

Office of the Superintendent of Schools  
MONTGOMERY COUNTY PUBLIC SCHOOLS  
Rockville, Maryland

February 23, 2004

MEMORANDUM

To: Members of the Board of Education

From: Jerry D. Weast, Superintendent of Schools

Subject: Recommendation for Brickyard Road, Kendale Road, and Edson Lane School Sites

As a follow-up to the county executive's request for the school system to relinquish three properties to the county as part of its workforce housing initiative, my recommendation to the Board of Education is attached.

There will be a public hearing on this and other CIP items on March 3, 2004, at 7:00 p.m. in the auditorium at the Carver Educational Services Center. The Board is scheduled to act on CIP and boundary items at its regularly scheduled meeting on March 22, 2004.

JDW:vnb

Attachment

## **Superintendent's Recommendation on the County's Request to Surplus the Brickyard Road, Kendale Road, and Edson Lane Properties**

This recommendation paper covers a wide range of issues surrounding a request received by the Montgomery County Public Schools (MCPS) to surplus three properties (two school sites and one expansion parcel) to the county as part of its workforce housing initiative. The request has sparked passionate discussion about whether or not the Board of Education should surplus any school sites for any reason. As is the case with most seemingly simple requests, there is never a simple answer when there are many competing interests in the answer.

To address the request from the county to surplus the properties, this recommendation discusses the background regarding the request, the legal requirements concerning the surplusing of Board of Education property, and a brief description of the properties in question. Then, there is a discussion of issues and questions that have bearing on a recommendation of whether or not to surplus the properties. These issues and questions include the following:

- Are the sites needed for school purposes?
- How does the need for workforce housing affect MCPS?
- How will potential funding shortfalls impact the Board of Education's Requested FY 2005–2010 Capital Improvements Program (CIP)?
- Is there an opportunity to include a public-private partnership to address some of the funding issues?
- Is there a better facilities plan for addressing the Seven Locks and Potomac elementary schools facility needs?

This paper will address each of these questions.

### **Background**

#### The Request

The county executive wrote to me on October 20, 2003, requesting that the Board of Education declare three undeveloped sites in its real property inventory as no longer needed for school purposes. Further, the county executive asked that the property be transferred to the county for the purpose of providing sites for the development of affordable housing. The properties requested are—

1. Brickyard Road—20 acre middle school site—Winston Churchill Cluster
2. Kendale Road—10.54 acre elementary school site—Winston Churchill Cluster
3. Edson Lane—1.75 acre expansion parcel—Walter Johnson Cluster

I responded to Mr. Doug Duncan, county executive, on November 10, 2003, indicating that this request would be discussed with the Board of Education by mid-January 2004 as part of its FY 2005–2010 CIP deliberations. The correspondence from Mr. Duncan and my responses are included in the attached briefing memorandum dated January 16, 2004. The briefing memorandum was discussed by the County Council Planning, Housing, and Economic Development (PHED) Committee on January 20, 2004. This memorandum provides background on the PHED Committee's housing action plan and this priority item of utilizing publicly owned land for affordable and special needs housing.

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### **Legal requirements for surplusizing Board of Education property**

The Board of Education cannot sell land from its inventory. The Education Article of the Annotated Code of Maryland, § 4-115(c) *Disposition of real property*—(1) (i) states

...if, with the approval of the State Superintendent, a county board finds that any land, school site, or building no longer is needed for school purposes, it shall be transferred by the county board to the county commissioners or county council and may be used, sold, leased, or otherwise disposed of, except by gift, by the county commissioners or county council.

Significant in § 4-115(c) is the need for the Board of Education to find that any land or building is no longer needed for school purposes before a property can be declared surplus, and that the State Superintendent of Schools must approve of the transfer of the property. It also is important to note that once the title is transferred to the county, it is up to the County Council to determine the disposition of the property.

### **Properties requested to be surplusized by the County**

The three properties requested to be surplusized by the county executive are part of the Board of Education's real property inventory that includes 14 school sites and several expansion parcels for existing schools. The complete inventory is available for public information on the MCPS Web site—<http://www.mcps.k12.md.us/departments/facilities/REM/>.

The Brickyard Road and Kendale Road sites are located in Potomac and are middle and elementary school sites respectively. The Edson Lane site is an expansion site located adjacent to Tilden Middle School in Rockville. A listing of inventoried sites and a map showing their locations throughout the county are attached. The Edson Lane site, as an expansion parcel for Tilden Middle School, is not shown on the map. The map also indicates the locations of 12 more prospective sites that are master planned for schools as new areas develop. A brief description of each of the properties requested to be surplusized is as follows:

Brickyard Road Middle School Site consists of 20 acres of gently rolling, nearly flat land in Potomac in the southwestern most area of the Winston Churchill Cluster. The site fronts on Brickyard Road on the south, and was acquired in 1973 at a cost of \$215,274. The site is currently cleared and leased for agricultural purposes as an interim use. The zoning, consistent with the Potomac Master Plan, is rural cluster at one dwelling unit per every two acres (RE-2C). The site is currently in the W-1 (currently available) and S-6 (septic systems only) water and sewer categories, but water and sewer mains are located in Brickyard Road. Aerial and tax maps of the site are attached for information.

Kendale Road Elementary School Site consists of 10.54 acres of wooded land in Potomac within the Winston Churchill Cluster in the Seven Locks Elementary School service area. It was acquired in

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two parts in 1965 at a cost of \$117,667. The zoning, consistent with the Potomac Master Plan is rural cluster at one dwelling unit per every two acres (RE-2C). The site is currently in W-1 and S-1 (currently available) water and sewer categories, but would need a 150-foot sewer extension to the property. Aerial and tax maps of the site are attached for information.

Edson Lane Site (Expansion Parcel) consists of 1.75 acres of wooded land in Rockville within the Walter Johnson Cluster adjacent to Tilden Middle School. It was acquired in 1980 at no cost. The zoning is for planned development of nine dwelling units per acre (PD-9). The site is currently in W-1 and S-1 water and sewer categories. Aerial and tax maps of the site are attached for information.

## Issues and Questions for Consideration

### Are the sites needed for school purposes?

Brickyard Road Middle School Site—Middle school enrollment in the Winston Churchill Cluster is projected to trend downward slightly over the next 10 to 15 years. Two middle schools serve the Winston Churchill Cluster—Cabin John and Herbert Hoover middle schools. Cabin John Middle School is shared with the Thomas S. Wootton Cluster, with about half of the school's enrollment articulating to Winston Churchill High School and the other half to Thomas S. Wootton High School. Total enrollment at the two middle schools is 2,079 students this year and is projected to level off at 1,950 students through 2015. Total capacity of the two middle schools is 1,902.

While middle school enrollment is projected to stay slightly above capacity in the Winston Churchill Cluster, both middle schools are scheduled for modernization and could be expanded to accommodate 1,000–1,100 students each. There is not a sufficient amount of projected enrollment deficit to justify constructing another middle school in the area.

The Brickyard Road site is on the southwestern border of the Winston Churchill Cluster and is poorly positioned to serve the cluster. In addition, if a new middle school were to be constructed, it would be better to locate it in the Thomas S. Wootton Cluster, because there are already two middle schools in the Winston Churchill Cluster. If a new Thomas S. Wootton Cluster middle school were constructed in the future, the students attending Cabin John Middle School from the Thomas S. Wootton Cluster would be reassigned to the new middle school, resulting in additional space for Winston Churchill Cluster students at Cabin John and Herbert Hoover middle schools.

Given these enrollment trends and related considerations, it does not appear that the Brickyard Road middle school site will be needed for a new middle school in the Winston Churchill Cluster for the foreseeable future. There may be, however, other school purposes for which the Brickyard Road site could be used that will be discussed later in this recommendation.

Kendale Road Elementary School Site—Elementary enrollment in the Winston Churchill Cluster is projected to increase modestly over the next 10 to 15 years. This year, there are 2,439

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students enrolled in Winston Churchill Cluster elementary schools. By the 2009–2010 school year, this enrollment is projected to be 2,546. The longer-term forecast is for elementary enrollment to level off at approximately 2,600 students through 2015.

This year, total elementary school capacity in the Winston Churchill Cluster is 2,360. The FY 2005–2010 CIP includes plans to add elementary capacity, increasing the cluster elementary capacity to 2,544 students by the 2009–2010 school year. (This total capacity includes reductions in capacities that result from implementing full-day kindergarten in all Winston Churchill Cluster schools by the 2007–2008 school year.)

The Winston Churchill Cluster, with two small elementary schools, is able to accommodate more student capacity by providing additions to these existing schools. Scheduled in the FY 2005–2010 CIP is a ten-room addition at Seven Locks Elementary School, raising its capacity from 294 to 519 students in the 2006–2007 school year. Also, an addition to Bells Mill Elementary School will be constructed when the school is modernized, raising its capacity from 376 to 479 students in the 2009–2010 school year.

It is far more cost effective to add onto existing schools than to open additional schools when the amount of projected space needed is modest, as is the case in the Winston Churchill Cluster. Also, should there be a future need to open another elementary school in the Winston Churchill Cluster, the former Tuckerman Elementary School property remains titled to the Board of Education and could be reclaimed for use as an elementary school.

Given this set of circumstances, it does not appear that the Kendale Road site is needed for a new elementary school in the Winston Churchill Cluster. However, the Kendale Road site could be used to build a replacement Seven Locks Elementary School. Further discussion of this possible school use for the Kendale Road site is contained in a later section of this recommendation.

Edson Lane (Expansion Parcel) Site—At one time, while the school was known and operated as Charles Woodward High School, a driveway was considered for development through the parcel to obtain access to Edson Lane and relieve on-site traffic congestion. There was a great deal of opposition by the neighboring community to provide access to the school from Edson Lane. The driveway was never built and is no longer needed for the operation of the middle school, since an additional traffic signal was installed on Old Georgetown Road to facilitate ingress and egress from the school. It is unlikely that this parcel will be needed in the future.

### How does the need for workforce housing affect MCPS?

Each year MCPS hires more than 1,000 new employees, most notably teachers, but also a number of support staff, including bus drivers, paraeducators, food service workers, and building service workers. The system's ability to recruit and retain quality employees is tempered by the availability of moderately priced housing in the county. The same difficulty in recruiting and retaining other county employees, such as police officers and firefighters, affects other county agencies.

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The 2002 median price of an existing townhouse in Montgomery County is \$185,000, and the household income required to qualify for a mortgage in this price range is approximately \$61,700. The starting salary for new teachers is \$38,700, for police officers is \$38,600, and for firefighters is \$32,500. These salaries are all higher than the average starting salary for support services staff.

The 2002 median price for a new townhouse and a new single-family detached house are \$278,000 and \$481,300 respectively. Using the rule of thumb that three times the income is approximately the amount of mortgage a household can qualify for, it becomes obvious how difficult it is for teachers and others to buy a home in Montgomery County.

The areawide median income for a family of four in Montgomery County is \$84,000. Based on 80 percent to 120 percent of that figure, it could be anticipated that the price range for the workforce housing could be developed for the surplus properties would be approximately \$180,000 to \$300,000.

It is important for MCPS to assist the county in providing opportunities for our valuable county workforce, because it is discouraging for these valuable employees not to be able to afford to live in the communities for which they are providing education and life saving services. A school system such as MCPS relies on the quality of its workforce to provide for the education of its students.

### How will potential funding shortfalls impact the Requested FY 2005–2010 CIP?

The county executive did recommend the Board of Education's full \$956.2 million request for the six-year period, for which the Board is very appreciative. However, the county executive's recommendation modifies year-by-year expenditures, reducing expenditures in the first three years and increasing them in the last three years of the CIP. The county executive stated in his recommendation that he would look to the Board to adjust requested construction schedules to fit within annual affordability limits. Furthermore, the county executive's recommendation relies on \$148 million of state funding for the six year period, which, given the state's other fiscal priorities, may not be realized.

Based on the county executive's recommendation for FY 2005 expenditures and the current commitment from the state for only \$6.4 million, MCPS would have a potential combined revenue shortfall of approximately \$49 million in FY 2005. The Board of Education has been advised that if the potential shortfall cannot be closed for FY 2005, project schedules would need to be delayed.

I have attached a list of projects that would need to be delayed one year if additional local and/or state funds are not approved to support the Board's CIP request. This list has been shared with the County Council. The schools are listed based on the Board of Education's adopted priorities—health and safety, capacity, capital maintenance, modernizations, and gymnasiums. Projects on the top of the list would be the first to be delayed. The expenditures for the 23 projects on the list total approximately \$47.7 million in FY 2005. It should be noted that five of the 23 projects are

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scheduled for bidding this spring.

Is there an opportunity to address some of the funding shortfall and workforce housing issues by creating a public-private partnership?

Fairfax County recently entered into a public/private partnership to accelerate the construction of a high school and the development of other recreation and senior housing projects. Through the partnership agreement, the county was able to use the value of a portion of county-owned property to have a private developer build a high school and fund the debt service payments for the project until county financing became available later in its six-year CIP. No other school projects were delayed by the arrangement, and the county was able to occupy the high school three years ahead of schedule. Through the partnership agreement, the county was able to retain title to the site while transferring the ownership of the improvements to the developer in exchange for the developer constructing county specified projects. The developer structured the financing for all the assets developed in this project.

A similar approach could be used to help fund some of the potential shortfall in the Board's six-year CIP request. As part of this approach, the Board of Education would transfer the surplus properties to the county to assist with meeting the goal of providing workforce housing. In return, through a public-private partnership, the county could request proposals from private firms to both develop the selected sites in accordance with the approved land use plans for workforce housing and use the value of the property to provide funding for the construction of needed school projects. While the benefits of the public/private partnership or the value of the property would not be realized in time to help offset the potential FY 2005 shortfall due to the time it will take to finalize the workforce housing land use issues and select a developer, the financial benefits could be applied to the six-year total to offset any shortfall in state aid.

Is there a better facilities plan for addressing the Seven Locks and Potomac elementary schools facility needs?

Coinciding with all of the above issues and questions is the question of the best approach for addressing the facilities needs for both Seven Locks and Potomac elementary schools. The existing Seven Locks Elementary School site is located at the intersection of Seven Locks Road and Bradley Boulevard. The school faces undesirable traffic constraints and will undergo two major construction projects over the next five years—a ten-classroom and gymnasium addition project and a separate modernization project that will require the students to be relocated to a holding facility.

The currently adopted facilities plan for Seven Locks Elementary School includes the completion of the addition and gymnasium in September 2006 and January 2007 respectively, with the modernization to be started in 2008 and completed by September 2010. Partial funding for the planning of the classroom addition and gymnasium has been approved as part of the FY 2004 Capital Budget. The balance of the planning and construction funding for the additional classrooms,

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gymnasium, and modernization are included in the Board of Education's Requested FY 2005–2010 CIP.

The classrooms and gymnasium are needed prior to the modernization to accommodate approximately 200 students that will be reassigned to Seven Locks Elementary School from Potomac Elementary School to relieve the overutilization at Potomac Elementary School. The additional students will be reassigned once the classroom addition is completed.

The Seven Locks community is concerned about the disruption that will occur during the classroom and gymnasium additions followed 18 months later by a complete modernization. The other major concern of the community is the traffic congestion experienced by the school at its current site at the intersection of Seven Locks Road and Bradley Boulevard. The community also questions the current site's ability to handle the building and other amenities needed for the expansion to accommodate the 200 students that will be reassigned from Potomac Elementary School.

Winston Churchill Cluster leadership and the Seven Locks Elementary School Parent-Teacher Association have proposed a plan to build a replacement Seven Locks Elementary School on the Kendale Road site. When the replacement facility is completed, the students from Seven Locks Elementary School and the reassigned students from Potomac Elementary School would all move together to the new facility and the Seven Locks site could be transferred to the county for workforce housing. Given the complexity of the phased construction and the site measures planned as part of the modernization to address traffic concerns, it appears that building a new school on the Kendale site would be more cost effective. However, a feasibility study would have to be conducted to show conclusively that the new school was the best approach.

It may be possible with a public/private partnership, as discussed above, to create the funding necessary to construct a replacement facility for Seven Locks Elementary School at the Kendale site without delaying any other projects in the CIP. If a replacement school project could be funded on a timeline that would provide needed capacity relief for Potomac Elementary School and not impact the queue of elementary school modernizations, I believe the community would support the plan to surplus the Seven Locks site.

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For all of the reasons outlined above, I believe it would be in the best interest of the Board of Education to surplus the Edson Lane and Brickyard Road sites as requested by the county, contingent on being able to generate funding to support facility improvements for MCPS and workforce housing.

I also feel that the feasibility of building a new school on the Kendale site to serve the student needs of the current Seven Locks Elementary School and address overcrowding at Potomac Elementary School should be evaluated before a decision is made on the disposition of the

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Kendale site. If it proves more cost effective to build a new school on the Kendale site, I am inclined to recommend that the Seven Locks site be transferred to the county for workforce housing, contingent on being able to generate funding for the completion of the new school by September 2007 without impacting funding for the current queue of elementary school modernizations.

There will be a public hearing on this and other CIP items on March 3, 2004, at 7:00 p.m. in the auditorium at the Carver Educational Services Center. The Board is scheduled to act on CIP and boundary items at its regularly scheduled meeting on March 22, 2004.