Long-range Educational Facilities Planning Policy (FAA)
Long-range Educational Facilities Planning Regulation (FAA-RA)
Montgomery County Charter
Board of Education CIP Priorities
Planning Objectives
MSDE IAC/PSCP Administrative Guidebook

GUIDES

INPUT
• Enrollment Forecasts
• School Capacities
• Budget Estimates
• Demographic Data
• Facility Data
• Planning Criteria
• MCCPTA Input
• Cluster Comments

County CIP/Master Plan Development Process

OUTPUT
• Superintendent recommended CIP book
• BOE Adopted CIP Book
• Annual Master Plan
• Project Description Forms

ENABLER

Division of Long-range Planning Staff
Division of Construction Staff
Division of Maintenance Staff
Associate Superintendents
Office of Curriculum and Instructional Programs
Capital Improvements Program Process
High Order Map

Start Process

#1 Collect and develop special education data, room use data, and housing build-out data

#2 Collect and summarize cluster comments

#3 Update school capacities and develop 6-year enrollment forecast

#4 Prepare feasibility studies for school projects and collect budget estimates for countywide projects

#5 Meet with DFM director, COO, and superintendent to develop CIP recommendations (September/October)

#6 Publish CIP book (late October)

#7 Distribute CIP book (late October)

#8 Board of Education review and action on BOE Requested CIP (November)

End Process

#8 County Executive and County Council review and action (January–May)
Start School Data Input Process

- Special education master plan is developed by planner working with SPED/OSSI staff
- Room use and enrollment surveys are sent to principals by planner by end of June
- Planner calls for housing build-out schedules (summer)
- School capacities are reviewed and revised for six-year CIP by planner
- Room Use data is entered into Planning database by planner
- School enrollment forecasts are developed by DLRP director
- School grade by grade enrollments entered into Planning database by DLRP secretary
- Effects tables are printed for staff review and analysis
- DLRP staff analyze new projections and capacities for six years

End School Data Input Process

Start CIP Budget Data Input Process

- Feasibility studies are prepared for capital projects including additions, revitalization/expansions, new schools, and BMPI projects
- Memo is sent to offices requesting information on capital budget needs (attached)
- Budget and operations manager summarizes requests for countywide projects
- Budget and operations manager shares information for countywide projects with DOC Director
- Budget estimates are developed for individual and countywide projects by DOC director in August/September
- Finalize superintendent’s recommendations for CIP and Capital Budget (Oct.)
- Links to publication process

Staff meets with DFM director and OCOO to review superintendent’s recommendations (Sept.)

Budget and operations manager prepares CIP budget summary

Meet with supt., OCOO, OSSP, and others as needed to review recommendation (Sept.-Oct.)

Staff develops recommendations for superintendent review

CIP Book Publication Process

Budget and operations manager solicits input from other MCPS offices for countywide projects

School grade by grade enrollments entered into Planning database by DLRP secretary
CIP Public Input Process

Start Public Input Process

Solicit cluster comments thru a memo to cluster coordinators in May of each year.

Memo is sent to cluster coordinators by Planner (attached)

Memo asks for comments by June 1 of each year.

Were comments received by June 1?

No

Planner sends 1st reminder via email to send comments

Yes

Comments are summarized and organized in a summary template (attached)

Were comments received after 1st email?

No

Planner sends 2nd reminder via email to send comments

Yes

Send cluster comments summary to superintendent, BOE, OSS, school principals, PTAs and cluster coordinators

MCCPTA and SEAC leaders meet with DLRP staff during CIP retreat to discuss CIP/facility issues (June)

Meet with quad-cluster leadership (MCCPTA) to review cluster comments and CIP process (August/September)

End Public Input Process

Input summary comments into template (attached)

End cluster comments process

No comments submitted for that cluster/school

Budget and School Data Process

End Public Input Process
CIP/Master Plan Book Publication Process

Start publication process

1. Send Requisition to Graphics for cover photographs and printing of CIP/Master Plan (MP) book
2. Send photographer school names to take photographs for cover (Sept.)
3. Request the Graphic Designer to send all of the text files from previous publication
4. Assign DLRP staff duties for CIP/Master Plan sections (attached)
5. Staff members update text and tables for publication
6. Staff completes assigned sections and forwards to Senior Planner for review/edits
7. Other staff members are asked to review/edit the text and tables
8. After first review of text, Senior Planner sends text to Graphic Designer to format text (Intro. And Chap. 1-6)
9. Senior Planner reviews/edits and coordinates all sections of the book
10. Staff reviews Effects Tables, Chapter 1 tables, and Chapter 4 text for consistency as a group
11. GIS coordinator transfers all data required for Chapter 4 tables from database to EXCEL (Effects, Demographics, Facility, and Room Use tables)
12. EXCEL tables are printed to PDF format and sent to Graphic Designer for placement in document
13. Graphics prepares the running set for review and approval
14. Senior Planner reviews running set to ensure all sections are complete and correct
15. Senior Planner approves running set for printing
16. Senior Planner reviews and approves cover for printing
17. Staff reviews Effects Tables, Chapter 1 tables, and Chapter 4 text for consistency as a group
18. Is it the Effects Table?
   - Yes
     - Demographic, Facility, and Room Use tables are reviewed individually by staff
   - No
     - Text requiring changes is sent back to Graphic Designer for editing
     - Senior Planner sends formatted text back to Senior Facility Planner for review
     - DLRP secretary edits all formatted text
     - Graphic Designer sends formatted text back to Senior Facility Planner for review
19. Is the CIP section text?
   - Yes
     - Text requiring changes is sent back to Graphic Designer for editing
     - Senior Planner notifies Graphic Designer that section is final
   - No
     - Text requiring changes is sent back to Graphic Designer for editing
20. Staff completes assigned sections and forwards to Senior Planner for review/edits
21. Are all sections for the book complete?
   - Yes
     - Senior Planner approves cover for printing
     - Senior Planner reviews running set for printing
     - Senior Planner approves running set for printing
     - GIS coordinator transfers all data required for Chapter 4 tables from database to EXCEL (Effects, Demographics, Facility, and Room Use tables)
     - EXCEL tables are printed to PDF format and sent to Graphic Designer for placement in document
   - No
     - Continue to review and edit sections until final
22. Are all sections for the book complete?
   - Yes
     - Senior Planner approves cover for printing
     - Senior Planner reviews running set for printing
     - Senior Planner approves running set for printing
     - GIS coordinator transfers all data required for Chapter 4 tables from database to EXCEL (Effects, Demographics, Facility, and Room Use tables)
     - EXCEL tables are printed to PDF format and sent to Graphic Designer for placement in document
   - No
     - Continue to review and edit sections until final
23. Does the formatted text require changes?
   - Yes
     - Text requiring changes is sent back to Graphic Designer for editing
   - No
     - Staff reviews Effects Tables, Chapter 1 tables, and Chapter 4 text for consistency as a group

End publication process
Start BOE review of CIP process

1. **BOE briefing in mid-October on school enrollments and CIP issues**
2. **CIP distributed to BOE and superintendent in late October**
3. **Meet with BOE staff to review superintendent’s recommendations**
4. **MCCPTA CIP Forum in late Oct/early Nov to review recommendations and explain process**
5. **BOE holds work session on CIP and any boundary recommendations in early Nov.**
    - **Does BOE request any alternatives?**
        - Yes
            - Staff distributes alternatives to appropriate constituents
            - Staff prepares alternatives
        - No
            - BOE holds public hearings on recommended CIP in mid-Nov.
3. **BOE holds action meeting in late Nov.**
    - **Did BOE make changes to green sheet?**
        - Yes
            - Staff updates green sheets and labels the action “REVISED”
        - No
            - BOE Requested CIP book is published Late Nov.
2. **BOE Requested CIP is distributed to schools, PTAs, OSSIs, County Executive, County Council**
4. **Staff prepares Green Sheets for BOE final action**
    - **Does BOE request additional information from staff?**
        - Yes
            - Staff prepares responses to BOE questions from public hearings
        - No
            - Staff distributes responses to BOE and Exec staff
3. **County Council review of BOE CIP request**

End BOE process

**Links to Distribution process**
Begin County Govt Review Process

The CIP BOE Requested CIP is submitted to County Executive by Dec. 1

MCPS staff meets with OMB to review BOE request

Supt. And BOE meet with County Executive to review request

County Executive releases his recommended CIP to County Council (mid Jan.)

County Council holds public hearing on recommended CIP for MCPS and all county budgets (Feb)

Budget and operations manager works with County Council staff to respond to questions and provide information for MCPS CIP

County Council action on Capital Budget/CIP resolutions (end of May)

Budget and operations manager updates all PDFs to be included in the County Council CIP resolution

County Council work session for reconciliation of MCPS and county CIPs (May)

County Council review of recommended CIP for MCPS (May)

Education Committee holds work session(s) to review recommended CIP for MCPS (Mar.-Apr.)

New fiscal year begins on July 1

End review process