

STAFFORD COUNTY, VIRGINIA	
New School Planning Policy for the Development of the Capital Improvement Program	Resolution: R19-183 Dated: June 4, 2019 Version 1

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**Purpose**

The New School Planning Policy for the Development of the Capital Improvement Program (“policy”) contains the Board of Supervisors’ (“BOS”) direction for the development and planning of new schools for Stafford County Public Schools (“SCPS”). It provides requirements and standardizes timelines to ensure that fiscal resources are used judiciously for the betterment of Stafford County. This policy provides standards and criteria for determining when to add a new school to the Capital Improvement Program (CIP) and will direct staff in their work. The BOS may identify circumstances that would amend the standards and timelines addressed in this policy; those changes will be reflected in the adopted CIP.

**Scope**

This policy applies to all new elementary, middle and high school buildings being constructed for SCPS. This policy does not address renovation of existing SCPS buildings. This policy also does not address SCPS buildings that are projected to be used primarily for purposes other than elementary, middle and high school education.

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**Responsibilities**

The responsibilities listed in this policy are not exhaustive, but rather foundational. Unless stated otherwise, the authority provided below may be delegated; however, the responsibility of meeting the requirements in this policy remain with the person in the position.

**County Administrator**

The County Administrator will oversee the development and presentation of the CIP for consideration by the BOS.

**Chief Financial Officer**

The Chief Financial Officer (CFO) will request from SCPS and provide to the BOS an annual comparison of the last five years’ worth of enrollment projections compared to its corresponding September 30<sup>th</sup> actual enrollment numbers.

**Adding a New School to the Capital Improvement Program (CIP)**

Annually, in accordance with the adopted Budget Calendar, the School Board (SB) should provide a prioritized list of large scale school projects. Providing this list will provide the BOS an indication that that the SB is requesting projects for inclusion in the CIP. This prioritized list of projects will be considered within the CIP if the list was voted on by the SB and approved by a majority of its membership. The BOS adopted Budget Calendar will identify when the SB must provide its prioritized list of projects; generally, this will be in September. New schools will only be considered by County staff when the prioritized list from the SB is timely provided. The BOS may waive or override this guideline in its discretion to meet pressing community needs.

When the aggregate school enrollment projections for a school level—i.e. elementary, middle, or high—is at 90% of the aggregate design capacity, staff is directed to begin planning for adding a school to the CIP. The timeline listed in this policy will direct staff’s planning process.

The three major components to consider when adding a new school to the CIP are the following:

- Land Acquisition Planning
- Existing School Capacity
- School Enrollment Projections

**Land Acquisition Planning**

A joint SCPS and County work team will provide a base group of staff that is charged with looking for land for new schools. This work will begin at least two years prior to preliminary planning, but may occur simultaneously with the preliminary planning period. The BOS and the SB will work together to acquire the land. The working team will provide the BOS and the SB with communication and reporting on the surveys, appraisals, title reports, and negotiations of a purchase price. If there is a change in the

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CIP, and or location, the BOS and the SB will discuss continued ownership of any land already acquired. Land may be used for another CIP project or sold and the proceeds invested at the BOS’s direction in to another or future CIP projects.

**Existing School Capacity**

Staff is directed to consider the need for a new school based on the aggregate school enrollment projections for that school level, i.e. elementary, middle, or high. Design capacity shall be used when measuring capacity for CIP purposes, as it is the most stable base. The BOS acknowledges that programs within a school can impact how many students can comfortably attend a school building. To ensure that schools are not overcrowded, the BOS depends on the SB to judiciously and efficiently use space within the schools.

The BOS will only recognize changes to design capacity which are voted on and approved by the SB. A record of the vote and sufficient information justifying the change in design capacity must accompany a formal request from the SB to the BOS prior to being considered for inclusion in the CIP planning process. Any change to design capacity must be stated in such a way that it would be clear to a reasonable citizen.

**School Enrollment Projections**

SCPS staff, under the supervision of the Superintendent, will provide school enrollment projections annually. Providing enrollment projections are the responsibility of SCPS staff; however, they will work closely with County staff to gather and provide all available information. Annually, the SB should vote on and adopt school enrollment projections by a majority vote.

For CIP and planning purposes, the BOS expects the following four assumptions to be used when calculating the school enrollment projections:

- (1) Student generation rate from new residential development;
- (2) Student generation rate from existing residential development;
- (3) Cohort survival rate; and
- (4) Birth rate.

Additional information about these assumptions, including descriptions and risk level are included in Appendix A to this policy. Any deviation from these assumptions will be voted on and approved by the SB and reported the BOS with sufficient information to justify the deviation in a form that would be clear to a reasonable citizen. At the discretion of the BOS, changes in assumptions that are not approved by the SB or sufficiently justified may not be included in the planning and development of the CIP.

The CFO, as part of the annual CIP planning process, will provide the BOS the September 30<sup>th</sup> enrollment numbers that have been voted on and approved by the SB. The enrollment numbers will be compared to the last five years of enrollment projections and actuals to help provide short and long term analysis of SCPS enrollment numbers. The enrollment projections and comparisons will be provided to the BOS

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along with the CIP Technical Review Committee’s recommendation of projects. This will be done in accordance with the annual Budget Calendar and generally will be in November.

**Capital Improvement Program Timeline to Plan for a New School**

Staff is directed to begin planning for a new school in the CIP when aggregate school enrollment projections for a school level—i.e. elementary, middle, or high—is at 90% of the aggregate design capacity. The planning effort will then be guided by the following timeline:

- **Opening Year:** The opening year for a new school will be when the aggregate school enrollment projections are at 100% of aggregate design capacity for that school level.
- **Construction Period:** The construction period, which includes the opening year of the school as the final year of construction when all final punch-list items are complete, will be planned for three years for elementary schools and four years for middle and high schools.
- **Preliminary Planning:** The preliminary planning period, which includes design and education specifications, will be planned for two years for all school levels.
- **Land Acquisition:** The land acquisition phase, to be conducted by the joint SCPS and County staff work team, will be planned for at least two years prior to the preliminary planning period, but may occur simultaneously for all school levels.

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## Appendix A

The four assumptions used in the development of school enrollment projections are detailed below.

Assumption	Description	Risk Level
<b>Student generation rate from new residential development</b>	Data on residential development approved by the checkpoint date (recently September 1 has been used) provided by County Planning and GIS departments. SCPS staff contacts developers to gather anticipated build rates and/or development start/end dates. For active construction, SCPS staff also analyzes the number of units constructed historically as an additional data point. SCPS staff meets with County Planning Department staff to review and adjust, as necessary, anticipated build rates. Developments that have been approved for many years but have not started construction are considered approved but inactive, and assumed to begin producing units late in the 10-year planning window.	The further out in the 10-year planning window, the greater the risk as developments not currently under construction are input for anticipated start dates.
<b>Student generation rate from existing residential development</b>	Calculation of the “student generation factor,” which is the number of students projected to be produced per household based on housing type, i.e. single-family, townhouse, or multi-family. Housing type is determined by data provided by the Commissioner of the Revenue’s Office joined with data obtained from the GIS Department. Residential acreage may also be a factor when calculating the student generation factor.	Lower risk
<b>Cohort survival rate</b>	The cohort survival rate encompasses both in-migration and out-migration, that is, students moving in and out of SCPS. The cohort survival rate is calculated annually and current and historical ratios are used to project the anticipated survival rate.	Lower risk
<b>Birth rate</b>	The ratio of resident live births (RLB) for Stafford County is used to project the kindergarten cohort. There is a five-year gap between births and the projected start of kindergarten attendance. For example, the RLB data from 2016 will be used to project the kindergarten enrollment rate for 2021. After the most recent RLB data, an assumption is made of RLB increase on which the ratio of RLB to kindergarten attendance is applied.	The further out in the 10-year planning window, the greater the risk.