budget assumption of \$40 million, the County will need to secure \$18 million of the remaining \$67.5 to be allocated. With requests across the entire state totaling \$643.1 million, the competition for additional dollars is strong.

The final state-wide allocation for school construction dollars will be known once the State legislative session concludes. Final allocations by county are determined by the Board of Public Works in late April or early May.

**Given recent history, Council Staff believes the County Executive's \$40 million budget assumption is achievable (although far from certain) and, given the relative size of any gap, adjustments can be made at final reconciliation if necessary.**

### **Project-by-Project Review**

The Council's CIP process involves separate Committee and Council review of all of the Agency CIPs in February and March, followed by a final reconciliation process in early May that must balance all of the Council's expenditure recommendations by fiscal year with spending affordability assumptions (for G.O. bonds, for instance) and with Operating Budget assumptions (current revenue funding and PAYGO).

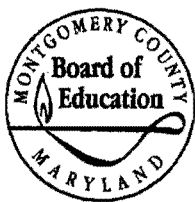
**As recommended earlier, because of the potentially large funding gap for MCPS as a result of uncertainty over the "School Financing Bonds" issue, Council Staff recommends that the Board of Education develop a priority list of projects.**

While overall affordability is in flux, Council Staff still intends to do a project-by-project review of the MCPS CIP and present project-specific recommendations to the Committee at future meetings.

As projects are reviewed, Council Staff will also note cases where Council Staff believes some potential for cuts or deferrals are possible.

### **Attachments**

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## **MONTGOMERY COUNTY BOARD OF EDUCATION**

850 Hungerford Drive ♦ Rockville, Maryland 20850

December 2, 2013

The Honorable Isiah Leggett  
Montgomery County Executive  
Executive Office Building  
101 Monroe Street  
Rockville, Maryland 20850

The Honorable Nancy Navarro, President  
and Members of the Montgomery County Council  
Stella B. Werner Council Office Building  
100 Maryland Avenue  
Rockville, Maryland 20850

Dear Mr. Leggett, Ms. Navarro, and Members of the Montgomery County Council:

At its November 18, 2013, meeting, the Board of Education approved the Requested Fiscal Year (FY) 2015 Capital Budget and the FY 2015–2020 Capital Improvements Program (CIP) for Montgomery County Public Schools (MCPS). Enclosed is a copy of the Board of Education resolution requesting an FY 2015 Capital Budget appropriation of \$240,242,000 and an FY 2015–2020 CIP totaling \$1,741,972,000 (Amended Action 3.1). The Board of Education is requesting \$162,929,000 from the state as its share of the FY 2015 Capital Budget. Fiscal Year 2015 is the first year of the biennial CIP review process. In accordance with the Montgomery County charter, all CIP projects are considered in odd-numbered fiscal years; therefore, this requested CIP will receive a full review by the county executive and the County Council.

The Board of Education is committed to working with Montgomery County elected officials to address the many facility needs of our school system. However, we also must provide our students with the best possible learning environment. The Board of Education believes as representatives of our staff, students, and parent community, it is its responsibility to request a CIP that reflects the essential funding to meet our needs, but also is mindful of the fiscal limitations of Montgomery County. This requested CIP accomplishes both of these goals.

### **Enrollment**

For the 2013–2014 school year, MCPS will experience the sixth straight year of significant enrollment growth. The official September 30, 2013, enrollment is 151,289, for a one-year increase of 2,510 students. Since the 2007–2008 school year, enrollment has increased by 13,544 students, with most of the increase at the elementary school level. This total amount

of increase is equivalent to 18 elementary schools with a capacity of 740 students. Although numerous school capacity projects have recently been built to address our student enrollment, the school system continues to be significantly behind in meeting our elementary school space needs.

The large cohort of today's elementary school students has begun to enter middle school and high school, and many of these buildings quickly will become overutilized in the next six years. By the 2019–2020 school year, middle school enrollment is projected to increase by approximately 5,082 students and high school enrollment by approximately 4,138 students. These increases are equivalent to approximately four middle schools with a capacity of 1,200 students each and two high schools with a capacity of 2,000 students each. The following chart illustrates the official September 30 enrollment for this year and the previous five years, as well as the enrollment projection for the 2018–2019 school year:

FY 2009	FY 2010	FY 2011	FY 2012	FY 2013	FY 2014	FY 2019 (projected)
139,276	141,777	144,064	146,497	148,779	151,289	162,255

Total MCPS enrollment is projected to increase by 10,966 students and will reach 162,255 students by the 2019–2020 school year. Adding the projected 10,966 increase to the 13,544 increase since 2007, results in a total increase of 24,510 students during the 12-year period from 2007 to 2019. This is a remarkable amount of enrollment growth for our school system to accommodate. If we do not address the overutilization at the elementary school level now, the urgency will be compounded by the anticipated overutilization at the secondary level in the near future.

#### **Requested CIP**

As indicated in the *Superintendent's Recommended FY 2015 Capital Budget and FY 2015–2020 Capital Improvements Program*, if all individual projects with completed feasibility studies were recommended for inclusion in the CIP, as well as full funding for revitalization/expansion projects and our countywide projects, the CIP submission would be approximately \$2.2 billion. While the superintendent of schools, as well as the Board of Education, believe that every project is justified and vital to our students and staff, a \$2.2 billion six-year CIP would represent an increase of approximately \$800 million more than the current approved CIP and would not be prudent given the fiscal constraints and projected revenue shortfalls still facing our county and state.

Therefore, the *Board of Education's Requested FY 2015 Capital Budget and the FY 2015–2020 Capital Improvements Program* totals \$1.742 billion, an increase of \$376.5 million or 27.6 percent more than the previously approved six-year plan. The request includes

\$251,589,000 in expenditures for FY 2015, an increase of \$44.2 million more than the previously approved FY 2015 expenditures.

In order to formulate his recommendations for the CIP, the superintendent of schools once again placed all capital projects in six categories and prioritized those categories—Compliance projects, Capital Maintenance projects, Capacity projects, Revitalization/Expansion projects, System Infrastructure projects, and the Technology Modernization project. The Board of Education recognizes the need to categorize and prioritize the capital projects included in the CIP request. We believe that the development of these priorities was valuable in guiding the Board of Education in its deliberations on the superintendent's recommendations.

As previously stated, MCPS continues to experience dramatic enrollment growth every year, especially in the elementary grades. More than 85 percent of that growth has occurred at this level, creating significant crowding throughout the school system. Therefore, the Board of Education supports the superintendent of schools' recommended CIP to maintain the completion dates of six elementary school addition projects included in the approved CIP, as well as the completion dates of three new elementary schools.

The Board of Education also supported the superintendent of schools' recommendation to include funding for seven new addition projects at the following elementary schools: Ashburton, Lucy V. Barnsley, Burtonsville, Diamond, Kensington Parkwood, S. Christa McAuliffe, and Judith A. Resnik. In order to submit a recommended CIP that was fiscally viable, the superintendent of schools utilized a threshold of 150 seats exceeding capacity in the last year of the recommended CIP to determine which additions would move forward at this time. The Board of Education supports this threshold and, unfortunately, four elementary schools—Capt. James E. Daly, Greencastle, Meadow Hall, and Strawberry Knoll—all with completed feasibility studies, were not included in the Board of Education's Requested FY 2015–2020 CIP. Two elementary schools, Burnt Mills and Summit Hall, have completed feasibility studies for proposed additions; however, these additions will be completed as part of their scheduled revitalization/expansion projects.

During the 2012–2013 school year, a comprehensive capacity study was conducted in the Downcounty Consortium to address the overutilization of elementary schools in the midsection of the Downcounty Consortium. The following elementary schools were included in the scope of the study: Arcola, Brookhaven, Forest Knolls, Georgian Forest, Glen Haven, Glenallan, Harmony Hills, Highland, Kemp Mill, Sargent Shriver, Weller Road, and Wheaton Woods. Based on the findings of the study, the Board of Education supports the superintendent of schools' recommendation to request funding for five new elementary school addition projects at Brookhaven, Glen Haven, Highland, Kemp Mill, and Sargent Shriver elementary schools. These additions, along with space that is available at Georgian Forest,

Glenallan, and Weller Road elementary schools, will address the overutilization issues at Arcola, Highland, Kemp Mill, and Sargent Shriver elementary schools.

As indicated above, the large cohort of today's elementary school students has started to enter middle and high school and many of these buildings will quickly become overutilized during the next six years. Therefore, the *Board of Education's Requested FY 2015 Capital Budget and the FY 2015–2020 Capital Improvements Program* maintains the completion dates of one middle school and one high school addition projects, as well as two new middle schools previously included in the approved CIP. The Board of Education concurs with the superintendent of schools' recommendation to fund two new addition projects at North Bethesda Middle School and Bethesda-Chevy Chase High School.

As noted above, if all individual projects with completed feasibility studies were recommended for inclusion in the CIP, as well as full funding for revitalization/expansion projects and our countywide projects, the requested CIP would be approximately \$2.2 billion. Of the \$2.2 billion, approximately \$1.0 billion would be for the six-year revitalization/expansion schedule for elementary, middle, and high schools. The superintendent of schools did not believe it was fiscally responsible to recommend this entire amount, and as a result, he recommended a one-year delay of all elementary school revitalization/expansion projects beginning with Wayside Elementary School, and a two-year delay of secondary school revitalization/expansion projects beginning with William H. Farquhar Middle School and Thomas S. Wootton High School.

While the Board of Education understands the continued fiscal constraints of the county, it cannot support a two-year delay of the revitalization/expansion projects for our secondary schools. The Board of Education believes that we must address the aging infrastructure of our secondary schools and be proactive with regard to the projected enrollment growth at our middle and high schools. Therefore, the *Board of Education's Requested FY 2015 Capital Budget and FY 2015–2020 Capital Improvements Program* includes funding to keep the revitalization/expansion projects on their approved schedule for the secondary schools, starting with William H. Farquhar Middle School and Thomas S. Wootton High School.

Also, during the November 18, 2013, meeting, the Board of Education included funding for facility improvements to the Blair G. Ewing Center. This facility houses alternative programs and serves students throughout Montgomery County. A feasibility study was conducted in FY 2013 and the Board of Education anticipates that the proposed improvements will support the program offerings and enhance the success for those students who attend the alternative programs.

With respect to countywide projects, the Board of Education supports the superintendent's recommendation to address our systemwide needs by increasing our systemic projects, such

as Planned Life-cycle Asset Replacement (PLAR), Roof Replacement, *Americans with Disabilities Act of 1990* (ADA) Compliance, Fire Safety Code Upgrades, and Asbestos Abatement. One countywide project—Heating, Ventilation, and Air Conditioning (HVAC) Replacement—is increased substantially to address the backlog of HVAC projects that directly affect our students, teachers, and administrators each school day. It is vital that MCPS has the necessary funding to address our aging infrastructure. The Board of Education's request for the HVAC project provides additional funds for upgrades and/or replacements of HVAC systems that are beyond their expected service life. To eliminate the backlog of approximately \$160 million, MCPS would require \$28 million per year for the next 10 years; therefore, the request for this project only begins to address this problem.

#### **State Aid**

Funding for the CIP continues to be complex. Local funding sources such as County General Obligation (GO) bonds, current revenue, the county Recordation Tax, and the School Impact Tax are utilized in conjunction with state aid to fund the CIP. For FY 2015, the revised state aid request is \$162.9 million. This figure is based on current eligibility of projects approved by the County Council in May 2013. Of the \$162.9 million request, \$25.8 million is for 4 projects that have received partial state funding in a prior year; \$25.2 million is for 7 forward-funded construction projects; \$10.6 million is for systemic roofing and HVAC projects; and, \$92.6 million is for 7 projects previously granted planning approval from the state and now require construction funding. The remaining \$8.7 million is for 5 projects that will require state planning approval in addition to construction funding. The Board of Education, along with the superintendent of schools, Montgomery County officials, and our state delegation will work together to strengthen our efforts and pursue various avenues for supplementary funding above our annual state allocation for school construction projects.

#### **Non-Capital Items**

Even with the request of five new addition projects in the Downcounty Consortium, we will not be able to accommodate all of the projected enrollment growth in this area of the county. Therefore, the Board of Education concurs with the superintendent of schools' recommendation for a second comprehensive elementary school capacity study for the Downcounty Consortium, this time in the lower portion of the consortium, to address the enrollment growth. The comprehensive capacity study will be conducted during the 2013–2014 school year. The superintendent of schools' recommendation included the following schools: East Silver Spring, Forest Knolls, Highland View, Rolling Terrace, Sligo Creek, and Woodlin elementary schools. While the Board of Education supports the inclusion of the aforementioned schools, the Board of Education also believes that in order to provide a

thorough analysis during the capacity study process, the following schools should be included: Montgomery Knolls, Pine Crest, New Hampshire Estates, Oak View, Takoma Park, and Piney Branch elementary schools.

In spring 2013, a Roundtable Discussion Group convened to explore the enrollment, demographic, and facility impact of unpairing New Hampshire Estates and Oak View elementary schools. Currently, New Hampshire Estates Elementary School serves students in prekindergarten through Grade 2, and Oak View Elementary School serves students in Grades 3 through 5. Representatives from the New Hampshire Estates and Oak View elementary schools Parent Teacher Association (PTA), Montgomery Blair cluster coordinators, and one representative from the community coalition, known as the "PreK-5 Neighborhood School Initiative" (PK5NSI), served on the New Hampshire Estates and Oak View Elementary Schools Roundtable Discussion Group.

The Board of Education commends the work of the New Hampshire Estates and Oak View elementary schools Roundtable. The superintendent of schools, in developing his recommendation, balanced the desires and concerns of the PK5NSI community coalition, PTA representatives, and cluster coordinators with the data and research presented by MCPS staff. After careful consideration of the Roundtable report and community input, the superintendent of schools recommended, and the Board of Education concurs, that the current pairing of New Hampshire Estates and Oak View elementary schools be maintained.

Also, in spring 2013, a Boundary Advisory Committee was convened to evaluate options for the service area of the new Clarksburg Cluster Elementary School. The Boundary Advisory Committee included six representatives from Cedar Grove Elementary School, five representatives from Little Bennett Elementary School, and two Clarksburg cluster coordinators. After review of all the information submitted, and in consideration of updated enrollment projections, the superintendent of schools' recommendation sought to align boundaries with major roadways where possible, enable contiguous homes to be assigned to the same school, bring enrollment at Little Bennett Elementary School to within the school's capacity, and mitigate the enrollment fluctuation that Cedar Grove Elementary School has experienced. The Board of Education appreciates the superintendent of schools' thorough analysis of the options and the reasons for his recommendation; however, the Board of Education supports an alternative for the service area of the new Clarksburg Cluster Elementary School (Amended Action 2.1).

Since 2007, elementary school enrollment in the Gaithersburg Cluster has increased by approximately 500 students. In addition, development of the Crown community continues, with 1,500 residential units in the Rosemont Elementary School service area. Therefore, the Board of Education supports the superintendent of schools' recommendation for a comprehensive elementary school capacity study for the Gaithersburg Cluster to address

The Honorable Isiah Leggett  
The Honorable Nancy Navarro  
Members of the County Council

7

December 2, 2013

enrollment growth in this area. The study will be conducted during the 2013–2014 school year and will include all of the elementary schools in the cluster.

Finally, an abbreviated boundary study was recommended by the superintendent of schools, and the Board of Education concurs, for winter 2013–2014 to consider the reassignment of the Walter Reed National Military Medical Center (Medical Center) from its current assignment of Rosemary Hills Elementary School for Grades K–2 and North Chevy Chase Elementary School for Grades 3–6, to Bethesda Elementary School for Grades K–5.

Families who temporarily reside at the Medical Center have enrolled their children in Bethesda Elementary School in the past, and disruption of this assignment would present a hardship for these families. For the 2013–2014 school year, families with elementary school students who reside at the Medical Center were granted Change of School Assignments to Bethesda Elementary School, allowing the school system the opportunity to review the school assignment for the Medical Center this year, without disrupting students enrolled at Bethesda Elementary School. Following the abbreviated boundary review, the superintendent of schools will forward his recommendation to the Board of Education for action in spring 2014.

The Board of Education looks forward to meeting with you to discuss its request. If additional information is needed, please do not hesitate to contact me.

Sincerely,



Christopher S. Barclay  
President

CSB:ak

Enclosure

Copy to:  
Members of the Board of Education  
Dr. Starr



# Board of Education's Requested FY 2015 Capital Budget and FY 2015–2020 Capital Improvements Program

(figures in thousands)

Project	FY 2015 Approp.	Total	Thru FY 2013	Remaining FY 2014	Total Six-Years	FY 2015	FY 2016	FY 2017	FY 2018	FY 2019	FY 2020
<b>Individual School Projects</b>											
Arcola ES Addition	130	3,841	141	1,096	2,604	1,057	1,547				
Ashburton ES Addition					7,221			256	2,052	4,017	896
Lucy Barnsley ES Addition	1,156	12,974			12,974	462	3,462	7,434	1,616		
Bethesda ES Addition	171	3,970	143	1,168	2,659	1,082	1,577				
Bethesda-Chevy Chase HS Addition	2,808	30,787			30,787	1,123	9,034	17,325	3,305		
Bethesda-Chevy Chase MS #2		52,314		250	52,064	829	15,181	30,674	5,380		
Brookhaven ES Addition (DCC Solution)		5,381			5,381		192	1,515	3,026	648	
Burtonsville ES Addition		12,818			12,818			469	3,692	7,288	1,369
Clarksburg Cluster ES (Clarksburg Village Site #1)		28,218	7,194	8,613	12,411	12,411					
Clarksburg HS Addition	529	11,823	377	3,229	8,217	3,269	4,948				
Clarksburg/Damascus MS (New)	48,750	52,764	200	1,107	51,457	14,633	31,246	5,578			
Diamond ES Addition	804	8,926			8,926	322	2,615	4,971	1,018		
Blair Ewing Center Improvements	1,512	16,579			16,579	605	3,527	10,425	2,022		
Glen Haven ES Addition (DCC Solution)		4,092			4,092		147	1,306	2,180	459	
Highland ES Addition (DCC Solution)		8,225			8,225		285	2,320	4,502	1,118	
Kemp Mill ES Addition (DCC Solution)		8,658			8,658		310	2,515	4,803	1,030	
Kensington-Parkwood ES Addition	998	11,156			11,156	399	3,244	6,192	1,321		
S. Christa McAuliffe ES Addition		10,171			10,171			364	2,959	5,646	1,202
North Bethesda MS Addition	1,691	18,610			18,610	676	5,324	10,547	2,063		
North Chevy Chase ES Addition	260	6,820	230	1,921	4,669	1,880	2,789				
Northwest ES #8	2,979	32,450			32,450	1,192	8,958	18,831	3,469		
Judith Resnik ES Addition		11,512			11,512			413	3,358	6,397	1,344
Rosemary Hills ES Addition	172	5,708	198	1,668	3,842	1,569	2,273				
Sargent Shriver ES Addition (DCC Solution)		3,881			3,881		136	1,108	2,136	501	
Waters Landing ES Addition		8,827	1,794	3,487	3,546	3,546					
Julius West MS Addition	13,798	15,303		409	14,894	4,664	8,554	1,676			
Wood Acres ES Addition	7,800	8,606		232	8,374	2,637	4,822	915			
ADA Compliance: MCPS	3,000	24,393	10,393	3,200	10,800	3,000	3,000	1,200	1,200	1,200	1,200
Asbestos Abatement	1,145	15,520	7,505	1,145	6,870	1,145	1,145	1,145	1,145	1,145	1,145
Building Modifications and Program Improvements	3,500	27,432	18,132	2,300	7,000	3,500	3,500				
Current Replacement/Modernizations	55,906	1,374,005	507,905	121,982	744,118	97,274	132,654	187,357	162,667	115,679	48,487
Design and Construction Management	4,900	65,775	31,475	4,900	29,400	4,900	4,900	4,900	4,900	4,900	4,900
Energy Conservation: MCPS	2,057	29,750	15,351	2,057	12,342	2,057	2,057	2,057	2,057	2,057	2,057
Facility Planning: MCPS	900	10,997	6,807	600	3,590	900	450	770	400	670	400
Fire Safety Upgrades	2,000	15,483	6,712	1,503	7,268	2,000	2,000	817	817	817	817
Future Replacements/Modernizations		153,375			153,375	0	0	0	3,368	33,772	116,235
HVAC (Mechanical Systems) Replacement	28,000	169,775	63,415	10,360	96,000	28,000	28,000	10,000	10,000	10,000	10,000
Improved (Safe) Access to Schools	1,200	10,828	7,228	1,200	2,400	1,200	1,200				
Indoor Air Quality Improvements	2,147	28,061	16,282	1,497	10,282	2,147	2,147	1,497	1,497	1,497	1,497
Planned Life-Cycle Asset Replacement (PLAR)	7,250	90,404	52,199	4,741	33,464	7,250	7,250	4,741	4,741	4,741	4,741
Rehabilitation/Renovation of Closed Schools (RROCS)	3,258	110,820	75,439		35,381	1,303	8,780	21,391	3,907		
Relocatable Classrooms	5,000	45,811	26,811	4,000	15,000	5,000	5,000	5,000			
Restroom Renovations	1,000	13,085	8,735	1,000	3,350	1,000	1,000	1,000	350		
Roof Replacement: MCPS	8,000	78,929	30,589	6,468	41,872	8,000	8,000	6,468	6,468	6,468	6,468
School Security Systems		18,610	9,614	5,860	3,136	3,136					
Stormwater Discharge and Water Quality Management	616	9,367	5,055	616	3,696	616	616	616	616	616	616
Technology Modernization	26,805	315,487	138,949	22,088	154,450	26,805	26,358	23,997	25,277	25,348	26,665
<b>Total Requested CIP</b>	<b>240,242</b>	<b>3,002,321</b>	<b>1,048,873</b>	<b>218,697</b>	<b>1,741,972</b>	<b>251,589</b>	<b>348,228</b>	<b>397,790</b>	<b>278,312</b>	<b>236,014</b>	<b>230,039</b>

# Revised FY 2015 State Capital Improvements Program for Montgomery County Public Schools

(figures in thousands)

Priority No.	PFA Y/N	Project	Total Estimated Cost	Non PSCP Funds	Prior IAC Funding Thru FY 2014	FY 2015 Request For Funding
<b>Balance of Funding (Forward-Funded)</b>						
1	Y	Paint Branch HS Revitalization/Expansion	93,745	62,022	25,230	6,493
2	Y	Herbert Hoover MS Revitalization/Expansion	44,930	34,366	2,350	8,214
3	Y	Glenallen ES Revitalization/Expansion (CSR)	26,591	19,500	1,600	5,491
4	Y	Beverly Farms ES Revitalization/Expansion	26,247	19,619	1,046	5,582
		<b>Subtotal</b>	<b>191,513</b>	<b>135,507</b>	<b>30,226</b>	<b>25,780</b>
<b>Funding (Forward-Funded)</b>						
5	Y	Weller Road ES Revitalization/Expansion (CSR)	24,547	15,895	0	8,652
6	Y	Bradley Hills ES Addition	17,949	13,426	0	4,523
7	Y	Westbrook ES Addition	11,805	9,396	0	2,409
8	N	Darnestown ES Addition	15,400	12,198	0	3,202
9	Y	Wyngate ES Addition	10,230	7,392	0	2,838
10	Y	Georgian Forest ES Addition (CSR)	10,620	7,875	0	2,745
11	Y	Viers Mill ES Addition (CSR)	11,177	10,335	0	842
		<b>Subtotal</b>	<b>101,728</b>	<b>76,517</b>	<b>0</b>	<b>25,211</b>
<b>Systemic Projects</b>						
12	Y	Quince Orchard HS HVAC	2,215	1,110	0	1,105
13	Y	S. Christa McAuliffe ES HVAC	2,150	1,077	0	1,073
14	Y	Damascus HS HVAC	2,122	1,063	0	1,059
15	Y	Shady Grove MS HVAC	2,050	1,027	0	1,023
16	Y	Goshen ES HVAC	1,750	877	0	873
17	Y	Roberto Clemente MS Roof	1,650	827	0	823
18	Y	Woodfield ES HVAC	1,451	727	0	724
19	N	Briggs Chaney MS Roof	1,550	777	0	773
20	Y	Lake Seneca ES HVAC	1,325	664	0	661
21	Y	White Oak MS Roof	1,245	624	0	621
22	Y	Summit Hall ES HVAC	1,185	594	0	591
23	Y	Woodlin ES HVAC	1,075	539	0	536
24	Y	Fields Road MS Roof	800	401	0	399
25	Y	Walt Whitman HS Roof	612	307	0	305
		<b>Subtotal</b>	<b>21,180</b>	<b>10,614</b>	<b>0</b>	<b>10,566</b>
<b>Construction Request</b>						
26	Y	Waters Landing ES Addition (CSR)	8,827	7,535	0	1,292
27	Y	Gaithersburg HS Revitalization/Expansion	109,100	69,514	0	39,586
28	Y	Clarksburg Cluster ES	28,732	19,311	0	9,421
29	Y	Bel Pre ES Revitalization/Expansion (CSR)	29,387	20,549	0	8,838
30	Y	Rock Creek Forest ES Revitalization/Expansion (CSR)*	29,100	18,854	0	10,246
31	Y	Candlewood ES Revitalization/Expansion*	23,833	16,392	0	7,441
32	Y	Wheaton HS Revitalization/Expansion*	128,734	97,165	0	15,785
		<b>Subtotal</b>	<b>357,713</b>	<b>249,320</b>	<b>0</b>	<b>92,609</b>
<b>Planning and Construction Request</b>						
33/34	Y	Clarksburg HS Addition	11,823	7,566	0	4,257
35/36	Y	North Chevy Chase ES Addition	6,820	5,215	0	1,605
37/38	Y	Rosemary Hills ES Addition	5,708	5,447	0	261
39/40	Y	Bethesda ES Addition	3,970	2,498	0	1,472
41/42	Y	Arcola ES Addition (CSR)	3,970	2,802	0	1,168
		<b>Subtotal</b>	<b>32,291</b>	<b>23,528</b>	<b>0</b>	<b>8,763</b>
<b>Planning Approval Request</b>						
43	Y	Clarksburg/Damascus MS (New)*	LP			LP
44	N	William H. Farquhar MS Revitalization/Expansion*	LP			LP
45	Y	Wheaton Woods ES Revitalization/Expansion* (CSR)	LP			LP
46	Y	Brown Station ES Revitalization/Expansion* (CSR)	LP			LP
47	Y	Wayside ES Revitalization/Expansion*	LP			LP
48	Y	Julius West MS Addition	LP			LP
49	Y	Wood Acres ES Addition	LP			LP
50	Y	Bethesda/Chevy Chase MS (New)*	LP			LP
51	Y	Seneca Valley HS Revitalization/Expansion*	LP			LP
52	Y	Thomas Edison HS of Technology Revitalization/Expansion*	LP			LP
		<b>TOTAL</b>	<b>704,425</b>	<b>495,486</b>	<b>30,226</b>	<b>162,929</b>

\*Split-FY Funding Request

**Board of Education's Requested FY 2015 Capital Budget  
and the FY 2015–2020 Capital Improvements Program  
Summary Table<sup>1</sup>**

Individual Projects	County Council Adopted Action (May 2013)	Board of Education Request	Anticipated Completion Date
<b>Bethesda-Chevy Chase Cluster</b>			
<b>Bethesda-Chevy Chase HS Addition</b>		<b>Request FY 2015 appropriation for planning funds.</b>	<b>8/17</b>
Bethesda-Chevy Chase MS #2	Approved FY 2014 appropriation for planning funds.		8/17
Bethesda ES Addition	Approved FY 2014 appropriation for construction funds.	Request FY 2015 appropriation for balance of funding.	8/15
North Chevy Chase ES Addition	Approved FY 2014 appropriation for construction funds.	Request FY 2015 appropriation for balance of funding.	8/15
Rock Creek Forest ES Revitalization/Expansion	Approved FY 2014 appropriation for construction funds.	Request FY 2015 appropriation for balance of funding.	1/15
Rosemary Hills ES Addition	Approved FY 2014 appropriation for construction funds.	Request FY 2015 appropriation for balance of funding.	8/15
Rosemary Hills ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions.	1/22
<b>Winston Churchill Cluster</b>			
Potomac ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions.	1/19
Wayside ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions.	8/17
<b>Clarksburg Cluster</b>			
Clarksburg HS Addition	Approved FY 2014 appropriation for construction funds.	Request FY 2015 appropriation for balance of funding.	8/15
Clarksburg/Damascus MS (New)		Request FY 2015 appropriation for construction funds.	8/16
Neelsville MS Addition		Request FY 2015 appropriation for facility planning.	TBD
Clarksburg Cluster ES #8 (New)		Request FY 2015 appropriation for facility planning.	TBD
Clarksburg Cluster ES (Clarksburg Village Site #1)	Approved FY 2014 appropriation for balance of funding.		8/14
Captain James E. Daly ES Addition			TBD
<b>Damascus Cluster</b>			
Clarksburg/Damascus MS (New)		Request FY 2015 appropriation for construction funds.	8/16
Damascus ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions.	1/22
<b>Downcounty Consortium</b>			
Wheaton HS Revitalization/Expansion	Approved FY 2014 appropriation for construction funds.		8/15 Building 8/18 Site
Eastern Middle School Revitalization/Expansion		Request FY 2018 expenditures for planning funds.	8/21
Col. E. Brooke Lee MS Addition		Request FY 2015 appropriation for facility planning.	TBD

<sup>1</sup>Bold indicates new project in the FY 2015–2020 CIP. Blank indicates no change from the approved project.

Individual Projects	County Council Adopted Action May 2013	Board of Education Request	Anticipated Completion Date
Col. E. Brooke Lee MS Revitalization/Expansion		Request FY 2020 expenditures for planning funds.	8/23
A. Mario Loiederman MS Addition	Approved FY 2014 appropriation for facility planning.		TBD
Parkland MS Addition		Request FY 2015 appropriation for facility planning.	TBD
Silver Spring International MS Addition		Request FY 2015 appropriation for facility planning.	TBD
Takoma Park MS Addition		Request FY 2015 appropriation for facility planning.	TBD
Arcola ES Addition	Approved FY 2014 appropriation for construction funds.	Request FY 2015 appropriation for balance of funding.	8/15
<b>Brookhaven ES Addition (DCC Solution)</b>		<b>Request FY 2016 expenditure for planning funds.</b>	<b>8/18</b>
Bel Pre ES Revitalization/Expansion	Approved FY 2014 appropriation for balance of funding.		8/14
<b>Glen Haven ES Addition (DCC Solution)</b>		<b>Request FY 2016 expenditure for planning funds.</b>	<b>8/18</b>
<b>Highland ES Addition (DCC Solution)</b>		<b>Request FY 2016 expenditure for planning funds.</b>	<b>8/18</b>
Highland View ES Addition			TBD
<b>Kemp Mill ES Addition (DCC Solution)</b>		<b>Request FY 2016 expenditure for planning funds.</b>	<b>8/18</b>
Rolling Terrace ES Addition	Approved FY 2014 appropriation for facility planning.		TBD
<b>Sargent Shriver ES Addition (DCC Solution)</b>		<b>Request FY 2016 expenditures for planning funds.</b>	<b>8/18</b>
Wheaton Woods ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions.	8/17
Woodlin ES Addition			TBD
<b>Gaithersburg Cluster</b>			
Gaithersburg HS Revitalization/Expansion			8/13 Building 8/14 Site
Gaithersburg ES Addition	Approved FY 2014 appropriation for facility planning.		TBD
Goshen ES Addition	Approved FY 2014 appropriation for facility planning.		TBD
Strawberry Knoll ES Addition			TBD
Summit Hall ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions.	1/22
<b>Walter Johnson Cluster</b>			
Walter Johnson HS Addition		Request FY 2015 appropriation for facility planning.	TBD
<b>North Bethesda MS Addition</b>		<b>Request FY 2015 appropriation for planning funds.</b>	<b>8/17</b>
Tilden MS Revitalization/Expansion	Approved FY 2014 appropriation for facility planning.	Request FY 2016 expenditure for planning funds.	8/19
<b>Ashburton ES Addition</b>		<b>Request FY 2017 expenditure for planning funds.</b>	<b>8/19</b>

<sup>1</sup> Bold indicates new project in the FY2015–2020 CIP. Blank indicates no change from the approved project.

Individual Projects	County Council Adopted Action May 2018	Board of Education Request	Anticipated Completion Date
<b>Kensington-Parkwood ES Addition</b>		<b>Request FY 2015 appropriation for planning funds.</b>	<b>8/17</b>
Luxmanor ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions.	1/19
<b>Col. Zadok Magruder Cluster</b>			
Candlewood ES Revitalization/Expansion	Approved FY 2014 appropriation for construction funds.	Request FY 2015 appropriation for balance of funding.	1/15
<b>Judith A. Resnik ES Addition</b>		<b>Request FY 2017 expenditure for planning funds.</b>	<b>8/19</b>
<b>Richard Montgomery Cluster</b>			
Julius West MS Addition	Approved FY 2014 appropriation for planning funds.	Request FY 2015 appropriation for construction funds.	8/16
Richard Montgomery ES #5 (Hungerford Park Site)		Request FY 2015 appropriation for planning funds.	8/17
Twinbrook ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions.	1/22
<b>Northeast Consortium</b>			
William Farquhar MS Revitalization/Expansion		Request FY 2015 appropriation for construction funds.	8/16
Broad Acres ES Addition	Approved FY 2014 appropriation for facility planning.		TBD
<b>Burtonsville ES Addition</b>		<b>Request FY 2017 expenditure for planning funds.</b>	<b>8/19</b>
Greencastle ES Addition			TBD
Stonegate ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions. Request FY 2015 appropriation for facility planning.	8/20
<b>Northwest Cluster</b>			
<b>Diamond ES Addition</b>		<b>Request FY 2015 appropriation for planning funds.</b>	<b>8/17</b>
Northwest ES #8		Request FY 2015 appropriation for planning funds.	8/17
<b>Poolesville Cluster</b>			
Poolesville HS Revitalization/Expansion		Request FY 2018 expenditures for planning funds.	8/22 Building 8/23 Site
<b>Quince Orchard Cluster</b>			
Brown Station ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions.	8/17
<b>Rockville Cluster</b>			
Earl B. Wood MS Addition	Approved FY 2014 appropriation for facility planning.		TBD
<b>Lucy V. Barnsley ES Addition</b>		<b>Request FY 2015 appropriation for planning funds.</b>	<b>8/17</b>

<sup>1</sup> Bold indicates new project to the FY 2015–2020 CIP. Blank indicates no change from the approved project.

Individual Projects	County Council Adopted Action May 2013	Board of Education Request	Anticipated Completion Date
Maryvale ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions.	1/19
Meadow Hall ES Addition			TBD
<b>Seneca Valley Cluster</b>			
Seneca Valley HS Revitalization/Expansion	Approved FY 2014 appropriation for planning funds.		8/18 Building 8/19 Site
Lake Seneca ES Addition	Approved FY 2014 appropriation for facility planning.		TBD
<b>S. Christa McAuliffe ES Addition</b>		<b>Request FY 2017 expenditure for planning funds.</b>	<b>8/19</b>
Waters Landing ES Addition	Approved FY 2014 appropriation for balance of funding.		8/14
<b>Sherwood Cluster</b>			
William Farquhar MS Revitalization/Expansion		Request FY 2015 appropriation for construction funds.	8/16
Belmont ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions. Request FY 2015 appropriation for facility planning.	8/20
<b>Watkins Mill Cluster</b>			
Neelsville MS Addition		Request FY 2015 appropriation for facility planning.	TBD
South Lake ES Addition	Approved FY 2014 appropriation for facility planning.		TBD
<b>Walt Whitman Cluster</b>			
Whitman HS Addition	Approved FY 2014 appropriation for facility planning.		TBD
Burning Tree ES Addition	Approved FY 2014 appropriation for facility planning.		TBD
Wood Acres ES Addition	Approved FY 2014 appropriation for planning funds.	Request FY 2015 appropriation for construction funds.	8/16
<b>Thomas S. Wootton Cluster</b>			
Thomas S. Wootton HS Revitalization/Expansion		Request FY 2016 expenditure for planning funds.	8/20 Building 8/21 Site
Cold Spring ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions. Request FY 2015 appropriation for facility planning.	8/20
DuFief ES Revitalization/Expansion		Request one year delay for elementary school Revitalizations/Expansions. Request FY 2015 appropriation for facility planning.	8/20

<sup>1</sup>Bold indicates new project to the FY 2015–2020 CIP. Blank indicates no change from the approved project.

Individual Projects	County Council Adopted Action May 2013	Board of Education Request	Anticipated Completion Date
<b>Other Educational Facilities</b>			
Thomas Edison High School for Technology Revitalization/Expansion			8/17 Building 8/18 Site
Blair G. Ewing Center Modifications		Request FY 2015 appropriation for planning funds.	8/17
Rock Terrace School Modifications			TBD
Carl Sandburg Revitalization/Expansion (collocation with Maryvale ES)		Request one year delay for elementary school Revitalizations/Expansions.	1/19
Stephen Knolls School Modifications			TBD

<sup>1</sup> Bold indicates new project to the FY 2015–2020 CIP. Blank indicates no change from the approved project.

**Board of Education's FY 2015 Capital Budget  
and the FY 2015–2020 Capital Improvements Program  
Summary Table<sup>1</sup>**

<b>Countywide Project</b>	<b>County Council Adopted May 2014</b>	<b>Board of Education Request</b>	<b>Anticipated Completion Date</b>
ADA Compliance	Approved FY 2014 appropriation to continue this project.	Request FY 2015 appropriation to continue this project.	Ongoing
Asbestos Abatement and Hazardous Materials Remediation	Approved FY 2014 appropriation to continue this project.	Request FY 2015 appropriation to continue this project.	Ongoing
Building Modifications and Program Improvements	Approved FY 2014 appropriation to continue this project.	Request FY 2015 appropriation to continue this project.	Ongoing
Current Revitalizations/Expansions	Approved FY 2014 appropriation for one planning and three construction modernization projects.	Request a one year delay for elementary schools	Ongoing
Design and Construction Management	Approved FY 2014 appropriation to continue this project.	Request FY 2015 appropriation to continue this project.	Ongoing
Energy Conservation	Approved FY 2014 appropriation to continue this project.	Request FY 2015 appropriation to continue this project.	Ongoing
Facility Planning	Approved amendment to the FY2013–2018 CIP to increase level of funding for FY 2014.	Request FY 2015 appropriation to continue this project.	Ongoing
Fire Safety Code Upgrades	Approved FY 2014 appropriation to continue this project.	Request FY 2015 appropriation to continue this project.	Ongoing
Future Revitalizations/Expansions		Request one year delay for elementary schools	Ongoing
HVAC Replacement	Denied request. Approved increase of \$3.82 million from the adopted FY 2013–2018 CIP for FY 2014.	Request increase in this project for FY 2015 and beyond to address the backlog of HVAC projects. Request FY 2015 appropriation to continue this project.	Ongoing
Improved (SAFE) Access to Schools	Approved FY 2014 appropriation to continue this project.	Request FY 2015 appropriation to continue this project.	Ongoing
Indoor Air Quality Improvements	Approved FY 2014 appropriation to continue this project.	Request FY 2015 appropriation to continue this project.	Ongoing
Planned Life Cycle Asset Replacement (PLAR)	Denied. Approved FY 2014 level of funding in the adopted FY2013–2018 CIP.	Request FY 2015 appropriation to continue this project.	Ongoing
Rehab./Reno. of Closed Schools (RROCS)		Request FY 2015 appropriation for planning funds for the Richard Montgomery Cluster Elementary School #5	Ongoing
Relocatable Classrooms	Approved FY 2014 appropriation to continue this project.	Request FY 2015 appropriation to continue this project.	Ongoing
Restroom Renovations	Approved FY 2014 appropriation to continue this project.	Request FY 2015 appropriation to continue this project.	Ongoing
Roof Replacement	Approved FY 2014 appropriation to continue this project.	Request FY 2015 appropriation to continue this project.	Ongoing
School Security Systems	Approved FY 2014 appropriation to continue this project.		Ongoing
Stormwater Discharge and Water Quality Management	Approved FY 2014 appropriation to continue this project.	Request FY 2015 appropriation to continue this project.	Ongoing
Technology Modernization	Approved FY 2014 appropriation to continue this project.	Request FY 2015 appropriation to continue this project.	Ongoing
Transportation Depots			TBD

<sup>1</sup>Bold indicates new project to the FY 2015–2020 CIP. Blank indicates no change from the approved project.



# Montgomery County Public Schools

## AGENCY DESCRIPTION

The Montgomery County Board of Education (BOE or Board) consists of seven publicly elected members; one student member elected by public school students; and the Superintendent of Schools, who is appointed by the Board of Education and is responsible for the administration of the school system. The vote of the Superintendent is not counted for capital and operating budget appropriations. Montgomery County Public Schools (MCPS) operates and maintains a Countywide system of public schools for students from pre-kindergarten through high school (including special education, interagency, and alternative programs) and also provides adult education services. At the start of the 2014-2015 school year, 151,289 students were attending 202 separate public educational facilities.

## PROGRAM DESCRIPTION AND OBJECTIVES

The Board's FY15-20 CIP request consists of 15 new and 32 ongoing projects with expenditures in the six-year period. Included within the ongoing projects are three projects with multiple sub-projects: Current Revitalizations / Expansions, Future Revitalizations / Expansions (formerly known as modernizations), and Rehab / Renovation of Closed Schools.

Three projects are included for technical reasons. State Aid Reconciliation includes State Aid funding not yet allocated to specific projects, as well as bond funding reductions assumed from this State Aid. MCPS Affordability Reconciliation and Funding Reconciliation projects adjust total expenditures to conform to the Executive's recommended funding levels, which are affordable within the CIP.

The section following this narrative only shows the project description forms (PDFs) for which the Executive recommends changes to the BOE's request. The complete BOE request can be found on the MCPS web site at <http://www.montgomeryschoolsmd.org/departments/planning/cipmaster.aspx>

## PROGRAM CONTACTS

Contact Adrienne Karamihas of the Montgomery County Public Schools at 240.314.1035 or Jane Mukira of the Office of Management and Budget at 240.777.2754 for more information about this agency's capital budget.

## CAPITAL PROGRAM REVIEW

### Board of Education Request

The Board's FY15-20 capital program request for MCPS totals \$1.742.0 million, a \$376.5 million or 27.6 percent increase over the amended FY13-18 capital program of \$1,365.5 million.

### Executive Recommendations

The Executive recommends \$1,717.7 million over the six-year CIP, an amount which is a 25.8 percent increase above the amended FY13-18 funding. This significant increase is made possible by a combination of record local funding for school construction coupled with an assumption of a new State-supported financing source.

Local funding, consisting of general obligation bonds, current revenue, recordation taxes, impact taxes and school facility payments represents \$1.247 billion of the recommended budget – an amount \$128.5 million over the prior approved CIP. The recommended CIP also assumes a \$230.7 million initial installment of a \$600-700 million initiative to jump start construction for school additions and new schools to address overcrowding, as well as the \$240.0 million in traditional State Aid.

The County Executive launched this initiative jointly with the County Council, the Board of Education, and members of the State delegation to enlist needed State support for this effort. As MCPS completes additional feasibility studies and more addition/new school projects are developed, additional school financing bond funds will be programmed.

### Highlights of Executive Recommendation

- Allocate over \$1.7 billion for school construction and technology enhancements. Local funding for school construction and technology is \$1.247 billion – a record high and \$128.5 million more than the previously approved budget.
- Address capacity needs from higher enrollment by funding four new elementary schools and two new middle schools, constructing additions in 18 elementary schools, two middle schools, and two high schools. Together, these projects will add 455 classrooms.
- Maintain Board of Education requested revitalizations/expansions schedule for twenty-one

elementary schools, four middle schools and five high schools.

- Address countywide special education needs by adding new funding for one alternative center, Blair Ewing Center Improvements.
- Increase funding for the Heating, Ventilation and Air Conditioning (HVAC) project by \$37 million.
- Maintain requested funding for MCPS countywide infrastructure projects including roof replacements, school security systems, indoor air quality, and life-cycle asset replacement.
- Fund \$5.0 million for relocatables to address overutilization of the schools.
- As part of the Smart Growth Initiative (transit-oriented economic development), MCPS will benefit from the \$32.2 million MCPS Food Distribution Facility Relocation project.
- MCPS will benefit from the \$69.0 million MCPS-MNCPPC Maintenance Facility Relocation project funded as part of the Smart Growth Initiative.
- Fund County projects which support MCPS initiatives to bolster at risk children and their families, including Linkages to Learning, School Based Health Centers, High School Wellness Centers, and Child Care in Schools.
- Other CIP projects which benefit MCPS programs include: Pedestrian Safety Program, Transportation Improvements for Schools, FiberNet, Ballfields Initiatives (M-MCPC), and the Kennedy Shriver Aquatic Center Building Envelope Improvement.
- Fund a feasibility study for adding a High School Wellness Center at Kennedy High School, which will support the broader Kennedy Initiative Project.

## PROGRAM EXPENDITURES

The County Executive reaffirms his commitment to preparing children to live and learn.

### Individual Schools

The Executive supports the Board's capacity-related requests, which include constructing additions for twelve elementary schools, one middle school and one high school, and funding four new elementary schools and two new middle schools. The Executive supports revitalization/expansion to existing facilities by recommending funding for six elementary schools, one middle school, and three high schools. The Executive also supports funding for the Blair Ewing Center Improvements.

### Countywide Projects

For the FY15-20 CIP, the Board has requested \$897.5 million for its school revitalizations/expansions program. The Board proposal results in an average expenditure level per year of \$149.6 million, an increase of \$41.2 million per year or 38 percent over the current approved average annual expenditure level. The following table shows annual funding for

revitalizations/expansions (formerly known as modernizations) since FY01.

**Revitalizations/Expansions Funding (\$000s)**

Six-Year CIP	Average Per Year	Six-Year Total
FY01-06 Amended	59,887	359,319
FY03-08 Amended	39,282	235,691
FY05-10 Amended	48,569	291,413
FY07-12 Amended	92,119	552,716
FY09-14 Amended	110,966	665,796
FY11-16 Amended	111,719	670,311
FY13-18 Amended	108,397	650,379
FY15-20 Request	149,582	897,493
<i>Change from FY13-18 Amended</i>	<i>41,186</i>	<i>247,114</i>

The Executive continues to view maintaining the current MCPS infrastructure as a priority. This includes \$37 million in increased funding for the Heating, Ventilation, and Air Conditioning project. Building Modifications and Program Improvements, Fire Safety, Indoor Air Quality, Roof Replacements, School Security Systems and Planned Life-Cycle Asset Replacement are also among a number of level of effort projects being recommended for higher or continued funding in FY15-20.

## PROGRAM FUNDING

The MCPS capital program would be funded using \$784.2 million of County bonds; \$462.8 million of other local resources including current revenue, recordation tax, schools impact tax, and school facilities payments. It also includes non-local resources including \$240 million of State aid and \$230.7 million in new school financing bonds. A funding summary of FY's 14-20 follows this narrative.

### County General Obligation Bonds

The Board's request includes large increases in general obligation bond expenditures throughout the six-year program. The Executive recommends bond funding of \$784.2 million over six years, which reflects the resources available within the CIP. This represents an increase of \$41.1 million or 5.5 percent over the amended FY13-18 capital program. An allocation of approximately 36.0 percent of total planned FY15 general obligation bond issues has been recommended for MCPS.

### Other County Resources

Within the six-year CIP, the Executive recommends \$125.4 million in current revenue. His proposal also assumes \$192.3 million in recordation tax, \$144.6 million in school impact tax, and \$0.5 million in school facilities payment during FY15-20. The allocation of these funding sources to MCPS increased by 20.3 percent over the FY13-18 CIP.

### State Support for Schools

The budget assumes \$240 million in traditional State Aid for school construction. The recommended CIP also assumes a \$230.7 million initial installment of a \$600-700 million initiative to jump start construction for school additions and new schools to address overcrowding. The Executive launched this initiative jointly with the County Council, the Board of Education, and members of the State delegation to enlist needed State support for this effort. As MCPS completes additional feasibility studies and more addition/new school projects are developed, additional school financing bond funds will be programmed.

The Executive will vigorously pursue State Aid and the enabling legislation for the additional State-supported bonds and urges the Board, the Council, the County Delegation, and the community to request that the State fully fund the County's State Aid request.

Financial support for BOE capital budget initiatives is contingent on a successful County effort to also secure traditional State Aid for school construction over the next six years. The Executive's recommendation assumes \$240 million of State Aid over six years with \$40 million in FY15. The following table compares the annual amount of State aid requested by MCPS to the amount finally approved since 2000.

State Aid Funding (\$millions)

Fiscal Year	State Aid Requested	State Aid Approved
FY00	57.5	50.2
FY01	59.0	50.0
FY02	55.7	44.4
FY03	22.1	18.0
FY04	18.5	10.6
FY05	59.9	9.0
FY06	126.2	30.4
FY07	125.2	40.1
FY08	134.0	52.3
FY09	132.7	46.3
FY10	113.8	28.4
FY11	139.1	30.2
FY12	163.6	42.0
FY13	184.5	43.1
FY14	149.3	35.1
FY15 Req.	162.9	N/A

Montgomery County has requested \$162.9 million of State funding in FY15 for 23 construction projects and 14 systems renovation projects. A chart at the end of this chapter presents

FY15-20 budget assumptions and projects likely to require State Aid.

The State's Interagency Committee on School Construction (IAC) made a preliminary recommendation on December 20, 2013 to the State Board of Public Works (BPW) for \$22.0 million of State Aid for Montgomery County in FY15. The table presented below shows details by project. The BPW will make final allocations in the spring of 2014 after the end of the Maryland General Assembly session.

FY15 State Aid for School Construction  
(\$000)

Project by Category	Total Est. Cost	FY15 Request	IAC Rec.	Balance
<b>Construction:</b>				
Paint Branch HS	93,745	6,493	6,493	-
Herbert Hoover MS	44,930	8,214	8,214	-
Glenallen ES	26,591	5,491	5,491	-
Beverly Farms ES	26,247	5,582	1,802	3,780
Subtotal, Construction	191,513	25,780	22,000	3,780
<b>Planning &amp; Construction:</b>				
Arcola ES	3,970	1,168		1,168
Bel Pre ES	29,387	8,838		8,838
Bethesda ES	3,970	1,472		1,472
Bradley Hills ES	17,949	4,523		4,523
Clarksburg HS	11,823	4,257		4,257
Clarksburg Cluster ES	28,732	9,421		9,421
Candlewood ES	23,833	7,441		7,441
Damascus ES	15,400	3,202		3,202
Gaithersburg HS	109,100	39,586		39,586
Georgian Forest ES	10,620	2,745		2,745
North Chevy Chase ES	6,820	1,605		1,605
Rock Creek Forest ES	29,100	10,246		10,246
Rosemary Hills ES	5,708	261		261
Viers Mills ES	11,177	842		842
Waters Landing ES	8,827	1,292		1,292
Weller Road ES	24,547	8,652		8,652
Westbrook ES	11,805	2,409		2,409
Wheaton HS	128,734	15,785		15,785
Wyngate ES	10,230	2,838		2,838
Subtotal, Plan. & Construct.	491,732	126,583	-	126,583
<b>Countywide:</b>				
Roof Replacement	5,857	2,921		2,921
HVAC/Electrical Replacement	15,323	7,645		7,645
Subtotal, Countywide	21,180	10,566	-	10,566
<b>Total, All Projects</b>	<b>704,425</b>	<b>162,929</b>	<b>22,000</b>	<b>140,929</b>

### SUBDIVISION STAGING POLICY

Article II of Chapter 33A-15 of the Montgomery County Code requires that, no later than November 15 in odd-numbered years, the County Council adopt the County's Subdivision Staging Policy. The Subdivision Staging Policy is the tool used to ensure that approvals of new subdivisions are commensurate with adequate transportation and school facilities. For the purposes of public school analysis and local area review of school facilities at time of subdivision, the County has been divided into 25 sectors which reflect the service areas of each of the MCPS high schools, including the middle schools and elementary schools which feed students to these high schools. These sectors are called "clusters."

The current Subdivision Staging Policy test of school adequacy applies to requests for residential subdivisions that have been filed with the Montgomery County Planning Board since January 1, 2013, and assesses school capacity five years in the future in each of the clusters. For each school level, the total projected enrollment of all schools in the cluster is compared to total school capacity in the future, including the additional capacity that will be built if the County Council approves the recommended CIP. The Subdivision Staging Policy test calculates a fixed structural capacity for schools. It assumes a class size of 22 for all-day kindergarten, 23 for elementary grades, and 25 for secondary grades. This measure does not count relocatable classrooms in computing capacity.

Clusters where enrollment is projected to be above 120 percent of program capacity are placed in development moratorium, which would apply to any residential subdivision plan that had not received approval from the Planning Board as of July 1, 2014, in the case of the FY15 school test. Clusters where enrollment is projected to be above 105 percent of program capacity, but not over 120 percent, are identified as requiring a special school facility payment from developers who choose to submit subdivision plans in these areas.

The tables that appear at the end of this chapter present the outcome of the Subdivision Staging Policy test based on the Board's requested FY15-20 CIP. The school test also requires a school facilities payment at the high school level in the Clarksburg, Albert Einstein, Quince Orchard, Richard Montgomery, Northwest, Northwood, and Walt Whitman clusters; at the middle school level in Montgomery Blair, John F. Kennedy, Northwood, Rockville, Wheaton and Walt Whitman clusters; and at the elementary school level in Montgomery Blair, Clarksburg, Gaithersburg, Northwood, and Quince Orchard clusters.

## **OPERATING BUDGET IMPACT**

Operating budget impacts measure resources needed to maintain or operate new or modernized facilities. They include such elements as salaries for administrators and building service workers and the cost of energy. They do not reflect teacher salaries because it is assumed that teachers already on staff would be transferred to fill positions in new schools.

According to MCPS standards and using FY15 dollars, each new 740 student elementary school will require approximately \$2.5 million in additional operating costs for the first year. These costs include salaries for 18.1 workyears of non-classroom positions. Each new 1,000 student middle school will require approximately \$3.8 million in additional operating costs for the first year. These costs include salaries for 31.8 workyears of non-classroom positions. A new 2,000 student high school is estimated to require approximately \$6.7 million in additional operating costs for the first year. These costs

include salaries for 58.2 workyears of non-classroom positions.

## **STATUTORY AUTHORITY**

Titles 3, 4, and 5 of the Education Article, Annotated Code of Maryland, govern the establishment of county boards of education, local school administration, and financing. Each county board is to maintain throughout its county a reasonably uniform system of public schools that is designed to provide quality education and equal educational opportunities for all children. Subtitle 3 of Title 5, State Aid for School Construction, provides for payment of certain public school construction and capital improvement costs by the State through its Public School Construction Program. The CIP review process for the public schools is governed by laws and regulations of the State of Maryland, the Montgomery County Charter, and the Board of Education's Policy on Long-Range Educational Facilities Planning.

# **FY15-20 Budgetary Assumptions of State Aid for School Construction (\$000s)**

<b>Projects by Category &amp; Priority</b>	<b>FY14</b>	<b>FY15-20</b>	<b>FY15</b>	<b>FY16</b>	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>
<b>Construction Funding</b>								
Fox Chapel ES	172							
Garrett Park ES	4,982							
Paint Branch HS		6,493	6,493					
Herbert Hoover MS		8,214	8,214					
Glenallen ES		5,491	5,491					
Beverly Farms ES		5,582	5,582					
<i>Subtotal, Construction</i>	<i>5,154</i>	<i>25,780</i>	<i>25,780</i>					
<b>Planning &amp; Construction</b>								
Beverly Farms ES	8,566	-						
Bradley Hills ES	4,586	4,523	4,523					
Brookhaven ES	1,647	-						
Darnestown ES	2,333	3,202	3,202					
Downcounty Consortium ES	9,405	-						
Fairland ES	2,086	-						
Gaithersburg HS	38,566	39,586	39,586					
Glenallen ES	9,388	-						
Georgian Forest ES	2,394	2,745	2,745					
Harmony Hills ES	2,827	-						
Herbert Hoover MS	14,812	-						
Jackson Road ES	1,254	-						
Montgomery Knolls ES	2,586	-						
North Chevy Chase ES	2,586	1,605	1,605					
Paint Branch HS	38,935	-						
Redland MS	4,634	-						
Ridgeview MS	1,954	-						
Rock View ES	1,938	-						
Seven Locks ES	5,910	-						
Viers Mill ES	2,690	842	842					
Waller Road ES	5,953	8,652	8,652					
Westbrook ES	3,363	2,409	2,409					
Whetstone ES	1,260	-						
Wyngate ES	2,508	2,838	2,838					
Arcola ES		1,168	1,168					
Bel Pre ES		8,838	8,838					
Bethesda ES		1,472	1,472					
Candlewood ES		11,161	7,441	3,720				
Rock Creek Forest ES		15,369	10,246	5,123				
Clarksburg Cluster ES		9,421	9,421					
Clarksburg HS		4,257	4,257					
Rosemary Hills ES		8,772	261				4,256	4,255
Waters Landing ES		1,292	1,292					
Wheaton HS		31,569	15,785	15,784				
William H. Farquhar MS		13,598		6,799	6,799			
Clarksburg/Damascus MS		16,041		8,021	8,020			
Brown Station ES		10,412		5,206	5,206			
Wayside ES		6,770		3,385	3,385			
Wheaton Woods ES		11,489		5,735	5,734			
Wood Acres ES		1,049		1,049				
Seneca Valley HS		33,198		16,599	16,599			
Thomas Edison HS of Technology		11,195		5,598	5,597			
Bethesda/Chevy Chase MS		15,247		7,624	7,623			
Julius West MS		1,684		1,684				
Highland View ES		5,275			2,638	2,637		
Tilden @ Woodward MS		14,761			7,381	7,380		
Bethesda /Chevy Chase HS		2,199			1,100	1,099		
Luxmanor ES		9,528			4,764	4,764		
Maryvale ES		17,969			8,985	8,984		
Northwest ES #8 (New)		14,078			7,039	7,039		
Potomac ES		9,024			4,512	4,512		
Richard Montgomery ES #5		14,740			7,370	7,370		
Belmont ES		9,052				4,526	4,526	
Coldspring ES		9,052				4,526	4,526	
Wootton HS		37,823				18,912	18,911	
Stonegate ES		8,511				4,256	4,255	
DuFief Mill ES		9,052				4,526	4,526	
Summit Hall ES		8,511				4,256	4,256	4,255
Poolesville HS		22,905				11,453	11,452	11,452
Damascus ES		8,511				4,256	4,255	4,255
Twinbrook ES		8,511				4,256	4,256	4,255
Eastern MS		17,511				8,756	8,755	8,755
<i>Subtotal, Planning and Construction</i>	<i>172,181</i>	<i>507,397</i>	<i>126,583</i>	<i>86,327</i>	<i>102,752</i>	<i>80,531</i>	<i>73,977</i>	<i>37,227</i>
<b>Countywide Projects</b>								
Roof Replacement	3,240	2,921	2,921					
HVAC/Electrical Replacement	6,532	7,645	7,645					
Addition Projects (Outyears)	-	62,500	-	12,500	12,500	12,500	12,500	12,500
Systemic Projects (Outyears)	-	75,000	-	15,000	15,000	15,000	15,000	15,000
<i>Subtotal, Countywide</i>	<i>9,772</i>	<i>148,066</i>	<i>10,566</i>	<i>27,500</i>	<i>27,500</i>	<i>27,500</i>	<i>27,500</i>	<i>27,500</i>
<b>Total, All Projects</b>	<b>181,953</b>	<b>655,463</b>	<b>137,149</b>	<b>113,827</b>	<b>130,252</b>	<b>108,031</b>	<b>101,477</b>	<b>64,727</b>
<b>Offset [1]</b>	<b>(145,107)</b>	<b>(441,243)</b>	<b>(122,929)</b>	<b>(73,827)</b>	<b>(90,252)</b>	<b>(68,031)</b>	<b>(61,477)</b>	<b>(24,727)</b>
<b>Total State Aid Assumed</b>	<b>42,000</b>	<b>240,000</b>	<b>40,000</b>	<b>40,000</b>	<b>40,000</b>	<b>40,000</b>	<b>40,000</b>	<b>40,000</b>

## **NOTES**

[1] This chart reflects outyear State Aid estimates from the MCPS November 2013 request to the State. Future annual request levels for State Aid will be based on State eligibility requirements and may exceed the amounts shown. In addition, anticipated changes to State funding formulas will affect amounts requested.

[2] Projects shown beyond FY15 do not yet have construction dollars approved. Expected funding requests are shown here.

[\*] Offset reconciles specified project total costs with assumed State funding levels.

## Summary of Subdivision Staging Policy School Test for FY 2015

Based on BOE Requested FY 2015–2020 CIP  
Would be Effective July 1, 2014

School Test Level	Description	Cluster Outcomes by Level		
		Elementary Inadequate	Middle Inadequate	High Inadequate
<u>Clusters over 105% utilization</u>  School facility payment required in inadequate clusters to proceed.	5-year test  Effective July 1, 2014  Test year 2019-20	Blake (107.8%) Clarksburg (115.2%) Gaithersburg (114.3) Northwood (106.7%) Quince Orchard (112.3%)	Blair (113.5%) Kennedy (107.0%) Northwood (112.8%) Rockville (110.7%) Wheaton (119.2%) Whitman (109.7%)	Clarksburg (116.0%) Einstein (108.6%) Walter Johnson (112.6%) Richard Montgomery (108.1%) Northwest (108.4%) Northwood (111.9%) Quince Orchard (108.3%) Whitman (112.7%)
<u>Clusters over 120% utilization</u>  Moratorium required in clusters that are inadequate.	5-year test  Effective July 1, 2014  Test year 2019-20	None	None	None

**FY2015 Subdivision Staging Policy School Test: Cluster Percent Utilizations in 2019**  
**Reflects BOE's Requested FY 2015-2020 Capital Improvements Program (CIP)**  
**Would be Effective July 1, 2014**

**Elementary School Enrollment**

<b>Cluster Area</b>	<b>Projected August 2019 Enrollment</b>	<b>100% MCPS Program Capacity With BOE Requested FY15-20 CIP</b>	<b>Cluster Percent Utilization in 2019</b>	<b>Growth Policy Test Result Capacity is:</b>	<b>Cluster Status?</b>
Bethesda-Chevy Chase	3,449	3,813	90.5%	Adequate	Open
<b>Montgomery Blair</b>	<b>4,471</b>	4,148	107.8%	<b>Inadequate</b>	<b>School Payment</b>
James Hubert Blake	2,296	2,201	104.3%	Adequate	Open
Winston Churchill	2,645	2,928	90.3%	Adequate	Open
<b>Clarksburg</b>	<b>4,461</b>	<b>3,872</b>	<b>115.2%</b>	<b>Inadequate</b>	<b>School Payment</b>
Damascus	1,847	2,133	86.6%	Adequate	Open
Albert Einstein	3,074	2,963	103.7%	Adequate	Open
<b>Gaithersburg</b>	<b>4,385</b>	<b>3,838</b>	<b>114.3%</b>	<b>Inadequate</b>	<b>School Payment</b>
Walter Johnson	4,141	4,491	92.2%	Adequate	Open
John F. Kennedy	2,875	3,046	94.4%	Adequate	Open
Col. Zadok Magruder	2,768	2,727	101.5%	Adequate	Open
Richard Montgomery	2,762	2,882	95.8%	Adequate	Open
Northwest	4,234	4,519	93.7%	Adequate	Open
<b>Northwood</b>	<b>3,666</b>	<b>3,435</b>	<b>106.7%</b>	<b>Inadequate</b>	<b>School Payment</b>
Paint Branch	2,561	2,480	103.3%	Adequate	Open
Poolesville	560	758	73.9%	Adequate	Open
<b>Quince Orchard</b>	<b>3,135</b>	<b>2,791</b>	<b>112.3%</b>	<b>Inadequate</b>	<b>School Payment</b>
Rockville	2,639	2,580	102.3%	Adequate	Open
Seneca Valley	2,471	2,390	103.4%	Adequate	Open
Sherwood	1,912	2,422	78.9%	Adequate	Open
Springbrook	3,266	3,178	102.8%	Adequate	Open
Watkins Mill	2,714	2,790	97.3%	Adequate	Open
Wheaton	3,212	3,631	88.5%	Adequate	Open
Walt Whitman	2,605	2,561	101.7%	Adequate	Open
Thomas S. Wootton	2,710	3,222	84.1%	Adequate	Open

Status of each cluster assumes current threshold for school facility payment (utilization >105%) and moratorium (utilization >120%)

**FY2015 Subdivision Staging Policy School Test: Cluster Percent Utilizations in 2019**  
**Reflects BOE's Requested FY 2015-2020 Capital Improvements Program (CIP)**  
**Would be Effective July 1, 2014**

**Middle School Enrollment**

<b>Cluster Area</b>	<b>Projected August 2019 Enrollment</b>	<b>100% MCPS Program Capacity With BOE Requested FY15-20 CIP</b>	<b>Cluster Percent Utilization in 2019</b>	<b>Growth Policy Test Result Capacity is:</b>	<b>Cluster Status?</b>
Bethesda-Chevy Chase	1,694	2,007	84.4%	Adequate	Open
<b>Montgomery Blair</b>	<b>2,672</b>	<b>2,354</b>	<b>113.5%</b>	<b>Inadequate</b>	<b>School Payment</b>
James Hubert Blake	1,263	1,354	93.3%	Adequate	Open
Winston Churchill	1,439	1,716	83.9%	Adequate	Open
Clarksburg	2,113	2,380	88.8%	Adequate	Open
Damascus	785	791	99.2%	Adequate	Open
Albert Einstein	1,304	1,434	90.9%	Adequate	Open
Gaithersburg	1,872	1,866	100.3%	Adequate	Open
Walter Johnson	2,126	2,408	88.3%	Adequate	Open
<b>John F. Kennedy</b>	<b>1,658</b>	<b>1,550</b>	<b>107.0%</b>	<b>Inadequate</b>	<b>School Payment</b>
Col. Zadok Magruder	1,277	1,602	79.7%	Adequate	Open
Richard Montgomery	1,341	1,445	92.8%	Adequate	Open
Northwest	2,258	2,225	101.5%	Adequate	Open
<b>Northwood</b>	<b>1,760</b>	<b>1,560</b>	<b>112.8%</b>	<b>Inadequate</b>	<b>School Payment</b>
Paint Branch	1,380	1,384	99.7%	Adequate	Open
Poolesville	288	468	61.5%	Adequate	Open
Quince Orchard	1,496	1,695	88.3%	Adequate	Open
<b>Rockville</b>	<b>1,064</b>	<b>961</b>	<b>110.7%</b>	<b>Inadequate</b>	<b>School Payment</b>
Seneca Valley	1,271	1,391	91.4%	Adequate	Open
Sherwood	1,098	1,456	75.4%	Adequate	Open
Springbrook	1,288	1,250	103.0%	Adequate	Open
Watkins Mill	1,298	1,379	94.1%	Adequate	Open
<b>Wheaton</b>	<b>1,773</b>	<b>1,488</b>	<b>119.2%</b>	<b>Inadequate</b>	<b>School Payment</b>
<b>Walt Whitman</b>	<b>1,455</b>	<b>1,326</b>	<b>109.7%</b>	<b>Inadequate</b>	<b>School Payment</b>
Thomas S. Wootton	1,455	1,640	88.7%	Adequate	Open

Status of each cluster assumes current threshold for school facility payment (utilization >105%) and moratorium (utilization >120%)



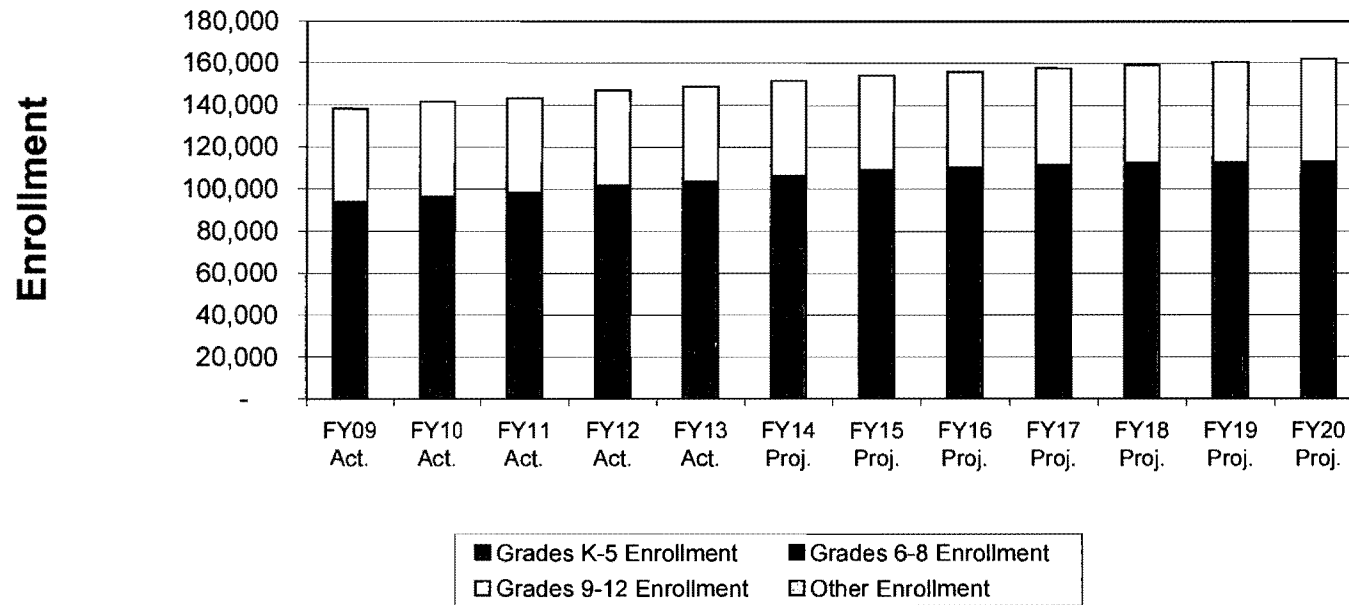
**FY2015 Subdivision Staging Policy School Test: Cluster Percent Utilizations in 2019**  
**Reflects BOE's Requested FY 2015-2020 Capital Improvements Program (CIP)**  
**Would be Effective July 1, 2014**

**High School Enrollment**

<b>Cluster Area</b>	<b>Projected August 2019 Enrollment</b>	<b>100% MCPS Program Capacity With BOE Requested FY15-20 CIP</b>	<b>Cluster Percent Utilization in 2019</b>	<b>Cluster Percent Utilization in 2019</b>	<b>Cluster Status?</b>
Bethesda-Chevy Chase	2,286	2,399	95.3%	Adequate	Open
Montgomery Blair	3,053	2,938	103.9%	Adequate	Open
James Hubert Blake	1,749	1,743	100.3%	Adequate	Open
Winston Churchill	2,091	2,013	103.9%	Adequate	Open
<b>Clarksburg</b>	<b>2,297</b>	<b>1,980</b>	<b>116.0%</b>	<b>Inadequate</b>	<b>School Payment</b>
Damascus	1,433	1,551	92.4%	Adequate	Open
<b>Albert Einstein</b>	<b>1,760</b>	<b>1,621</b>	<b>108.6%</b>	<b>Inadequate</b>	<b>School Payment</b>
Gaithersburg	2,240	2,317	96.7%	Adequate	Open
<b>Walter Johnson</b>	<b>2,630</b>	<b>2,336</b>	<b>112.6%</b>	<b>Inadequate</b>	<b>School Payment</b>
John F. Kennedy	1,801	1,847	97.5%	Adequate	Open
Col. Zadok Magruder	1,663	1,995	83.4%	Adequate	Open
<b>Richard Montgomery</b>	<b>2,416</b>	<b>2,236</b>	<b>108.1%</b>	<b>Inadequate</b>	<b>School Payment</b>
<b>Northwest</b>	<b>2,430</b>	<b>2,241</b>	<b>108.4%</b>	<b>Inadequate</b>	<b>School Payment</b>
<b>Northwood</b>	<b>1,762</b>	<b>1,575</b>	<b>111.9%</b>	<b>Inadequate</b>	<b>School Payment</b>
Paint Branch	2,059	2,047	100.6%	Adequate	Open
Poolesville	1,146	1,170	97.9%	Adequate	Open
<b>Quince Orchard</b>	<b>2,012</b>	<b>1,857</b>	<b>108.3%</b>	<b>Inadequate</b>	<b>School Payment</b>
Rockville	1,504	1,570	95.8%	Adequate	Open
Seneca Valley	1,282	1,994	64.3%	Adequate	Open
Sherwood	1,748	2,136	81.8%	Adequate	Open
Springbrook	1,921	2,167	88.6%	Adequate	Open
Watkins Mill	1,672	1,917	87.2%	Adequate	Open
Wheaton	1,610	1,596	100.9%	Adequate	Open
<b>Walt Whitman</b>	<b>2,121</b>	<b>1,882</b>	<b>112.7%</b>	<b>Inadequate</b>	<b>School Payment</b>
Thomas S. Wootton	2,158	2,154	100.2%	Adequate	Open

Status of each cluster assumes current threshold for school facility payment (utilization >105%) and moratorium (utilization >120%)

## MCPS Enrollment by School Level



## MCPS Affordability Reconciliation (P056516)

Category Montgomery County Public Schools  
 Sub Category Miscellaneous Projects  
 Administering Agency Public Schools (AAGE18)  
 Planning Area Countywide

Date Last Modified 1/6/14  
 Required Adequate Public Facility No  
 Relocation Impact None  
 Status Ongoing

	Total	Thru FY13	Est FY14	Total 6 Years	FY 15	FY 16	FY 17	FY 18	FY 19	FY 20	Beyond 6 Yrs
<b>EXPENDITURE SCHEDULE (\$000s)</b>											
Planning, Design and Supervision	0	0	0	0	0	0	0	0	0	0	0
Land	0	0	0	0	0	0	0	0	0	0	0
Site Improvements and Utilities	0	0	0	0	0	0	0	0	0	0	0
Construction	0	0	0	0	0	0	0	0	0	0	0
Other	-24,272	0	0	-24,272	-4,047	-3,820	-2,639	-3,279	-4,620	-5,867	0
<b>Total</b>	<b>-24,272</b>	<b>0</b>	<b>0</b>	<b>-24,272</b>	<b>-4,047</b>	<b>-3,820</b>	<b>-2,639</b>	<b>-3,279</b>	<b>-4,620</b>	<b>-5,867</b>	<b>0</b>

<b>FUNDING SCHEDULE (\$000s)</b>											
Current Revenue: General	-24,272	0	0	-24,272	-4,047	-3,820	-2,639	-3,279	-4,620	-5,867	0
<b>Total</b>	<b>-24,272</b>	<b>0</b>	<b>0</b>	<b>-24,272</b>	<b>-4,047</b>	<b>-3,820</b>	<b>-2,639</b>	<b>-3,279</b>	<b>-4,620</b>	<b>-5,867</b>	<b>0</b>

### APPROPRIATION AND EXPENDITURE DATA (000s)

Appropriation Request	FY 15	-4,047
Appropriation Request Est.	FY 16	-3,820
Supplemental Appropriation Request		0
Transfer		0
Cumulative Appropriation		0
Expenditure / Encumbrances		0
Unencumbered Balance		0

Date First Appropriation	FY 15
First Cost Estimate	
Current Scope	FY01
Last FY's Cost Estimate	0

### Description

This project reconciles the Board of Education's request with the County Executive's recommendation. Fiscal constraints lead the Executive to adjust the annual amounts to be affordable within the CIP. School construction will proceed on the Board of Education's requested schedule. The only change in my recommended CIP is for Technology Modernization. The Executive recommends maintaining the FY13-18 approved funding level of \$130.2 million for the Technology Modernization Project for FY15-18. Potential increases to the Technology Modernization project may be considered in the context of the operating budget.

## MCPS Funding Reconciliation (P076510)

Category Montgomery County Public Schools  
 Sub Category Miscellaneous Projects  
 Administering Agency Public Schools (AAGE18)  
 Planning Area Countywide

Date Last Modified 1/6/14  
 Required Adequate Public Facility No  
 Relocation Impact None  
 Status Ongoing

Total	Thru FY13	Est FY14	Total 6 Years	FY 15	FY 16	FY 17	FY 18	FY 19	FY 20	Beyond 6 Yrs
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### EXPENDITURE SCHEDULE (\$000s)

Planning, Design and Supervision	0	0	0	0	0	0	0	0	0	0
Land	0	0	0	0	0	0	0	0	0	0
Site Improvements and Utilities	0	0	0	0	0	0	0	0	0	0
Construction	0	0	0	0	0	0	0	0	0	0
Other	0	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

### FUNDING SCHEDULE (\$000s)

Current Revenue: General	-12,455	0	-10,413	-2,042	0	0	0	0	-939	-1,103	0
Current Revenue: Recordation Tax	115,170	0	3,946	111,224	4,572	17,884	15,605	3,511	34,417	35,235	0
G.O. Bonds	-197,536	0	-5,141	-192,395	-11,165	-25,481	-22,039	-19,675	-56,900	-57,135	0
School Facilities Payment	521	0	0	521	0	521	0	0	0	0	0
Schools Impact Tax	94,300	0	11,608	82,692	6,593	7,076	6,434	16,164	23,422	23,003	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

### APPROPRIATION AND EXPENDITURE DATA (000s)

Appropriation Request	FY 15	0
Appropriation Request Est.	FY 16	0
Supplemental Appropriation Request		0
Transfer		0
Cumulative Appropriation		0
Expenditure / Encumbrances		0
Unencumbered Balance		0

Date First Appropriation	FY 07
First Cost Estimate	
Current Scope	FY07
Last FY's Cost Estimate	0

#### Description

This project reconciles the Board of Education's request with the updated funding estimates by balancing funding components on the macro level. The entries here should be zeroed out after funding adjustments are made to individual projects by MCPS.

#### Fiscal Note

Adjustment figures reflect a funding switches of Recordation Tax, School Impact Tax and School Facilities Payment with GO Bonds; funding switch of Current Revenue with Recordation Tax.

## State Aid Reconciliation (P896536)

Category: Montgomery County Public Schools  
 Sub Category: Miscellaneous Projects  
 Administering Agency: Public Schools (AAGE18)  
 Planning Area: Countywide

Date Last Modified: 1/6/14  
 Required Adequate Public Facility: No  
 Relocation Impact: None  
 Status: Ongoing

	Total	Thru FY13	Est FY14	Total 6 Years	FY 15	FY 16	FY 17	FY 18	FY 19	FY 20	Beyond 6 Yrs
<b>EXPENDITURE SCHEDULE (\$000s)</b>											
Planning, Design and Supervision	0	0	0	0	0	0	0	0	0	0	0
Land	0	0	0	0	0	0	0	0	0	0	0
Site Improvements and Utilities	0	0	0	0	0	0	0	0	0	0	0
Construction	0	0	0	0	0	0	0	0	0	0	0
Other	0	0	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

<b>FUNDING SCHEDULE (\$000s)</b>											
G.O. Bonds	-523,612	-52,912	0	-470,700	-40,000	-112,000	-189,000	-49,700	-40,000	-40,000	0
School Financing Bonds	230,700	0	0	230,700	0	72,000	149,000	9,700	0	0	0
State Aid	292,912	52,912	0	240,000	40,000	40,000	40,000	40,000	40,000	40,000	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

### APPROPRIATION AND EXPENDITURE DATA (000s)

Appropriation Request	FY 15	0
Appropriation Request Est.	FY 16	0
Supplemental Appropriation Request		0
Transfer		0
Cumulative Appropriation		0
Expenditure / Encumbrances		0
Unencumbered Balance		0

Date First Appropriation	
First Cost Estimate	
Current Scope	FY 96
Last FY's Cost Estimate	0

### Description

This project shows assumed traditional State Aid for FY2015 and beyond. When actual State Aid is known for specific projects, the amount of such aid is shown in those projects and then this PDF is zeroed out for the budget year.

The budget assumes \$240 million in traditional State Aid for school construction. The recommended CIP also assumes a \$230.7 million initial installment of a \$600-700 million initiative to jump start construction for school additions and new schools to address overcrowding. This initiative was launched jointly with the County Council, the Board of Education, and members of the State delegation to enlist needed State support for this effort. As MCPS completes additional feasibility studies and more addition/new school projects are developed, additional school financing bond funds will be programmed.

### Justification

From 2009-2014, MCPS grew by 13,526 students, more than the growth of Anne Arundel, Howard, Frederick, and Baltimore Counties combined over the same period. Due to this high increases in enrollment, half of MCPS schools are projected to have seat deficits by the 2018-2019 school year even with the approved FY13-18 CIP assumed.

Public Schools (A18) asserts that this project conforms to the requirements of relevant local plans, as required by the Maryland Economic Growth, Resource Protection and Planning Act.

## Summary of School Test for FY 2013

Based on BOE Requested FY 2013-2018 CIP  
Would Be Effective July 1, 2012

School Test Level	Description	Cluster Outcomes by Level		
		Elementary Inadequate	Middle Inadequate	High Inadequate
<u>Clusters over 105% utilization</u>  School facility payment required in inadequate clusters to proceed.	5-year test Effective July 1, 2012  Test year 2017-18	Blake (106.7%) Gaithersburg (110.0%) Magruder (105.4%) Paint Branch (114.5%) Quince Orchard (108.9%) Rockville (113.3%) Seneca Valley (111.9%)	Blair (106.9%) Walter Johnson (112.3%) Rockville (115.4%) Springbrook (106.7%) Wheaton (109.4%) Whitman (116.0%)	Blake (106.7%) Walter Johnson (106.3%) Northwood (111.5%) Quince Orchard (107.1%) Walt Whitman (109.3) Wootton (107.6%)
<u>Clusters over 120% utilization</u>  Moratorium required in clusters that are inadequate.	5-year test Effective July 1, 2012  Test year 2017-18			B-CC (131.7%)

# MONTGOMERY COUNTY COUNCIL EDUCATION COMMITTEE

## Montgomery County Public Schools

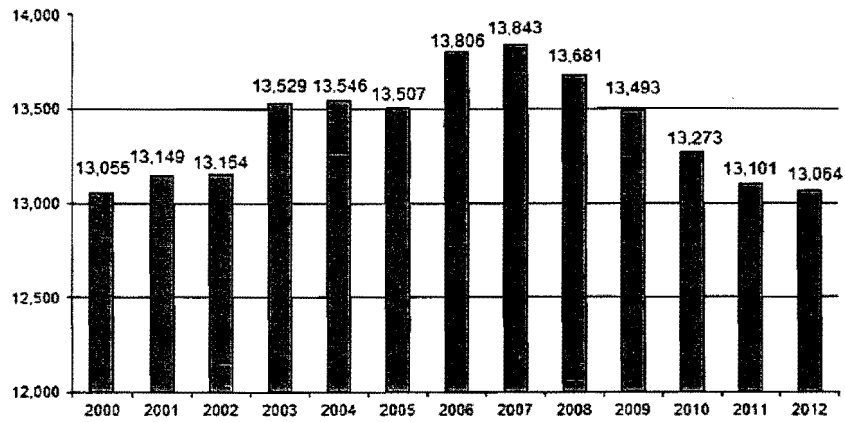
Enrollment Trends and Overview of the  
*FY 2015 Capital Budget and the  
FY 2015–2020 Capital Improvements Program (CIP)*

February 10, 2014

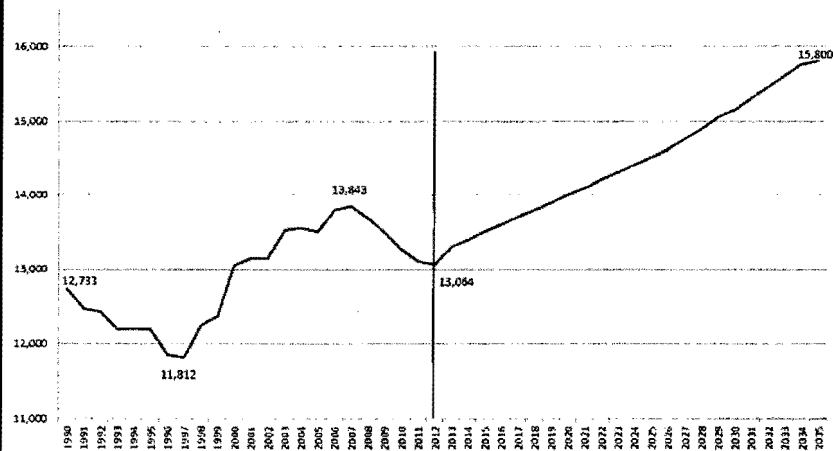
[www.montgomeryschoolsmd.org/departments/planning/cipmaster.aspx](http://www.montgomeryschoolsmd.org/departments/planning/cipmaster.aspx)

## Trends in County Births and Population

### Montgomery County Resident Births, 2000 to 2012

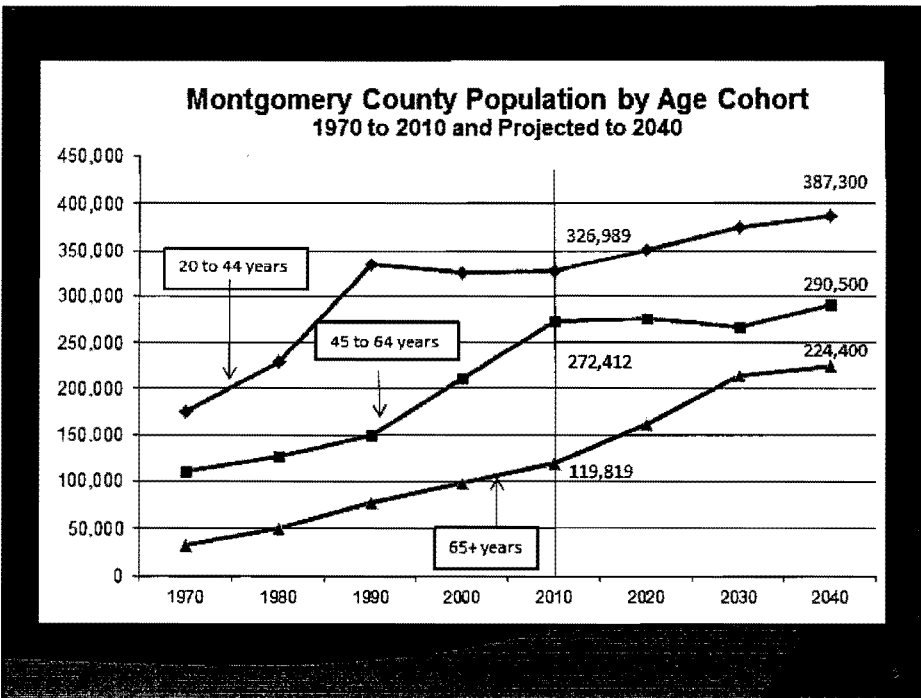
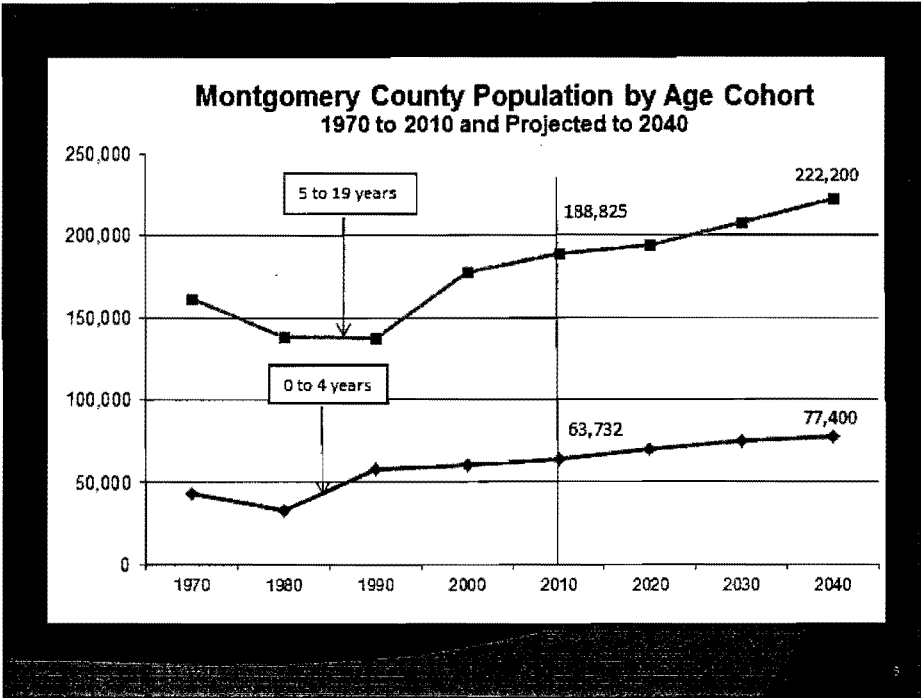


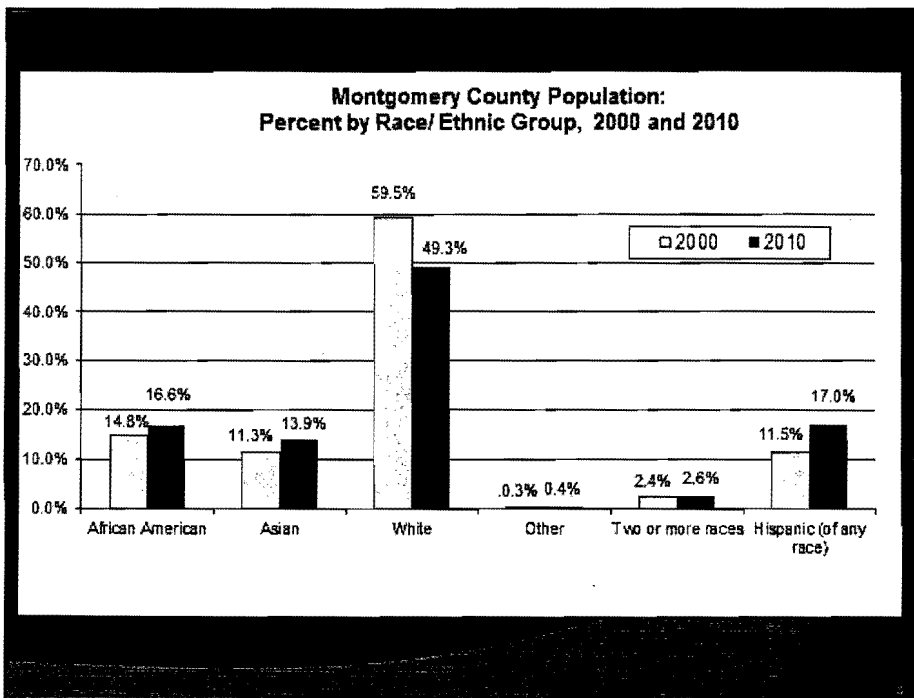
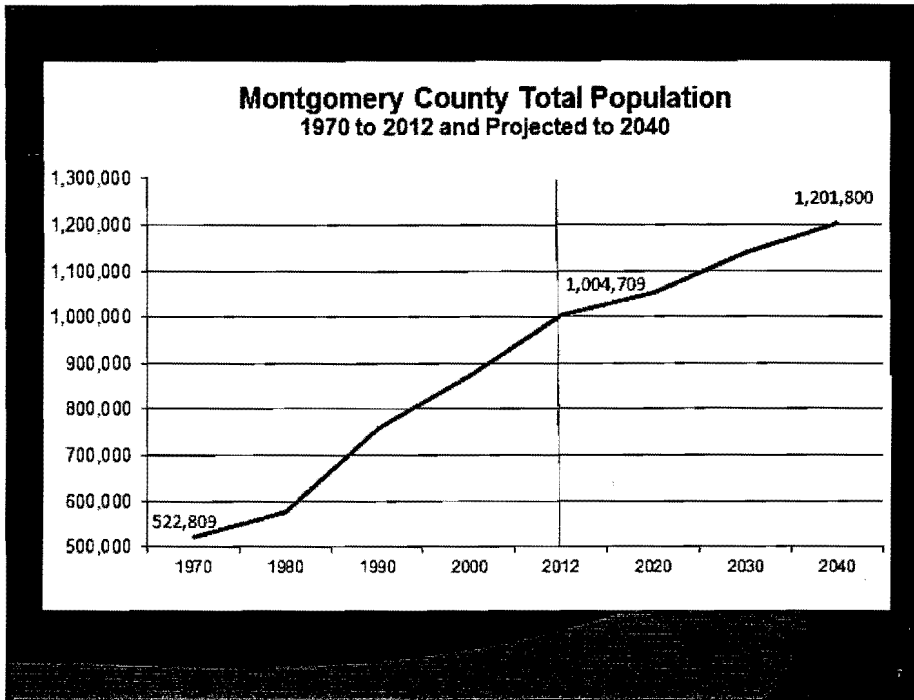
### Montgomery County Resident Births 2000 to 2012 Actual and Projected 2013 to 2035 Round 8.2



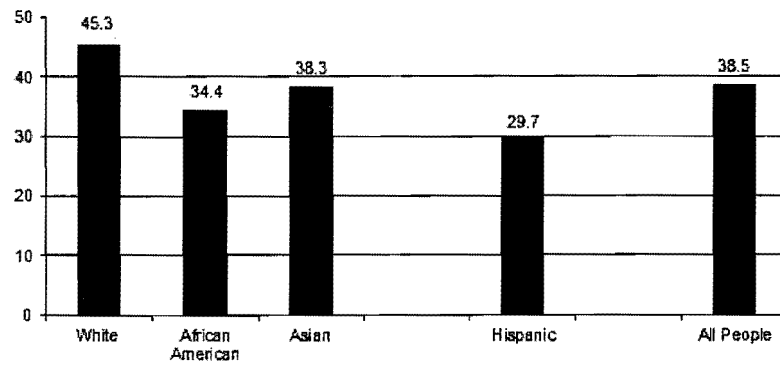
Source: Montgomery County Planning Department, Research Division, November 2012, Round 8.2 Population Forecast



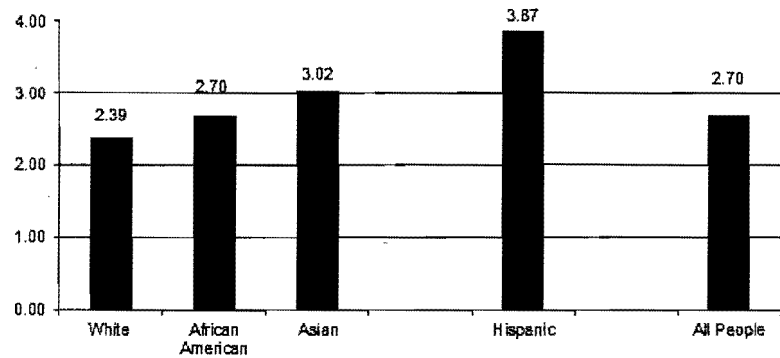




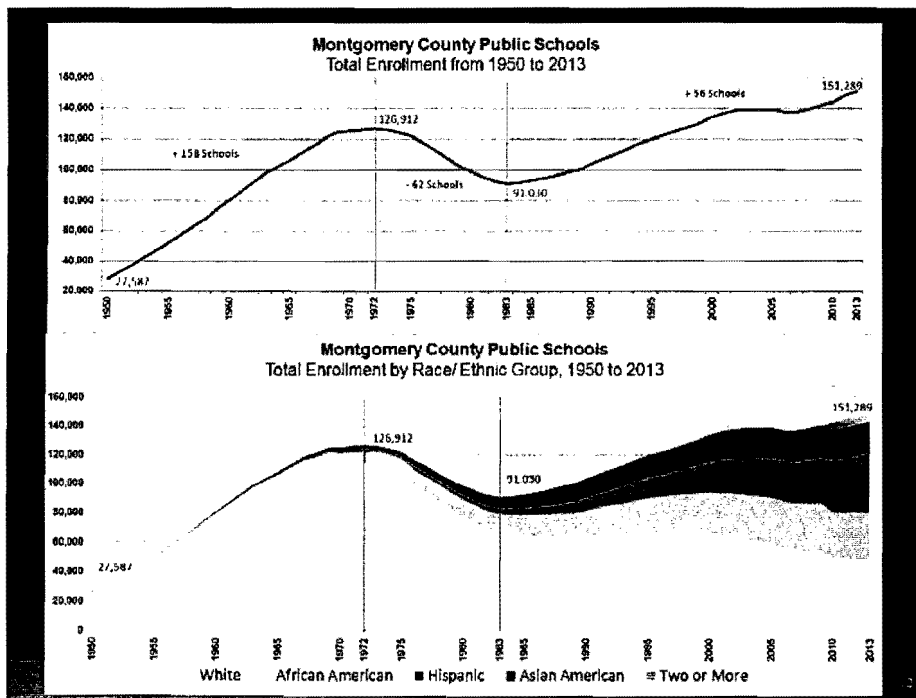
**Montgomery County Median Age  
by Race/ Ethnic Group in 2010**



**Montgomery County Average Household Size  
by Race/Ethnic Group in 2010**



# MCPS Enrollment Trends

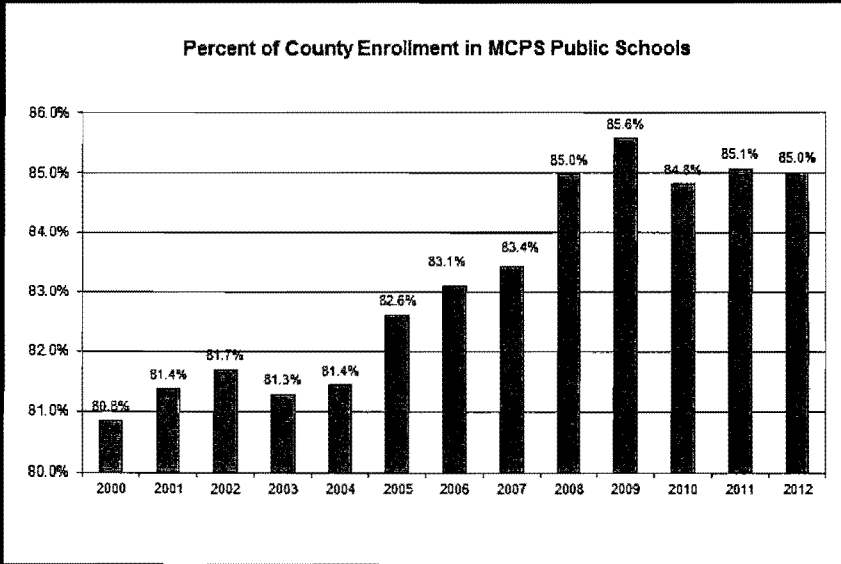
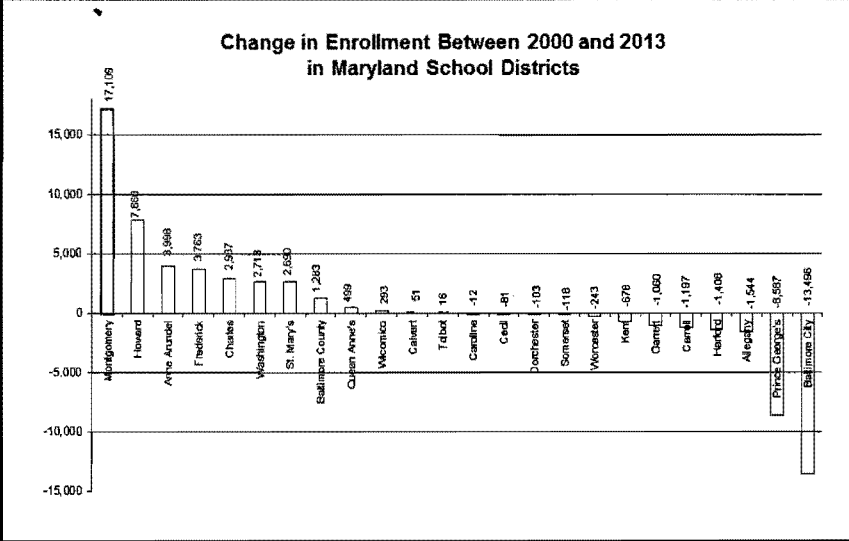


## Fall 2013 Enrollment Increases by 2,510

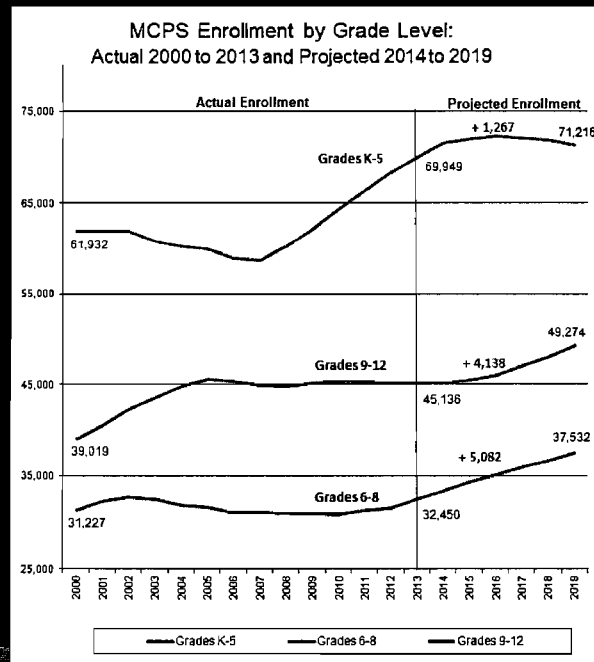
Grade	Official 2012-13 Enrollment	Official 2013-14 Enrollment	One Year Change
K	11,653	11,916	263
1	11,784	11,936	152
2	11,398	11,799	401
3	11,418	11,498	80
4	11,193	11,540	347
5	10,885	11,260	374
6	10,518	10,920	402
7	10,617	10,706	89
8	10,395	10,824	429
9	12,449	12,453	4
10	11,844	11,675	31
11	10,709	10,458	-251
12	10,381	10,550	169
K-5	68,332	69,949	1,617
6-8	31,530	32,450	920
9-12	45,163	45,136	-27
K-12	145,025	147,535	2,510
H.S./PreK*	2,675	2,642	-33
PreK Sp.Ed*	1,079	1,112	33
<b>TOTAL</b>	<b>148,779</b>	<b>151,289</b>	<b>2,510</b>

## Enrollment in Maryland School Districts, 2013-14

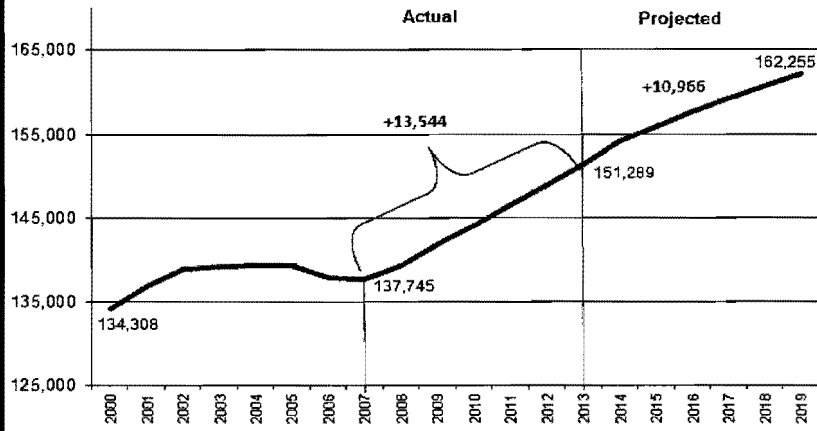
Maryland School Districts	2013-14	Percent of State Enrollment
Montgomery	151,289	17.5%
Prince George's	125,136	14.5%
Baltimore County	108,181	12.5%
Baltimore City	84,730	9.8%
Anne Arundel	78,489	9.1%
Howard	52,808	6.1%
Frederick	40,848	4.7%
Harford	37,842	4.4%
Charles	26,455	3.1%
Carroll	26,331	3.0%
Washington	22,495	2.6%
St. Mary's	17,841	2.1%
Calvert	16,221	1.9%
Cecil	15,824	1.8%
Wicomico	14,431	1.7%
Allegany	8,872	1.0%
Queen Anne's	7,716	0.9%
Worcester	6,649	0.8%
Caroline	5,545	0.6%
Dorchester	4,766	0.6%
Talbot	4,537	0.5%
Garrett	3,886	0.4%
Somerset	2,945	0.3%
Kent	2,117	0.2%
<b>TOTAL STATE</b>	<b>865,752</b>	<b>100%</b>



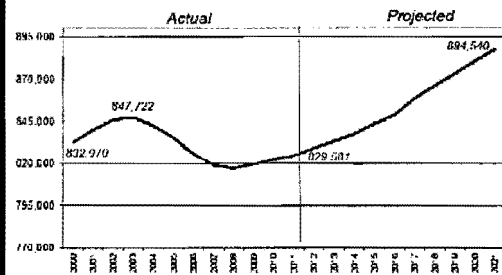
# MCPS Enrollment Forecast



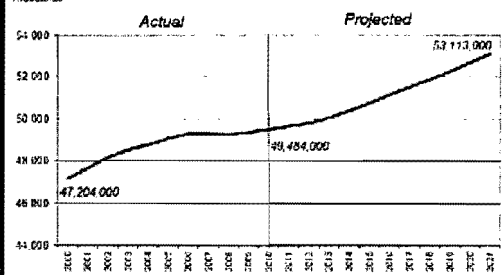
**MCPS Total Enrollment:**  
Actual 2000 to 2013 and Projected 2014 to 2019



**Maryland Public Enrollment**  
Forecast from September, 2013



**United States Public Enrollment**  
Forecast from May 2012

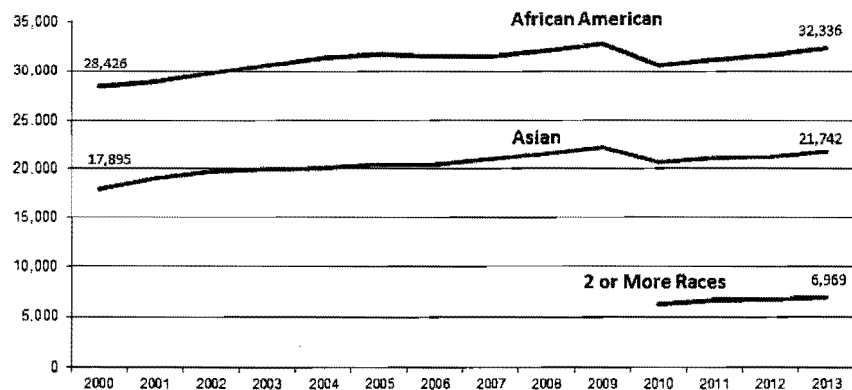




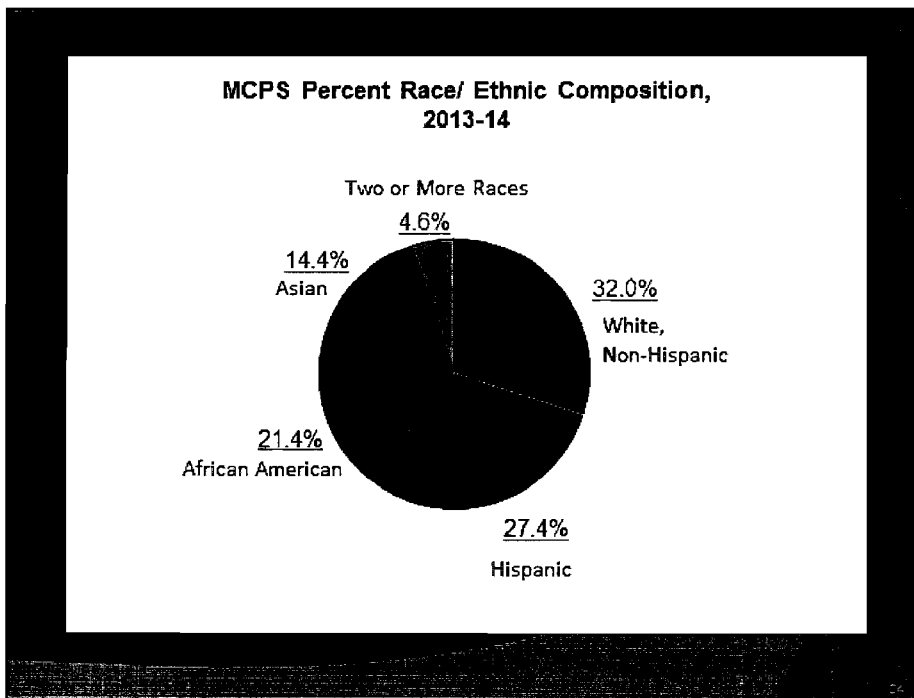
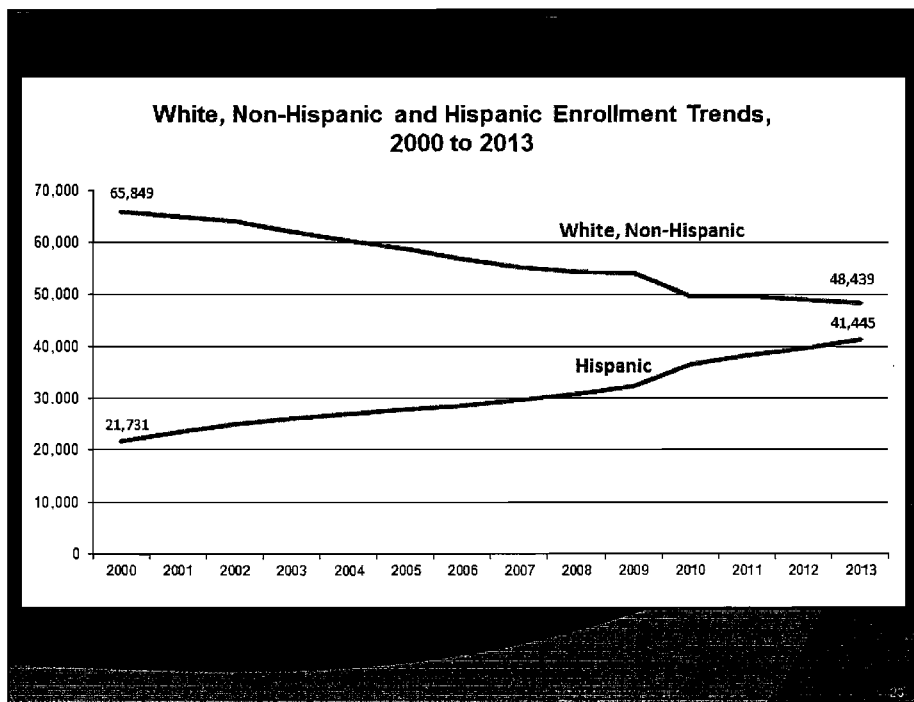
## MCPS Student Diversity Trends

21

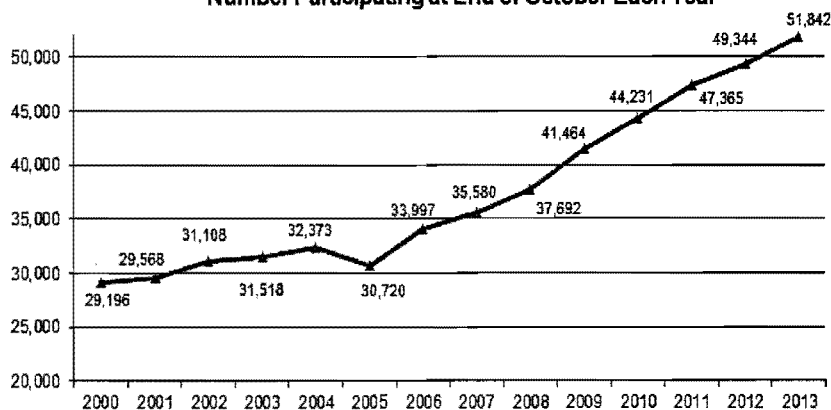
**African American and Asian Enrollment Trends,  
2000 to 2013**



22

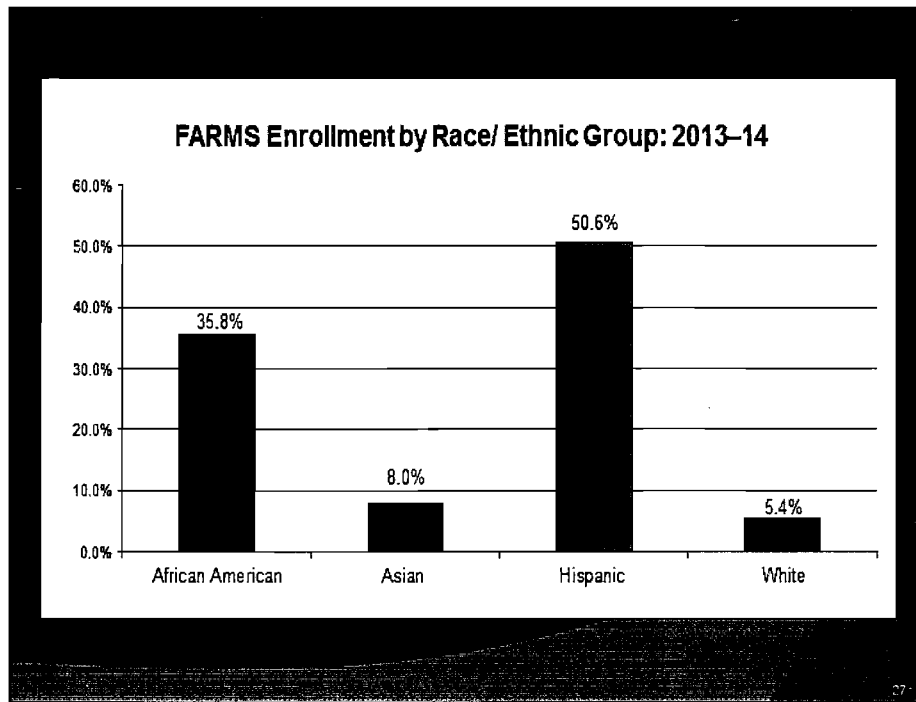


**MCPS Free and Reduced-Price Meals System (FARMS)  
Number Participating at End of October Each Year**



**Income Eligibility Guidelines  
(Effective July 1, 2013 through June 30, 2014)**

Household Size	Free Meals			Reduced-Price Meals		
	Year	Month	Week	Year	Month	Week
1	\$14,937	\$1,245	\$288	\$21,257	\$1,772	\$409
2	20,163	1,681	388	28,694	2,392	552
3	25,389	2,116	489	36,131	3,011	695
4	30,615	2,552	589	43,568	3,631	838
5	35,841	2,987	690	51,005	4,251	981
6	41,067	3,423	790	58,442	4,871	1,124
7	46,293	3,858	891	65,879	5,490	1,267
8	51,519	4,294	991	73,316	6,110	1,410
For each additional family member add . . .	\$5,226	\$436	\$101	\$7,437	\$620	\$144



## Subdivision Staging Policy School Test

## Current FY 2014 School Test 18 clusters > 105% Utilization

### Subdivision Staging Policy Results of School Test for FY 2014

Reflects County Council Approve FY 2014 Capital Budget and Amendments to the FY 2013-2018 Capital Improvements Program (CIP)  
Effective July 1, 2013

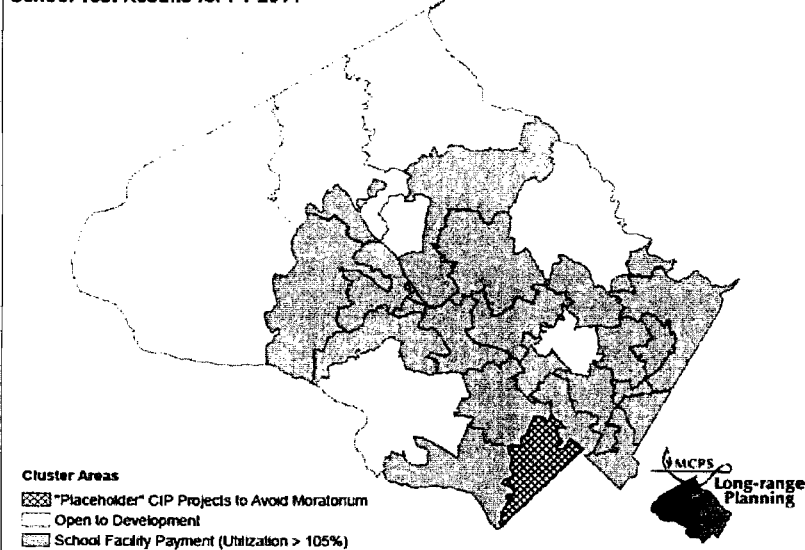
School Test Level	Description	Cluster Outcomes by Level		
		Elementary Inadequate	Middle Inadequate	High Inadequate
<u>Clusters over 105% utilization</u>  School facility payment required in inadequate clusters to proceed.	5-year test  Effective July 1, 2013  Test year 2018-19	Blair (106.2%) Blake (109.8%) Clarksburg (105.1%) Einstein (106.0%) Gaithersburg (117.1%) Magruder (108.7%) Northwood (108.3%) Paint Branch (116.2%) Quince Orchard (109.7%) Rockville (112.7%) Seneca Valley (112.4%)	Blair (112.9%) Waller Johnson (111.5%) Northwest (106.4%) Northwood (109.9%) Rockville (118.8%) Springbrook (107.9%) Whealon (119.4%) Whitman (118.5%)	8-CC (117.4%) * Blair (107.1%) Waller Johnson (108.5%) Richard Montgomery (107.2%) Northwest (113.8%) Northwood (106.9%) Quince Orchard (109.1%) Whitman (114.9%)
<u>Clusters over 120% utilization</u>  Moratorium required in clusters that are inadequate	5-year test  Effective July 1, 2013  Test year 2018-19	None	None	None

\* Utilization of 8-CC HS includes a "placeholder" capital project of ten classrooms, pending a request for an addition in a future CIP

29

## Clusters Over 105% Utilization, FY 2014 Test

**School Test Results for FY 2014**



# Preliminary FY 2015 School Test 13 Clusters > 105% Utilization

**DRAFT - PENDING COUNTY COUNCIL ACTION IN MAY 2014**

## **Subdivision Staging Policy**

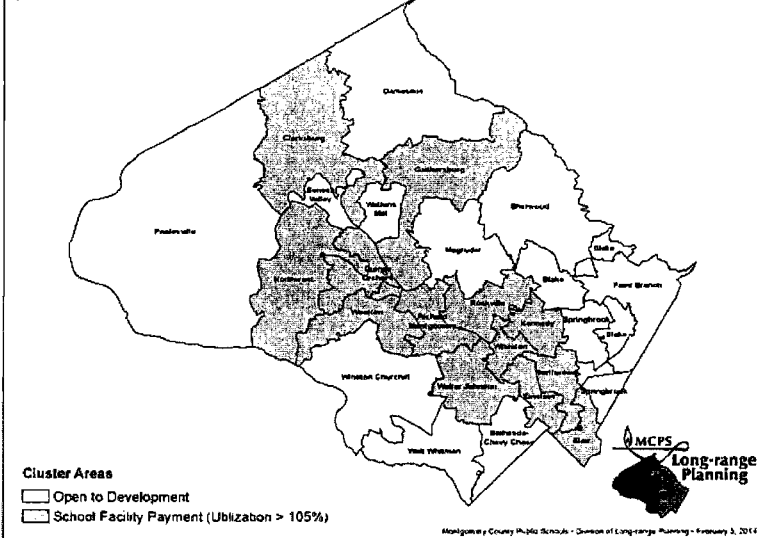
### **Results of School Test for FY 2015**

Reflects Board of Education Requested FY 2015 Capital Budget and FY 2015-2020 Capital Improvements Program (CIP)  
Effective July 1, 2014

School Test Level	Description	Cluster Outcomes by Level		
		Elementary Inadequate	Middle Inadequate	High Inadequate
<b>Clusters over 105% utilization</b>  School facility payment required. A inadequate clusters to proceed	5-year test  Effective July 1, 2014  Test year 2019-20	Blair (107.8%) Clarksburg (115.2%) Gaithersburg (114.3%) Northwood (106.7%) Quince Orchard (112.3%)	Blair (113.5%) Kennedy (107.0%) Northwood (112.8%) Rockville (110.7%) Wheaton (119.2%) Whitman (109.7%)	Clarksburg (116.0%) Einstein (108.6%) Walter Johnson (112.8%) Richard Montgomery (108.1%) Northwest (108.4%) Northwood (111.9%) Quince Orchard (108.3%) Whitman (112.7%)
<b>Clusters over 120% utilization</b>  Moratorium required in clusters that are inadequate	6-year test  Effective July 1, 2014  Test year 2019-20	None	None	None

## Clusters Over 105% Utilization, FY 2015 Test

School Test Results for FY 2015

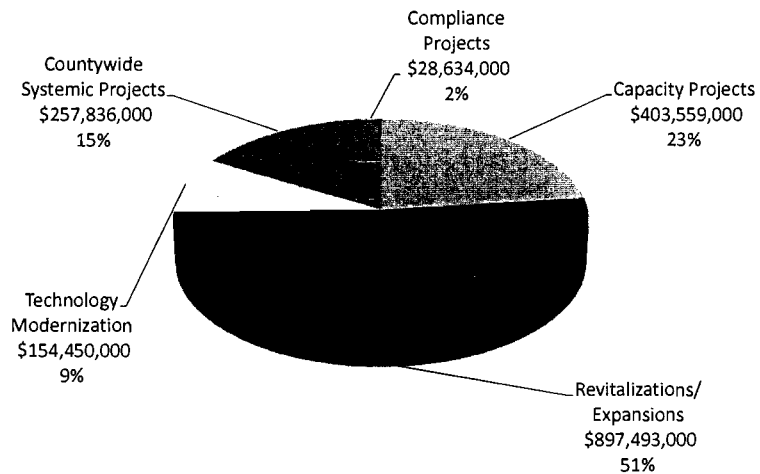


## Board of Education's Requested FY 2015–2020 Capital Improvements Program

### Capital Improvement Program Categories and Priorities

1. Compliance Projects
2. Capital Maintenance Projects
3. Capacity Projects
4. Revitalization/Expansion Projects
5. System Infrastructure Projects
6. Technology Modernization Projects

**Board of Education's Requested FY 2015–2020  
Capital Improvements Program**



## New Schools

(Opening date is in parenthesis)

- Clarksburg Cluster Elementary School (8/14)
- Clarksburg/Damascus Middle School (8/16)
- August 2017—
  - Bethesda-Chevy Chase Middle School #2
  - Richard Montgomery Cluster Elementary School #5
  - Northwest Elementary School #8



## Elementary School Addition Projects

(Opening date is in parenthesis)

### Previously Approved Projects

- Arcola (8/15)
- Bethesda (8/15)
- North Chevy Chase (8/15)
- Rosemary Hills (8/15)
- Waters Landing (8/14)
- Wood Acres (8/16)

### Recommended Projects

- Ashburton (8/19)
- Lucy V. Barnsley (8/17)
- Brookhaven (8/18)
- Burtonsville (8/19)
- Diamond (8/17)
- Glen Haven (8/18)
- Highland (8/18)
- Kemp Mill (8/18)
- Kensington-Parkwood (8/17)
- S. Christa McAuliffe (8/19)
- Judith A. Resnik (8/19)
- Sargent Shriver (8/18)

17

## Secondary School Addition Projects

(Opening date is in parenthesis)

### Previously Approved Projects

- Clarksburg High School (8/15)
- Julius West Middle School (8/16)

### Recommended Projects

- Bethesda-Chevy Chase High School (8/17)
- North Bethesda Middle School (8/17)

18

## Elementary School Revitalization/Expansion Projects

(Opening dates are in parenthesis; schools in grey indicate one-year delay)

- Bel Pre (8/14)
- Candlewood (1/15)
- Rock Creek Forest (1/15)
- Brown Station (8/17)
- Wayside (8/17)
- Wheaton Woods (8/17)
- Luxmanor (1/19)
- Maryvale /Carl Sandburg Learning Center (1/19, 8/19)
- Potomac (1/19)
- Belmont (8/20)
- Cold Spring (8/20)
- DuFief (8/20)
- Stonegate (8/20)
- Damascus (1/22)
- Rosemary Hills (1/22)
- Summit Hall (1/22)
- Twinbrook (1/22)

## Secondary Revitalization/Expansion Projects

(Opening dates are in parenthesis)

### Middle Schools

- Farquhar (8/16)
- Tilden (8/19)
- Eastern (8/21)

### High Schools

- Wheaton (8/15)
- Thomas Edison HS of Technology (8/17)
- Seneca Valley (8/18)
- Thomas S. Wootton (8/20)
- Poolsville (8/22)

## Total Capacity Increase by 2018–2019 School Year

### Elementary School Capacity:

3 New Elementary Schools = 2,076 seats

Additions at 18 Elementary Schools (149 classrooms) = 3,138 seats

Revitalization/Expansions at 8 Elementary Schools (87 classrooms) = 1,769 seats

TOTAL Elementary School Capacity Added = 6,983 seats

### Middle School Capacity:

2 New Middle Schools = 1,909 seats

Additions at 2 Middle Schools (35 classrooms) = 735 seats

TOTAL Middle School Capacity Added = 2,644 seats

### High School Capacity:

Additions at 2 High Schools (51 classrooms) = 1,049 seats

Revitalization/Expansions at 2 High Schools (33 classrooms) = 896 seats

TOTAL High School Capacity Added = 1,945 seats

**GRAND TOTAL CAPACITY ADDED = 11,572 seats**

## Facility Planning Projects

### FY 2014 Previously Approved

#### Additions

- Broad Acres ES
- Burning Tree ES
- D-CC Capacity Study
- Gaithersburg Cluster Capacity Study
- Lake Seneca ES
- South Lake ES
- A. Mario Loiederman MS
- Walt Whitman HS

### FY 2015 Request

#### Addition

- Col. E. Brooke Lee MS
- Parkland MS
- Neelsville MS
- Silver Spring Int'l. MS
- Takoma Park MS
- Walter Johnson HS

#### New Schools

- Clarksburg ES #8

#### Revitalizations/Expansion

- Belmont ES
- Cold Spring ES
- DuFief ES
- Stonegate ES
- Thomas S. Wootton HS

## Requested Countywide Projects

- Systemic projects are vital to address our aging infrastructure
- Increases to systemic projects include:
  - Planned Life-cycle Asset Replacement (PLAR)
  - Roof Replacement
  - American with Disabilities Act of 1990 Compliance
  - Fire Safety Code Compliance
  - Asbestos Abatement
  - Heating Ventilation and Air Conditioning (HVAC) Replacement—significant increase of \$28 million for FY 2015 and FY 2016 to address backlog of approximately \$160 million.

## Discussion