

**FREQUENTLY ASKED QUESTIONS**  
**MCPS FACT Assessments**  
**Draft Methodology and Scoring Criteria**

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**Why are the FACT Criteria being updated?**

The current modernization queues were developed using assessments that were made in the late 1990s. Although the middle school and high school queues still have many years before completion, MCPS anticipates that it will complete the current elementary school queue near the end of the next full CIP planning period (that is, around 2018). Therefore, planning for the next round of elementary schools will begin during the next CIP. MCPS wishes to assess the 53 schools in order to begin that planning.

For several years, MCCPTA has argued that the FACT criteria should be re-evaluated before they were used to assess another group of schools. Many of the factors previously considered were no longer applicable (such as whether a school had air conditioning or a gymnasium), and others were felt to be less appropriate for determining the modernization priority (such as the degree of current overcrowding).

**Did MCCPTA participate in the development of the revisions?**

Yes. MCCPTA's President and CIP Chair participated on the committee that developed the general criteria in the spring of 2010. In addition, MCCPTA's President and CIP Chair participated in weekly meetings with MCPS, EMG, Inc. and other stakeholders from late August through the end of September to develop the methodology and scoring criteria.

**What are the major changes between this round and previous assessments?**

The purpose of the FACT assessments is to determine how to prioritize the schools for modernization. As we have seen with the current modernization queues, schools often are not modernized for 10 years or more after they are assessed. In recognition of this lengthy time period before modernization, the primary change in the methodology is that school conditions expected to change over time or that would be addressed by other capital programs will not be included in setting the priority. For example, a school that is overcrowded will not be given a priority in modernization. Instead, the school will be considered for an addition separate from the modernization schedule. Similarly, the

current condition of a school's HVAC systems, roof, etc. will not be considered in assessing its modernization priority. Instead, these components would be replaced according to MCPS' capital programs for HVAC replacements, roof replacements and the like. MCCPTA's representatives felt that this principle would help ensure that schools in the modernization queue do not deteriorate rapidly while awaiting modernization.

In addition, new factors will be considered in prioritizing schools. The new FACT criteria will assess the energy efficiency of a school, with less efficient schools being given a priority, all other factors being equal. The new FACT criteria will assess the level of community use of the building, with more heavily used buildings being given greater weight toward modernization. Finally, the new criteria will factor in the maintenance costs of each building, with schools imposing a higher maintenance burden receiving a higher priority. MCCPTA's representatives felt that these new criteria would help ensure that the schools receiving the greatest benefit from modernization would be prioritized first.

### **Is the point scale different this time?**

Yes, the new FACT methodology will assess schools on a 600 point scale. Unlike the last assessment, where a low score indicated a school in worse condition, under the new FACT methodology, a school with a **higher** score is considered to be in worse condition. Thus, schools with a high FACT score will be prioritized first in the new modernization queue.

### **What are the major elements evaluated in the Educational Program-Related Components?**

This area evaluates the degree to which the school meets the educational program objectives of MCPS. The most significant factor will be the degree to which the school's facilities are consistent with the educational specifications MCPS uses to construct new schools. Each of the school's spaces (core, regular classrooms, administrative, specialized instruction, etc.) will be compared to current educational specifications, and schools that lack elements considered mandatory in the specifications will be noted. Collectively, the educational specifications portion of this area will account for 76% of the possible 300 points for educational program-related components. The remaining 24% will be determined by evaluation of the school's visitor access characteristics and the degree to which the school contained open plan elements that are not favored today.

## **What are the major elements evaluated in the Physical Infrastructure Components?**

This area evaluates the physical infrastructure of the school. The primary factor will be an evaluation of the facility design characteristics of the school. For example, this factor will evaluate whether the mechanical systems of the school are adequate to meet the school's needs and the presence of key air quality standards in use today. (This factor evaluates whether the HVAC system has adequate air handling capabilities to meet the needs of the school; it will not evaluate whether the HVAC system is performing at maximum efficiency. Schools with deficient performance in HVAC systems will be addressed through maintenance or the HVAC replacement capital program instead.) Overall, the physical infrastructure characteristics of the building will account for two-thirds (67%) of the possible 300 points for physical infrastructure-related components.

The remaining one-third of the points will be determined by three factors: (1) energy utility and efficiency, (2) maintenance costs, and (3) community use of the facility.

## **When will the FACT Criteria be final?**

MCPS released the draft methodology on November 12. The public is asked to comment on the methodology by November 24. The Board of Education will review the methodology and public comments at its December 7 meeting. While it is not clear whether the Board will formally approve the methodology, EMG, Inc. will begin collecting data in December or January.

## **When will assessments be conducted?**

EMG, Inc. will conduct assessments of the 53 schools over the course of the next few months. The goal is to have the assessments completed this spring so that the next round of assessed schools can be included within the FY 2013-18 CIP (to be proposed in October 2011).

## **How will schools be ranked in the assessments?**

The 53 schools will be placed on modernization lists **after** the schools currently in the modernization queue. Schools in the current modernization queue will retain their current order in the queue.

Once the assessments of the 53 schools are completed, the Board will rank those schools for modernization. Separate modernization queues will be maintained by type of school (ES, MS and HS), as is the case with the current queue. Although every school will have a FACT score, it will be up to the Board to determine whether to rank all schools in the next CIP or to group some schools for future final rankings.

## **Where can the proposed FACT methodology be found?**

The proposed FACT methodology is available on the web page for MCPS' Division of Long Range Planning, at this link:

<http://www.montgomeryschoolsmd.org/departments/planning/Index2.shtml>

You may click on the “modernizations” tab to view the November 12 FACT Report and the two field checklists that would be used. This page also contains other information relevant to the FACT assessments, including the results of the spring 2010 FACT Review Committee discussions and the general assessment criteria adopted by the Board of Education in June 2010.

## **What input do you want from schools to be assessed?**

MCCPTA argued for an additional round of comment after the detailed methodology and scoring criteria were determined. We urge those schools that will be assessed to provide input on the final methodology. Please review the methodology to determine whether it would provide a fair assessment of the condition of your school. In particular, we are interested in hearing whether you think that an important factor is not evaluated. We also are looking for comment on whether the relative weighting of factors is appropriate.

Further, it would be appropriate to comment on how the new FACT scores should be used. As stated above, MCPS wants to conduct FACT assessments now so that it may include planning for the first few elementary schools in the latter years of the next six-year CIP. But for most of the schools, significant work on the modernizations will not occur until 2020 or possibly later. Therefore, the Board will have at least two options for what to do with the FACT scores it receives.

Under one option, the Board could rank all schools according to the FACT score that is determined by this process. This option would have the effect of fixing the order of all schools for modernization now, while leaving the exact timing of the modernizations to future CIPs to be determined.

Under an alternative option, the Board would use the FACT scores to identify the “highest priority” schools, so that they may be included in the next CIP’s planning horizon. Schools other than the “highest priority” schools would not be given final rankings now. Instead, these schools could be grouped into two or more groups reflecting those schools with similar FACT characteristics. At a future date, the Board could then determine the final ranking of each group of schools – presumably with some additional information to be gathered about the schools – when planning is ready to

begin on the next group. This approach places the final ranking of schools closer to the actual planning, but does not guarantee any school a specific order within the modernization queue.

It will be up to the Board of Education to determine which of these options is preferable. If a school has a preference among these approaches, it would be appropriate to express that in these comments.

### **How do we submit comments to the Board of Education?**

The Board of Education is requesting comment by November 24, 2010. Comments may be emailed to the Board at [boe@mcpsmd.org](mailto:boe@mcpsmd.org), with a copy to [Bruce Crispell@mcpsmd.org](mailto:Bruce_Crispell@mcpsmd.org). In addition, MCCPTA requests that you copy the CIP Chair, Steve Augustino, at [sauggiedog@comcast.net](mailto:sauggiedog@comcast.net).