

Update on Key Facility Indicators and Major Capital Projects

October 29, 2018

Framework

Montgomery County Public Schools (MCPS) has been engaged in reframing key aspects of our educational facilities planning processes. The purpose of this effort has been to reflect and adjust to continued growth and capacity pressures; dynamic and diverse land use and development environments; and a wide range of facility conditions and needs among our schools. We also are mindful of the fiscal constraints that increasingly have impacted our ability to address system facility needs.

Central to this reframing effort is the re-envisioning of our Revitalization/Expansion program, formerly known as the modernization program. We have worked to develop a framework for priority setting that will allow us to integrate these major capital projects with the facility, capacity, and programmatic needs across all schools; to be able to respond flexibly to changing system needs; and to leverage each major facility project to align top priorities in the Capital Improvements Program (CIP).

To ground our understanding of facility conditions, we contracted with external consultants to conduct a facility assessment of all of our schools. This assessment evaluates the key facility indicators (KFI) that impact a school environment, ranging from major system infrastructure, to security, to interior elements and features. It is important to note that KFI data are not endpoints for decision making, nor are they automatic determinants for a particular type of project. Facility data are critical starting points for analysis of multiple educational facility objectives. The KFI data will provide context for planning coordinated projects with a scope of work that improves a schools' needs in facility condition, capacity, and program where necessary.

At this time, the consultants are continuing to collect, refine, and analyze the KFI school assessment data. However, our analysis of existing data in the context of the KFI approach, combined with an evaluation of enrollment and facility utilization and program elements, clearly points to an initial set of schools that require major capital work. In addition, our analysis points to opportunities to expand the scope of work in schools where replacement of major building systems is needed to address multiple needs and positively impact the broader school environment.

Fiscal Year 2020 Recommendation

As part of our work in Fiscal Year (FY) 2020, through the funding approved in the FY 2019–2024 CIP, I am recommending that we initiate planning for the first set of schools through the approved FY 2020 planning funds in Major Capital Projects. The schools identified in the following chart require major capital work due to both facility condition elements and capacity or programmatic elements. We will begin work in this fiscal year to identify the project scope for each school and continue the formal project planning process in FY 2020. Any additional funding that

may be needed then will be requested in the next CIP cycle, and the project schedule for these schools will be finalized in alignment with the approved CIP funding level.

Major Capital Projects	
These schools combine significant and extensive facility needs with capacity pressures and programmatic elements. Project scopes will be determined individually.	
<ul style="list-style-type: none"> • Burnt Mills ES • South Lake ES • Stonegate ES • Woodlin ES • Neelsville MS 	<ul style="list-style-type: none"> • Damascus HS • Col. Zadok Magruder HS • Poolesville HS • Thomas S. Wootton HS

The high schools noted in the preceding chart previously were identified for future projects. High schools are significantly different from our other school facilities, and I believe will need to be treated as a distinct group of projects. High schools are large facilities with specific, individualized needs based both on the characteristics of the building and also on the program elements of the school within the unique features of the site. We will review each of these four high schools through this lens to develop a project scope of work for each that address the facility, capacity, and program needs of the school. Once the project scopes are fully identified, the schedules of work and the funding that will be needed can be planned and determined. Given the likely scale and scope of these projects, it may be necessary to phase work or otherwise adjust schedules to accommodate the fiscal impact within the overall CIP.

Another important aspect of this recommended approach will be coordinating the various work indicated by the KFI assessment with a large systemic replacement project. The schools listed in the following table are identified for a countywide systemic project, and within each major category of work, the KFI data will be used to develop expanded project scope. During the remainder of this year, we will begin to develop the scope of work for each school, with more detailed planning work to continue in FY 2020.

It is important to note that as all of these are multi-year projects, the planning and design will begin in FY 2020. Once the scope and cost information is developed, the next CIP cycle will reflect the project schedule and sequencing that may be feasible within funding levels, as well as any additional funding requests needed to support the expanded scope of work.

Schools Identified for a Countywide Systemic Project		
<p>For these schools, we will coordinate other work indicated by the KFI assessment data or program needs into one capital project centered on the large systemic replacement need. The schools are categorized according to the systemic replacement portion of the project.</p>		
HVAC	Roofing	Security
<ul style="list-style-type: none"> • Ashburton ES (also addition) • Burtonsville ES • Clearspring ES (also security) • Diamond ES • Fallsmead ES • Flower Hill ES • Highland View ES • Montgomery Knolls ES (also addition) • Oakland Terrace ES • Judith A. Resnik ES • Sequoyah ES • Twinbrook ES • Briggs Chaney MS • White Oak MS (also security) 	<ul style="list-style-type: none"> • East Silver Spring ES • Fox Chapel ES • Highland ES • Jackson Road ES • Kemp Mill ES • Sherwood ES 	<ul style="list-style-type: none"> • Bannockburn ES • Belmont ES • Clearspring ES (also HVAC) • Forest Knolls ES (also play space) • Rosemary Hills ES • Watkins Mill ES • Whetstone ES • White Oak MS (also HVAC)

HVAC=Heating, Ventilation, and Air Conditioning

We will anchor the work for each school around the primary need, whether systemic, capacity, or program, and then build out a scope of work that takes other facility, capacity, and program needs and information into account. For example:

- A school with a programmed addition also needs a Heating, Ventilation, and Air Conditioning (HVAC) system replacement project. In this school, we also will coordinate project needs around Safe Access; outdoor play space; and interior finishes such as ceiling, floor tiles, and updated painting.
- In one school experiencing capacity pressures that have not been sufficient to program a separate addition, we can coordinate classroom expansion with Safe Access, HVAC, electrical system upgrades, and interior finishes such as painting.

FY 2020: First Phase of the Transition

This FY 2020 planning work across these several categories of facility infrastructure needs represents the first step in the transition from the Revitalization/Expansion model to the integrated Major Capital Projects approach. Each year as part of the CIP planning cycle, we will identify additional schools for which to initiate planning through our analysis of the KFI data, utilization data, and program changes. Following these planning efforts, we will work within the funding and project schedule of the CIP to program the specific school projects and request funding as needed to support the ongoing program.

I would highlight that all except three of the schools previously listed with a project date under the former Revitalization/Expansion program are represented in the set of schools identified in the preceding table for our initial FY 2020 planning. The three schools not included in this planning set of schools at this time are Cold Spring and Summit Hall elementary schools and Eastern Middle School. We acknowledge the specific facility concerns each of these schools is experiencing and as we finalize our analysis of the KFI data this year, we will examine these schools again in the context of the full CIP cycle and project development.

I appreciate the degree of change that this approach represents for our system and for our community. I firmly believe that it ultimately will result in an improved ability to address more schools sooner than was possible over time through the Revitalization/Expansion program.

One catalyst for this change in approach was a report from the Office of Legislative Oversight (OLO) in 2015. Since that time, we have been reviewing the report's recommendations and have engaged with stakeholders from County and state agencies in the context of the changing fiscal and planning environment in Montgomery County. We have discussed alternative approaches with the Board of Education. We have engaged in dialogue with our parent/guardian leadership throughout the two years of this review and with other advocacy and community stakeholders. This spring, the Board revised Policy FAA, *Educational Facilities Planning*, to integrate the principles of former Policy FKB, *Sustaining and Modernizing Montgomery County Public Schools (MCPS) Facilities*, into one policy and one capital planning continuum.

Throughout this extensive analysis, it is clear that we no longer can maintain a large construction program with dedicated funding that seeks to replace buildings in a predetermined order outside of other facility planning priorities. Due to pressures on other areas of the CIP, primarily capacity and utilization, the previous model has resulted in increasing delays and deferrals of schools and has limited our ability to coordinate needed priorities in a timely manner.

The pace of completing Revitalization/Expansion projects has varied greatly, often due to funding constraints. The OLO report found that between 1993 and 2000, MCPS completed on average more than four projects per year. Between 2001 and 2015, the pace decreased to approximately 2.5 projects per year. As funding constraints continue, and as the pressures of CIP priorities such as capacity continue, it is difficult to anticipate what pace of projects we would be able to sustain going forward during the next 30 years.

In recent years, the impact of managing facility conditions through the Revitalization/Expansion program has been seen particularly at the high school level.

- In the 2012 CIP, Seneca Valley High School had a completion date of August 2016; Thomas S. Wootton High School had a completion date of August 2018; and the Poolesville High School completion date was to be determined. Tilden Middle School had a completion date of August 2017.
- In the 2013 CIP, Seneca Valley High School had a completion date of August 2018; Thomas S. Wootton High School had a completion date of August 2020; Poolesville High School had a completion date of August 2022; and Tilden Middle School had a completion date of August 2019.

- In the 2015 CIP and 2016 CIP, Seneca Valley High School had a completion date of August 2019; Thomas S. Wootton High School had a completion date of August 2021; Poolesville High School had a completion date of August 2023; and Tilden Middle School had a completion date of August 2020.

Currently, Seneca Valley High School is under construction with a completion date of September 2020. The Tilden Middle School Project, which includes collation with Rock Terrace School, also is under construction with a completed date of September 2020. In addition, capacity and utilization pressures at the high school level have resulted in the addition of three major high school projects to the FY 2019–2024 CIP to expand capacity: reopening of Charles W. Woodward High School; the addition and facility project at Northwood High School; and a new Crown High School. Adding this degree of high school construction for capacity would make the likelihood of funding and completing a high school revitalization/expansion every two years at the same time even further unlikely. Under the previous model, the next schools' completion dates would continue to be delayed further into the future, while the CIP's fiscal capacity was adjusted to accommodate the multiple school capacity projects around the revitalization/expansion schedule.

Our new approach will facilitate our ability to ensure that the highest priority schools continually rise to the top of the CIP project priority focus. We will work to develop project scopes in the coming months of this school year and schedule work in a program and timeframe that can be more realistically accomplished. This schedule will be reflected in the next CIP cycle and each CIP cycle will identify a set of priorities according to the facility, capacity, and program data available for each school.

School Level Data Displays

An important element of our reframing the capital planning process is that we are working to develop a public facing format for the facility data about each school. We have been working with external consultants on both the facility assessments and on developing a new methodology for enrollment projections for long-term capital planning. As we refine and finalize the data analysis for both elements, we will make available data displays of the facility condition and utilization information for each school, as well as for the district as a whole. Our consultants are working with us to develop displays that provide easily accessible information.

Ultimately, we envision a web page for each school presenting:

- Enrollment projections, program capacity, and utilization trends;
- Facility condition information, including KFI analysis in areas such as infrastructure, building quality, indoor environment, and security; and
- Links to other available information such as districtwide information, CIP projects, and planning studies.

Through sharing information with our parent/guardian and school communities, we aim to proactively respond to questions about the relative state of various facility elements and provide context for how the data lead to facility planning and decision making in the CIP.