



Montgomery Planning | Functional Planning and Policy Division

Schools Technical Advisory Team

Meeting #1

October 22, 2019



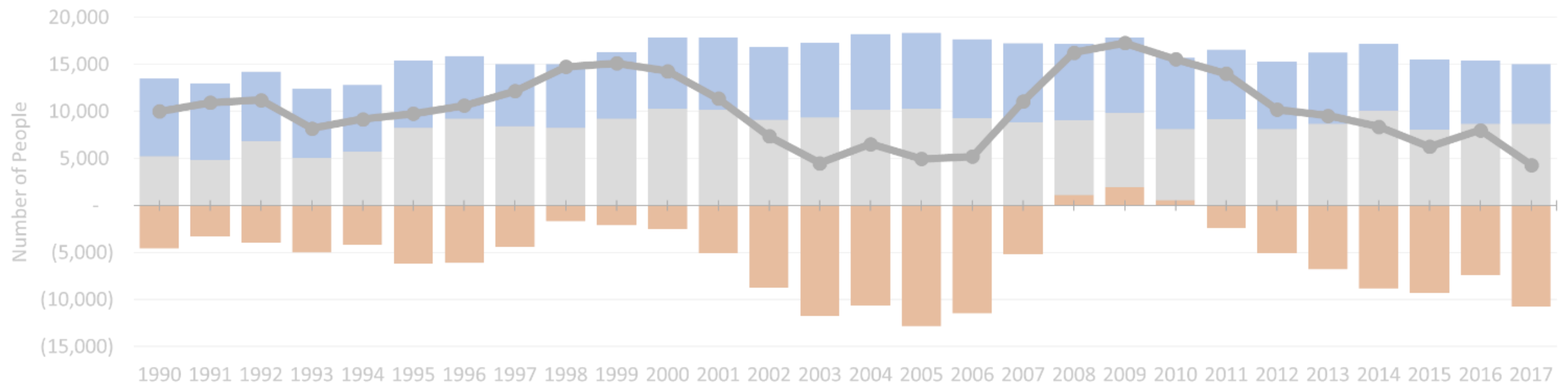
Welcome!

Meeting Agenda

- I. **Welcome** | *15 minutes*
 - a. Introductions
 - b. Overview of Agenda
 - c. STAT Purpose and Member Responsibilities
 - d. Discussion Ground Rules
 - e. Navigating Microsoft Teams
- II. **Overview of Subdivision Staging Policy and Impact Taxes** | *20 minutes*
 - a. Annual School Test
 - b. Moratorium Policy and Exceptions
 - c. Student Generation Rates
 - d. School Adequacy Reviews for Development Applications
 - e. School Facility Payments (prior versions of the SSP)
 - f. Impact Tax Calculations and Applicability
- III. **Initial STAT Perspectives on the SSP** | *25 minutes*
- IV. **Growth Management in Similar Jurisdictions** | *15 minutes*
- V. **Montgomery County Growth Trends** | *40 minutes*
- VI. **Preview of STAT Meeting #2** | *5 minutes*

STAT Purpose

- To provide in depth analysis of the SSP and related data
- To provide guidance to Planning staff as we prepare our recommendations to the Planning Board



STAT Member Responsibilities

- To serve as a **liaison** to your community and other stakeholders
- To be **actively engaged** in our conversations
- To keep an **open mind**
- To be **solutions-oriented**, aiming for the best possible outcomes for all stakeholders
- To **continue participating** beyond the confines of these meetings

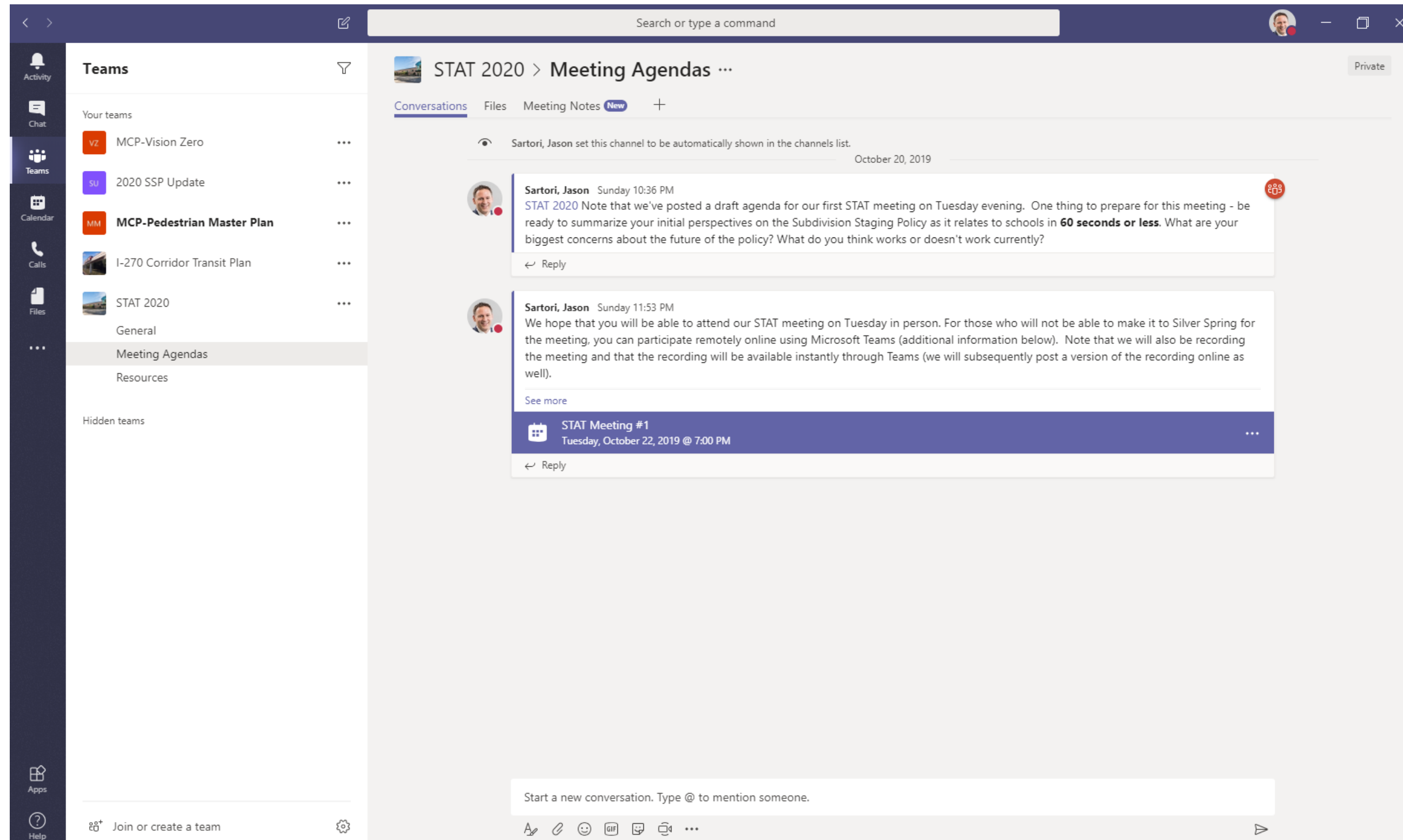
STAT Participant Ground Rules

1. Lean in. Lean out.
2. Listen to understand. Suspend your beliefs to hear someone else's experience.
3. Speak for yourself, not a group, and use "I" statements.
4. Disagree with people without being disagreeable.
 - It's okay to disagree. We are not aiming to agree. You do not have to persuade each other.
5. We have a lot to cover every meeting, therefore:
 - Try not to repeat things that others have said, simply indicate your agreement with another person's comments.
 - Stay on topic and be concise while still being a thoughtful, provocative and active participant.
6. You must have a microphone to talk.

STAT Observer Ground Rules

1. To stay on track with such a large group we ask that you do not participate directly in the STAT conversation, but rather observe and take notes.
2. Preferably, please submit comments or questions on the comment cards.
 - We will respond to you sometime after tonight's meeting.
 - If applicable, we will share your comments with the STAT membership at the next meeting or share our responses to your questions.
3. Otherwise, feel free to catch us after the meeting to share your comments or ask your questions.

Navigating Microsoft Teams



Overview of the Subdivision Staging Policy and Impact Taxes

What Does the SSP Do?

- Requires an **Annual School Test** to evaluate projected school capacity and that the Planning Board annually approve the test results
- Defines adequacy and establishes the criteria for enacting **development moratoria** based on projected school capacity utilization
- Identifies **exceptions to the moratoria**
- Previously, established thresholds for **school facility payments**



Important Terms

- **Enrollment** – the number of students in a school or cluster as counted or modeled for future school years by MCPS
 - Planning does not run its own enrollment projections
- **Cluster** – a geographically based high school and all the middle and elementary schools that articulate to it
- **Split Articulation** – an elementary or middle school that articulate to more than one higher level school
 - For school test purposes, Planning accounts for split percentages (as identified by MCPS) in the calculation of cluster enrollment and capacity)

Important Terms

- **Capacity** – the student capacity school based on the of a number of students in a school or cluster as counted or modeled for future school years by MCPS
 - Planning does not run its own enrollment projections
- **Utilization** – ratio between enrollment and capacity

$$\text{Capacity Utilization Rate} = \text{Enrollment} \div \text{Capacity}$$

$$\begin{aligned}\text{Blair HS Utilization Rate} &= 3,619 \text{ students} \div 2,912 \text{ seats} \\ &= 124.3\%\end{aligned}$$

$$\text{Seat Deficit/Surplus} = \text{Capacity} - \text{Enrollment}$$

$$\begin{aligned}\text{Blair HS Seat Deficit} &= 2,912 \text{ seats} - 3,619 \text{ students} \\ &= -707 \text{ seats}\end{aligned}$$

Capacity Calculations - General

- Capacity is based on the programs in the schools and the amount of space they require.*
- Do not confuse capacity ratios with staffing ratios.

	Program Capacity	Staffing Ratios
Grade K	22:1	25:1
Grades 1-3	23:1	27:1
Grades 4-5	23:1	29:1
Grades 6-8	21.25:1	
Grades 9-12	22.5:1	

* Focus schools and Title 1 schools have lower capacity and staffing ratios in some cases.

Program Capacity vs. State Rated Capacity

- Two different methods of calculating a school's capacity, using two different sets of classroom capacity ratios.

**Facilities Data and State Rated Capacity
School Year 2018–2019**

	Elementary Schools	Sm. Gr.	Year Built	Year Renov./ Reopen/ Revital.*	Exist. Sq. Ft.	Site Size	Park	State-Rated Capacity Number of Rooms				State- Rated Capacity	MCPS Program Capacity
								Pre-K @20	Kind. @22	Reg. @23	Sp. Ed. @10		
Elementary Schools													
1	Arcola	S	1956	2007	95,421	5	Yes	1	7	25	0	754	651
2	Ashburton	S	1957	1993	81,438	8.32		0	6	22	3	655	677
3	Bannockburn	S	1957	1988	54,234	8.34		0	2	14	0	365	366
4	Lucy V. Barnsley	S	1965	1998	72,024	10		0	5	24	6	469	652
5	Beall	S	1954	1991	79,477	8.44	Yes	2	4	20	3	616	639
6	Bel Pre	S	1968	2014	95,330	8.91	Yes	3	9	21	0	741	640
7	Bells Mill	S	1968	2009	77,244	9.6		1	4	22	2	634	626
8	Belmont	S	1974		49,279	10.52		0	3	15	1	422	424
9	Bethesda	R	1952	1999	75,257	8.42		0	4	20	2	568	560
10	Beverly Farms	S	1965	2012	98,916	5	Yes	0	4	25	2	684	689
11	Bradley Hills	S	1951	1984	76,745	6.71	Yes	0	3	26	0	663	664
12	Brooke Grove	S	1990		72,582	10.96		1	3	16	6	514	517
13	Brookhaven	S	1961	1995	81,320	8.57		1	4	13	7	477	475
14	Brown Station	G	1969	2017	113,998	9	Yes	3	4	26	5	819	761
15	Burning Tree	S	1958	1991	68,119	6.78	Yes	0	4	10	6	379	378
16	Burnt Mills	S	1964	1990	57,318	15.14		1	5	13	1	439	392
17	Burtonsville	G	1952	1993	71,349	11.92		0	5	20	1	581	513
18	Candlewood	S	1968	2015	48,543	11.78		0	3	19	2	522	515
19	Cannon Road	S	1967	2012	83,377	4.4	Yes	0	6	17	5	575	481
20	Carderock Springs	S	1966	2010	75,351	9		0	2	15	3	419	407

Annual School Test Timeline

October	November	December	January	February
Superintendent Recommendation <i>MCPS releases the Superintendent's recommended Capital Budget and CIP (or CIP Amendments), along with updated enrollment projections for each school. These projections will be used in the next Annual School Test's calculations.</i>	Public Hearings <i>The Board of Education receives written and oral testimony from residents, students and other stakeholders. The Board then holds work sessions to prepare its request.</i>	BOE Request <i>The Board of Education submits its Capital Budget and CIP request to the County Executive and County Council.</i>	CE Proposal <i>The County Executive combines all County agency budget and CIP requests and submits his/her proposed Capital Budget and CIP to the County Council.</i>	Committee Work Sessions <i>The County Council begins committee work sessions to review affordability issues, request non-recommended reductions, and make recommendations to the full Council.</i>

Annual School Test Timeline

May	June	July
Budget Reconciliation and Adoption <i>The County Council adopts a budget and 6-year CIP, which may include funding for “placeholder” solutions. This finalizes the planned capacity component for the Annual School Test.</i>	MCPS Publishes Master Plan <i>The Master Plan reflects the final capital budget and CIP adopted by the County Council. It includes Project Description Forms for each project.</i>	Annual School Test Approved <i>The Planning Board certifies the Annual School Test results for the following fiscal year, identifying which areas of the county (if any) will be in a residential development moratorium.</i>
		School Adequacy Reviews for new Fiscal Year <i>New school test results are used to evaluate school adequacy for development applications during preliminary plan review.</i>

Project Description Form

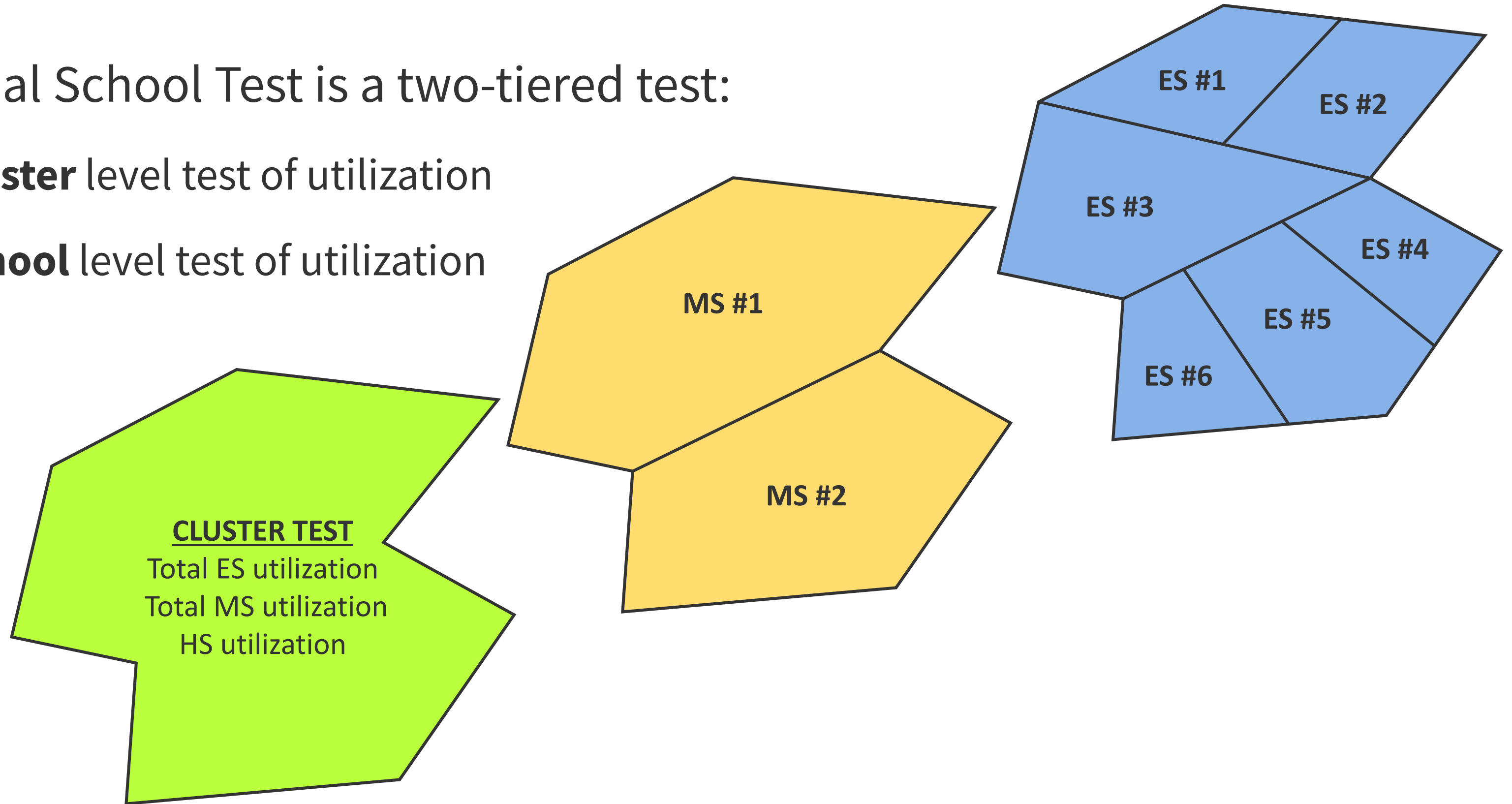
- Identifies the timing and phasing of the project and its funding
- Identifies the source of the funds
- Describes the project, including the number of classrooms/seats to be added

Col. E. Brooke Lee MS Addition/Facility Upgrade (P651910)												
Category	Montgomery County Public Schools		Date Last Modified	05/17/18								
SubCategory	Individual Schools		Administering Agency	Public Schools								
Planning Area	Kemp Mill-Four Corners and Vicinity		Status	Preliminary Design Stage								
	Total	Thru FY17	Est FY18	Total 6 Years	FY 19	FY 20	FY 21	FY 22	FY 23	FY 24	Beyond 6 Years	
EXPENDITURE SCHEDULE (\$000s)												
Planning, Design and Supervision	3,921	-	-	3,921	1,568	1,177	764	392	-	-	-	-
Site Improvements and Utilities	8,927	-	-	8,927	-	6,005	2,232	-	-	-	-	-
Construction	43,296	-	-	43,296	-	8,653	20,286	14,327	-	-	-	-
Other	1,750	-	-	1,750	-	-	525	1,225	-	-	-	-
TOTAL EXPENDITURES	57,864	-	-	57,864	1,568	16,525	23,827	15,944	-	-	-	-
FUNDING SCHEDULE (\$000s)												
G.O. Bonds	57,864	-	-	57,864	1,568	16,525	23,827	15,944	-	-	-	-
TOTAL FUNDING SOURCES	57,864	-	-	57,864	1,568	16,525	23,827	15,944	-	-	-	-
OPERATING BUDGET IMPACT (\$000s)												
Maintenance				306	-	-	-	102	102	102		
Energy				114	-	-	-	38	38	38		
NET IMPACT				420	-	-	-	140	140	140		
APPROPRIATION AND EXPENDITURE DATA (\$000s)												
Appropriation FY 19 Request	3,921											
Appropriation FY 20 Request		52,198										
Cumulative Appropriation												
Expenditure / Encumbrances												
Unencumbered Balance												
PROJECT DESCRIPTION Projections indicate that enrollment at Col. E. Brooke Lee Middle School will exceed capacity by 246 seats by the end of the six-year planning period. The approved CIP included an addition for this school, as well as future expenditures for a revitalization/expansion project. The addition project also will require reconfiguration of existing spaces and building systems upgrades to accommodate the larger numbers of students. Therefore, the Board of Education's requested FY 2019-2024 CIP included that the scope of the addition project be expanded to include these infrastructure and system upgrades while construction is on-site to make better use of fiscal resources. An FY 2019 appropriation was approved to begin planning this addition and facility upgrades project. This project is scheduled to be completed September 2021.												
COORDINATION Mandatory Referral - M-NCPPC, Department of Environmental Protection, Building Permit, Code Review, Fire Marshall, Department of Transportation, Inspections, Sediment Control, Stormwater Management, WSSC Permits												

Annual School Test Overview

The Annual School Test is a two-tiered test:

- **Cluster** level test of utilization
- **School** level test of utilization



Current Adequacy Thresholds

Test Level	Moratorium Threshold
Cluster	Projected cumulative utilization greater than 120% at any school level (elementary, middle or high school) across the entire cluster.
Individual Elementary School	Projected utilization greater than 120% and projected capacity deficit of 110 seats or more .
Individual Middle School	Projected utilization greater than 120% and projected capacity deficit of 180 seats or more .

Utilization Examples

Cluster Test

School Level	Projected Gaithersburg Cluster Totals, September 2024			Moratorium Threshold
	Enrollment	Program Capacity	% Utilization	
Elementary	4,694	4,668	100.6%	908
Middle	1,882	1,958	96.1%	467
High	2,764	2,429	113.8%	150

Individual School Test

School	Enrollment	Projected School Totals, September 2024			Moratorium Threshold
		Program Capacity	% Utilization	Surplus/ Deficit	
Gaithersburg ES	804	788	102.0%	-16	142
Gaithersburg MS	942	1,009	93.4%	+67	269

FY2020 Annual School Test

- Identified areas for a residential development moratorium for FY20
- Identified the amount of space available in each cluster and school before a moratorium would be triggered
- Based on projected utilization data for the 2024-25 school year (6-year projection)

Current Moratorium Coverage

FY2020 Annual School Test - Service Area Status

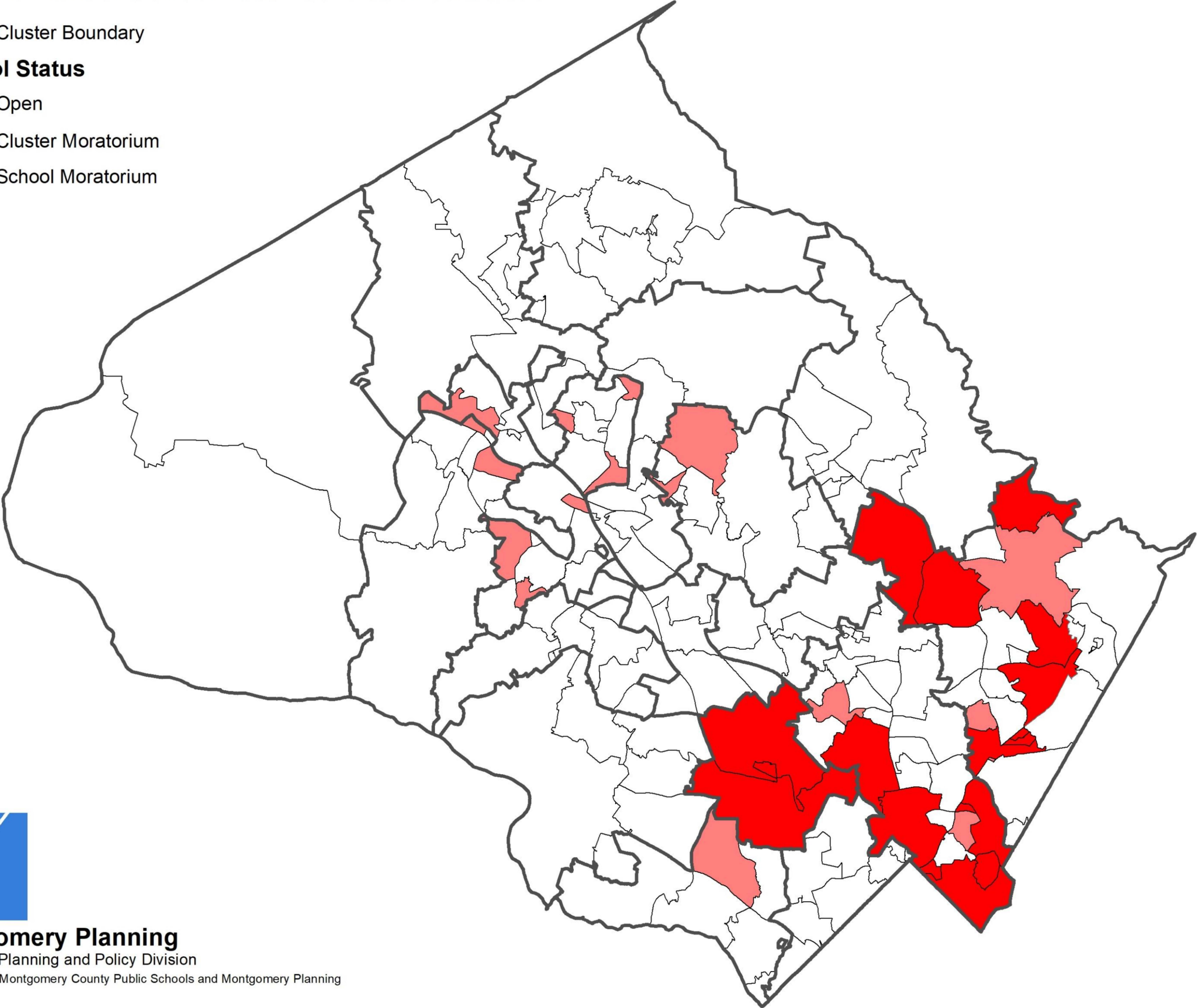
Cluster Boundary

School Status

Open

Cluster Moratorium

School Moratorium



Montgomery Planning

Functional Planning and Policy Division

Data Source: Montgomery County Public Schools and Montgomery Planning
June 20, 2019

Exceptions to the Moratorium

- **Non-residential** projects
- **De minimis** projects of 3 units or less
- **Age-restricted** senior housing
- Certain projects that generate 10 or fewer students at any one school and meet other conditions related to the removal of a **condemned structure** or provide high quantities of **deeply affordable housing**

How Many Kids Live There?!

Student Generation Rates (SGRs) are an average of the number of students per type of dwelling unit.

2018 MCPS Student Generation Rates by Region and Housing Type

COUNTYWIDE STUDENT GENERATION RATES		ES	MS	HS	K-12
Countywide	Single Family Detached	0.199	0.110	0.154	0.462
	Single Family Attached	0.227	0.113	0.150	0.490
	Multi-Family Low to Med Rise	0.197	0.086	0.109	0.393
	Multi-Family High Rise	0.055	0.023	0.031	0.110

REGIONAL STUDENT GENERATION RATES		ES	MS	HS	K-12
East Blair, Einstein, Kennedy, Northwood, Wheaton, Blake, Paint Branch and Springbrook clusters	Single Family Detached	0.203	0.103	0.144	0.450
	Single Family Attached	0.219	0.115	0.160	0.494
	Multi-Family Low to Med Rise	0.253	0.112	0.148	0.512
	Multi-Family High Rise	0.088	0.036	0.047	0.171
Southwest Bethesda-Chevy Chase, Churchill, Walter Johnson, Richard Montgomery, Rockville, Whitman, and Wootton clusters	Single Family Detached	0.186	0.109	0.151	0.446
	Single Family Attached	0.167	0.085	0.111	0.363
	Multi-Family Low to Med Rise	0.150	0.068	0.085	0.303
	Multi-Family High Rise	0.041	0.018	0.025	0.084
Upcounty Clarksburg, Damascus, Gaithersburg, Magruder, Northwest, Poolesville, Quince Orchard, Seneca Valley, Sherwood, and Watkins Mill clusters	Single Family Detached	0.210	0.120	0.169	0.499
	Single Family Attached	0.248	0.121	0.157	0.526
	Multi-Family Low to Med Rise	0.183	0.077	0.093	0.352
	Multi-Family High Rise	0.020	0.008	0.010	0.038

Rates are calculated using Fall 2018 enrollment data from Montgomery County Public Schools. Of the nearly 163,000 students enrolled in MCPS schools in Fall 2018, Planning Staff were able to match 99.4% of the students to a housing type.

School Adequacy Reviews for a Development Application

- Number of Expected Students =

Regional SGR x NET Number of Dwelling Units (for each Housing Type)

- EXAMPLE: Subdivision with a net of 20 townhouse units and 150 multifamily high-rise units in the Gaithersburg Cluster:

	Net Number of Units	ES Generation Rates	ES Students Generated	MS Generation Rates	MS Students Generated	HS Generation Rates	HS Students Generated
Single Family Attached	20	0.248	4.960	0.121	2.420	0.157	3.140
Multi-Family High Rise	150	0.020	3.000	0.008	1.200	0.010	1.500
TOTALS	170		7		3		4

School Adequacy Reviews for a Development Application

Cluster Level Test:

School Level	Projected Gaithersburg Cluster Totals, September 2024			Moratorium Threshold	Estimated Application Impact
	Enrollment	Program Capacity	% Utilization		
Elementary	4,694	4,668	100.6%	908	7
Middle	1,882	1,958	96.1%	467	3
High	2,764	2,429	113.8%	150	4

School Level Test:

School	Enrollment	Projected School Totals, September 2024			Moratorium Threshold	Estimated Application Impact
		Program Capacity	% Utilization	Surplus/ Deficit		
Gaithersburg ES	804	788	102.0%	-16	142	7
Gaithersburg MS	942	1,009	93.4%	+67	269	3

School Impact Taxes

- Paid when building permits are issued, based on the NET number of units being built.
- Impact taxes fund the school capital budget (not otherwise restricted)
- Calculated at 120% of the school construction cost impact of an individual unit for all three school levels:

SGR_{ES} x Per Student Construction Cost_{ES} x 120%

+

SGR_{MS} x Per Student Construction Cost_{MS} x 120%

+

SGR_{HS} x Per Student Construction Cost_{HS} x 120%

School Construction Costs

- Includes the average cost of planning and constructing a new school to the identified capacity.
 - Includes furnishing the school
 - Does not include cost of land acquisition

	Elementary School	Middle School	High School
Capacity/Core	740	1,200	2,400
Average Project Cost	\$32,680,000	\$53,600,000	\$126,820,000
Cost per Student	\$44,162	\$44,667	\$52,842

Source: Seth Adams, Director of MCPS Division of Construction, April 5, 2019

School Impact Taxes

Residential (per unit)	Countywide
Single Family Detached	\$26,207
Single Family Attached	\$27,598
Multifamily Low-rise	\$21,961
Multifamily High-rise	\$6,113
Multifamily Senior	\$0

Impact Taxes Exemptions

- All moderately priced dwelling units (**MPDUs**) are exempt
- Any project that includes **25% or more MPDUs** are fully exempt on all units
- Any project in a current or former **Enterprise Zone** (including Downtown Silver Spring)

School Facility Payments

- Eliminated in 2016 in lieu of higher impact taxes
- Additional payments made by the developer if a CLUSTER was projected to exceed 105% utilization at any level
 - Payment was only required for those levels over 105%
- Was calculated at 60% of the impact on school construction costs:

SGR x Per Student Construction Cost x 60% x NET Number of Dwelling Units

School Facility Payments

- Funds generated were restricted to be used for school construction **within the cluster**
- Generated very little funding (approximately \$5 million over six years)

Initial STAT Perspectives on the SSP

Initial STAT Perspectives

- In **60 seconds or less**, summarize your initial perspectives on the SSP.
 - What works?
 - What doesn't work?
 - What concerns you most?
 - What creative ideas do you have?
 - What gives you the most hope?
 - What changes do you want to see?
 - What do you want to maintain from the current policy?

Growth Management in Similar Jurisdictions

Process

- Counties chosen included those that were similar in size and outside of a major city.
 - Other MD counties, smaller in size were included for state comparison.
- Counties that were evaluated:

Prince George's County, MD	Baltimore County, MD	Fairfax County, VA	Howard County, MD	Harford County, MD	Montgomery County, PA
Fresno County, CA	Wake County, NC	Pinellas County, FL	Snohomish County, WA	Contra Costa County, CA	Pierce County, WA

Evaluating Adequacy in Other Jurisdictions

- Arizona, California, Florida, Maryland, Montana, North Carolina, Washington and Wisconsin are among the states where local governments utilize an Adequate Public Facilities Ordinance (APFO).
- Other counties/states may refer to it in different ways such as a “Concurrency Management System” or Facility Planning which is generally included in their General Plan.

General Notes

- Many jurisdictions and school districts around the country are dealing with similar issues of overcrowding in schools and are constantly evaluating their growth management policies.
- Impact Fees are a highly debated option to fund public facilities such as schools and roads.
 - In some jurisdictions, they are highly contested. In other jurisdictions, they have been an important tool to fund needed facilities.
- Moratorium on development is generally not considered in most counties outside of MD as a solution to manage crowding in schools. More commonly, it is used for transportation issues.

General Notes

- Solutions that jurisdictions are using for school crowding:
 - Capped Schools/Partner Schools (Wake County, NC/Montgomery County, PA)
 - Mobile classrooms (Wake County, NC)
 - Year-Round School (Wake County, NC)
 - General Bonds
 - Portable classrooms
 - Redistricting/Boundary changes
 - Space Reassignment
 - Renovation of old/underutilized buildings

Moratorium

- In the counties evaluated, only MD counties enact moratoria to halt residential development when *school* infrastructure is deemed inadequate (excluding Prince George's County).
 - Other counties may use moratoria for transportation and/or other facilities

Thresholds for adequacy:

Montgomery County, MD	Cluster - 120% capacity utilization School - 120% capacity utilization and 110 seat deficit for ES or 180 seat deficit for MS <i>Program capacity</i>
Howard County, MD	ES - 105% capacity utilization MS - 110% capacity utilization HS - 115% capacity utilization <i>Program capacity</i>
Harford County, MD	110% capacity utilization or will hit 110 % of capacity in three years <i>State rated capacity</i>
Baltimore County, MD	115% capacity utilization <i>State rated capacity</i>

School Impact Fees

- Montgomery County's impact fees rank highest in the region and across the jurisdictions we studied. *

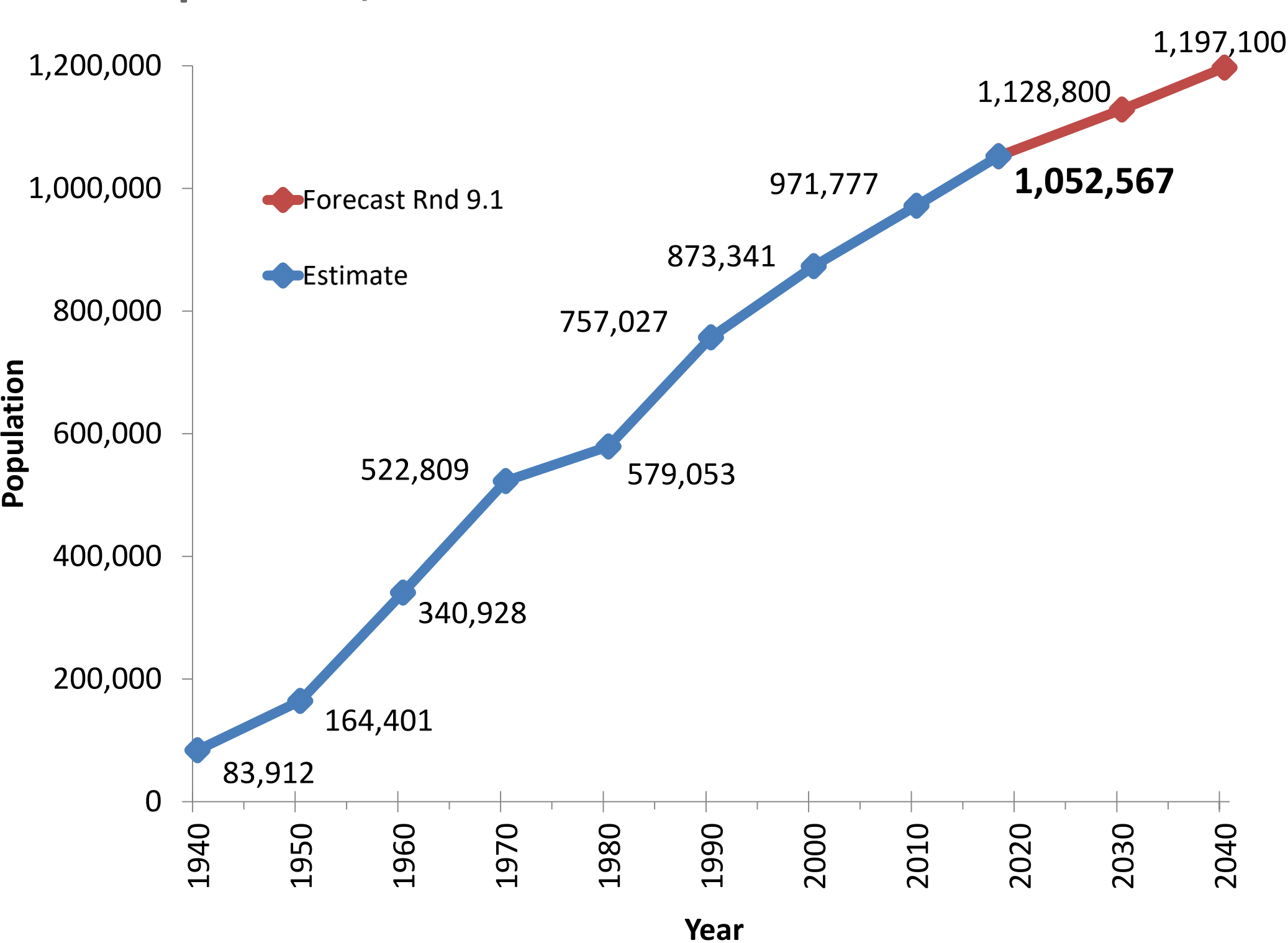
Jurisdiction	School Impact Fee Range	What is the range based on?
Montgomery County, MD	\$6,791-\$24,227	Per dwelling unit type
Prince George's County, MD	\$9,550 - \$16, 371 per unit	Inside/Outside of Beltway
Howard County, MD	\$1.35 (\$675-\$6,750 per unit)	Per square foot
Harford County, MD	\$1,200 - \$6,000	Per dwelling unit type
Fairfax County, VA	\$12,262	avg. cost per student for recommendation
Snohomish County, WA	\$0 - \$17,000	Per dwelling unit type
Fresno County, CA	\$3.79 (\$1,895 - \$18,950 per unit)	Per square foot

* Baltimore County impact fees take effect in July 2020 and fees are not yet available.

Montgomery County Growth Trends

Slower growth in a maturing Montgomery County

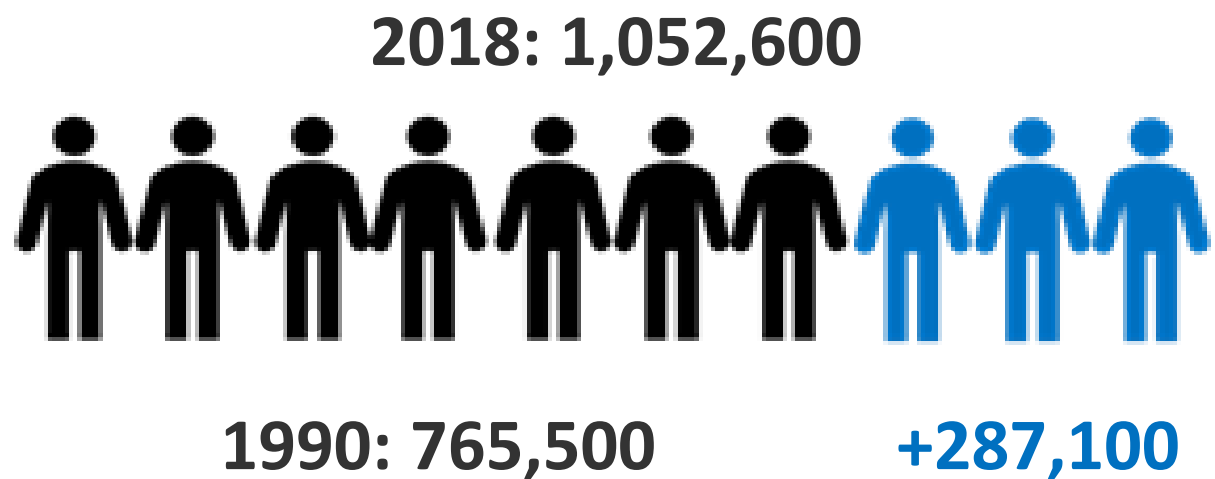
Total Population, 1940-2040



Most populous county in Maryland with over 1 million people since 2012



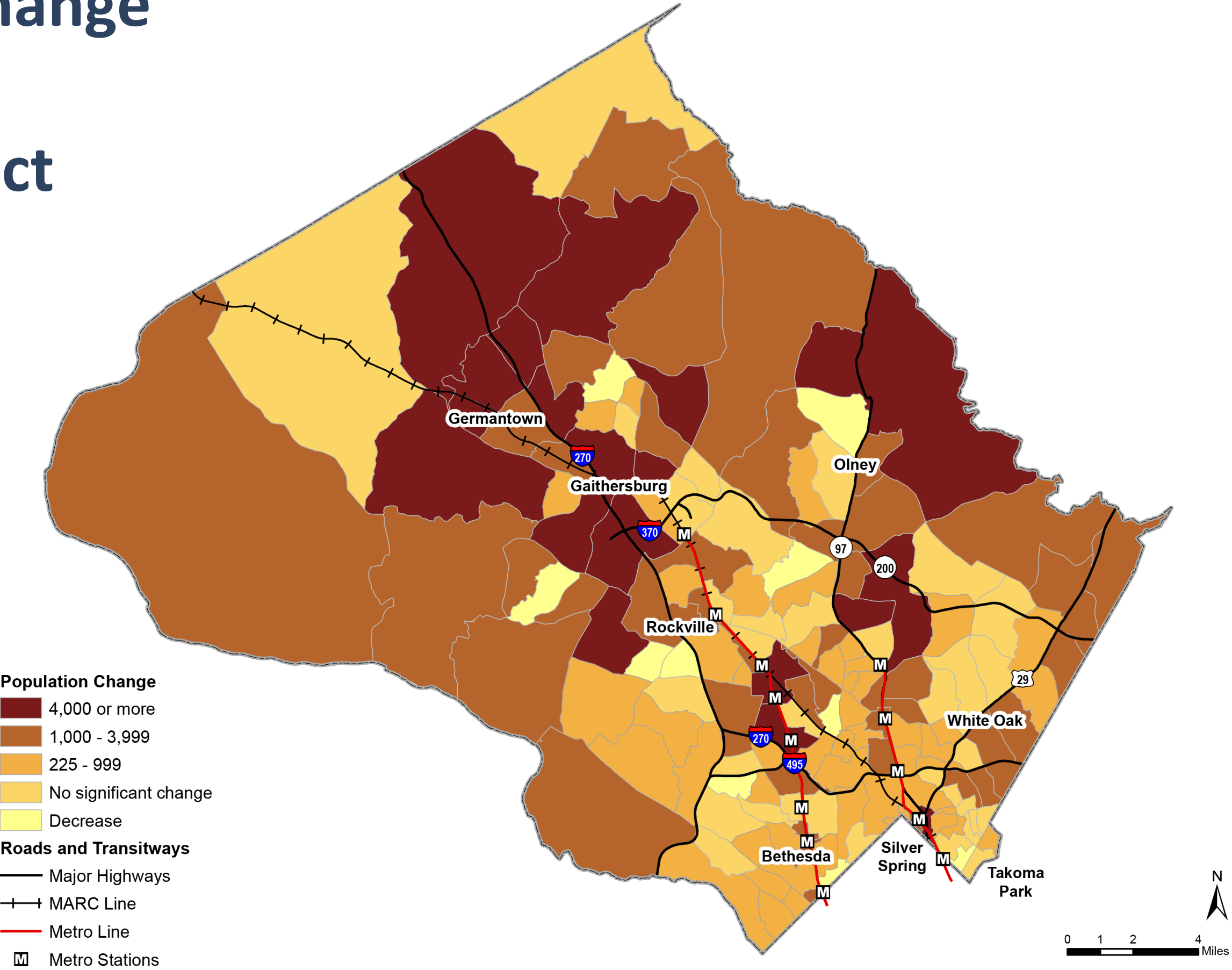
38% population increase since 1990



Forecasting a 7.2 % gain of 76,235 people between 2018 and 2030

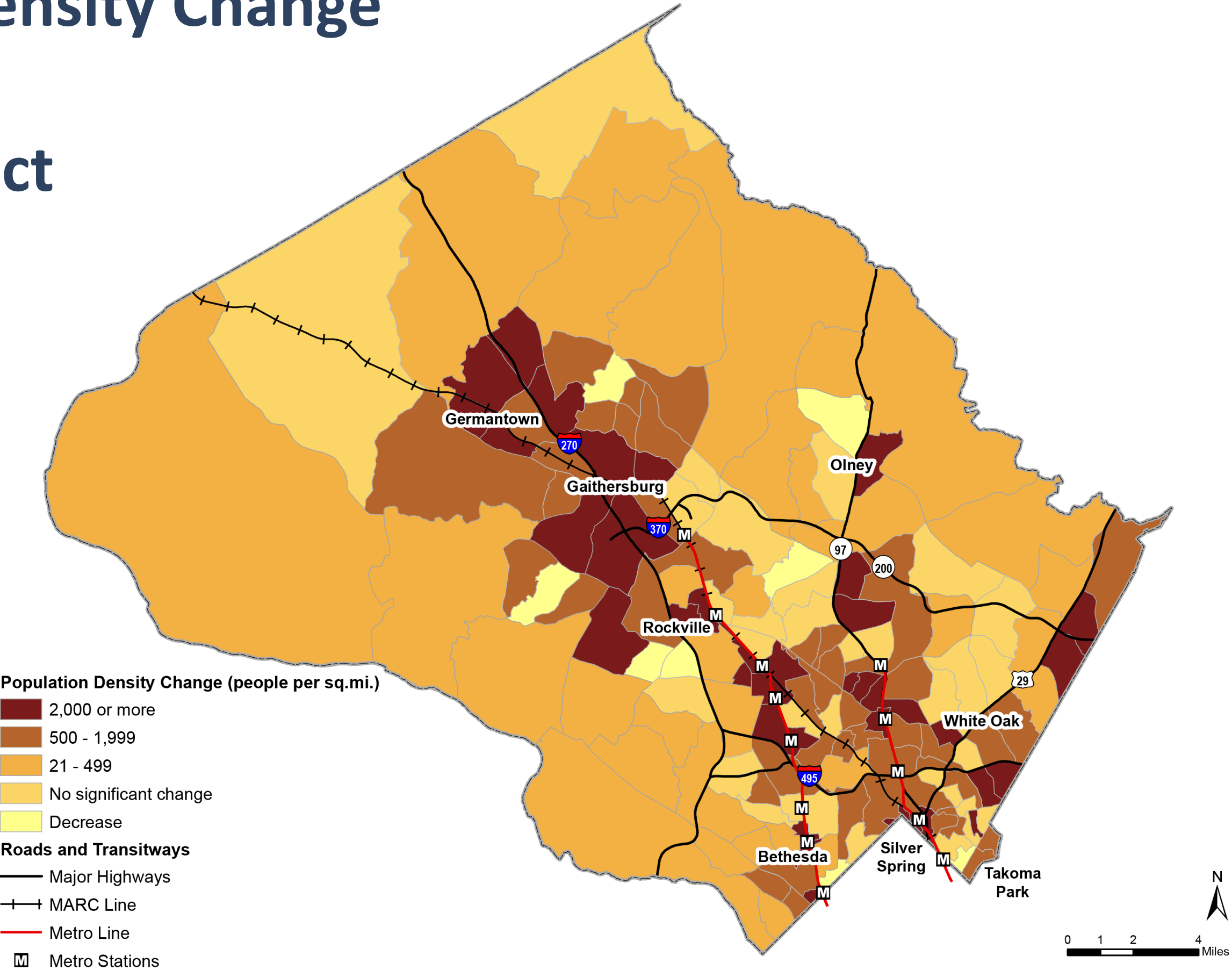
Source: 1940-2010 Decennial Census, 2018 Population Estimate Program U.S. Census Bureau; Washington Council of Governments Forecast Round 9.1, Research and Special Projects.

Population Change 1990-2016 by Census Tract



Source: 1990 Census and 2012-2016 American Community Survey 5-year estimate, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division

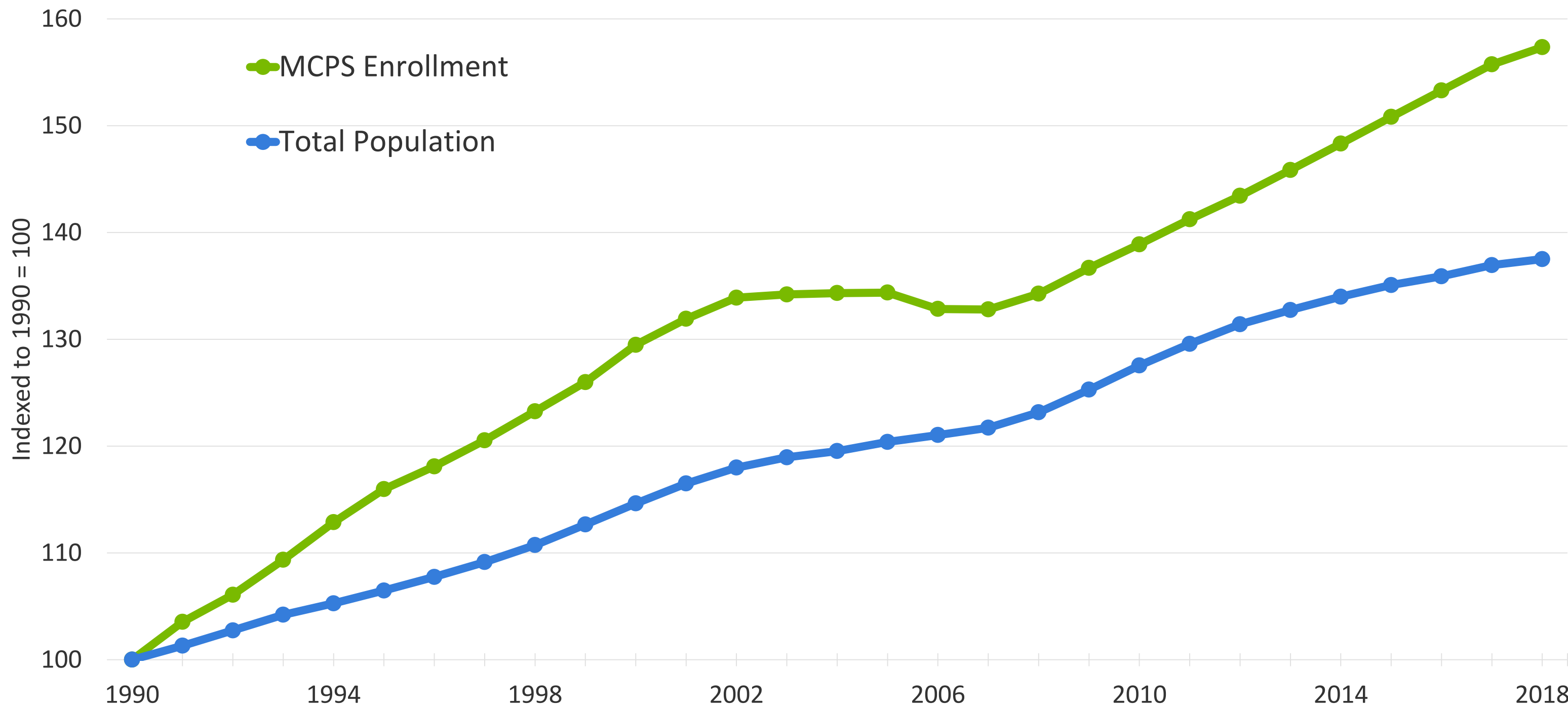
Population Density Change 1990-2016 by Census Tract



Source: 1990 Census and 2012-2016 American Community Survey 5-year estimate, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division

Enrollment vs. Population, 1990-2018

Enrollment and Population Growth Indexed to 1990 (1990-2018)

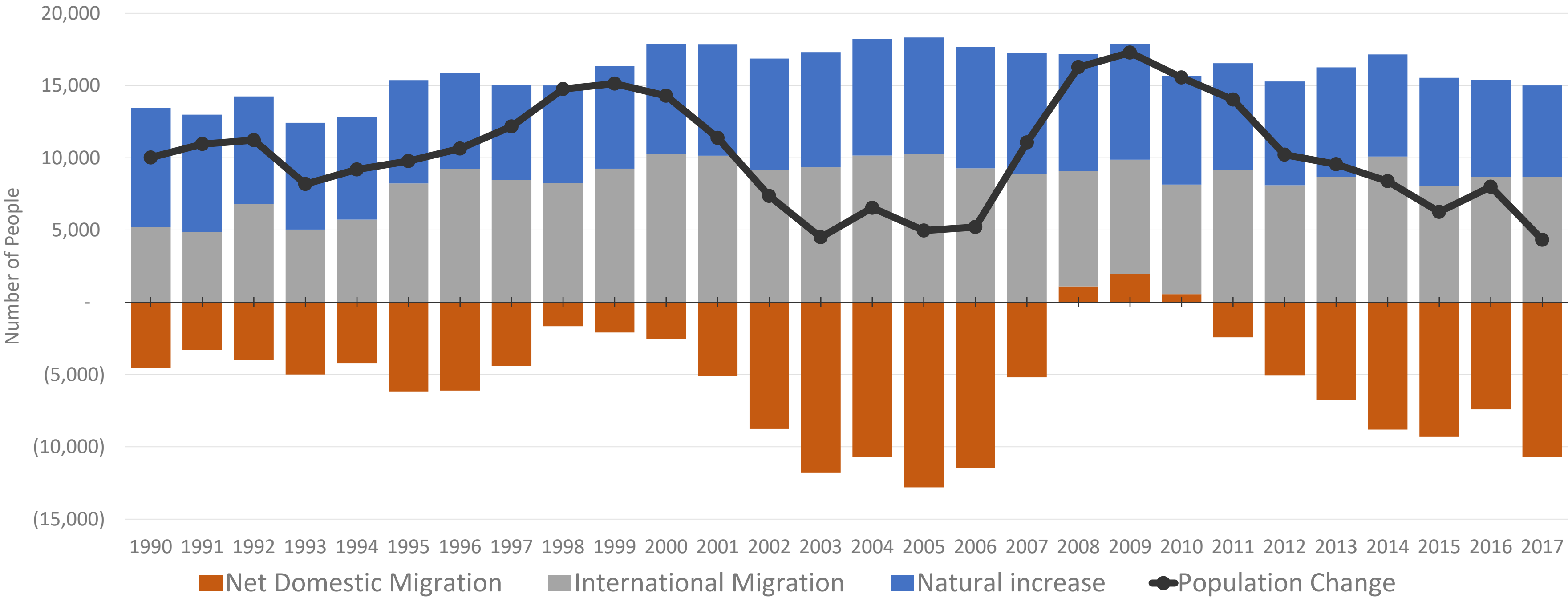


Source: Montgomery County Public Schools Enrollment; U.S. Census Bureau, Decennial U. S. Census, Population Estimate Program

Sources of Population Growth

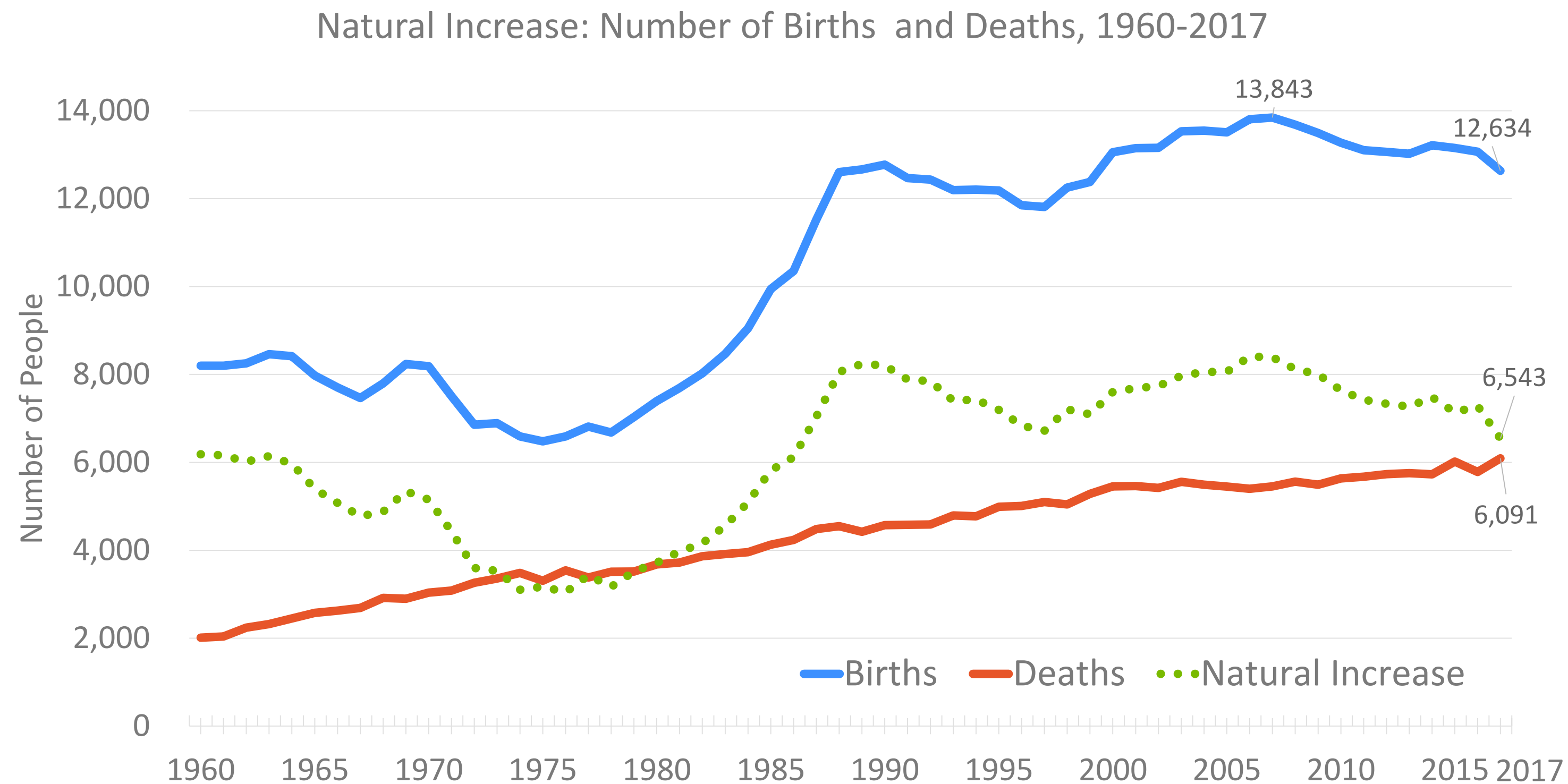
1990-2017

Components of Population Growth



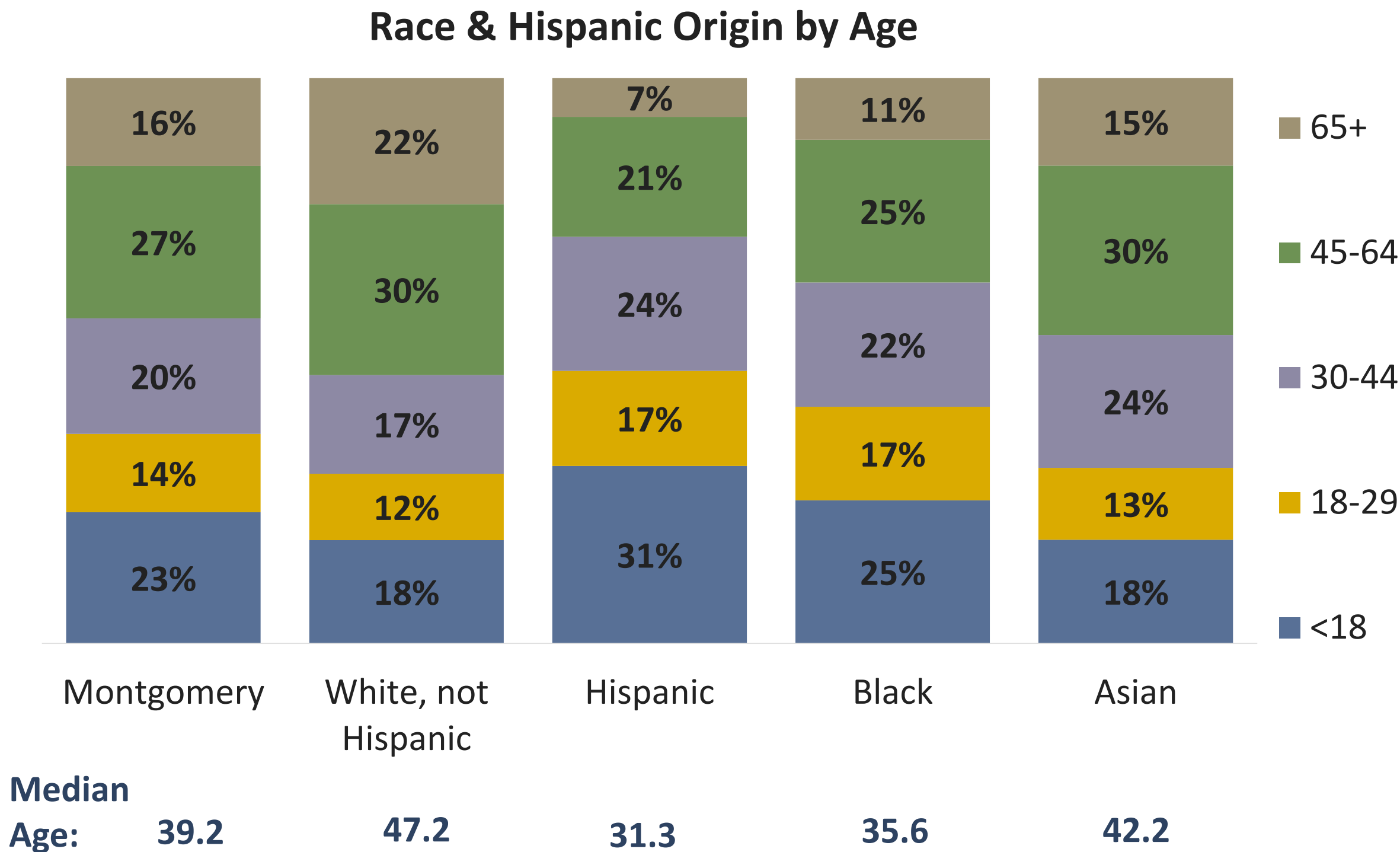
Source: U.S. Census Bureau, Population Estimate Program, 3/2019

Number of births at lowest point since 1999



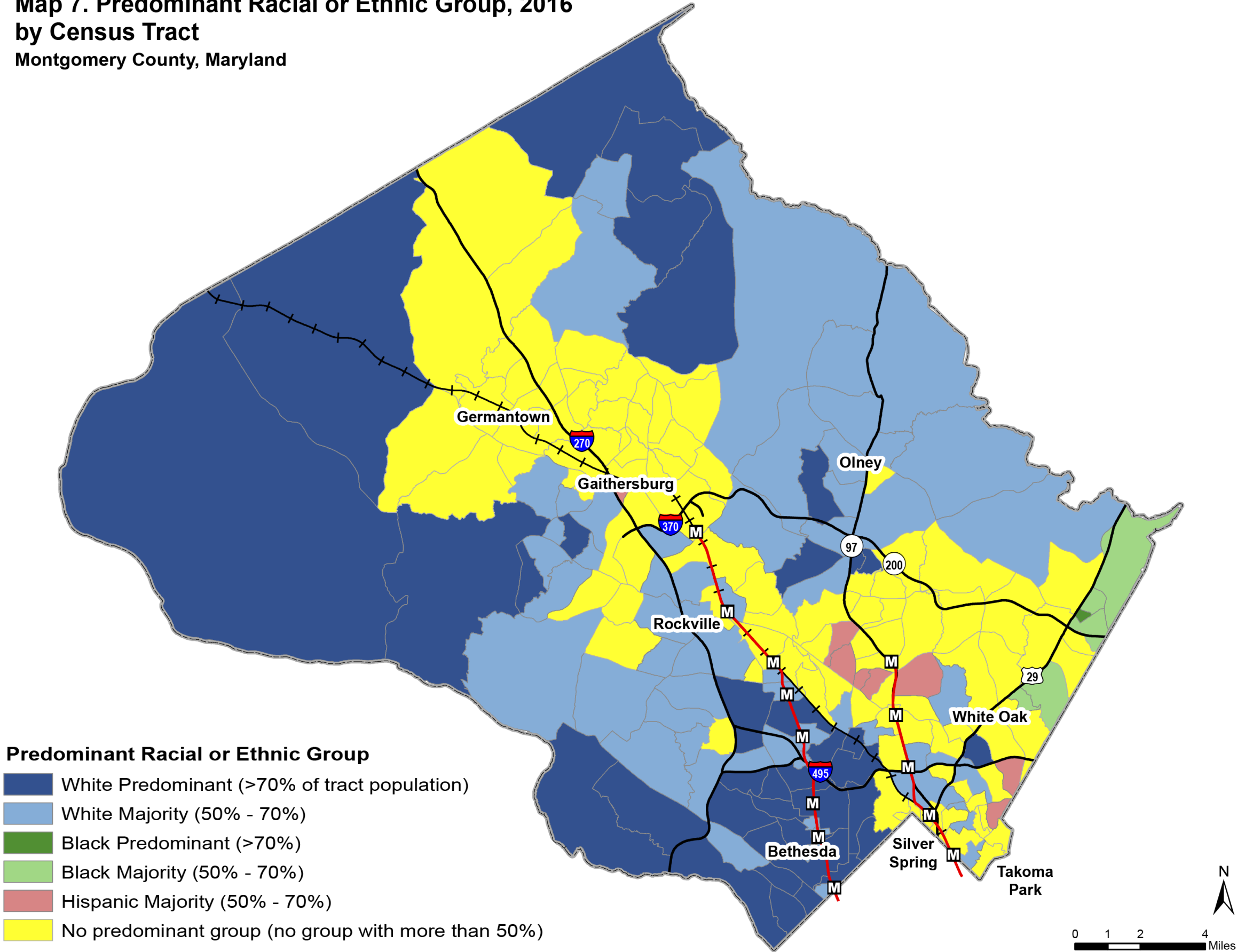
Source: Maryland Vital Statistics Annual Report, Maryland Department of Health.

Youthful people of color and aging white baby boomers



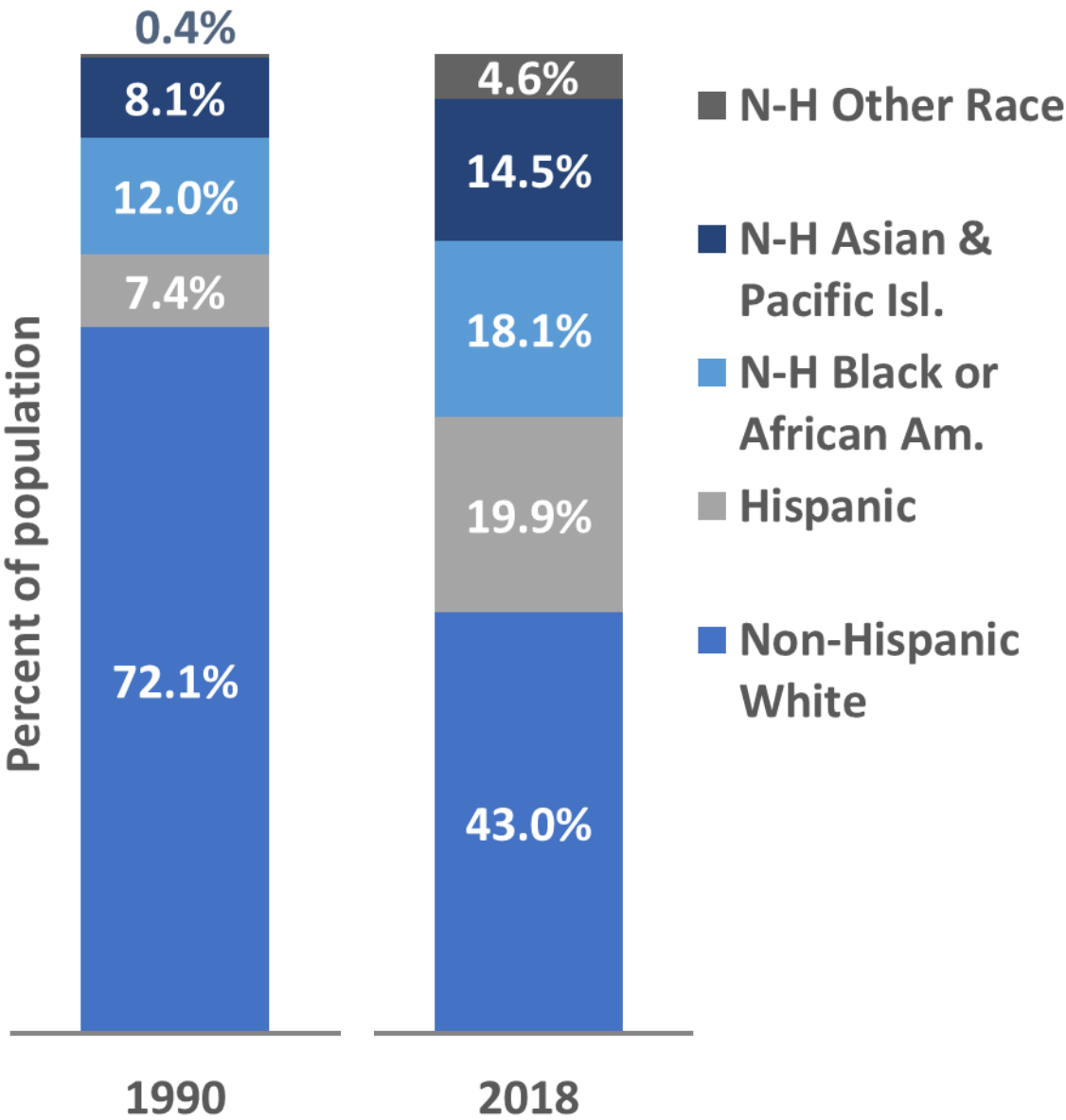
Source: U.S. Census Bureau, 2018 American Community Survey

Map 7. Predominant Racial or Ethnic Group, 2016
by Census Tract
 Montgomery County, Maryland



Increasing racial & ethnic diversity

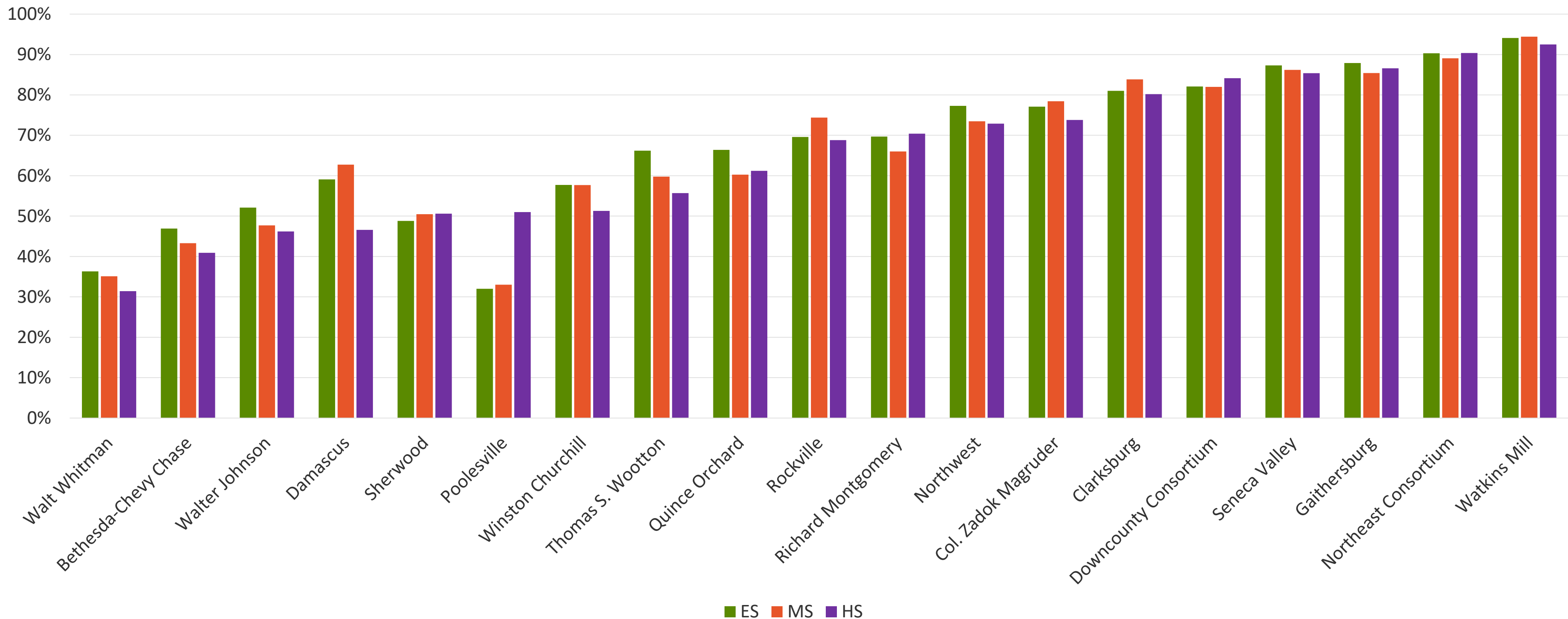
People of Color: 599,674 (57%)



Source: 1990 Decennial Census, 2018 American Community Survey, 1-year estimate, U.S. Census Bureau.

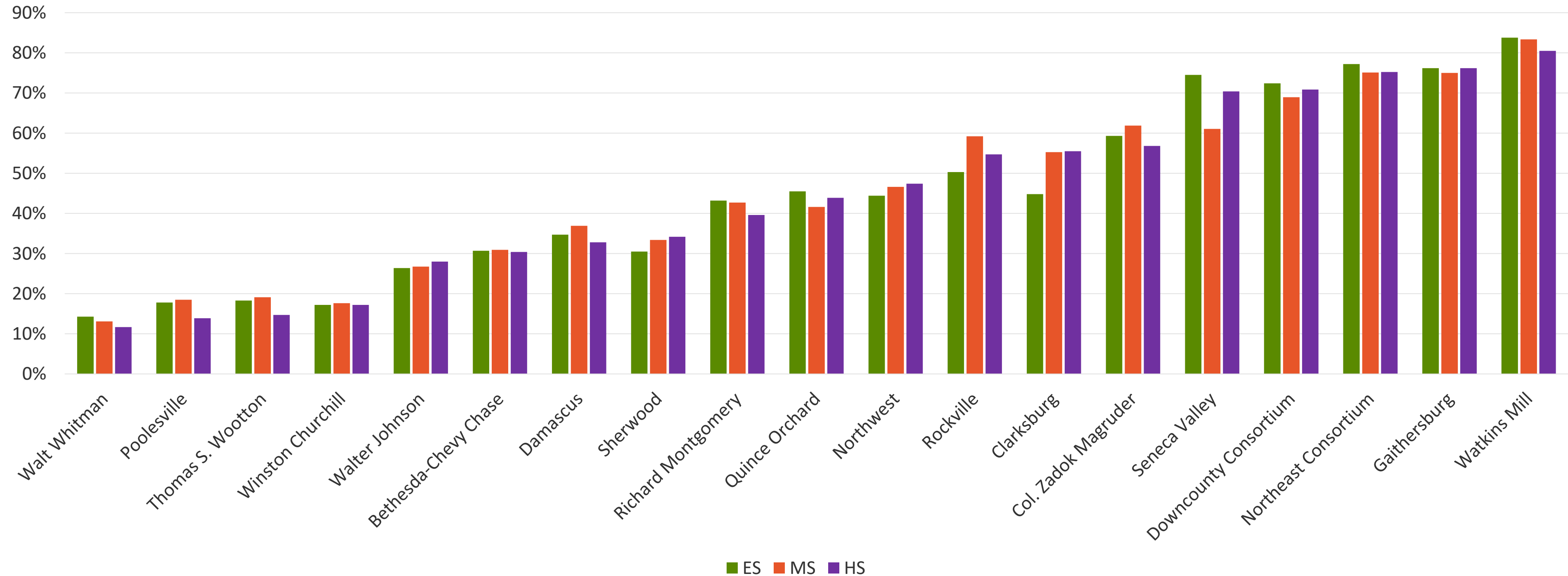
Percent of Non-White Students

by Cluster/Consortium, 2018 MCPS Student Enrollment

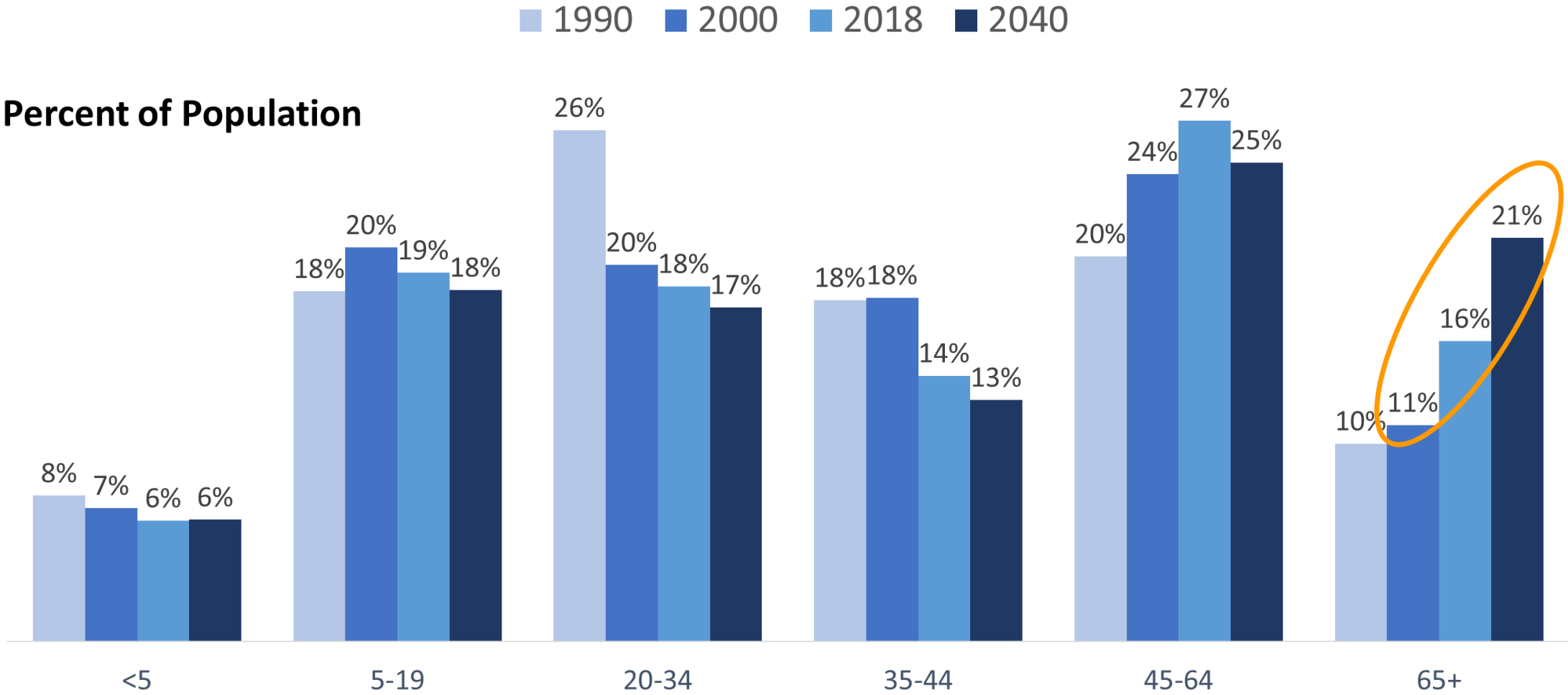


Percent of Black + Hispanic Students

by Cluster/Consortium, 2018 MCPS Student Enrollment



Increasingly older population



Aging baby boom generation:

- 1990: ages 26 to 44
- 2018: ages 54 to 72
- Increased median age from 33.9 years in 1990 to 39.2 in 2018
- Forecasted to increase 65+ population from 16% in 2018 to 21% in 2040

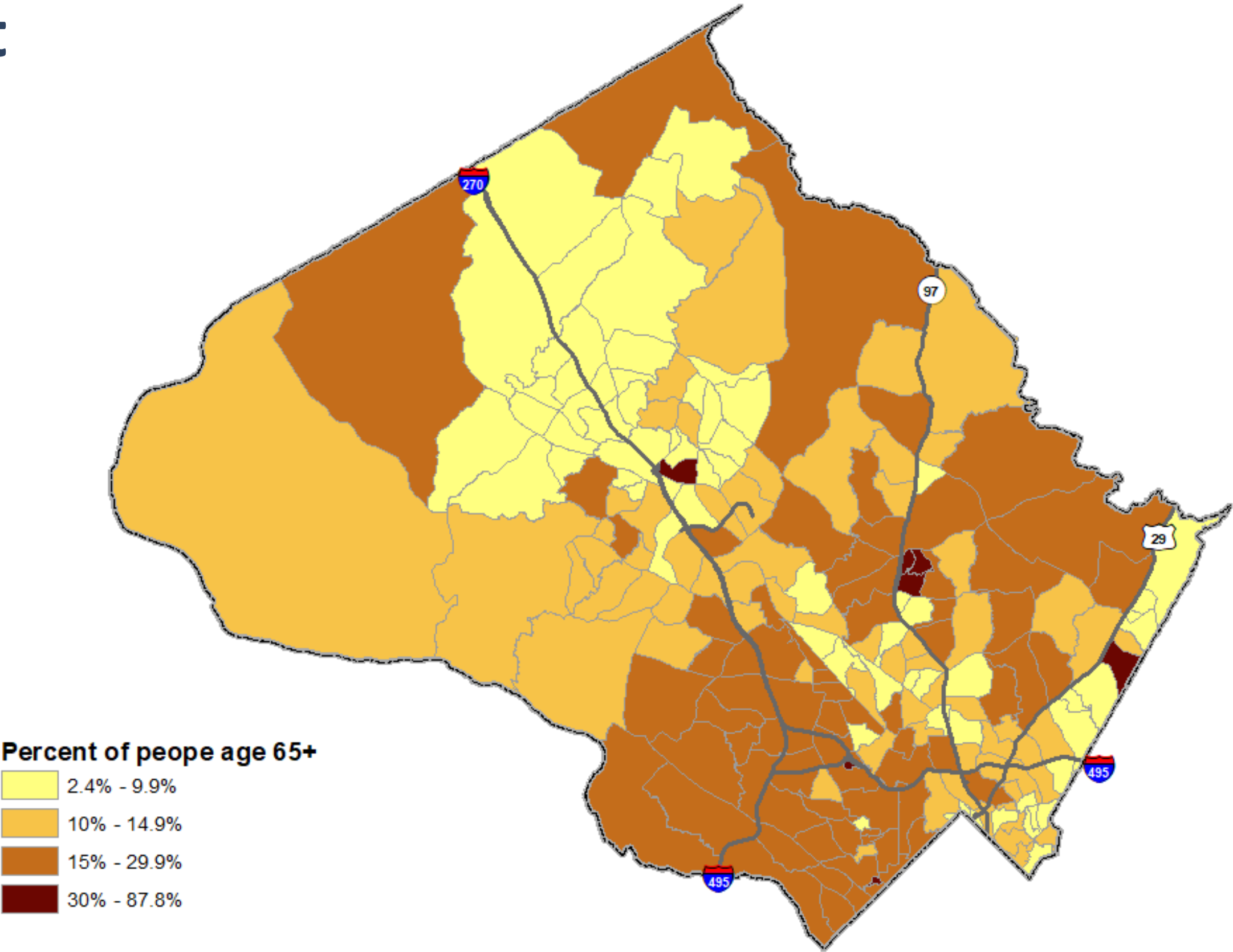
18% of residents are young adults age 20 to 34 in 2018

23% of the population are children <18, in 2018

Source: U.S. Census Bureau, 1990 U. S. Census, 2018 American Community Survey, 1-year estimate; Maryland Department of Planning Age Forecast

Percent of People Age 65 and Older, 2017

by Census Tract



Source: 2013-2017 American Community Survey, 5-year estimate, U.S. Census Bureau.

Percentage of Owner-Occupied Households, 1990-2018

by Age of Homeowners

Increase in 55+ homeowners

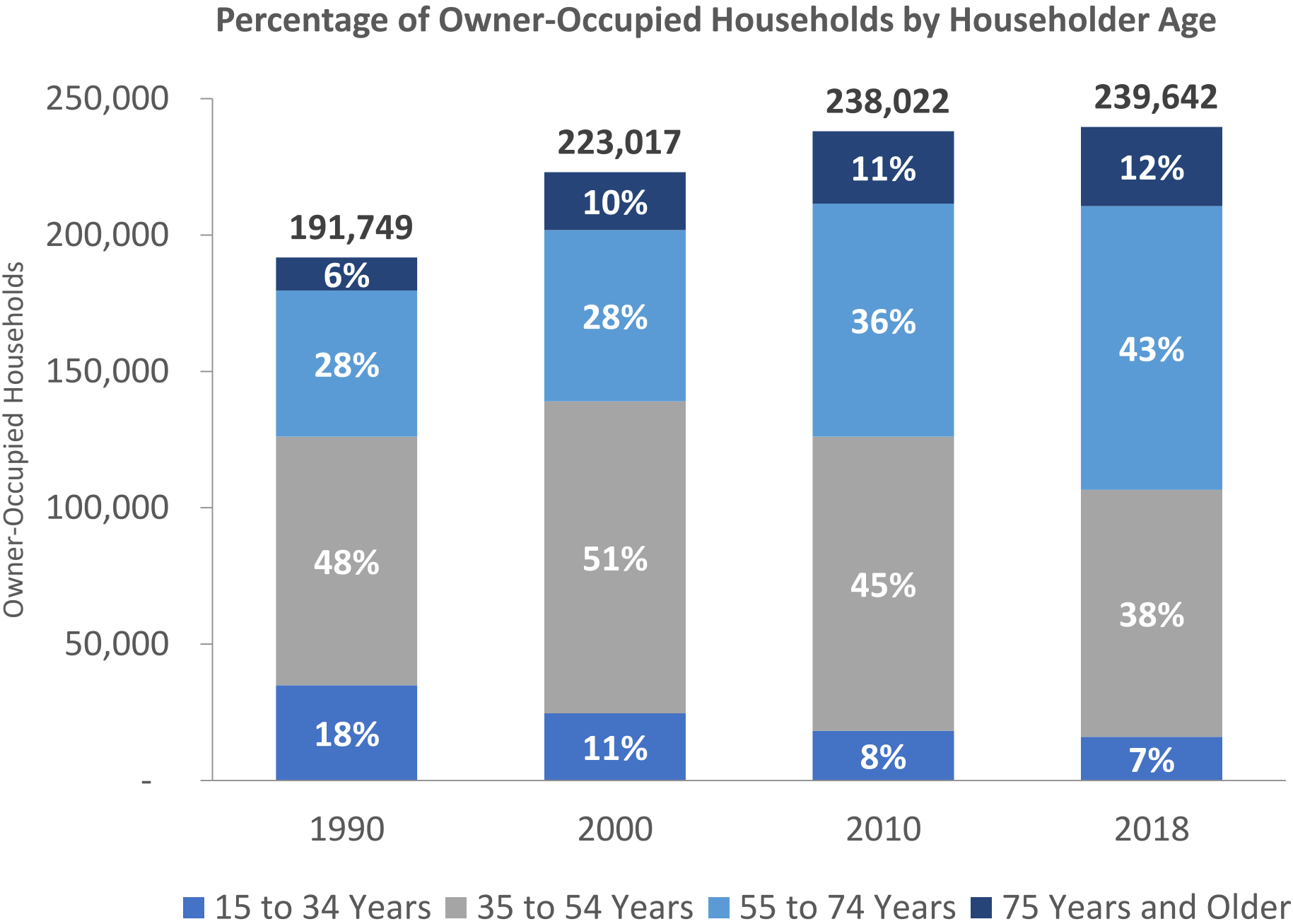
- 34% in 1990
- 56% in 2018

Decrease in the number of younger homeowners

- 18% in 1990
- 7% in 2018

Demand Shifts

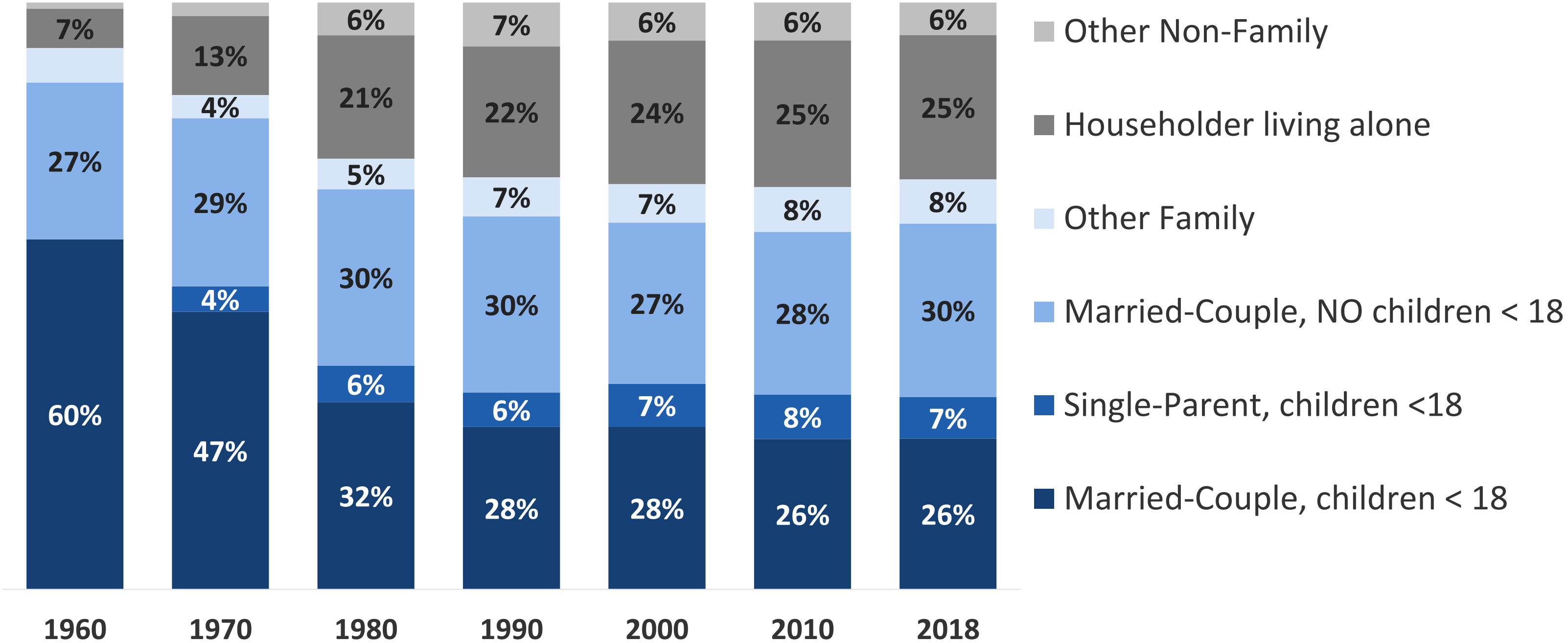
- Population Changes
- Millennial tastes & preferences
- Affordability
- Product Diversity



Source: 1990-2010 Census, 2018 American Community Survey, 1-year estimate U.S. Census Bureau.

Wider Variety of Household Types Since 1960, but Distribution Relatively Stable Since 1990

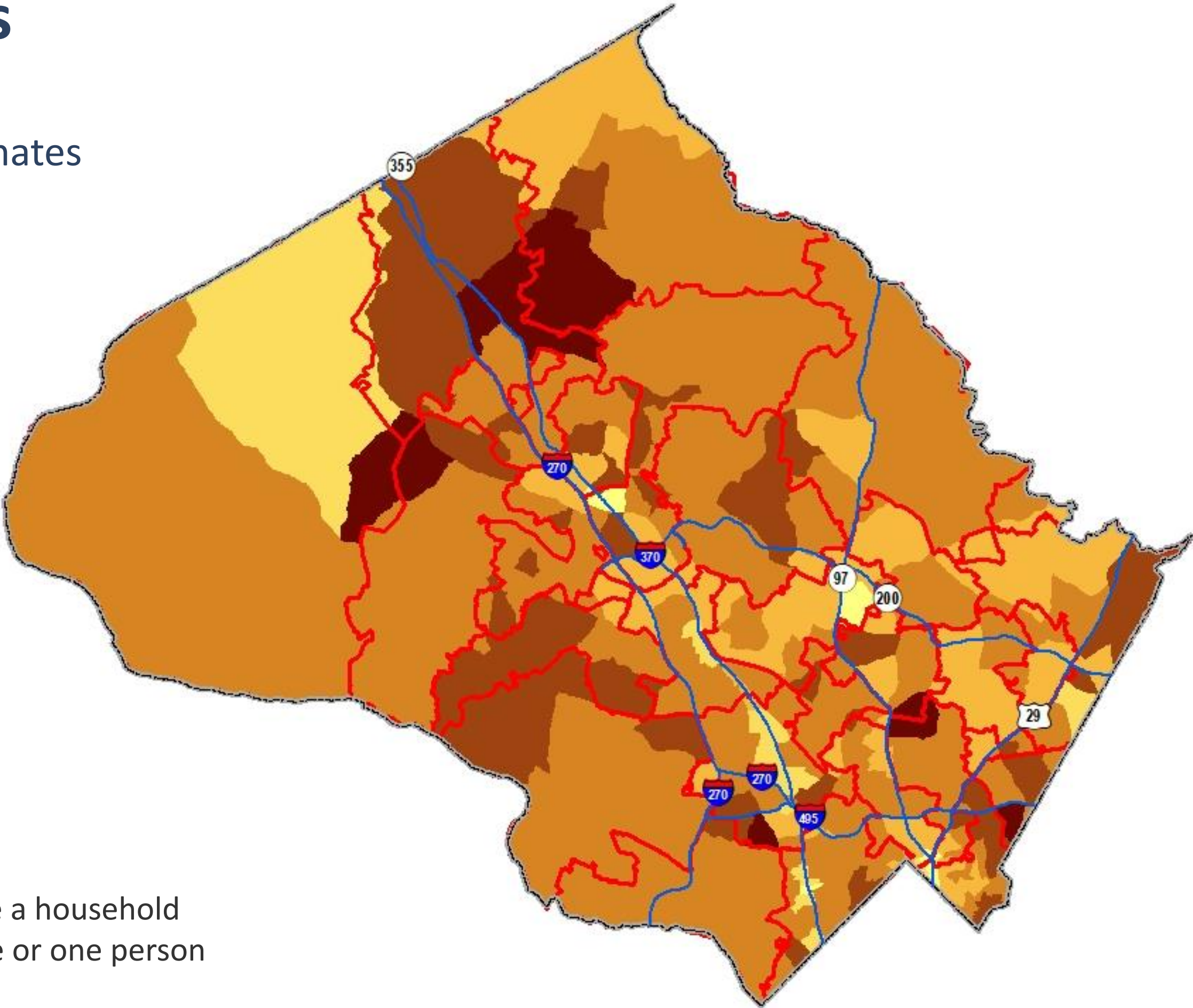
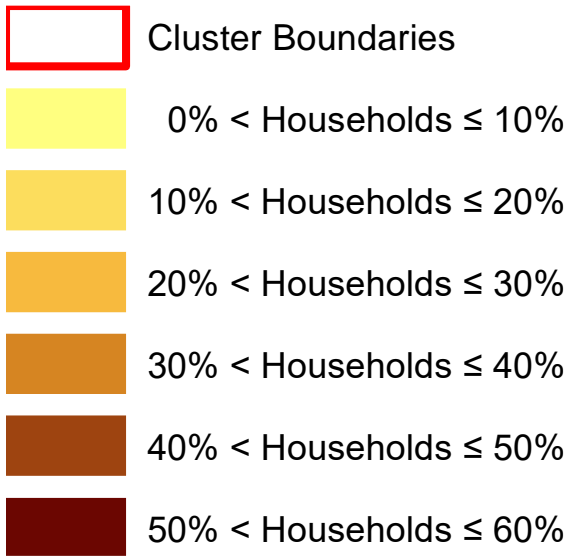
% of Households by Type



Source: 1960-2010 US Census, 2018 American Community Survey, 1-year estimate

Percent of Households w/Children Under 18

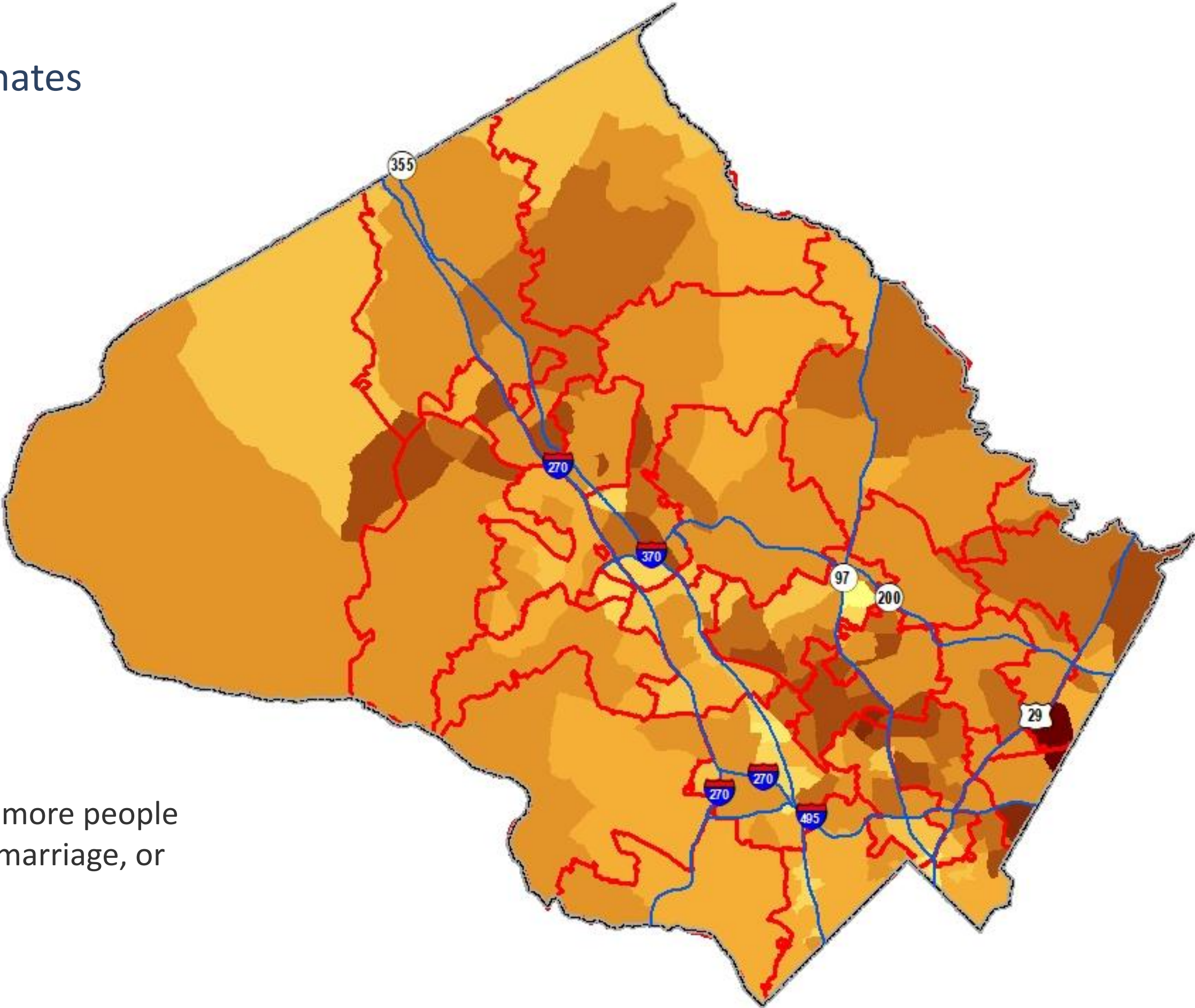
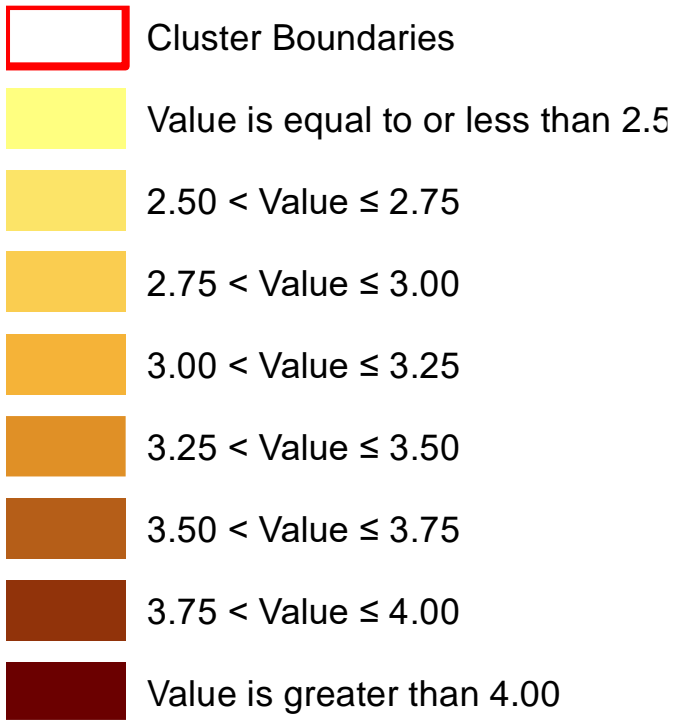
by Census Tract, 2017 ACS 5-yr Estimates



* Not all households contain families since a household may comprise a group of unrelated people or one person living alone.

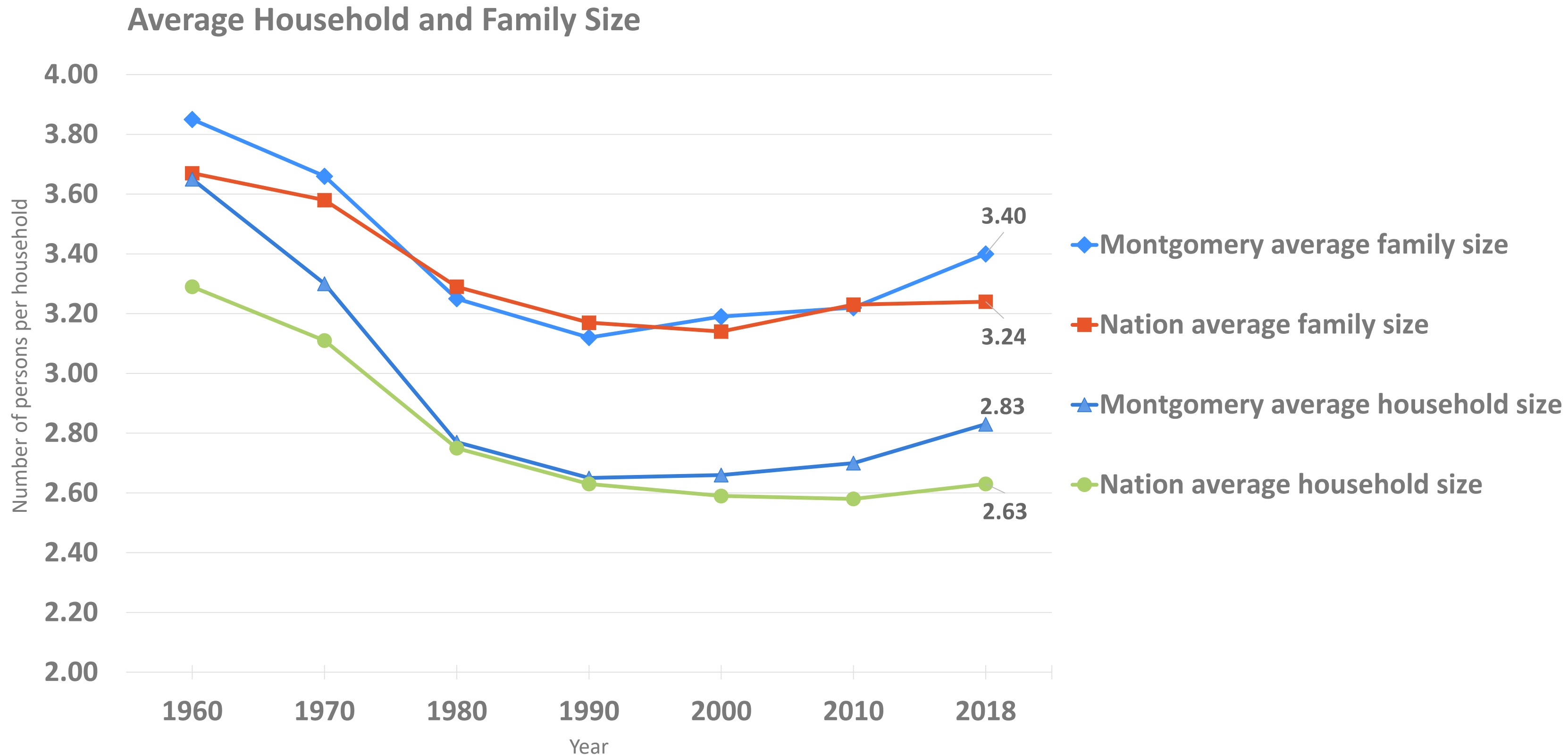
Average Family Size

by Census Tract, 2017 ACS 5-yr Estimates



* A family includes a householder and one or more people who are related to the householder by birth, marriage, or adoption living in the same household.

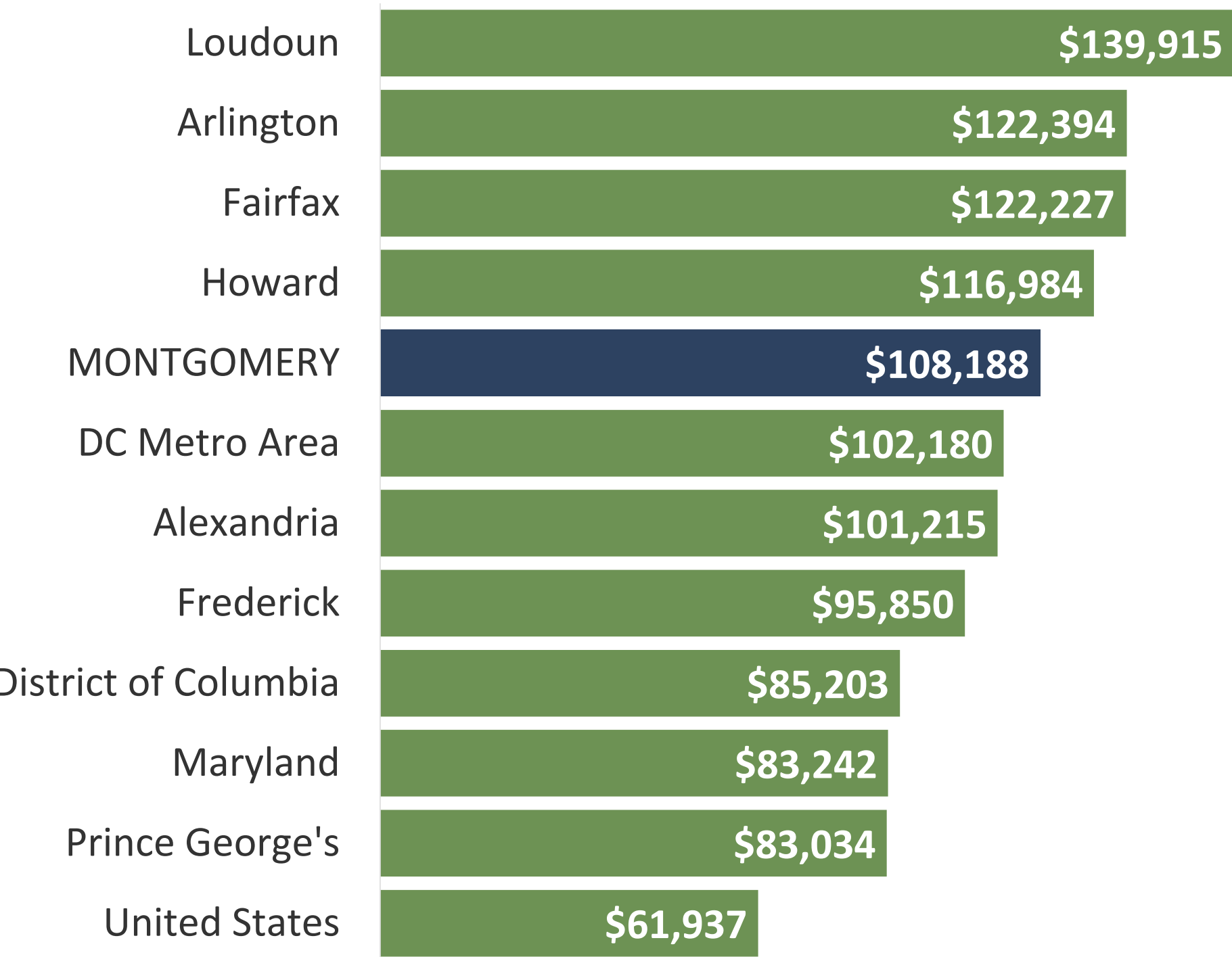
Average sizes of households and families increase since 1990



Source: 1960-2010 U.S. Census, 2018 American Community Survey, 1-year estimate, U.S. Census Bureau.

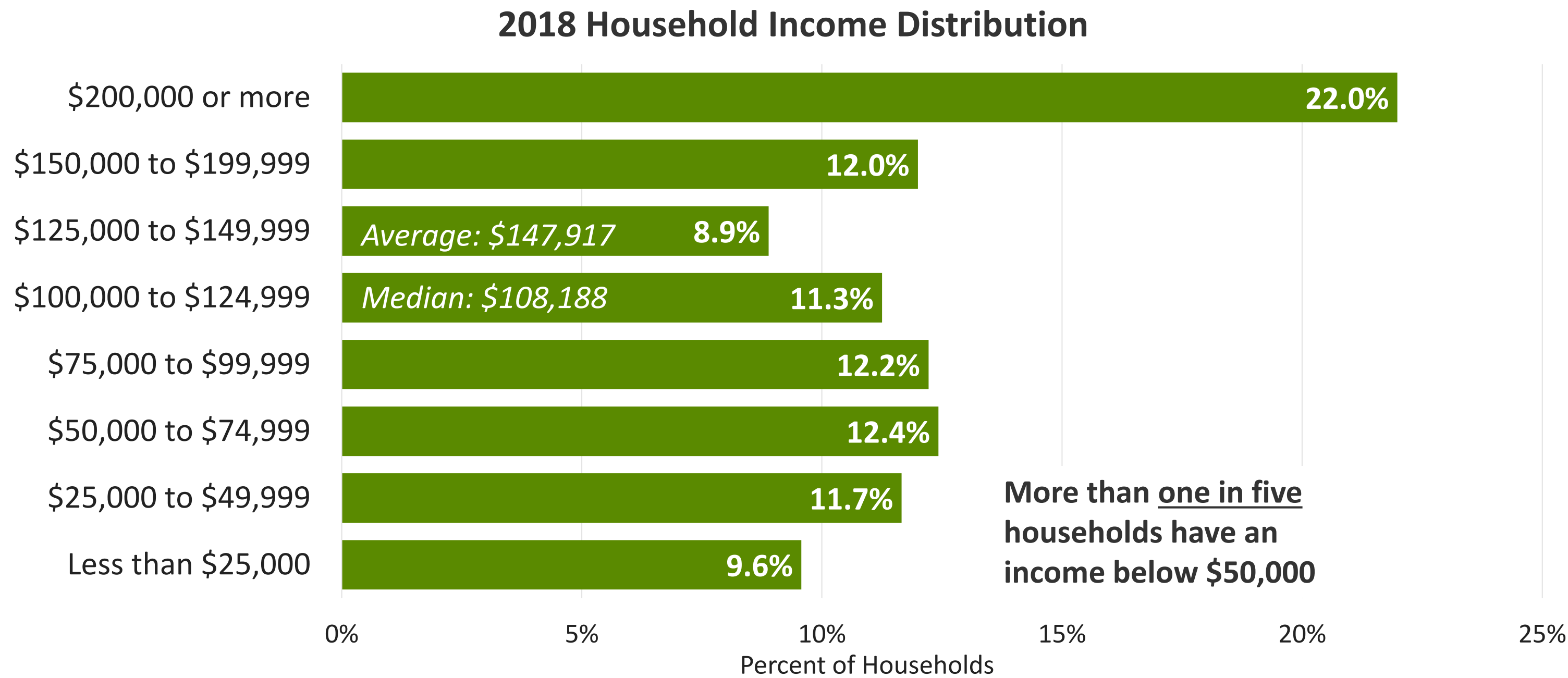
Consistently high-ranking median income in region

2018 Median Household Income



Source: 2018 American Community Survey, 1-year estimate, U.S. Census Bureau

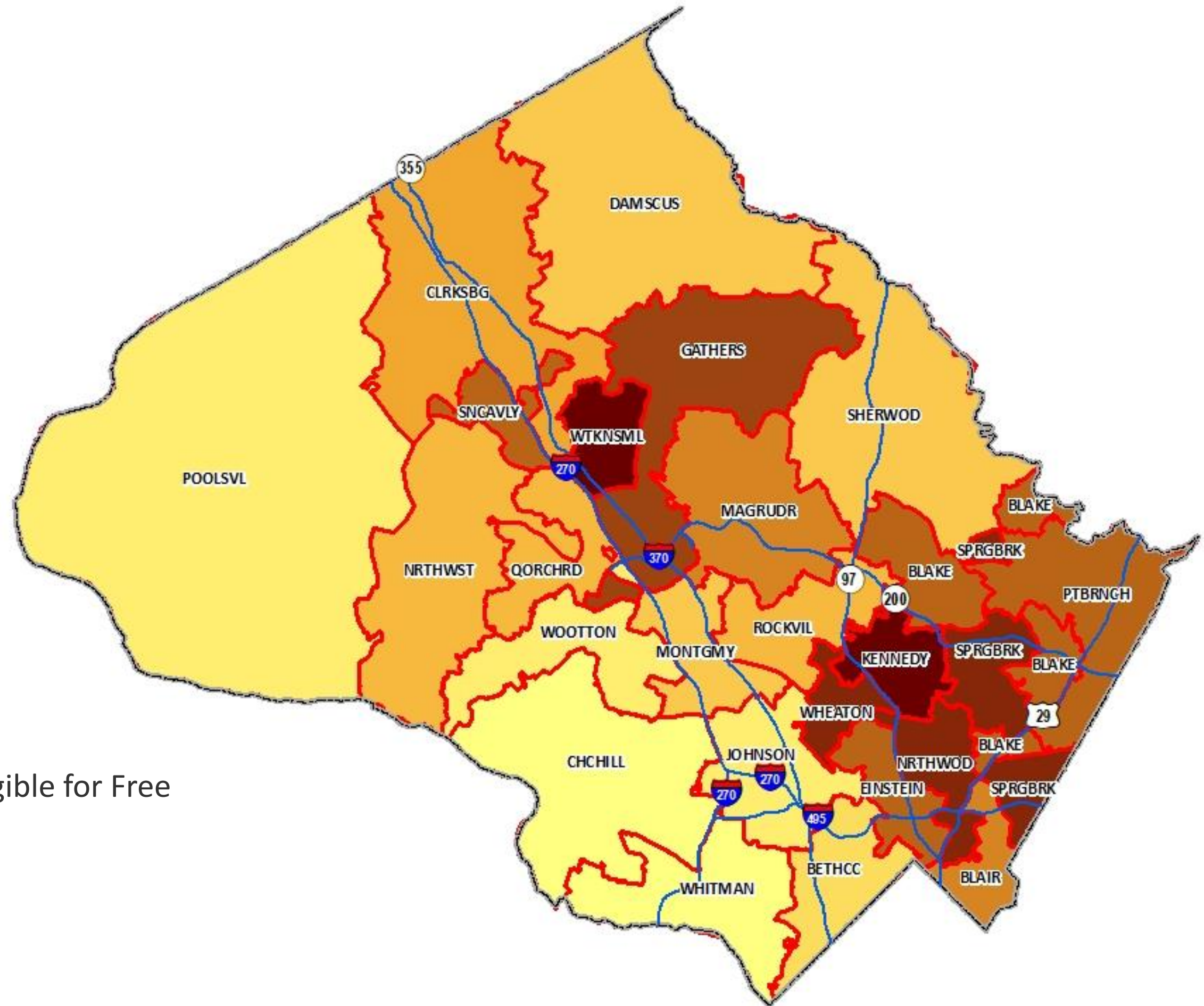
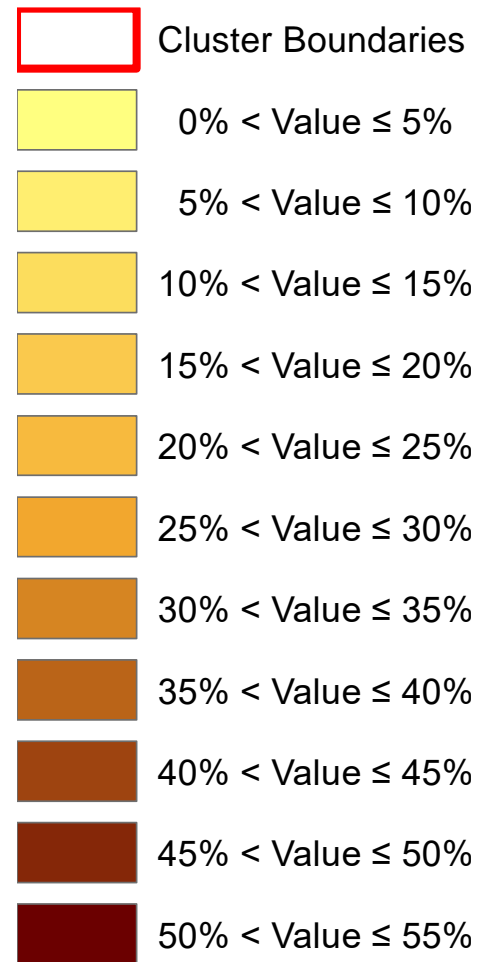
Consistently high median income, yet 1:5 households have income below \$50,000



Source: 2018 American Community Survey, 1-year estimate, U.S. Census Bureau

FARMS Rate by HS

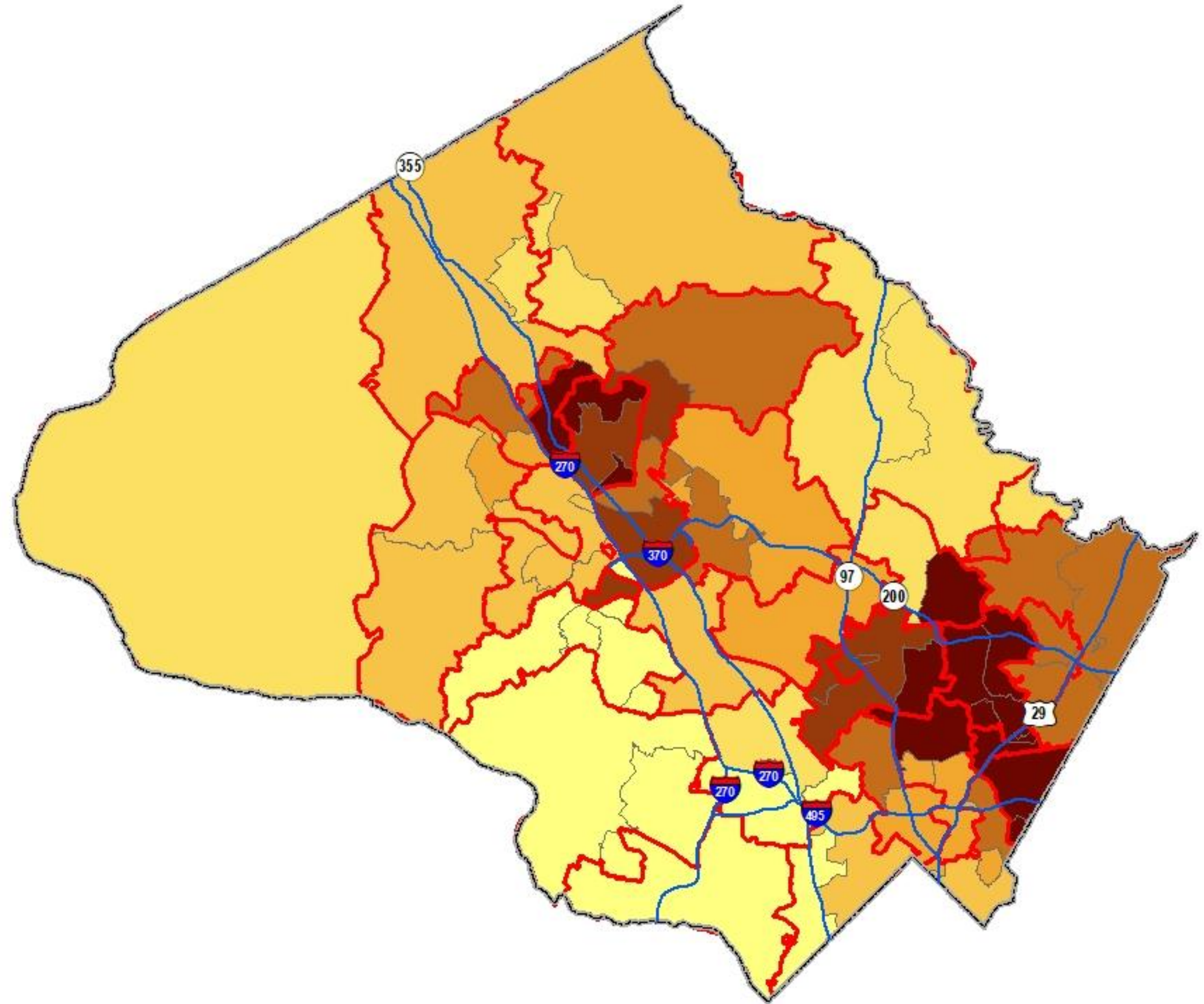
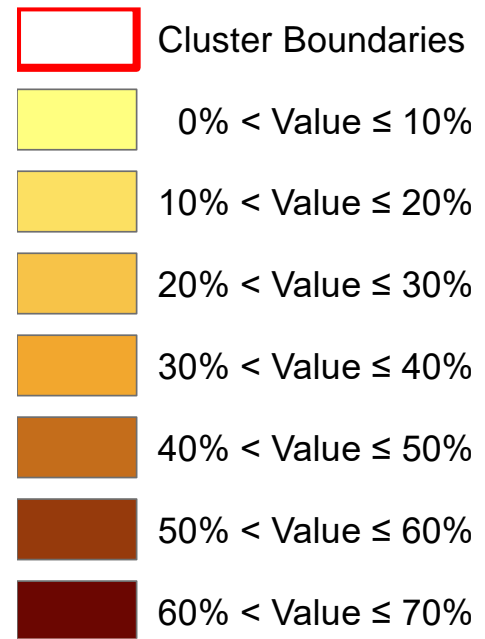
2018 MCPS Student Enrollment



* FARMS rate is the percentage of students eligible for Free and Reduced-price Meals System services.

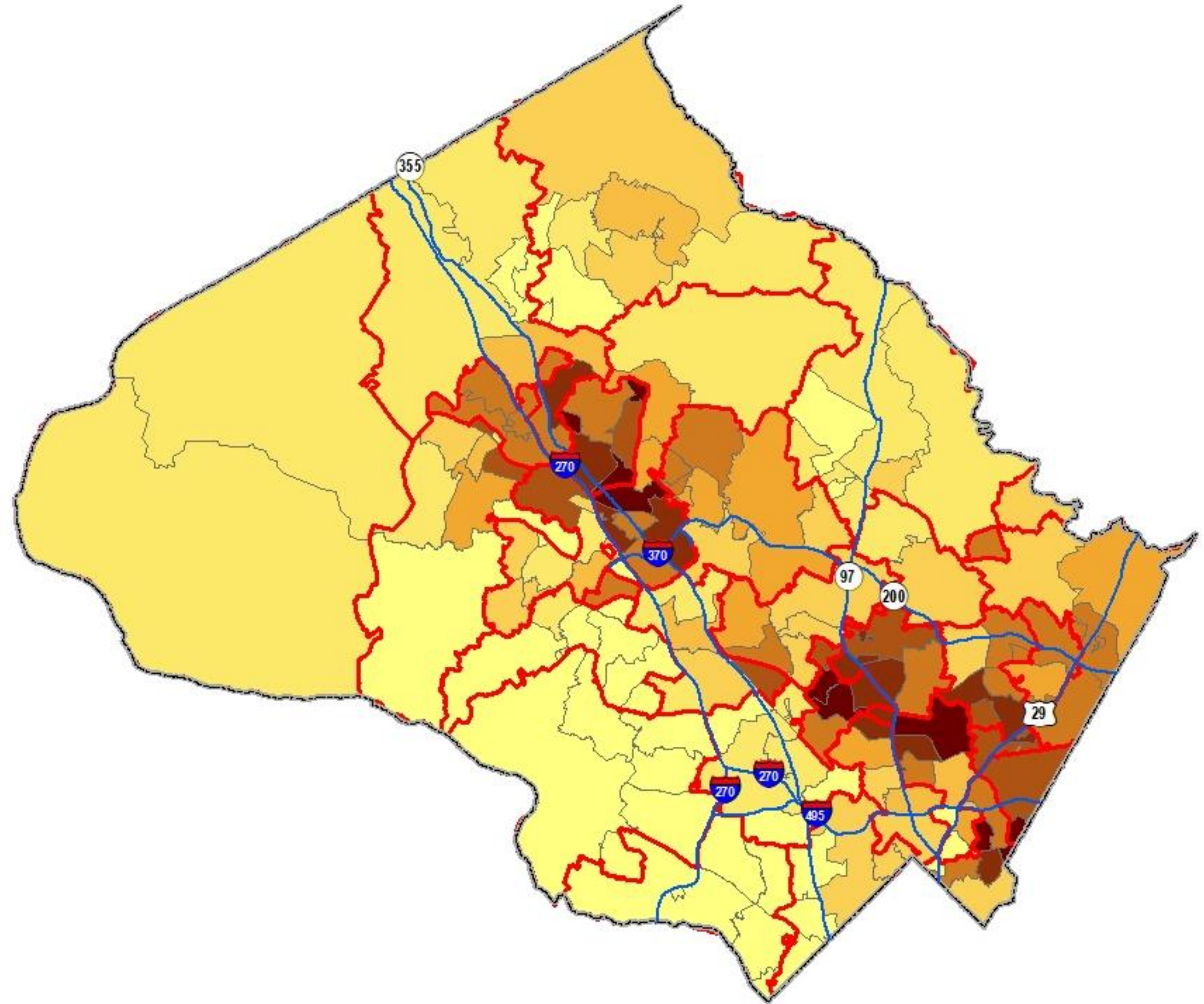
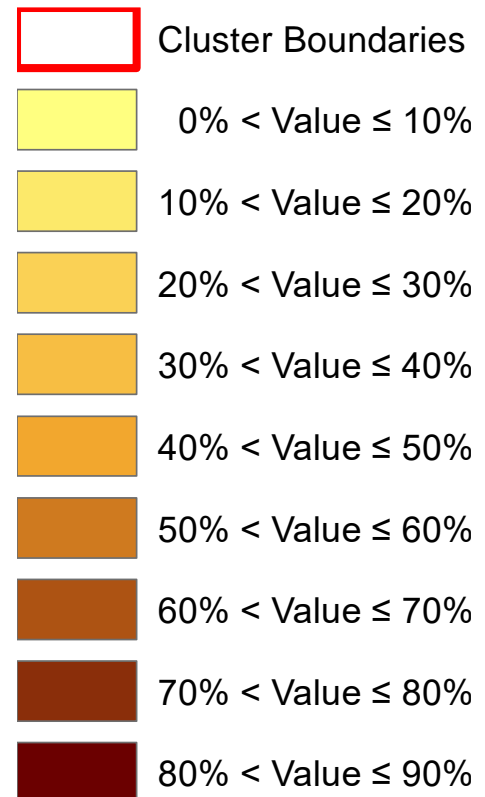
FARMS Rate by MS

2018 MCPS Student Enrollment



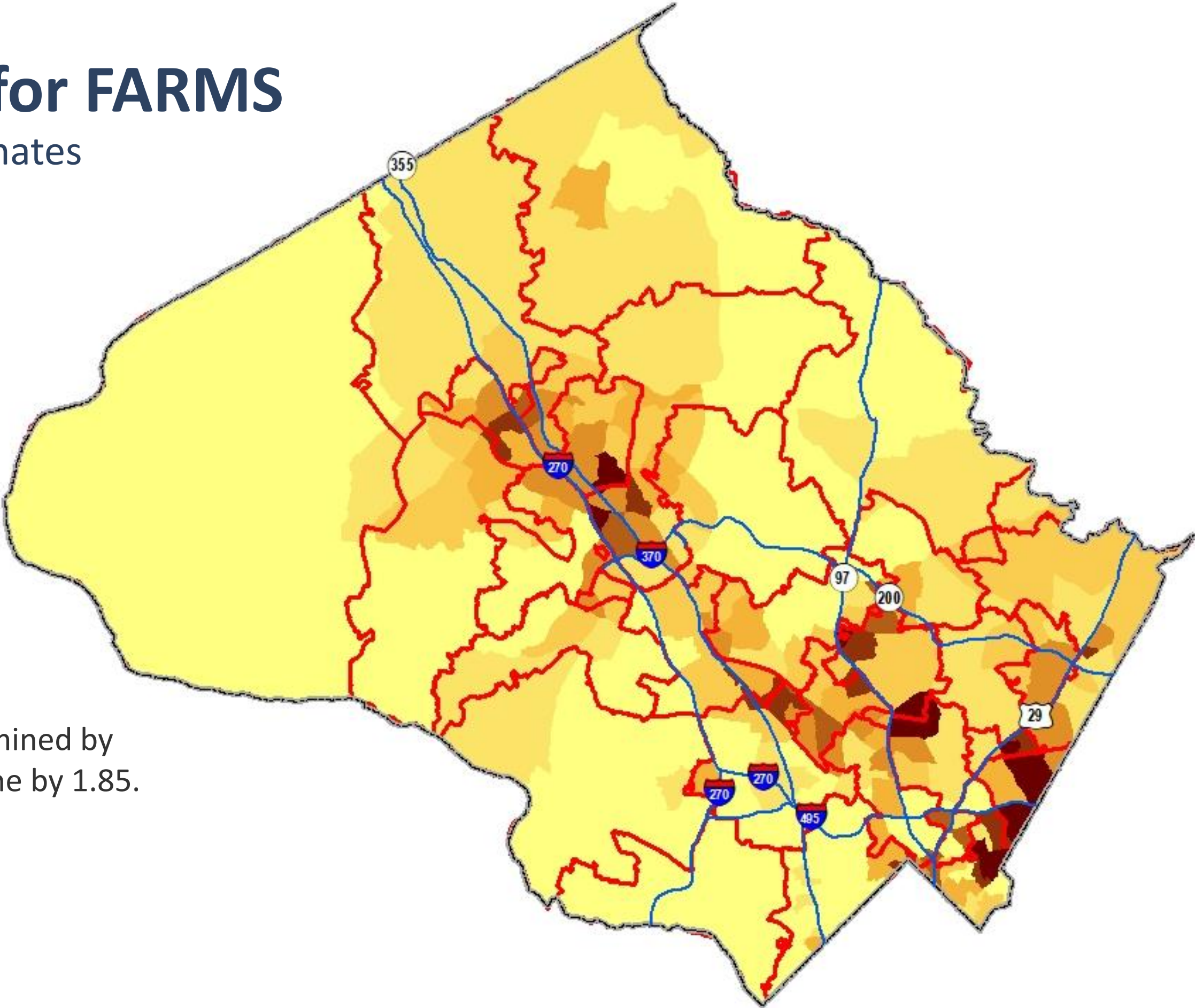
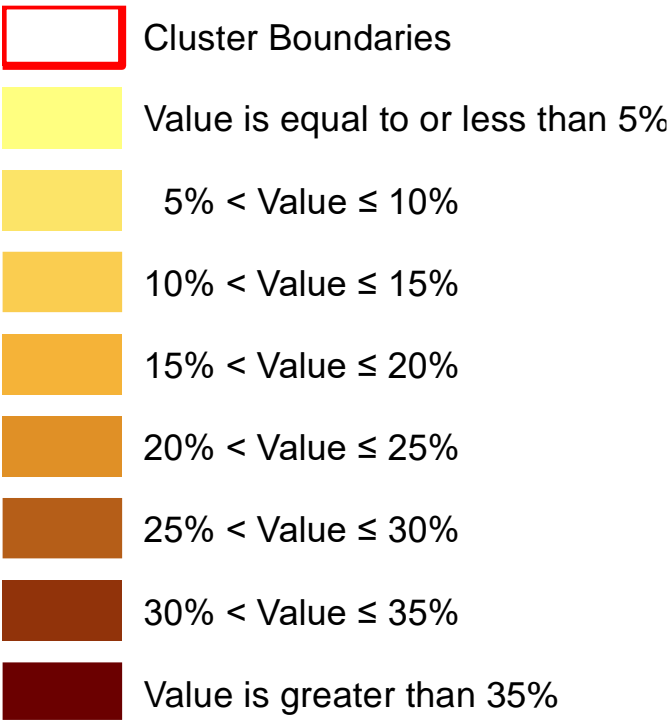
FARMS Rate by ES

2018 MCPS Student Enrollment



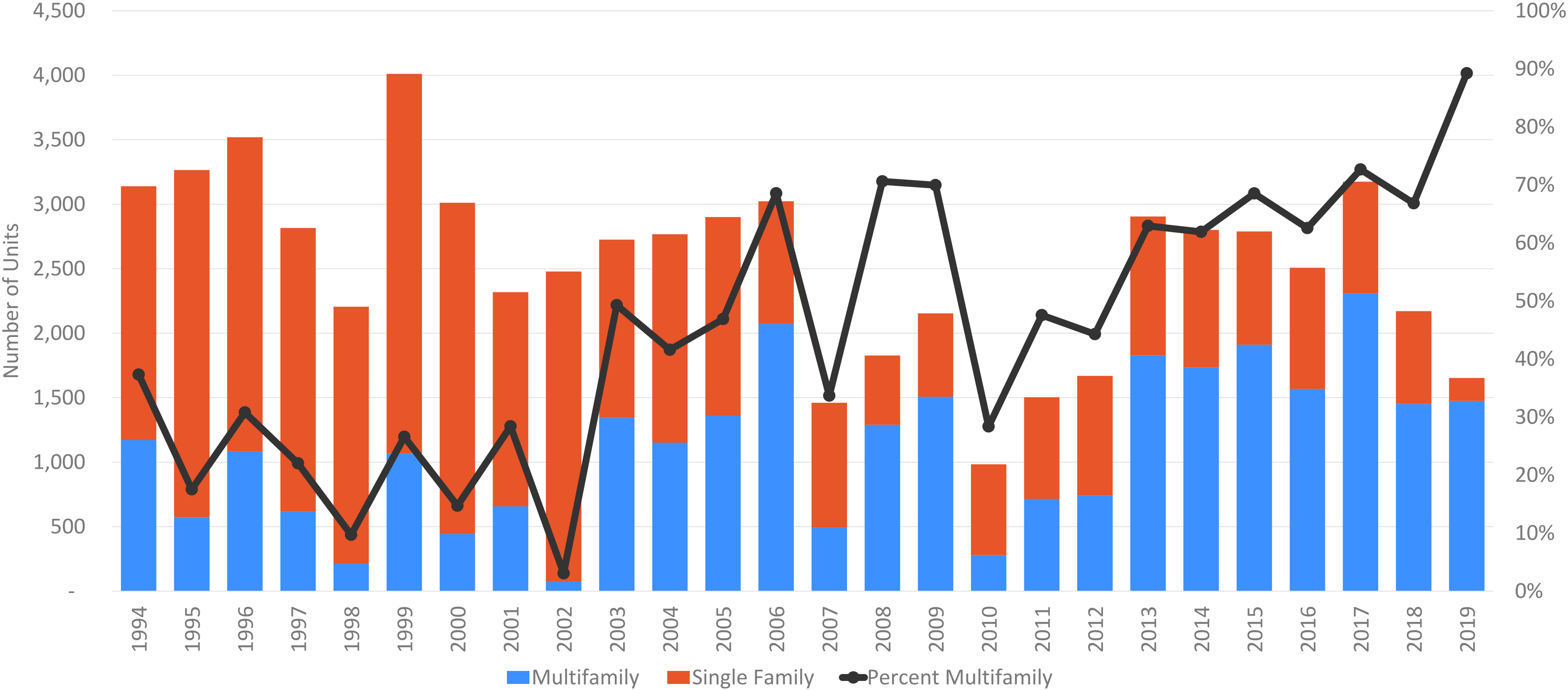
Percent of Families w/Income Qualifying for FARMS

by Census Tract, 2017 ACS 5-yr Estimates



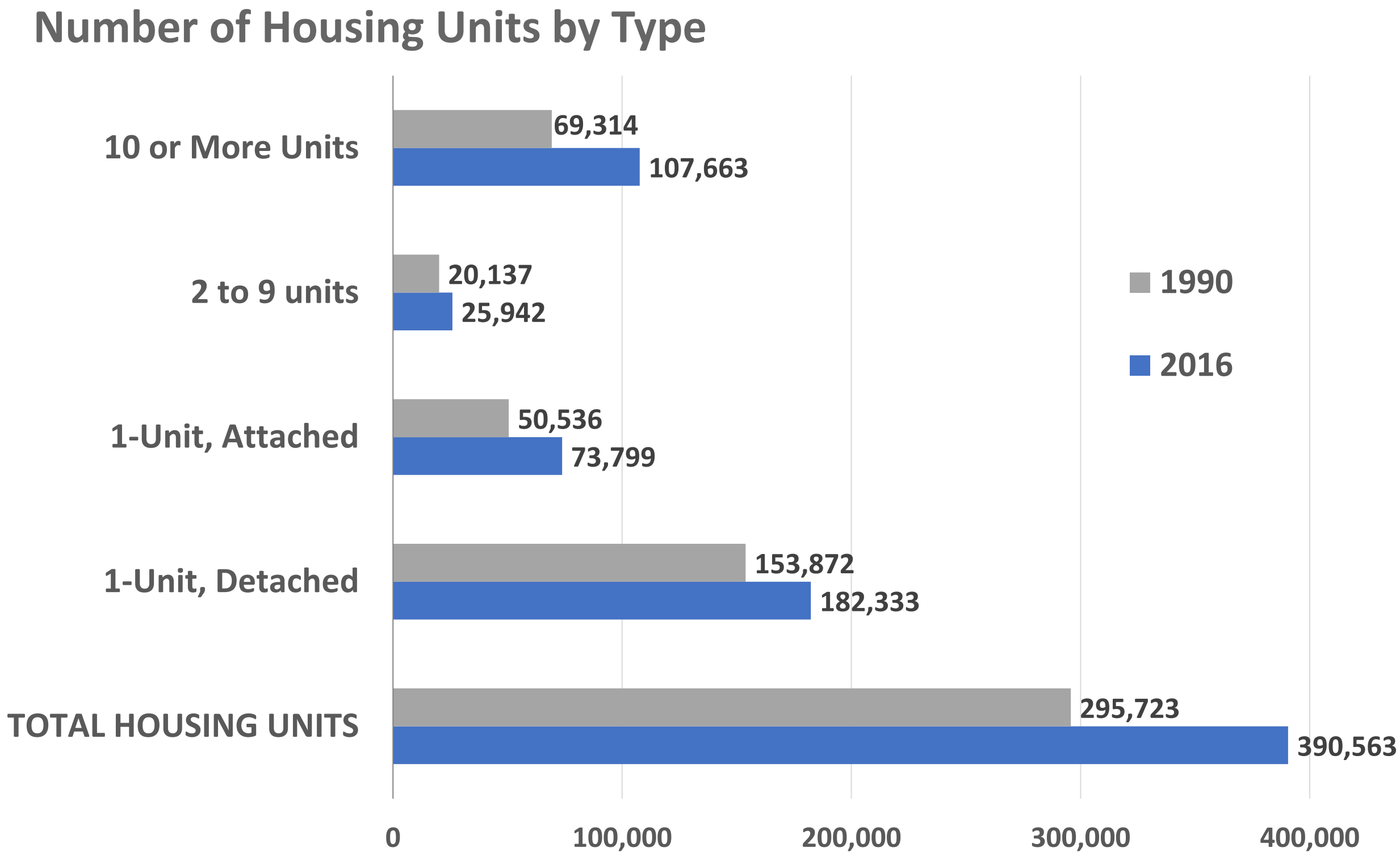
* The FARMS income eligibility criteria is determined by multiplying the Federal income poverty guideline by 1.85.

Housing Units Built by Year and Type, 1994-Current



Source: SDAT

Growth of multifamily housing outpacing all other types of housing

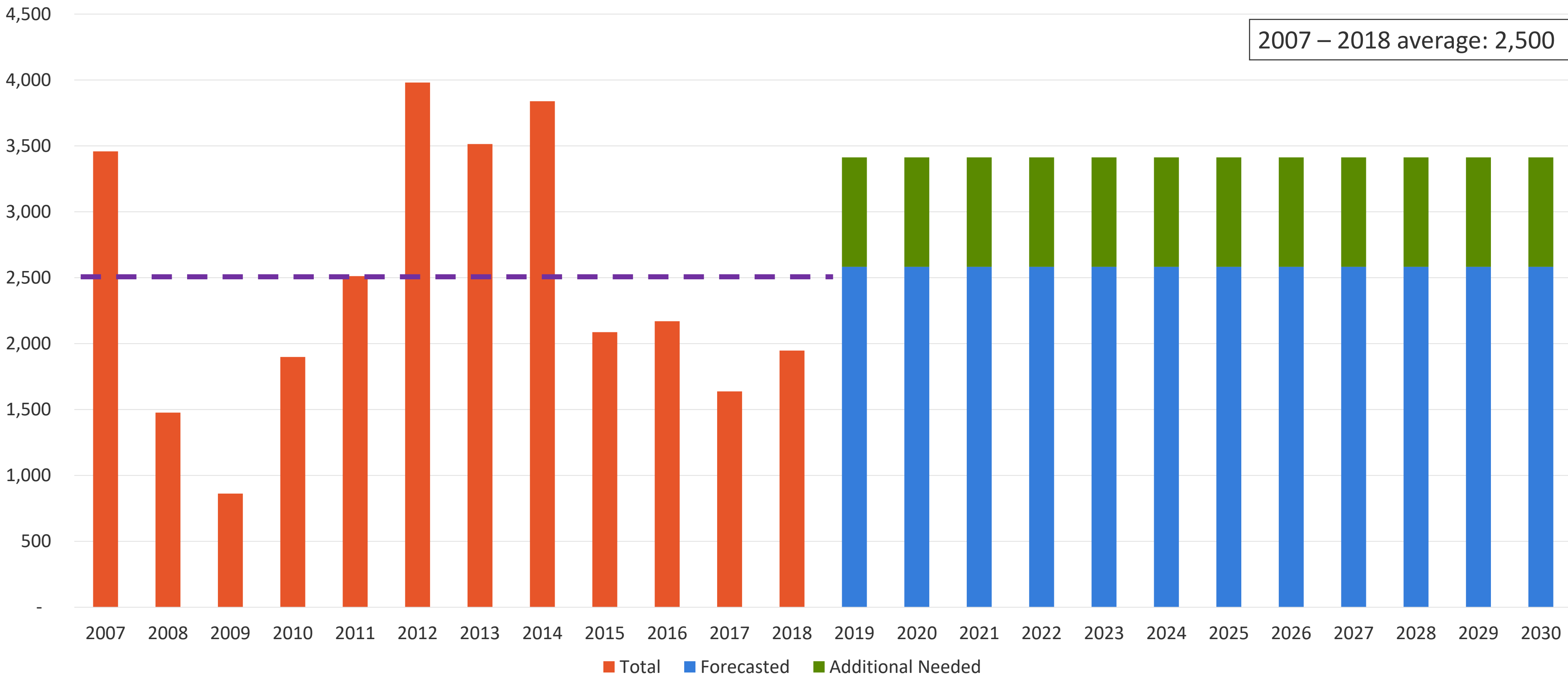


From 1990 to 2016:

- **32% increase** in the number of housing units from 295,723 to 390,563
- **49% increase** in the number of multi-family units
- **25% increase** in the number of single-family units

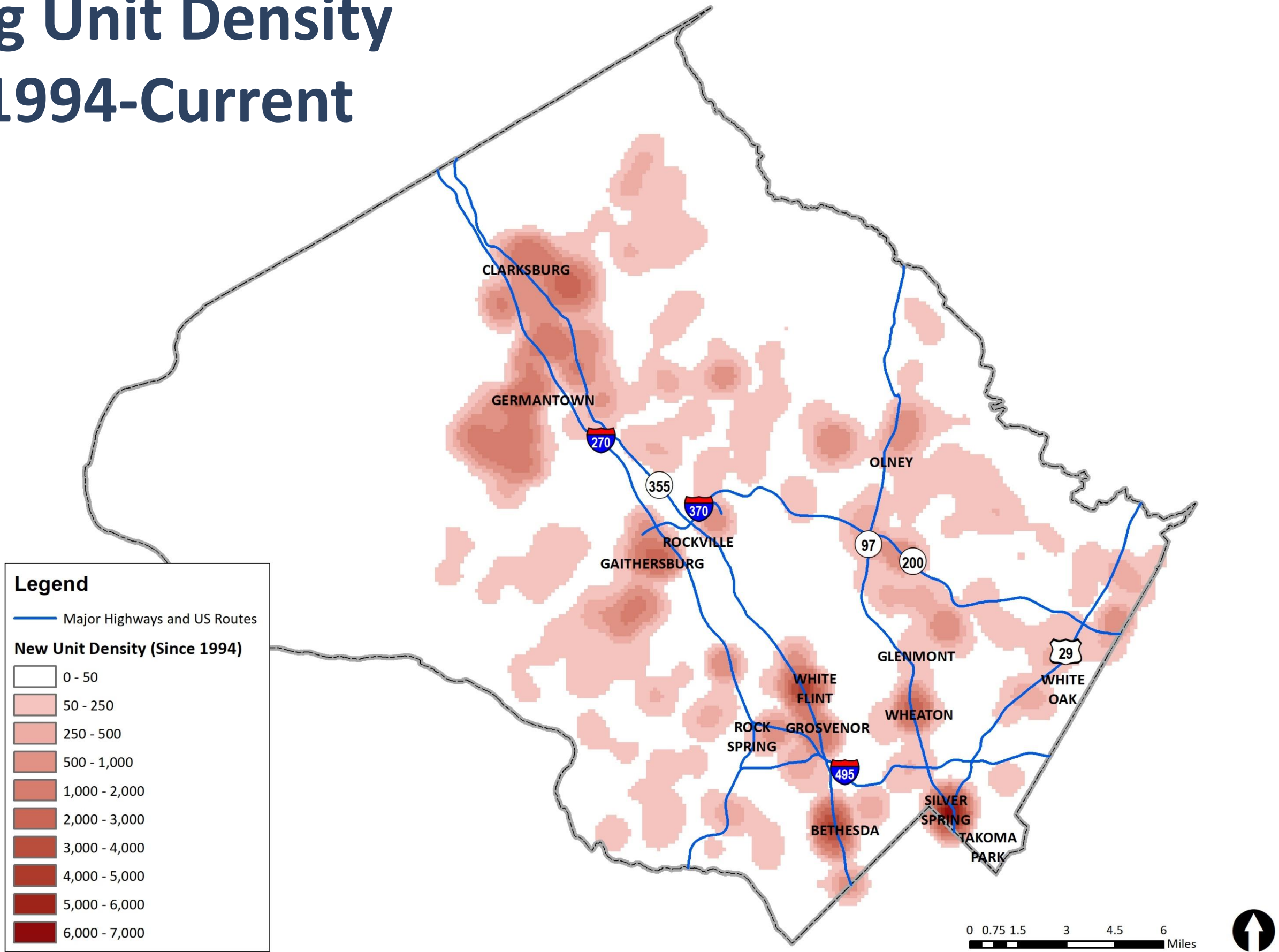
Source: 1990 U.S. Census, 2016 American Community Survey, 1-year estimates, U.S. Census Bureau

Housing Units Permitted, Forecasted, and Additional Needed



Source: Census Bureau (data includes the municipalities of Rockville and Gaithersburg)

New Housing Unit Density (All Types), 1994-Current



Source: SDAT

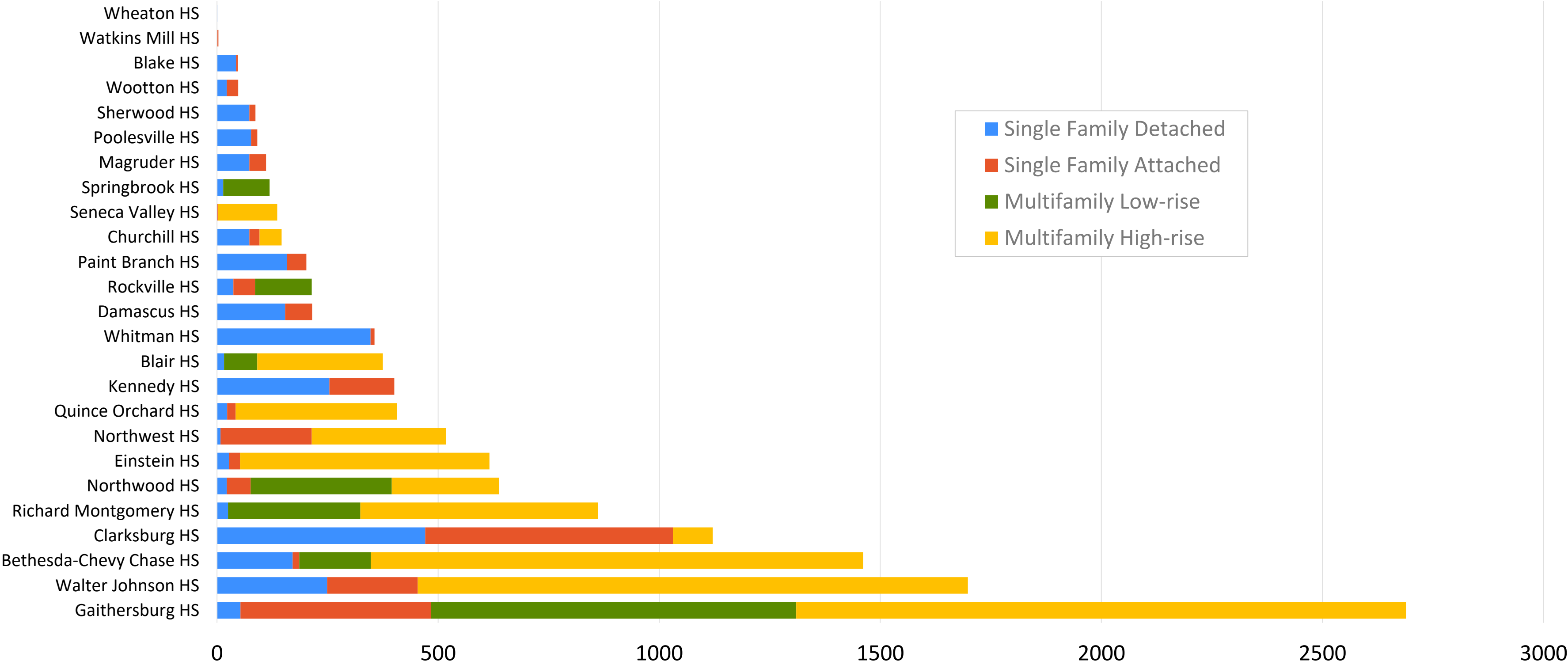
Housing Growth, 2015-18

- Clusters with the most housing growth between 2015 and 2018:
 - Gaithersburg – 2,689 units
 - Walter Johnson – 1,698 units
 - Bethesda-Chevy Chase – 1,461 units
 - Clarksburg – 1,121 units
 - Richard Montgomery – 862 units

Source: SDAT

New Housing Constructed 2015-18

by Cluster



Source: SDAT

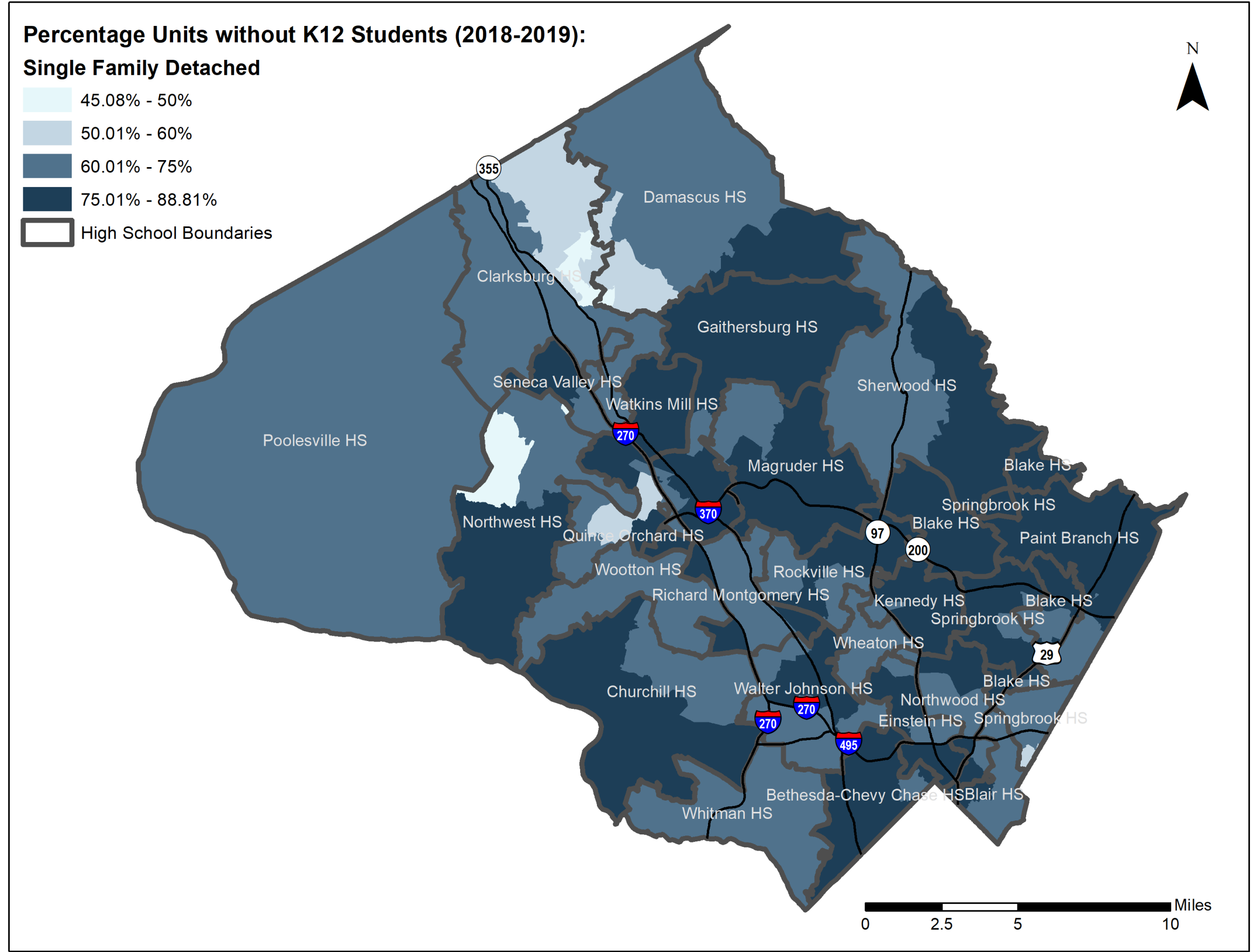
Enrollment Growth, 2015-18

K-12

- Clusters with the highest enrollment growth between 2015 and 2018:
 - Walter Johnson – 789 students
 - Clarksburg – 776 students
 - Wheaton – 576 students
 - John F. Kennedy, Jr. – 492 students
 - Damascus – 490 students

Sources: MCPS FY 2020 and FY 2017 Master Plans

Housing without K-12 Students

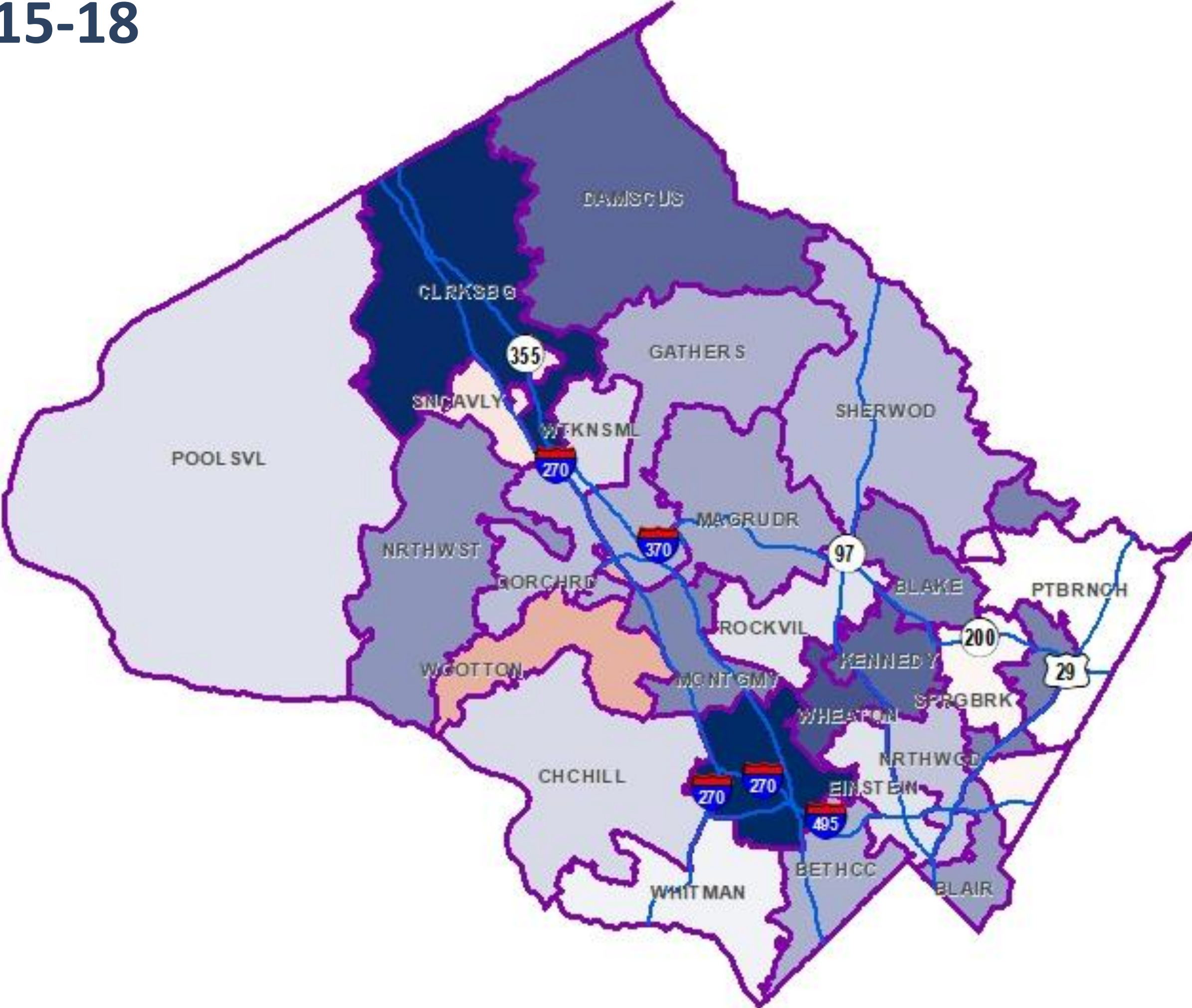
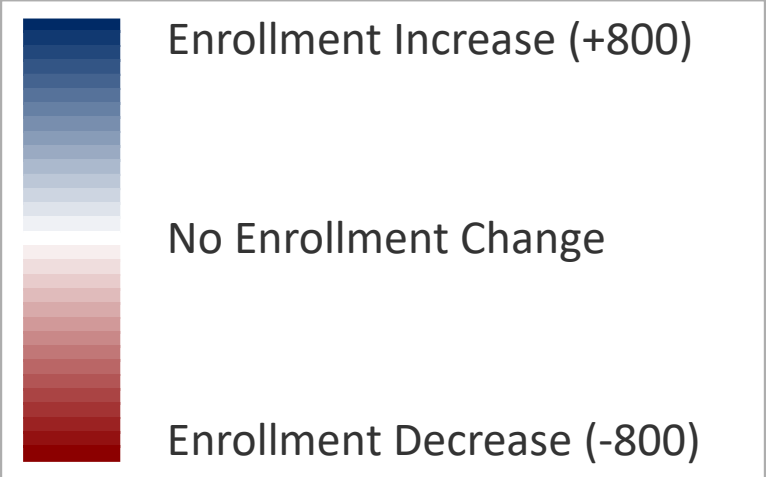


Sources: MCPS SY 2018 Enrollment & SDAT

Change in Enrollment, 2015-18

K-12

by Cluster

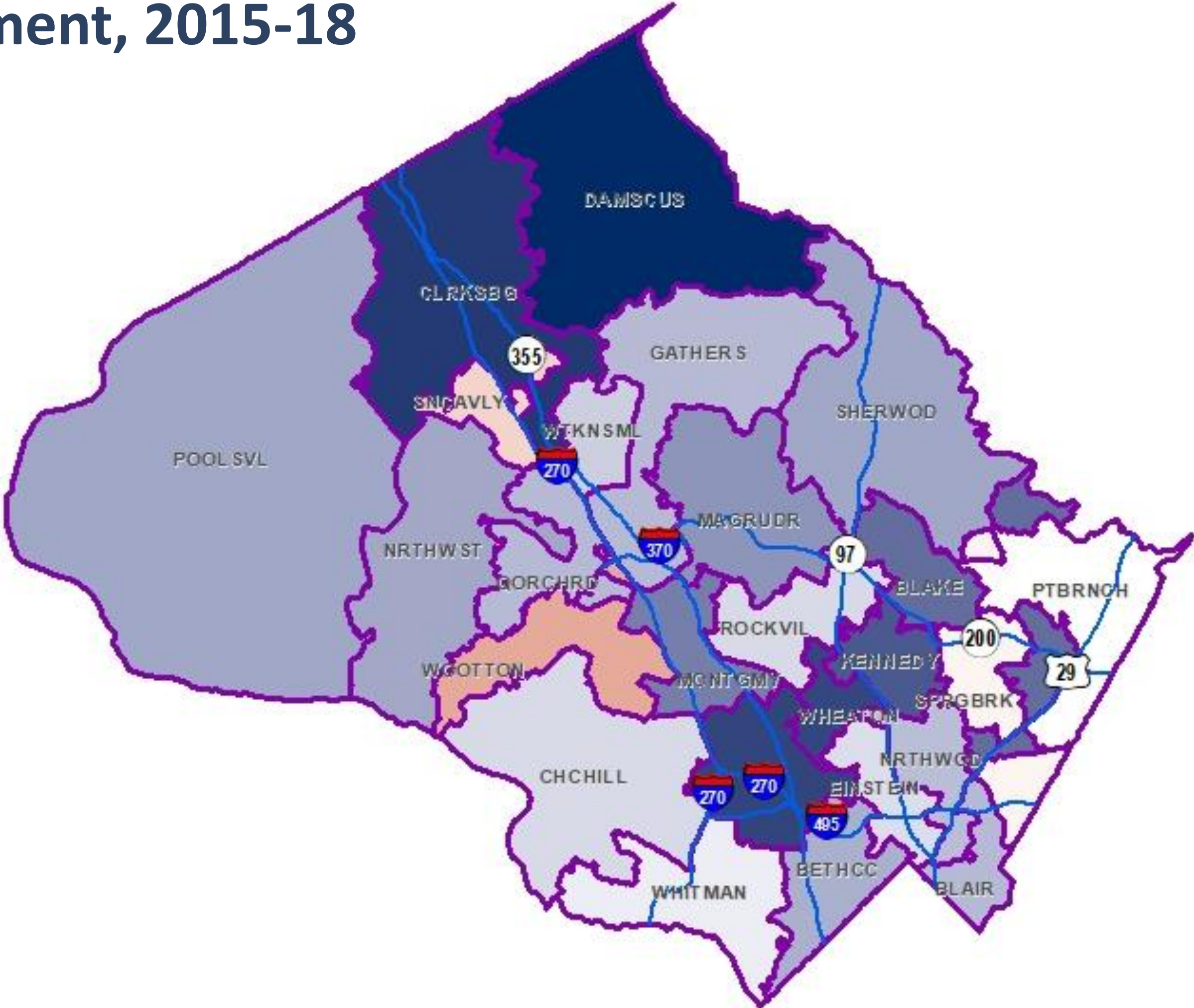
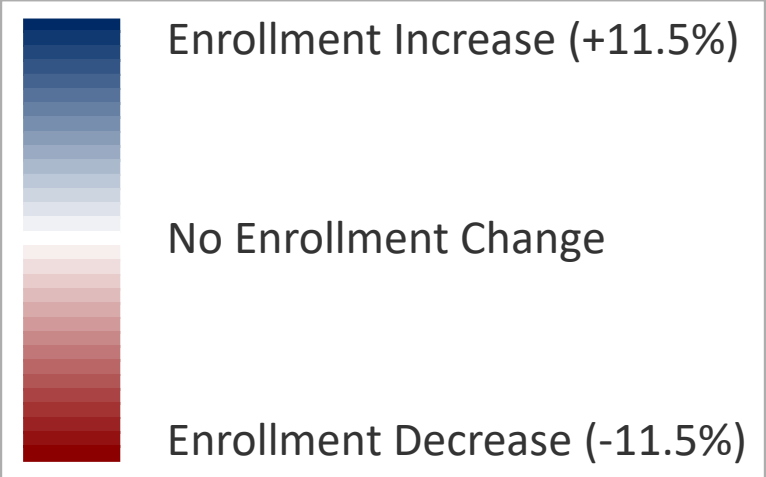


Sources: MCPS FY 2020 and FY 2017 Master Plans

Percent Change in Enrollment, 2015-18

K-12

by Cluster

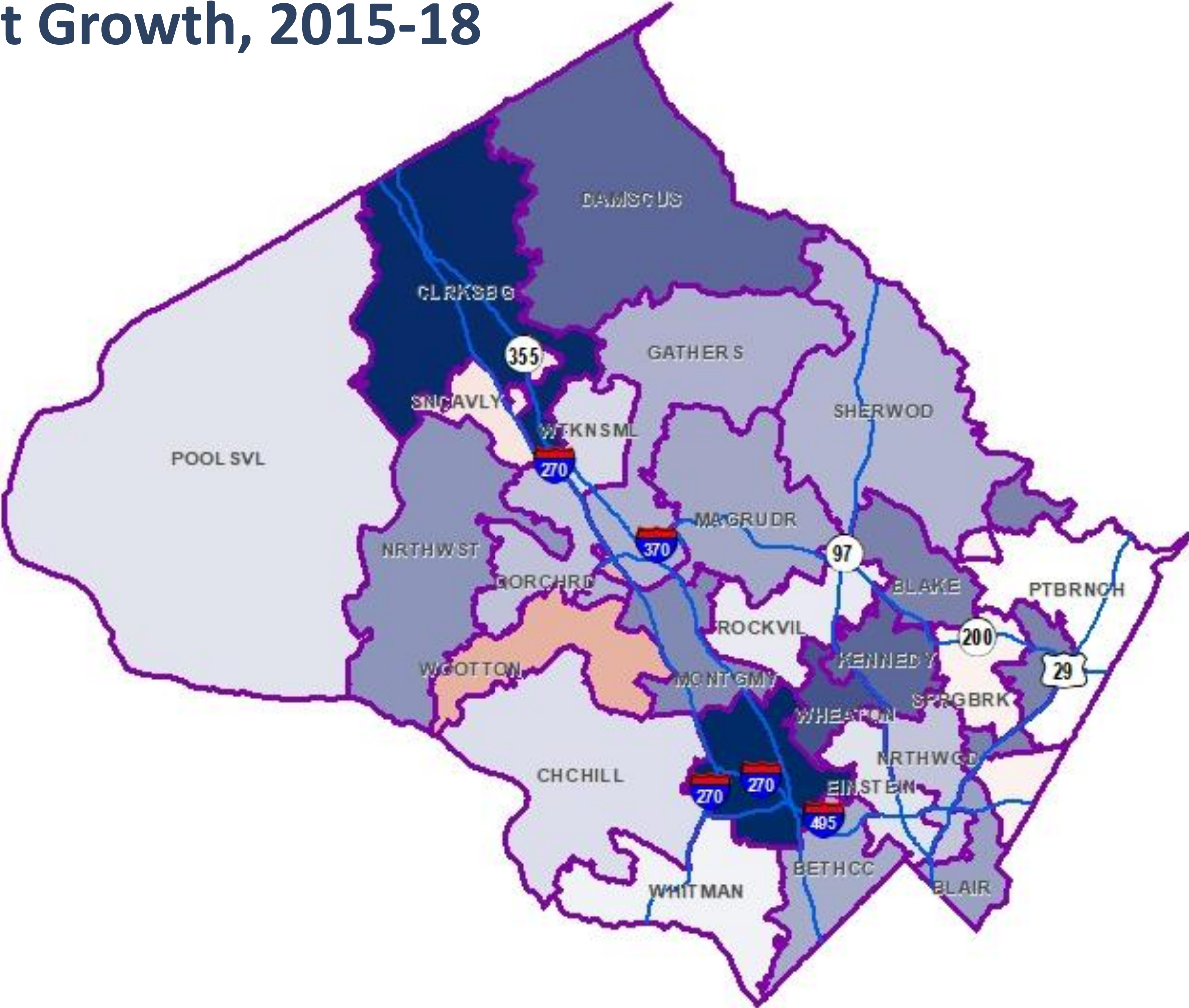
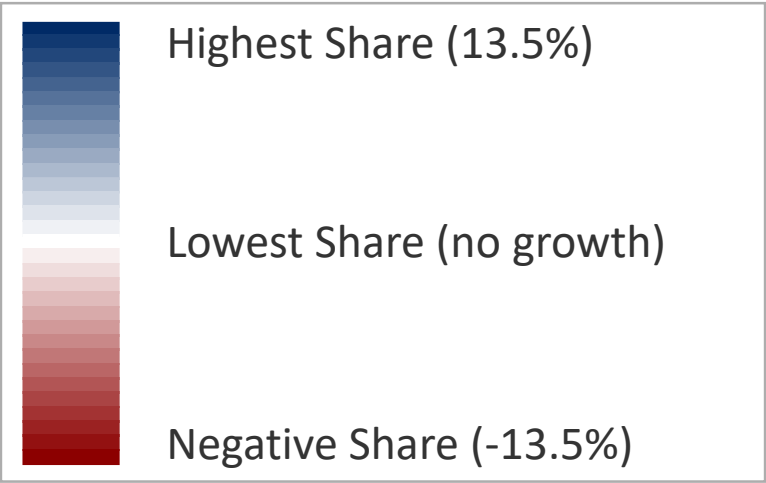


Sources: MCPS FY 2020 and FY 2017 Master Plans

Share of MCPS Enrollment Growth, 2015-18

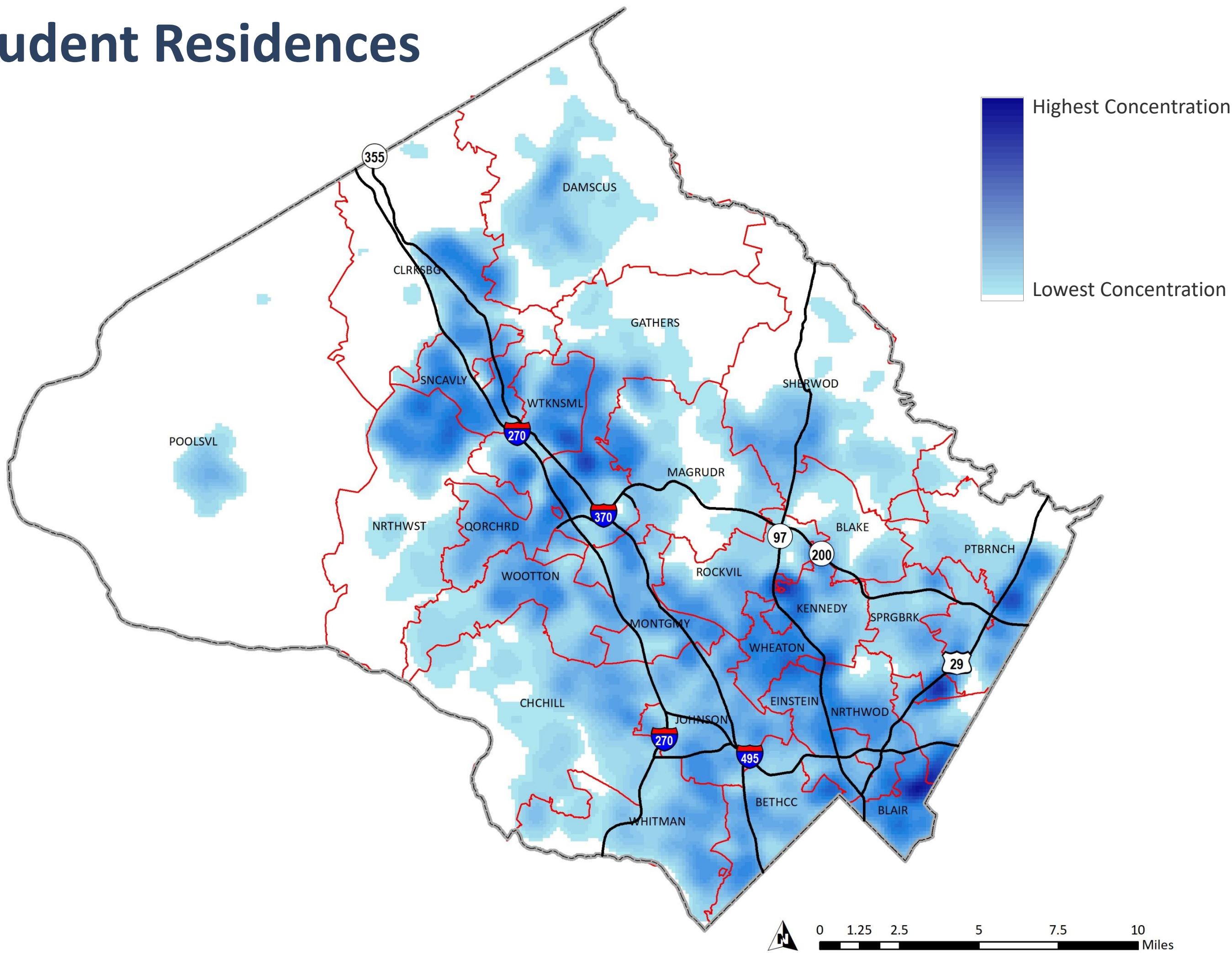
K-12

by Cluster



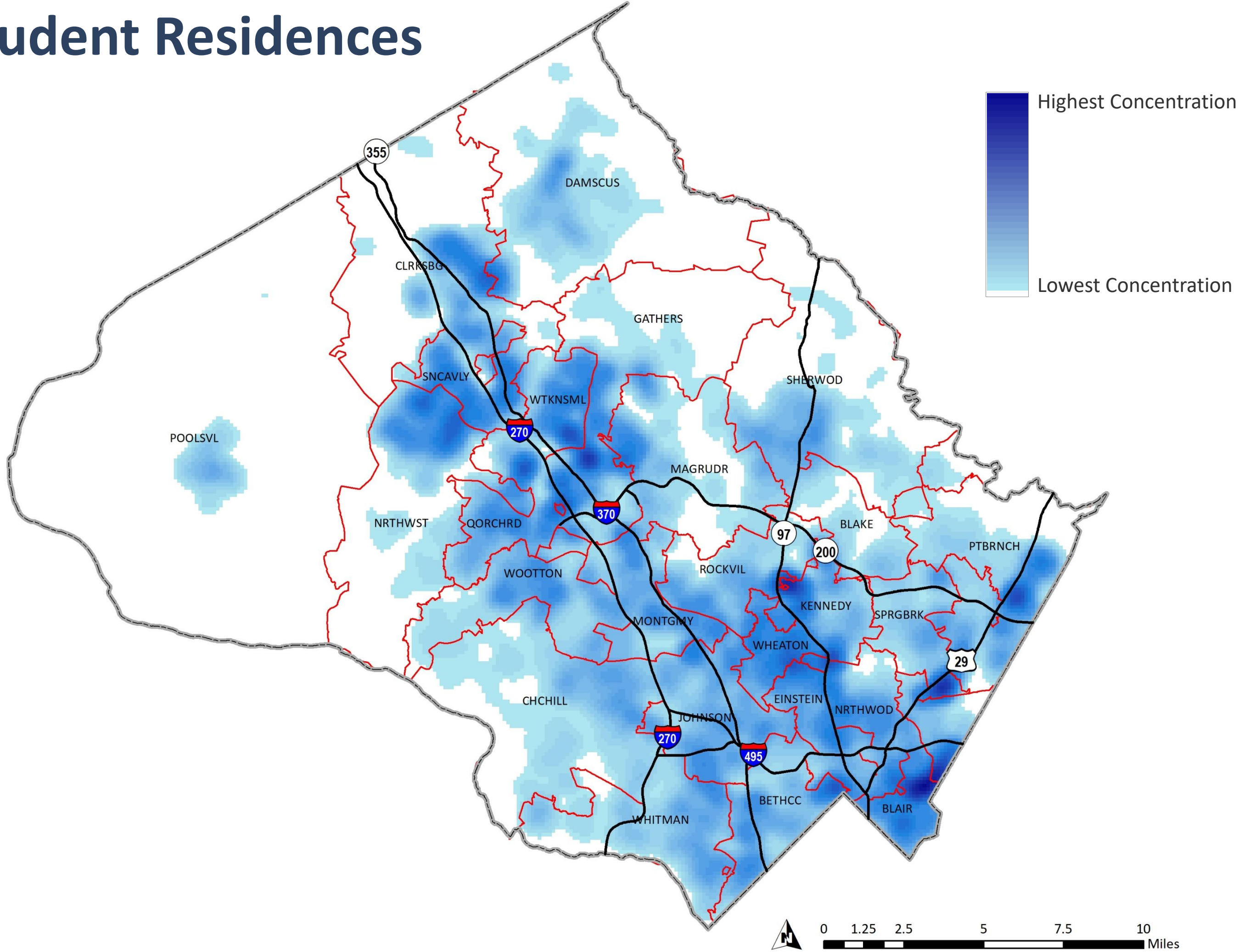
Sources: MCPS FY 2020 and FY 2017 Master Plans

Heat Map of Student Residences 2015

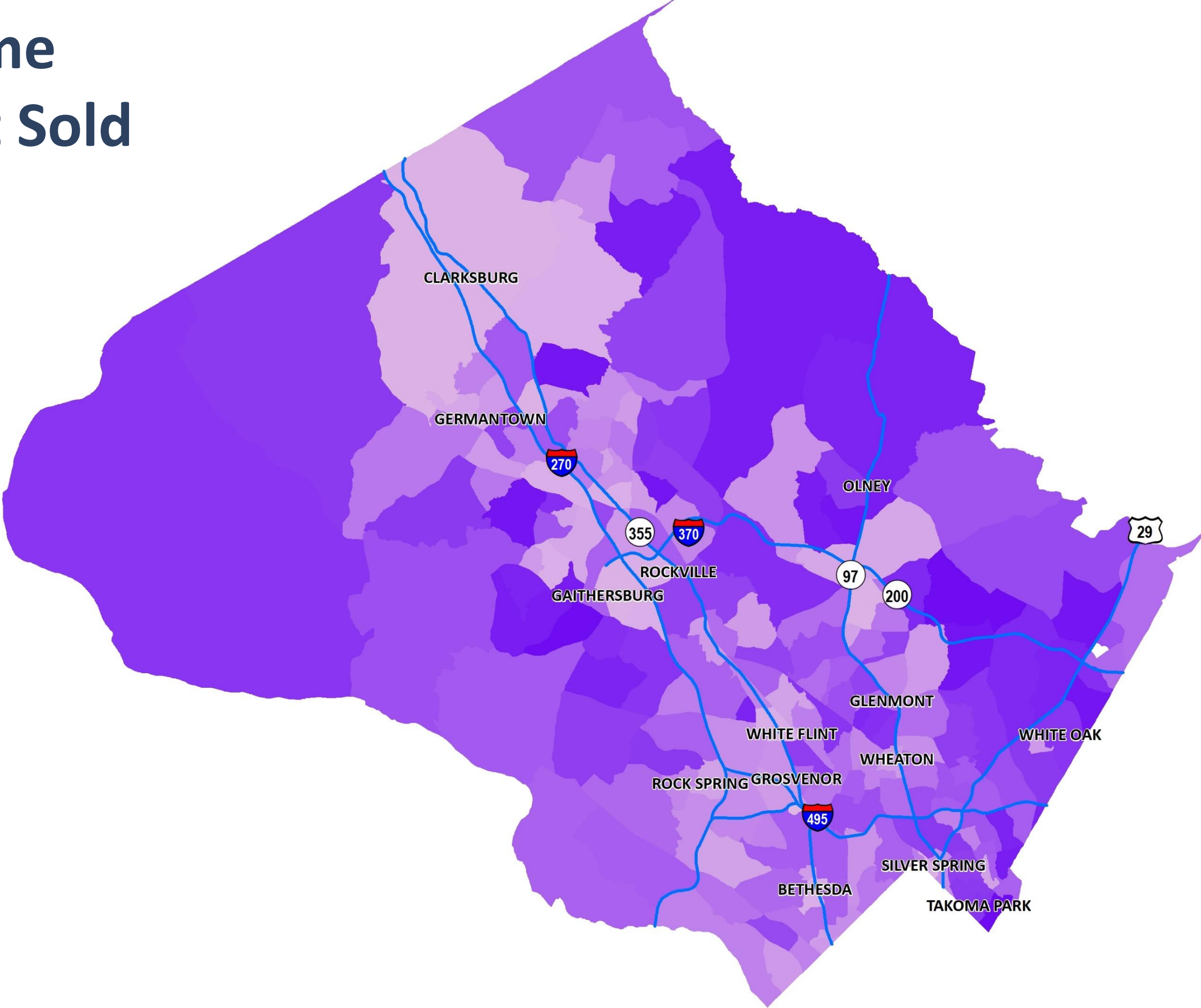


Heat Map of Student Residences

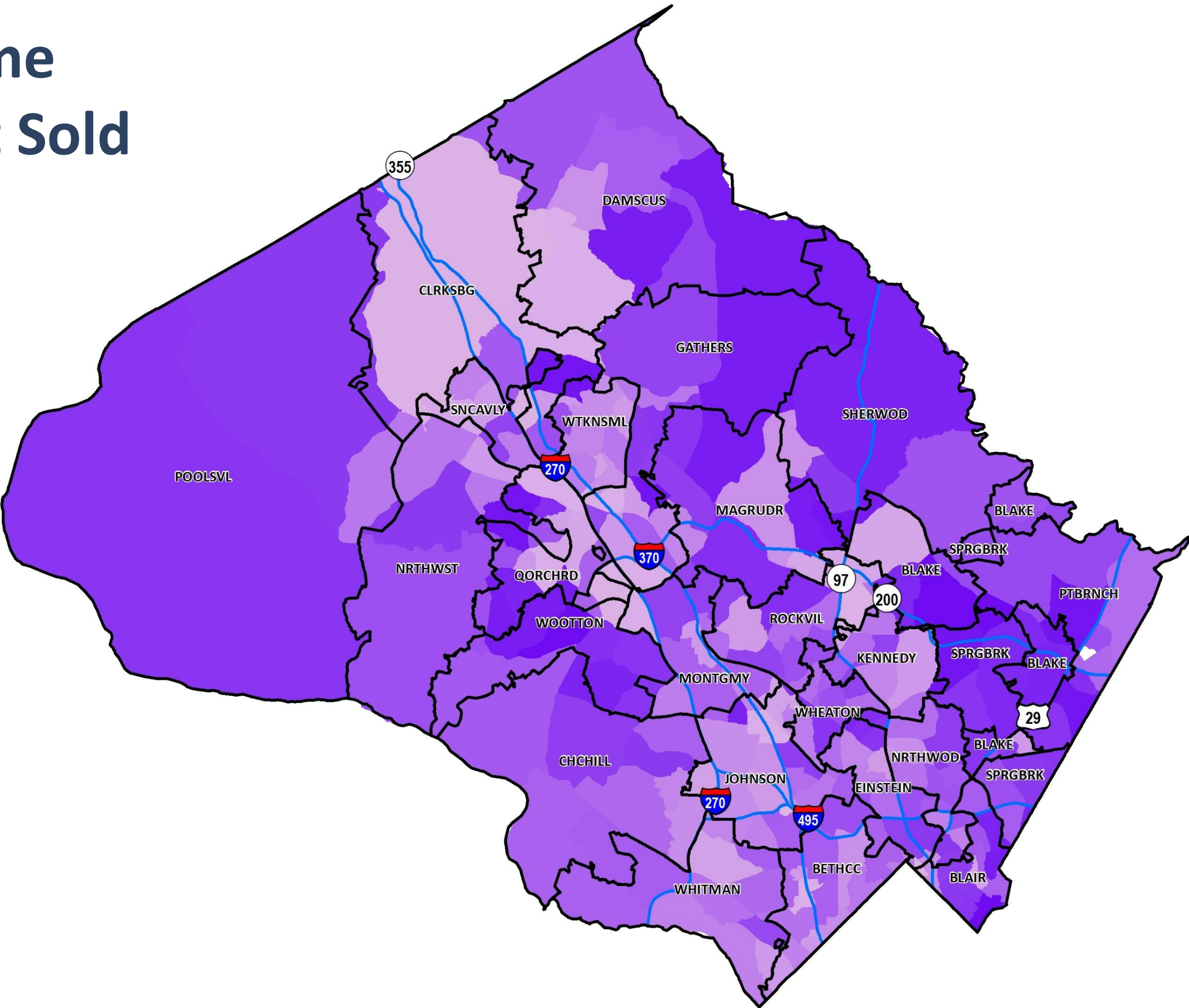
2018



Average Length of Time Since Units Were Last Sold by Census Tract



Average Length of Time Since Units Were Last Sold by Census Tract with Cluster Borders



Preview of STAT Meeting #2

STAT Meeting #2

- Scheduled for Tuesday, November 12 at 7:00 pm
- Topics:
 - Circle back on items from today's meeting
 - Review of alternative Student Generation Rates
 - Additional data review and discussion

Alternative SGRs

- Population Density (by tract)
- Median Household Income (by tract)
- Percent Foreign Born (by tract)
- Percent Minority (by tract)
- Within $\frac{1}{4}$ mile of a school
- Within $\frac{1}{2}$ mile of a school
- Inside/Outside Beltway
- Census Tracts
- Policy Areas
- Inside/Outside Equity Emphasis Areas
- Median Age
- Years Since Last Sold
- % Affordable Units
- Gross Floor Area
- Mean Unit GFA
- Lot Size
- Mean Number of Bedrooms
- % of Units with 3 or more Bedrooms
- Year Built