

## Issue Paper #3 Alternative Recommendations

The following alternative Recommendations were generated from the discussion at Meeting 14 on September 25<sup>th</sup>. Staff has included a qualitative staff evaluation of each alternative. These alternative recommendations correspond to the analysis provided for each alternative on the attached chart.

1. Allow no mitigation payments either through DRRAs or through mandatory school facility payments when SRC would be exceeded.

*Staff Evaluation -- This approach would allow virtually no additional growth in the County outside of the St. Charles PUD and the Towns of La Plata and Indian Head, and therefore, generate no mitigation payments and limited excise tax and/or impact fees. The result would be to severely limit new school capacity construction funding without increased income and/or property taxes.*

2. Allow mitigation payments either through DRRAs or through mandatory school facility payments when the SRC is exceeded to a maximum cap as indicated in the range of alternative approaches 2A-2E below. It is understood that the “local measurement of capacity with relocatables as determined by the BOE” may be amended after the completion of the School Facility Assessment Study to be performed. It is further understood that no mitigation is to be allowed after the BOE stated cap is reached.

*Staff Evaluation – The following caps would allow a range of additional growth scenarios in the County outside of the St. Charles PUD and the Towns of La Plata and Indian Head, and therefore, offer a range of potential mitigation payments and excise tax and/or impact fees. These options recognize the need for additional growth to help fund schools while also recognizing that there are a number of existing school allocations granted to current projects that will result in student enrollments that would not be affected by the cap.*

- 2A. Set the cap at 105% over SRC, but in no case greater than the “local measurement of capacity with relocatables as determined by the BOE.”

*Staff Evaluation -- This cap would allow some additional growth in the County and therefore, generate a limited amount of mitigation payments and excise tax and/or impact fees. The result would be to provide some funding of new school capacity construction without complete dependence on income and/or property taxes.*

- 2B. Set the cap at a point halfway between SRC and the “local measurement of capacity with relocatables as determined by the BOE” for each school.

*Staff Evaluation – This cap will fluctuate depending on the actual capacity available for each school. In some cases there may be no available capacity and in others (especially new schools) it may approach 110% of SRC. This cap would allow additional growth in the County, and therefore, generate a greater amount of mitigation payments and excise*

*tax and/or impact fees. The result would be to provide moderate funding of new school capacity construction without undue increases in income and/or property taxes.*

- 2C. Set the cap at 110% over SRC, but in no case greater than the “local measurement of capacity with relocatables as determined by the BOE.”

*Staff Evaluation – This cap would allow more additional growth in the County than Alternative 2B, and therefore, generate a greater amount of mitigation payments and excise tax and/or impact fees. The result would be to provide better than moderate funding of new school capacity construction and minimize increased income and/or property taxes.*

- 2D. Set the cap at 95% of the local measurement of capacity.

*Staff Evaluation -- This cap would allow somewhat less additional growth in the County than allowing the cap to equal the “local measurement of capacity with relocatables,” and therefore, generate a somewhat lesser amount of mitigation payments and excise tax and/or impact fees. The result would be to provide slightly less funding of new school capacity construction than Alternative 2E without increased income and/or property taxes.*

- 2E. Set the cap at the “local measurement of capacity with relocatables as determined by the BOE.”

*Staff Evaluation -- This cap would allow the most additional growth in the County among the alternatives 2A-2E, and therefore, generate a greater amount of mitigation payments and excise tax and/or impact fees. The result would be to provide the most funding of new school capacity construction among alternative 2A-2E without increased income and/or property taxes.*

3. Allow mitigation payments either through DRRAs or through mandatory school facility payments when the SRC is exceeded up to a maximum of 120%. No mitigation is to be allowed after a school reaches the level of 120% of SRC.

*Staff Evaluation -- This cap would allow maximum growth potential in the county outside of the St. Charles PUD and the Towns of La Plata and Indian Head, and therefore, generate the greatest amount of mitigation payments and excise tax and/or impact fees. The result would be to provide the most adequate funding of new school capacity construction without increased income and/or property taxes.*

## APFO COMMITTEE ANALYSIS

### SRC, 105% SRC, 110% SRC, CORE, & 95% CORE CAPACITY & ENROLLMENT COMPARISON

SY 2013- 2014, TELEPHONE COUNT 09/30/2013\*\*

FACILITY	STATE RATED CAPACITY (SRC)	105 % STATE RATED CAPACITY	110 % STATE RATED CAPACITY	LOCAL CORE CAPACITY	95% LOCAL CORE CAPACITY	SEPT. 30, 2013 ENROLLMENT**	105% SRC EXCESS/ (SHORTAGE)	110% SRC EXCESS/ (SHORTAGE)	95% CORE EXCESS/ (SHORTAGE)
<b>ELEMENTARY</b>									
C. Paul Barnhart	608	639	669	669	636	597.0	42.0	72.0	39.0
Berry	656	689	722	792	753	835.5	(146.5)	(113.5)	(82.5)
Dr. Gustavus Brown	381	401	420	488	464	403.5	(2.5)	16.5	60.5
Dr. James Craik	406	427	447	586	557	504.0	(77.0)	(57.0)	53.0
William A. Diggs	816	857	898	920	874	749.5	107.5	148.5	124.5
Gale-Bailey	438	460	482	458	436	392.5	67.5	89.5	43.5
Dr. Higdon	447	470	492	479	456	408.0	62.0	84.0	48.0
Indian Head	404	425	445	507	482	495.0	(70.0)	(50.0)	(13.0)
Jenifer	495	520	545	618	588	612.5	(92.5)	(67.5)	(24.5)
Malcolm	417	438	459	496	472	428.0	10.0	31.0	44.0
T. C. Martin	486	511	535	488	464	565.0	(54.0)	(30.0)	(101.0)
Mary H. Matula	554	582	610	669	636	576.0	6.0	34.0	60.0
Arthur Middleton	439	461	483	498	474	440.5	20.5	42.5	33.5
Walter J. Mitchell	606	637	667	651	619	653.5	(16.5)	13.5	(34.5)
Mt. Hope/Nanjemoy	373	392	411	376	358	362.0	30.0	49.0	(4.0)
Dr. Samuel A. Mudd	404	425	445	469	446	430.0	(5.0)	15.0	16.0
Mary Burgess Neal	791	831	871	949	902	683.5	147.5	187.5	218.5
J. C. Parks	656	689	722	764	726	734.5	(45.5)	(12.5)	(8.5)
J. P. Ryon	656	689	722	764	726	579.0	110.0	143.0	147.0
Eva Turner	391	411	431	446	424	459.0	(48.0)	(28.0)	(35.0)
William B. Wade	672	706	740	813	773	698.0	8.0	42.0	75.0
<b>TOTAL ELEMENTARY</b>	11,096.0	11,660.0	12,216.0	12,900.0	12,266.0	11,606.5	135.0	609.5	659.5
<b>MIDDLE</b>									
Theodore G. Davis	1,148	1206	1263	1,148	1091	902	304	361	189
John Hanson	843	886	928	1,078	1025	765	121	163	260
Matthew Henson	659	692	725	856	814	696	(4)	29	118
Mattawoman	890	935	979	1,140	1083	891	44	88	192
Piccowaxen	544	572	599	676	643	429	143	170	214
General Smallwood	659	692	725	801	761	546	146	179	215
Milton M. Somers	802	843	883	962	914	907	(64)	(24)	7
Benjamin Stoddert	711	747	783	852	810	697	50	86	113
<b>TOTAL MIDDLE</b>	6,256	6,573	6,885	7,513	7,141	5,833	767	1,052	1,308
<b>HIGH</b>									
Henry E. Lackey	1,539	1616	1693	1,587	1508	1,209	407	484	299
La Plata	1,162	1221	1,279	1,425	1354	1,413	(192)	(134)	(59)
Maurice J. McDonough	1,200	1260	1,320	1,459	1387	1,118	142	202	269
North Point	1,600	1680	1,760	1,920	1824	2,203	(523)	(443)	(379)
Thomas Stone	1,513	1589	1,665	2,000	1900	1,287	302	378	613
Westlake	1,203	1264	1,324	1,600	1520	1,427	(163)	(103)	93
<b>TOTAL HIGH</b>	8,217	8,630	9,041	9,991	9,493	8,657	(311)	384	836
<b>TOTALS</b>	25,569		28,142	30,404		26,096.5	591.0	2,045.5	2,803.5

Red numbers are where 105% or 110% SRC calculation exceeds Core Capacity

Green numbers are where the 105% or 110% State Rated Capacity is within 25 students of the prior Core Capacity

Represents schools where prior Core Capacity is less than 105% or 110% of State Rated Capacity (SRC)

\*\* Sept 30, 2013 enrollment numbers are telephone count and are not official.