

## Appendix S

# **Long-range Educational Facilities Planning Policy (FAA) and Regulation (FAA-RA)**

On May 23, 2005, the Board of Education adopted a revision to Policy FAA—Long-range Educational Facilities Planning. This policy was revised in order for Policy FAA to conform to other Board of Education policies that separate policy requirements from regulations. Subsequently, on June 1, 2005, the superintendent issued interim Regulation FAA-RA. The regulation was created from language previously contained in Policy FAA that was regulatory in nature.

In adopting revisions to Policy FAA, the Board of Education directed the superintendent to conduct a public review process for Regulation FAA-RA, prior to a final regulation being issued. A review process was conducted in the fall 2005 with input from MCCPTA and other community representatives. The superintendent incorporated this input in issuing the Regulation FAA-RA on March 21, 2006.

# POLICY

## BOARD OF EDUCATION OF MONTGOMERY COUNTY

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**Related Entries:** ABA, ABC, ABC-RA, ACD, DNA, FAA-RA, FKB, JEE, JEE-RA  
**Responsible Office:** Chief Operating Officer  
Department of Facilities Management

### Long-range Educational Facilities Planning

#### A. PURPOSE

The Montgomery County Board of Education (Board) has a primary responsibility to plan for school facilities that address changing enrollment patterns and sustain high-quality educational programs in accordance with the policies of the Board. The Board fulfills this responsibility through the facilities planning process. Long-range educational facilities planning is essential to identify the infrastructure needed to ensure success for every student.

The *Long-range Educational Facilities Planning* (LREFP) policy guides the planning process. The process is designed to promote public understanding of planning for Montgomery County Public Schools (MCPS) and to ensure that there are sufficient opportunities for parents, students, staff, community members and organizations, local government agencies, and municipalities to identify and communicate their priorities and concerns to the superintendent of schools and the Board. LREFP will be in accordance with all federal, state, and local laws and regulations.

#### B. ISSUE

Enrollment in MCPS is constantly changing. The fundamental goal of facilities planning is to provide a sound educational environment for changing enrollment. The number of students, their geographic distribution, and the demographic characteristics of this population all impact facilities planning. Enrollment changes are driven by factors including birth rates and movement within the school system and into the school system from other parts of the United States and the world.

MCPS is among the largest school systems in the country in terms of enrollment and serves a county of approximately 500 square miles. The full range of population density, from rural to urban, is present in the county. Since 1984, enrollment has increased where new communities have formed, as well as in established areas of the county where turnover of houses has occurred.

MCPS is challenged continually to anticipate and plan for facilities in an efficient and fiscally responsible way to meet the varied educational needs of students. The LREFP policy describes how the school system responds to educational and enrollment change; the rate of change; its geographic distribution; and the racial, ethnic, and socioeconomic diversification of enrollment.

School facilities also change. Aging of the physical plant requires a program of maintenance, renovation, and revitalization/expansion, in accordance with Board Policy FKB, *Sustaining and Modernizing Montgomery County Public Schools (MCPS) Facilities*. Acquiring new sites, designing new facilities, and modifying existing facilities to keep current with program needs is essential. This policy provides the framework to coordinate planning for capital improvements.

**C. POSITION**

The long-range facilities planning process will continue to:

1. Plan for utilization of schools in ways that are consistent with sound educational practice and consider the impact of facility changes on educational program and related operating budget requirements and on the community.
2. Establish processes designed to obtain input by engaging in a discussion among a broad variety of stakeholders and utilizing opportunities for input from the public and relevant staff members, in accordance with Board Policy ABA, *Community Involvement*, for the capital improvements program and the facilities planning activities listed below:
  - a) Selection of school sites
  - b) Facility design
  - c) Boundary changes
  - d) Geographic student choice assignment plans (such as consortia)
  - e) General enrollment, demographic, and facility related issues that are explored through roundtables and other community input processes.
  - f) School closures and consolidations
3. Provide a six-year capital improvements program and educational facilities master plan which include enrollment projections, educational program needs, and available school capacity countywide, and identify—

- a) when new schools and additions will be needed to keep facilities current with enrollment levels and educational program needs;
  - b) funds for systemic maintenance and replacement projects to sustain schools in good condition and extend their useful life;
  - c) a schedule to revitalize/expand older school buildings in order to continue their use on a cost-effective basis, and to keep facilities current with educational program needs;
  - d) when school closures and consolidations are appropriate due to declining enrollment levels; and
  - e) facility utilization levels, capacity calculations, school enrollment size guidelines, and school site size (adopted as part of the Board review of the superintendent of schools' recommended CIP).
4. Provide for the Board to hold public hearings and solicit written testimony on the recommendations of the superintendent of schools.
5. Provide a process for facility design that—
- a) ensures a safe and secure environment;
  - b) is consistent with educational program needs;
  - c) includes community input;
  - d) demonstrates environmental stewardship; and
  - e) anticipates future needs
6. Provide a process for changing school boundaries and establishing geographic student choice assignment plans that—
- a) Solicits input at the outset of the process consistent with Board Policy ABA, *Community Involvement*;
  - b) Considers four main factors in development of school boundaries, student choice assignment plans, and ways to address other facility issues including—
    - 1) demographic characteristics of student population,

- 2) geographic proximity of communities to schools,
  - 3) stability of school assignments over time,
  - 4) facility utilization;
- c) recognizes that the Board may, by majority vote, identify alternatives to the superintendent of schools' recommendations for school boundaries or geographic student choice assignment plans for review;
  - d) allows time for the Board to hold public hearings and solicit written testimony on the recommendations of the superintendent of schools and Board identified alternatives for school boundaries or geographic student choice assignment plans; and
  - e) Recognizes that the Board has the discretion to adopt minor modifications to the superintendent of schools' recommendation or Board identified alternatives if, by a majority vote, the Board has determined that such action will not have a significant impact on an option for school boundaries or geographic student choice assignment plans that has received public review.
7. Provide a process for closing and consolidating schools that meets the requirements of COMAR (Chapter 13A).
8. Provide for articulation in school assignments by:
- a) Traditional Student Assignments
 

Structure high schools for Grades 9-12 and, where possible, creating straight articulation for clusters composed of one high school, and a sufficient number of elementary and middle schools, each of which sends its students, including special education and ESOL students, to the next higher level school in that cluster.
  - b) Student Choice Assignment Plans
 

In cases where students participate in a student choice assignment plan (e.g., consortium) to identify the school they wish to attend, articulation patterns may vary from the straight articulation pattern that is desired in traditional student assignment.

9. Provide for a different and/or condensed process and time schedule, developed by the superintendent of schools, for making recommendations to the Board regarding the capital improvements program and the facility planning activities listed above, including but not limited to changing school boundaries and establishing geographic student choice assignment plans in the event that the Board determines that unusual circumstances exist.

**D. DESIRED OUTCOMES**

1. A LREFP process that identifies the infrastructure necessary to deliver high quality educational facilities to all students and incorporates the input of parents, staff, and community and, as appropriate, students.
2. The superintendent of schools will develop regulations with student, staff, community, and parental input to guide implementation of this policy.

**E. REVIEW AND REPORTING**

1. The annual June publication of the Educational Facilities Master Plan will constitute the official reporting on facility planning. This document will reflect all facilities actions taken during the year by the Board and approved by the County Council. The Master Plan will project the enrollment and utilization of each school, and identify schools and sites that may be involved in future planning activities.
2. This policy will be reviewed in accordance with the Board policy review process.

**Policy History:** Adopted by Resolution No. 257-86, April 28, 1986; amended by Resolution No. 271-87, May 12, 1987; amended by Resolution No. 831-93, November 22, 1993; amended by Resolution No. 679-95, October 10, 1995; amended by Resolution No. 581-99 September 14, 1999; updated office titles June 1, 2000; updated November 4, 2003; amended by Resolution No. 268-05, May 23, 2005; amended by Resolution 282-14, June 17, 2014.

# REGULATION MONTGOMERY COUNTY PUBLIC SCHOOLS

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**Related Entries:** ABA, ABC, ACD, CFA, DNA, FAA, FKB, JEE, JEE-RA

**Responsible Office:** Chief Operating Officer  
Department of Facilities Management

**Related Source:** *Code of Maryland Regulations* 13A.02.09.01

## Long-range Educational Facilities Planning

### I. PURPOSE

To implement the Montgomery County Board of Education (Board) Policy FAA, *Long-range Educational Facilities Planning*, by addressing changing enrollment patterns and supporting high-quality educational programs through the provision of appropriately utilized, functional, and modern facilities

### II. BACKGROUND

Montgomery County Public Schools (MCPS) is one of the largest school systems in the country, with an enrollment that is constantly changing. Montgomery County is increasingly diverse, creating a student population with varying educational needs. MCPS' success depends in part on appropriately utilized, functional, and modern facilities, as well as a facility planning process, based on rigorous analyses, that takes into account best educational practices, the changing needs of the community, and fiscal realities, to produce the physical learning environment necessary for an excellent educational system.

The components of long-range educational facilities planning include the following: facilities planning guidelines; the facility planning process; the Capital Improvements Program (CIP), and Educational Facilities Master Plan (Master Plan); community involvement processes; and the calendar for facilities planning activities.

### III. DEFINITIONS

A. The *Capital Budget* is the annual budget adopted for capital project appropriations.

- B. The *Capital Improvements Program (CIP)* is a comprehensive six-year spending plan for capital improvements. The CIP focuses on the acquisition, construction, revitalization/expansion, and maintenance of public school facilities. The CIP is reviewed and approved through a biennial process that takes effect for the six-year period that begins in each odd-numbered fiscal year. For even-numbered fiscal years, amendments are considered to the adopted CIP for changes needed in the second year of the six-year CIP period.
- C. *Civic groups* are civic, homeowner, neighborhood, or citizen associations listed with the Maryland-National Capital Park and Planning Commission (M-NCPPC) or Montgomery Regional Service Centers.
- D. *Cluster* is a geographic grouping of schools within a defined attendance area that includes a high school and the elementary and middle schools that send students to that high school.
- E. *Community involvement*, for the purposes of Board Policy FAA, *Long-range Educational Facilities Planning*, and this regulation, refers to processes designed to obtain input by engaging a broad variety of stakeholders and to utilize opportunities for input from the public and relevant staff members, in accordance with Board Policy ABA, *Community Involvement*.
- F. *Consortium* is a grouping of high schools or middle schools within proximity to one another that provides students the opportunity to express their preference for attending one of the schools based on a specific instructional program or emphasis.
- G. *Facility Design* encompasses all the planning and design processes that lead up to construction of a school facility. In order of events, the milestones of facility design are:
  1. Educational specifications—a description of spaces needed to support the instructional program and guide the architect in development of the building layout and design.
  2. Feasibility study—determines the scope and estimated cost of a project, but does not develop a detailed design of the facility.
  3. Schematic design—the initial design phase that evaluates and develops concepts into a preliminary design for the school. When it is complete, it is presented to the Board for approval.

4. Design development—this phase of design refines the architecture and develops the infrastructure of the project including mechanical, electrical, and plumbing systems.
  5. Construction documents—provide the details of construction that are incorporated into the drawings and specifications for use as contract documents to construct the facility.
- H. *Geographic Student Choice Assignment Plans* identify the geographic area(s) wherein students may express a preference for a school assignment, based on program offerings or emphasis. These geographic areas may include areas known as “base areas,” where students may be guaranteed attendance at the school under certain criteria; or, the area may be a single unified area with no base areas for individual schools.
- I. *Parent Teacher (Student) Associations (PT(S)As)* are member groups of the Montgomery County Council of Parent Teacher Associations, Inc. (MCCPTA). Also, in the absence of a PT(S)A, an organization of parents, teachers and (students) that operate at a school in lieu of a PT(S)A.

#### IV. FACILITIES PLANNING GUIDELINES

The following calculations and analyses are developed as part of the facilities planning process.

- A. *Enrollment Forecasts* are the basis for evaluating school space needs and initiating planning activities.
1. Enrollment forecasts are developed in coordination with the Montgomery County Department of Planning’s county population forecast and other relevant planning sources.
  2. Each fall, enrollment forecasts for each school are developed for a six-year period. Long-term forecasts project enrollment to the subsequent 10th and 15th year. The units of analysis for long-term forecasts are secondary school level, and the cluster or consortium level for elementary schools.
  3. On or about March 1, revisions to school enrollment forecasts for the next school year are developed to refine the forecast and to reflect any changes in service areas or programs.

4. The enrollment forecast methodology utilized is provided in an appendix to the CIP and Master Plan documents.

B. *Preferred Range of Enrollment* for schools includes all students attending a school.

1. The preferred ranges of enrollment for schools are—
  - a) 450 to 750 students in elementary schools;
  - b) 750 to 1,200 students in middle schools; and
  - c) 1,600 to 2,400 students in high schools.
  - d) Enrollment in special and alternative program centers may differ from the above ranges and generally is lower.
2. The preferred range of enrollment is considered when planning new schools or when changes are made to existing schools. Departures from the preferred ranges may occur if circumstances warrant.

C. *School Demographic Profile* and *Facility Profile*

1. *School Demographic Profile* includes the racial/ethnic composition of a school's student population, the percentage of students participating in the Free and Reduced-price Meals System (FARMS) and English for Speakers of Other Languages (ESOL) programs, and school mobility rates.
2. *Facility Profile* includes room use by program and facility characteristics such as square footage, site size, year of opening, adjacency to parks, and number of relocatable classrooms.

D. *Program Capacity* refers to the number of students that can be accommodated in a facility based on the educational programs at the facility. The MCPS program capacity is calculated as the product of the number of teaching stations in a school and the student-to-classroom ratio for each grade and program in each classroom.

E. *Program Capacity* and *Facility Utilization* are calculated as follows:

1. Unless otherwise specified by Board action, the *program capacity* of a facility is determined by the space requirements of the educational

programs in the facility and student-to-classroom ratios. These ratios should not be confused with staffing ratios that are determined through the annual operating budget process.

Ratio Guidelines

Level	Student-to-Classroom Ratios
Head Start & prekindergarten	40:1 (2 sessions per day)
Head Start & prekindergarten	20:1 (1 session per day)
Grade K	22:1
Grade K-reduced class size	18:1
Grades 1-2—reduced class size	18:1
Grades 1-5 Elementary	23:1
Grades 6-12 Secondary	
Grades: 6-8 Middle School	25:1 <sup>a</sup>
Grades: 9-12 High School	25:1 <sup>b</sup>
Special Education, ESOL, Alternative Programs	See “c” below

- a) Program capacity is adjusted at the middle school level to account for scheduling constraints. The regular classroom capacity of 25 is multiplied by .85 to reflect the optimal utilization of a middle school facility (equivalent to 21.25 students per classroom).
  - b) Program capacity is adjusted at the high school level to account for scheduling constraints. The regular classroom capacity of 25 is multiplied by .90 to reflect the optimal utilization of a high school facility (equivalent of 22.5 students per classroom).
  - c) Special education, ESOL, alternative programs, and other special programs may require classroom ratios different from those listed.
2. Unless otherwise specified by Board action, elementary, middle, and high schools should operate in an efficient facility utilization range of 80 to 100 percent of program capacity. If a school is projected to be underutilized (less than 80 percent) or overutilized (more than 100 percent), then a boundary study, noncapital action, or a capital project may be considered. Whether a school meets the preferred range of enrollment also is considered. In the case of overutilization, an effort to

judge the long-term need for permanent space is made prior to planning for new construction. Underutilization of facilities also is evaluated in the context of long-term enrollment forecasts.

3. Relocatable classrooms may be used on an interim basis to provide program space for enrollment growth until permanent capacity is available. Relocatable classrooms also may be used to enable child care programs to be housed in schools, and may be used to accommodate other complementary uses. Relocatable classrooms should have health and safety standards that are comparable to other MCPS classrooms.
- F. *School Site Size* is the minimum acreage desired to accommodate the full instructional program, as follows:
1. Elementary schools—a minimum useable site size of 7.5 acres that is capable of fitting the instructional program, including site requirements. The 7.5 acres is based on an ideal leveled site, and the size may vary depending on site shapes and surrounding site constraints.
  2. Middle schools—a minimum useable site size of 15.5 acres that is capable of fitting the instructional program, including site requirements. The 15.5 acres is based on an ideal leveled site, and the size may vary depending on site shapes and surrounding site constraints.
  3. High schools—a minimum useable site size of 35 acres that is capable of fitting the instructional program, including site requirements. The 35 acres is based on an ideal leveled site, and the size may vary depending on site shapes and surrounding site constraints.
- G. *State-rated Capacity (SRC)* is defined by the state of Maryland as the number of students who can be accommodated in a school, based on the product of state-determined student-to-classroom ratios and the number of teaching stations in a school. SRC is used by the state to determine state budget eligibility for capital projects funded through the Public School Construction Program administered by the Interagency Committee for Public School Construction. SRCs are provided for schools in appendices to the CIP and the Master Plan.

**V. GUIDELINES FOR FACILITY PLANNING: EVALUATING UTILIZATION OF FACILITIES**

- A. By November 1 each year, after new enrollment forecasts are developed, the projected utilization levels of all facilities are evaluated and incorporated into the superintendent of schools' CIP recommendations. The effect of class size changes and other relevant factors, such as proposed educational program

changes, including prekindergarten programs, special education programs, ESOL programs, or grade level reorganizations also is evaluated. For schools that are projected to have insufficient capacity, excess capacity, or other facility issues, the superintendent of schools may recommend—

1. a capital project;
  2. a noncapital action such as convening a roundtable discussion group, boundary change, geographic student choice assignment plan, school pairing, facility sharing, closing/consolidation, or any other similar action;
  3. no action; or
  4. deferral pending further study of enrollment or other factors.
- B. Facility recommendations made by the superintendent of schools include consideration of educational program impacts. As part of the process of developing facility plans, MCPS staff members will work closely with appropriate program staff members to identify program requirements for facility plans. Modifications to the facility will adhere to the requirements of the *Americans with Disabilities Act*.

## VI. CAPITAL IMPROVEMENTS PROGRAM AND EDUCATIONAL FACILITIES MASTER PLAN

### A. CIP

1. On or about November 1 of each year, the superintendent of schools publishes recommendations for an annual Capital Budget and a six-year CIP or amendments to the previously adopted CIP. Boundary change or geographic student choice assignment plan recommendations, and any other facility planning recommendations identified by the superintendent of schools as requiring more time for public review, are released by mid-October.
2. The six-year CIP includes:
  - a) The following standards for Board review and action:
    - (1) Preferred range of school enrollments
    - (2) Program capacity and facility utilization calculations

- (3) School site size
  - b) Background information on the enrollment forecasting methodology.
  - c) Current enrollment figures, school demographic profiles, and facility profiles.
  - d) School enrollment forecasts for each of the next six years and long-term forecasts for the 10th and 15th year.
  - e) A listing of recommended actions, such as changes in school capacities, new schools, revitalizations/expansions, program locations, and/or the service area of the schools. Supplements to the CIP may be published to provide more information on issues when deemed advisable by the superintendent of schools.
  - f) A line item summary of Capital Budget appropriation recommendations of the superintendent of schools.
  
- 3. The superintendent of schools' recommended CIP is posted on the MCPS website. Copies of the document are provided to Board members and Board staff, MCPS executive staff, and the MCCPTA president, area MCCPTA vice presidents, and cluster coordinators. In addition, notification of the CIP's publication and availability online is sent to principals, PTA leadership, municipalities, and civic groups. This notification includes the Board schedule for work sessions, public hearings, and action on the CIP.
  
- 4. The Board timeline for review and action on the CIP consists of a work session in early November, followed by a public hearing in mid-November, and action in mid- to late November of each year. (See Section IX.E. for the public hearing process and Section X for the annual calendar.)
  
- 5. The superintendent of schools' recommendations on any deferred planning issues and/or amendments to the CIP are made in mid-February. The Board timeline for these items consists of a work session in late February to early March, a public hearing in mid-March, and action in late March. If necessary, the timeline for deferred planning issues may be modified by the superintendent of schools to allow more time for community input processes.

6. In cases where the Board determines an unusual circumstance exists, the superintendent of schools may develop an alternative time schedule for making recommendations regarding the CIP, facility planning activities, school boundary changes, or geographic student choice assignment plans.
7. After review and Board action, the Board-requested CIP—including official Project Description Forms (PDFs) for all requested capital projects—is submitted to the County Council and county executive for their review and for County Council action. The Board-requested CIP also is sent for information purposes to M-NCPPC, the Maryland State Department of Education, and the State Interagency Coordinating Committee.
8. The county executive’s recommendations are forwarded to the County Council in mid-January for inclusion in the overall county CIP. The County Council timeline for review and action on the Board-requested CIP is from February to May.
9. The County Council adopts the biennial six-year CIP, and amendments to the CIP, in late May.

B. Master Plan

By June 30 of each year, the superintendent of schools publishes a summary of all County Council-adopted capital and Board-adopted non-capital facilities actions. This document, the Educational Facilities Master Plan, is required under the rules and regulations of the State Public School Construction Program.

1. The Master Plan incorporates the projected impact of all capital projects approved for funding by the County Council and any non-capital facilities actions approved by the Board.
2. Similar to the CIP, the Master Plan includes the following:
  - a) The following standards:
    - (1) Preferred range of school enrollments
    - (2) Program capacity and facility utilization calculations
    - (3) School site size

- b) Background information on the enrollment forecasting methodology.
- c) Current enrollment figures, school demographic profiles, and facility profiles.
- d) Program capacity and facility utilization calculations.
- e) School enrollment forecasts for each of the next six years, and long-term forecasts for the 10th and 15th years. This information reflects projections made the previous fall with an updated one-year projection in the spring, and any changes in projected enrollment that result from boundary changes, geographic student choice assignment plans, or other changes adopted by the Board.
- f) County Council-adopted PDFs for all capital projects with schedules, estimated costs, and funding sources.

**VII. COMMUNITY INVOLVEMENT PROCESSES**

A. Community Involvement

School and community involvement in MCPS facility planning is important to the success of the plans. Stakeholders and interested members of the community have several opportunities for input in facilities planning through processes that are in accordance with Board Policy ABA, *Community Involvement*.

- 1. Parents, staff, and students are the primary stakeholders in the planning process. MCCPTA, local PTAs, or other parent or student representatives along with appropriate MCPS staff members are involved in the following planning processes:
  - a) Site selection for new schools
  - b) Facility design (architect selection and architectural design) for new schools, additions, or revitalizations/expansions of existing schools
  - c) School boundary changes and geographic student choice assignment plans

- d) Facility-related focus groups, task forces, work groups, advisory committees, and roundtable discussion groups
  - e) School closures and consolidations
2. Additionally, MCPS employees, municipalities, local government agencies, civic groups, and countywide organizations may contribute to planning processes.

B. Cluster Comments

- 1. In June, cluster representatives may submit to the superintendent of schools any facility-based concerns, priorities, or proposals that they have identified for their schools in consultation with local PTA leadership, principals, and the community.
- 2. Cluster comments are to be considered in the development of facilities recommendations made by the superintendent of schools in the CIP.

C. Community Involvement Methods

The superintendent of schools will solicit community input on school facility-related issues, including boundary changes and geographic student choice assignment plans, through any one or more of the following methods: focus groups, task forces, work groups, advisory committees, roundtable discussion groups, public forums, surveys, and/or technologically facilitated communications.

- 1. Focus groups, task forces, work groups, advisory committees (committees) or roundtable discussion groups (roundtables):
  - a) The superintendent of schools develops a charge for the focus group, task force, work group, advisory committee, or roundtable to follow:
    - (1) If the facility-related issue involves a boundary change or geographic student choice assignment plan, the superintendent of schools shall ensure that the potentially affected areas are represented on any focus group, task force, work group, advisory committee, or roundtable and that there are outreach efforts to promote racial, ethnic, and socioeconomic diversity within the group.

- (2) If the facility-related issue involves site selection for a new school, the superintendent of schools shall ensure that civic groups with candidate sites in their area and appropriate municipal, county government, and Montgomery County Planning Department and Montgomery County Parks Department staff have an opportunity to participate.
- b) Except as otherwise provided herein, the focus group, task force, work group, advisory committee or roundtable members identify criteria to assist staff in the development of approaches to address the facility-related issue. The superintendent of schools and the Board also will consider these criteria in their review of approaches to address the facility-related issue.
  - c) MCPS staff members will develop a range of approaches for the focus group, task force, work group, advisory committee, or roundtable to consider, with the number of approaches dependent on the nature of the facility-related issue. However, the total number of approaches developed for the group usually will not exceed 10.
  - d) Representatives, who are liaisons between the focus group, task force, work group, advisory committee, or roundtable, and the community they represent share relevant information with their community through PTA meetings, and other forums, such as civic group meetings, as appropriate. Input received from the community is then presented by representatives at subsequent meetings. Community input also is factored into evaluations of approaches by representatives and in optional PTA or cluster position papers.
  - e) The focus group, task force, work group, advisory committee or roundtable develops a report for the superintendent of schools that includes evaluations of the approaches by members. For selection of a new school site, members will identify the most favorably scored site and the second most favorably scored site based on the evaluation criteria. In addition, as appropriate, the superintendent of schools will consider any individual PTA or cluster position papers. Unless otherwise provided herein, the criteria developed at the outset of the process are the basis for assessing the approaches.

2. Public forums, surveys, and technologically facilitated communications
  - a) At any point in the process the superintendent of schools may direct MCPS staff and/or any facility-related focus group, task force, work group, advisory committee, or roundtable to use a public forum, survey, or technologically facilitated communication to obtain community input in conjunction with or in lieu of other methods for community input.
  - b) If the facility-related issue involves a boundary change or geographic student choice assignment plan, the superintendent of schools shall ensure that the potentially affected areas are notified of the public forum, survey, or technologically facilitated communication and have an opportunity to participate.
  - c) If the facility-related issue involves site selection for a new school, the superintendent of schools shall notify civic groups with candidate sites in their area; and appropriate municipal, county government, and Montgomery County Planning Department and Montgomery County Parks Department staff and provide an opportunity to participate.

**VIII. SPECIFIC EVALUATION CRITERIA**

A. School Boundary Changes and Geographic Student Choice Assignment Plans

The following factors are considered when evaluating changes to school boundaries and in geographic student choice assignment plans:

1. Facility Utilization
  - a) School boundary and geographic student choice assignment plans should result in facility utilizations in the 80 percent to 100 percent efficient range whenever possible.
  - b) Plans should be fiscally responsible to minimize capital and operating costs whenever feasible. The geographic scope of the studies should be broad enough to realize economies in costs and provide long-range plans to address facility issues while preserving as much stability in school assignments as possible.

- c) Shared use of a facility by more than one cluster may be the most feasible facility plan in some cases. In these cases, it is desirable for 25 percent or more of articulating enrollment to move on to each of the assigned upper-level schools.

## 2. Demographic Characteristics of Student Population

- a) School boundary and geographic student choice assignment plans should consider the impact of various options on the overall populations of affected schools. A school population consists of students assigned from a specific geographic attendance area.
- b) Where reasonable, school boundaries or geographic student choice assignment plans should promote the creation of a diverse student body in each of the affected schools. Data showing the impact of various options include the following factors:
  - (i) The racial/ethnic composition of the student population
  - (ii) The socioeconomic composition of the student population as measured by participation in the federal FARMS program
  - (iii) The level of English language learners as measured by enrollment in the ESOL program
  - (iv) Other reliable demographic indicators, such as the mix of single family and multiple family dwellings, student mobility rates, and special education participation also may be considered where applicable and appropriate

## 3. Geographic Proximity of Communities to Schools

- a) In most cases, the geographic scope of elementary school and middle school boundary studies and geographic student choice assignment plan studies should be limited to the high school cluster area. For high schools, more than one high school may be studied.

- b) In accordance with MCPS’ emphasis on community involvement in schools, boundary and student choice area plans should give consideration to the creation of service areas that are, as much as practical, made up of contiguous communities surrounding the school. Walking access to the school should be maximized and transportation distances minimized when other factors do not require otherwise.

4. Stability of School Assignments over Time

- a) Boundaries and student choice assignment plans should result in stable assignments for as long a period as possible.
- b) Student reassignments should consider recent boundary or geographic student choice assignment plan changes, and/or school closings and consolidations that may have affected the same students.

B. Selection of Sites for New Schools

When MCPS projections indicate a new school is required in the six-year CIP, the following factors are considered when evaluating potential new school sites, including those acquired through dedication or purchase and placed in the Board’s inventory:

1. The geographic location relative to existing and future student populations and existing schools
2. Size in acreage
3. Topography and other environmental characteristics
4. Availability of utilities
5. Physical condition
6. Availability and timing to acquire
7. Cost to acquire if private property

C. Architect Selection and Facility Design

The following factors are considered when selecting an architect and evaluating facility design for classroom additions, revitalization/expansion for existing schools, and new school construction:

1. Educational specifications for school buildings as developed by MCPS staff members in consultation with instructional program staff and school-based administrators
2. Input from school administrators, school staff, and PTA representatives in selection of an architect
3. Input from adjacent property owners, if any

D. School Closures and Consolidations

The requirements of Maryland law are followed when evaluating school closures and consolidations.

**IX. SUPERINTENDENT OF SCHOOLS RECOMMENDATION AND BOARD ACTION**

- A. The superintendent of schools develops recommendations on the six-year CIP after considering staff advice, any input from PTA cluster position papers or comments, task forces, work groups, advisory committees, roundtable reports, option or approach evaluations, public forums, surveys, and/or input from other organizations and individuals through avenues of community input.
- B. The recommendations of the superintendent of schools are published no later than November 1, depending on the nature of the facility issues. Some recommendations may be published in mid-October or mid-February when necessary depending on the nature of the facility issues. In addition, recommendations may be made at other times of the year if the Board determines that an unusual circumstance exists that warrants a condensed schedule for recommendations and Board review and action.
- C. Recommendations of the superintendent of schools are posted to the MCPS website, and affected school principals and PTAs are notified of their availability and the process for Board review and action.
- D. The Board holds a work session to review the superintendent of schools' recommendations. The Board may request by majority vote that alternatives to the superintendent of schools' recommendation for boundary changes,

geographic student choice assignment plans, or closures or consolidations of schools be developed for Board consideration. Any significant modification to the superintendent of schools' recommendation requires an alternative supported by a majority of Board members. Any modification that impacts any or all of a school community that has not previously been included in the superintendent of schools' recommendation should be considered a significant modification.

1. Recommendations from the superintendent of schools and Board-requested alternatives are subject to a public hearing prior to final Board action.
2. The Board has the discretion to adopt minor modifications to the superintendent of schools' recommendation or Board-requested alternative(s) if this action will not have a significant impact on a plan that has received public review. Alternatives will not be considered after the Board work session without adequate notification and opportunity for comment by the affected communities.

E. Board Public Hearing Process

1. Public hearings are conducted annually following publication of the superintendent of schools' CIP recommendations. In addition, public hearings are conducted prior to actions affecting school boundaries, geographic student choice assignment plans, and closure or consolidation of schools.
  - a) Public hearings are conducted in November following publication of the superintendent of schools' recommended Capital Budget and six-year CIP.
  - b) Public hearings also may be conducted in March for any superintendent of schools' recommendations not previously subject to public hearings.
  - c) Public hearings also may be conducted at other times during the year if the Board determines an unusual circumstance exists and the superintendent of schools has developed a different and/or condensed schedule for making recommendations.
  - d) The PTA cluster coordinators and/or PTA area vice presidents in consultation with the PTA presidents coordinate testimony at the hearing on behalf of cluster schools and are encouraged to present a variety of opinions when scheduling testimony. Testimony time

for each cluster is scheduled and organized by the PTA organizational units (“quad-clusters”) and/or consortium whenever possible.

- e) Civic groups, municipalities, and countywide organizations also may testify at public hearings.
  - f) Individuals also may present public comments to the Board.
  - g) The Board office is responsible for scheduling those interested in testifying at public hearings.
2. In addition to other avenues of input, community members have opportunities to provide input to the superintendent of schools and the Board through written correspondence and public testimony. Written comments from the community are accepted at any point but, in order to be considered, comments must reach the Board at least 48 hours before action is scheduled by the Board.

**X. CALENDAR**

The long-range facilities planning process is conducted according to the county’s biennial CIP process and adheres to the following calendar adjusted annually to account for holidays and other anomalies.

MCPS staff members meet with MCCPTA, area vice presidents, cluster coordinators, and PTA representatives to exchange information about the adopted CIP and consider issues for the upcoming CIP or amendments to the CIP.	Summer
MCPS staff members present enrollment trends and planning issues to the Board.	Mid-October
County Council adopts Spending Affordability Guidelines for the new CIP cycle, based on debt affordability.	Early-October of odd numbered fiscal years
Superintendent of schools publishes and sends to the Board any recommendations for school boundary, geographic student choice assignment plans, or other facility-related issues requiring more time for public review.	Mid-October
Superintendent of schools publishes and sends to the Board recommendations for the annual Capital Budget and the six-year CIP or amendments to the CIP.	By November 1

Board holds a work session on the CIP and to consider alternatives to superintendent of schools' recommended boundary changes, geographic student choice assignment plans, or other facility-related issues.	Early-November
Board holds a public hearing on the recommended CIP and boundary, geographic student choice assignment plans, and other facility-related recommendations and any alternatives identified by the Board at its work session.	Mid-November
Board acts on Capital Budget, CIP, amendments, and any boundary changes, geographic student choice assignment plans, or other facility-related issues.	Late November
County executive and County Council receive Board-requested capital budget and CIP for review.	December 1
County executive transmits recommended Capital Budget and CIP or amendments to County Council.	January 15
County Council holds public hearings on CIP.	February - March
County Council reviews Board requested and county executive recommended Capital Budget and CIP.	March - April
Superintendent of schools' recommendations on any deferred planning issues, boundary changes, geographic student choice assignment plans, and other facility-related issues, and/or recommended amendment(s) to the CIP are published for Board review, if needed.	Mid-February*
Board holds work session and identifies any alternatives to boundary changes, or geographic student choice assignment plans, or other facility-related recommendations, if needed.	Late-February/ early-March*
Board holds public hearing if needed.	Mid-March*
Board acts on deferred CIP recommendations and/or boundary changes, geographic student choice assignment plans or other facility-related issues, if needed.	Late-March*
County Council approves six-year Capital Budget and CIP.	Late-May
Cluster PTA representatives submit comments to the superintendent of schools about issues affecting their schools for the upcoming CIP or amendments to the CIP.	June
Superintendent of schools publishes a summary of all actions to date affecting schools (Educational Facilities Master Plan) and identifies future needs.	By June 30

\*If necessary the timeline for deferred planning issues may be modified to allow more time for community input processes.

**Regulation History:** Interim Regulation, June 1, 2005; revised March 21, 2006; revised October 17, 2006; revised June 8, 2008; revised June 6, 2015.

