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

STAT Meeting #1

Sartori, Jason Sunday 10:36 PM
STAT 2020> Note that we’ve posted a draft agenda for our first STAT meeting on Tuesday evening. One thing to prepare for this meeting - be ready to summarize your initial perspectives on the Subdivision Staging Policy as it relates to schools in 60 seconds or less. What are your biggest concerns about the future of the policy? What do you think works or doesn’t work currently?

Sartori, Jason Sunday 11:53 PM
We hope that you will be able to attend our STAT meeting on Tuesday in person. For those who will not be able to make it to Silver Spring for the meeting, you can participate remotely online using Microsoft Teams (additional information below). Note that we will also be recording the meeting and that the recording will be available instantly through Teams (we will subsequently post a version of the recording online as well).

See more
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

  \[
  \text{Capacity Utilization Rate} = \frac{\text{Enrollment}}{\text{Capacity}}
  \]

  Blair HS Utilization Rate = \(\frac{3,619 \text{ students}}{2,912 \text{ seats}}\) = 124.3%

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

  Blair HS Seat Deficit = 2,912 seats - 3,619 students = -707 seats
## 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.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Program Capacity</th>
<th>Staffing Ratios</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade K</td>
<td>22:1</td>
<td>25:1</td>
</tr>
<tr>
<td>Grades 1-3</td>
<td>23:1</td>
<td>27:1</td>
</tr>
<tr>
<td>Grades 4-5</td>
<td>23:1</td>
<td>29:1</td>
</tr>
<tr>
<td>Grades 6-8</td>
<td>21.25:1</td>
<td></td>
</tr>
<tr>
<td>Grades 9-12</td>
<td>22.5:1</td>
<td></td>
</tr>
</tbody>
</table>

* 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

<table>
<thead>
<tr>
<th>Elementary Schools</th>
<th>Sm. Gr.</th>
<th>Year Built</th>
<th>Year Renov./Reopen/Revital.*</th>
<th>Exist. Sq. Ft</th>
<th>Site Size</th>
<th>Park</th>
<th>State-Rated Capacity Number of Rooms</th>
<th>State-Rated Capacity</th>
<th>MCPS Program Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Pre-K @20 Kind. @22 Reg. @23 Sp. Ed. @10</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Arcola</td>
<td>S</td>
<td>1956</td>
<td>2007</td>
<td>95,421</td>
<td>5</td>
<td>Yes</td>
<td>1 7 25 0</td>
<td>754</td>
<td>651</td>
</tr>
<tr>
<td>2. Ashburton</td>
<td>S</td>
<td>1957</td>
<td>1993</td>
<td>81,438</td>
<td>8.32</td>
<td></td>
<td>0 6 22 3</td>
<td>655</td>
<td>677</td>
</tr>
<tr>
<td>3. Bannockburn</td>
<td>S</td>
<td>1957</td>
<td>1988</td>
<td>54,234</td>
<td>8.34</td>
<td></td>
<td>0 2 14 0</td>
<td>365</td>
<td>366</td>
</tr>
<tr>
<td>4. Lucy V. Barnsley</td>
<td>S</td>
<td>1965</td>
<td>1998</td>
<td>72,024</td>
<td>10</td>
<td></td>
<td>0 5 24 0</td>
<td>469</td>
<td>652</td>
</tr>
<tr>
<td>6. Bel Pre</td>
<td>S</td>
<td>1968</td>
<td>2014</td>
<td>95,330</td>
<td>8.91</td>
<td>Yes</td>
<td>3 9 21 0</td>
<td>741</td>
<td>640</td>
</tr>
<tr>
<td>7. Bells Mill</td>
<td>S</td>
<td>1968</td>
<td>2009</td>
<td>77,244</td>
<td>9.6</td>
<td></td>
<td>1 4 22 2</td>
<td>634</td>
<td>626</td>
</tr>
<tr>
<td>8. Belmont</td>
<td>S</td>
<td>1974</td>
<td></td>
<td>49,279</td>
<td>10.52</td>
<td></td>
<td>0 3 15 1</td>
<td>422</td>
<td>424</td>
</tr>
<tr>
<td>10. Beverly Farms</td>
<td>S</td>
<td>1965</td>
<td>2012</td>
<td>98,916</td>
<td>5</td>
<td>Yes</td>
<td>0 4 25 2</td>
<td>684</td>
<td>689</td>
</tr>
<tr>
<td>11. Bradley Hills</td>
<td>S</td>
<td>1951</td>
<td>1984</td>
<td>76,745</td>
<td>6.71</td>
<td>Yes</td>
<td>0 5 26 0</td>
<td>663</td>
<td>664</td>
</tr>
<tr>
<td>12. Brooke Grove</td>
<td>S</td>
<td>1990</td>
<td></td>
<td>72,582</td>
<td>10.96</td>
<td></td>
<td>1 3 16 6</td>
<td>514</td>
<td>517</td>
</tr>
<tr>
<td>18. Candlewood</td>
<td>S</td>
<td>1968</td>
<td>2015</td>
<td>48,543</td>
<td>11.78</td>
<td></td>
<td>0 3 19 2</td>
<td>522</td>
<td>515</td>
</tr>
<tr>
<td>19. Cannon Road</td>
<td>S</td>
<td>1967</td>
<td>2012</td>
<td>83,377</td>
<td>4.4</td>
<td>Yes</td>
<td>0 6 17 5</td>
<td>575</td>
<td>481</td>
</tr>
<tr>
<td>20. Carderock Springs</td>
<td>S</td>
<td>1966</td>
<td>2010</td>
<td>75,351</td>
<td>9</td>
<td></td>
<td>0 2 15 3</td>
<td>419</td>
<td>407</td>
</tr>
<tr>
<td>October</td>
<td>November</td>
<td>December</td>
<td>January</td>
<td>February</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Superintendent Recommendation</strong></td>
<td><strong>Public Hearings</strong></td>
<td><strong>BOE Request</strong></td>
<td><strong>CE Proposal</strong></td>
<td><strong>Committee Work Sessions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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.</td>
<td>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.</td>
<td>The Board of Education submits its Capital Budget and CIP request to the County Executive and County Council.</td>
<td>The County Executive combines all County agency budget and CIP requests and submits his/her proposed Capital Budget and CIP to the County Council.</td>
<td>The County Council begins committee work sessions to review affordability issues, request non-recommended reductions, and make recommendations to the full Council.</td>
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</tr>
</tbody>
</table>
## May

**Budget Reconciliation and Adoption**

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.

## June

**MCPS Publishes Master Plan**

The Master Plan reflects the final capital budget and CIP adopted by the County Council. It includes Project Description Forms for each project.

**Annual School Test Approved**

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.

## July

**School Adequacy Reviews for new Fiscal Year**

New school test results are used to evaluate school adequacy for development applications during preliminary plan review.
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
The Annual School Test is a two-tiered test:

- **Cluster** level test of utilization
- **School** level test of utilization
## Current Adequacy Thresholds

<table>
<thead>
<tr>
<th>Test Level</th>
<th>Moratorium Threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cluster</td>
<td>Projected <strong>cumulative utilization greater than 120%</strong> at any school level (elementary, middle or high school) across the entire cluster.</td>
</tr>
<tr>
<td>Individual Elementary School</td>
<td>Projected <strong>utilization greater than 120%</strong> and projected capacity <strong>deficit of 110 seats or more.</strong></td>
</tr>
<tr>
<td>Individual Middle School</td>
<td>Projected <strong>utilization greater than 120%</strong> and projected capacity <strong>deficit of 180 seats or more.</strong></td>
</tr>
</tbody>
</table>
## Cluster Test

<table>
<thead>
<tr>
<th>School Level</th>
<th>Enrollment</th>
<th>Program Capacity</th>
<th>% Utilization</th>
<th>Moratorium Threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elementary</td>
<td>4,694</td>
<td>4,668</td>
<td>100.6%</td>
<td>908</td>
</tr>
<tr>
<td>Middle</td>
<td>1,882</td>
<td>1,958</td>
<td>96.1%</td>
<td>467</td>
</tr>
<tr>
<td>High</td>
<td>2,764</td>
<td>2,429</td>
<td>113.8%</td>
<td>150</td>
</tr>
</tbody>
</table>

## Individual School Test

<table>
<thead>
<tr>
<th>School</th>
<th>Enrollment</th>
<th>Program Capacity</th>
<th>% Utilization</th>
<th>Surplus/ Deficit</th>
<th>Moratorium Threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gaithersburg ES</td>
<td>804</td>
<td>788</td>
<td>102.0%</td>
<td>-16</td>
<td>142</td>
</tr>
<tr>
<td>Gaithersburg MS</td>
<td>942</td>
<td>1,009</td>
<td>93.4%</td>
<td>+67</td>
<td>269</td>
</tr>
</tbody>
</table>
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]

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:

<table>
<thead>
<tr>
<th>Housing Type</th>
<th>Net Number of Units</th>
<th>ES Generation Rates</th>
<th>ES Students Generated</th>
<th>MS Generation Rates</th>
<th>MS Students Generated</th>
<th>HS Generation Rates</th>
<th>HS Students Generated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Family Attached</td>
<td>20</td>
<td>0.248</td>
<td>4.960</td>
<td>0.121</td>
<td>2.420</td>
<td>0.157</td>
<td>3.140</td>
</tr>
<tr>
<td>Multi-Family High Rise</td>
<td>150</td>
<td>0.020</td>
<td>3.000</td>
<td>0.008</td>
<td>1.200</td>
<td>0.010</td>
<td>1.500</td>
</tr>
<tr>
<td>TOTALS</td>
<td>170</td>
<td></td>
<td>7</td>
<td></td>
<td>3</td>
<td></td>
<td>4</td>
</tr>
</tbody>
</table>
### Cluster Level Test:

<table>
<thead>
<tr>
<th>School Level</th>
<th>Projected Gaithersburg Cluster Totals, September 2024</th>
<th>Moratorium Threshold</th>
<th>Estimated Application Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elementary</td>
<td>Enrollment: 4,694, Program Capacity: 4,668, % Utilization: 100.6%</td>
<td>908</td>
<td>7</td>
</tr>
<tr>
<td>Middle</td>
<td>Enrollment: 1,882, Program Capacity: 1,958, % Utilization: 96.1%</td>
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<td>3</td>
</tr>
<tr>
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<td>Enrollment: 2,764, Program Capacity: 2,429, % Utilization: 113.8%</td>
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<td>4</td>
</tr>
</tbody>
</table>

### School Level Test:

<table>
<thead>
<tr>
<th>School</th>
<th>Enrollment</th>
<th>Projected School Totals, September 2024</th>
<th>Surplus/ Deficit</th>
<th>Moratorium Threshold</th>
<th>Estimated Application Impact</th>
</tr>
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<tr>
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<td>804</td>
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<td>142</td>
<td>7</td>
</tr>
<tr>
<td>Gaithersburg MS</td>
<td>942</td>
<td>Program Capacity: 1,009, % Utilization: 93.4%</td>
<td>+67</td>
<td>269</td>
<td>3</td>
</tr>
</tbody>
</table>
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:

\[
SGR_{ES} \times \text{Per Student Construction Cost}_{ES} \times 120% \\
+ \\
SGR_{MS} \times \text{Per Student Construction Cost}_{MS} \times 120% \\
+ \\
SGR_{HS} \times \text{Per Student Construction Cost}_{HS} \times 120%
\]
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

<table>
<thead>
<tr>
<th></th>
<th>Elementary School</th>
<th>Middle School</th>
<th>High School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capacity/Core</td>
<td>740</td>
<td>1,200</td>
<td>2,400</td>
</tr>
<tr>
<td>Average Project Cost</td>
<td>$32,680,000</td>
<td>$53,600,000</td>
<td>$126,820,000</td>
</tr>
<tr>
<td>Cost per Student</td>
<td>$44,162</td>
<td>$44,667</td>
<td>$52,842</td>
</tr>
</tbody>
</table>

Source: Seth Adams, Director of MCPS Division of Construction, April 5, 2019
### School Impact Taxes

<table>
<thead>
<tr>
<th>Residential (per unit)</th>
<th>Countywide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Family Detached</td>
<td>$26,207</td>
</tr>
<tr>
<td>Single Family Attached</td>
<td>$27,598</td>
</tr>
<tr>
<td>Multifamily Low-rise</td>
<td>$21,961</td>
</tr>
<tr>
<td>Multifamily High-rise</td>
<td>$6,113</td>
</tr>
<tr>
<td>Multifamily Senior</td>
<td>$0</td>
</tr>
</tbody>
</table>

**STAT Meeting #1**
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:

\[ \text{SGR} \times \text{Per Student Construction Cost} \times 60\% \times \text{NET Number of Dwelling Units} \]
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:

<table>
<thead>
<tr>
<th>Prince George's County, MD</th>
<th>Baltimore County, MD</th>
<th>Fairfax County, VA</th>
<th>Howard County, MD</th>
<th>Harford County, MD</th>
<th>Montgomery County, PA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresno County, CA</td>
<td>Wake County, NC</td>
<td>Pinellas County, FL</td>
<td>Snohomish County, WA</td>
<td>Contra Costa County, CA</td>
<td>Pierce County, WA</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Thresholds for adequacy:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Montgomery County, MD</strong></td>
</tr>
</tbody>
</table>
| Cluster - 120% capacity utilization  
School - 120% capacity utilization and 110 seat deficit for ES or 180 seat deficit for MS Program capacity |
| **Howard County, MD** |
| ES - 105% capacity utilization  
MS - 110% capacity utilization  
HS - 115% capacity utilization Program capacity |
| **Harford County, MD** |
| 110% capacity utilization or will hit 110% of capacity in three years State rated capacity |
| **Baltimore County, MD** |
| 115% capacity utilization State rated capacity |
School Impact Fees

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

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

* 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

- Forecast Rnd 9.1
- Estimate

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

38% population increase since 1990

2018: 1,052,600
1990: 765,500 +287,100

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

Population Change 1990-2016 by Census Tract

Population Change
- 4,000 or more
- 1,000 - 3,999
- 225 - 999
- No significant change
- Decrease

Roads and Transitways
- Major Highways
- MARC Line
- Metro Line
- Metro Stations

Population Density Change
1990-2016
by Census Tract

Population Density Change (people per sq.mi.)
- 2,000 or more
- 500 - 1,999
- 21 - 499
- No significant change
- Decrease

Roads and Transitways
- Major Highways
- MARC Line
- Metro Line
- Metro Stations

Source: 1990 Census and 2012-2016 American Community Survey 5-year estimates, 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)

- MCPS Enrollment
- Total Population

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

Number of People


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

STAT Meeting #1
Number of births at lowest point since 1999

Youthful people of color and aging white baby boomers

Race & Hispanic Origin by Age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Montgomery</th>
<th>White, not Hispanic</th>
<th>Hispanic</th>
<th>Black</th>
<th>Asian</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;18</td>
<td>23%</td>
<td>12%</td>
<td>17%</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>18-29</td>
<td>27%</td>
<td>30%</td>
<td>24%</td>
<td>22%</td>
<td>24%</td>
</tr>
<tr>
<td>30-44</td>
<td>20%</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>45-64</td>
<td>14%</td>
<td>12%</td>
<td>31%</td>
<td>25%</td>
<td>18%</td>
</tr>
<tr>
<td>65+</td>
<td>16%</td>
<td>22%</td>
<td>7%</td>
<td>11%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Median Age:
- Montgomery: 39.2
- White, not Hispanic: 47.2
- Hispanic: 31.3
- Black: 35.6
- Asian: 42.2

Source: U.S. Census Bureau, 2018 American Community Survey
Percent of Non-White Students by Cluster/Consortium, 2018 MCPS Student Enrollment
Percent of Black + Hispanic Students
by Cluster/Consortium, 2018 MCPS Student Enrollment

STAT Meeting #1
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

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

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

STAT Meeting #1
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.
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.

* 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


STAT Meeting #1
Consistently high-ranking median income in region

2018 Median Household Income

- Loudoun: $139,915
- Arlington: $122,394
- Fairfax: $122,227
- Howard: $116,984
- Montgomery: $108,188
- DC Metro Area: $102,180
- Alexandria: $101,215
- Frederick: $95,850
- District of Columbia: $85,203
- Maryland: $83,242
- Prince George's: $83,034
- United States: $61,937

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

2018 Household Income Distribution

- $200,000 or more: 22.0%
- $150,000 to $199,999: 12.0%
- $125,000 to $149,999: 8.9%
- $100,000 to $124,999: 11.3%
- $75,000 to $99,999: 12.2%
- $50,000 to $74,999: 12.4%
- $25,000 to $49,999: 11.7%
- Less than $25,000: 9.6%

More than one in five households have an 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 ES
2018 MCPS Student Enrollment

Cluster Boundaries
- 0% < Value ≤ 10%
- 10% < Value ≤ 20%
- 20% < Value ≤ 30%
- 30% < Value ≤ 40%
- 40% < Value ≤ 50%
- 50% < Value ≤ 60%
- 60% < Value ≤ 70%
- 70% < Value ≤ 80%
- 80% < Value ≤ 90%
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.
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

Growth of multifamily housing outpacing all other types of housing

Number of Housing Units by Type

- **TOTAL HOUSING UNITS**
  - 1990: 295,723
  - 2016: 390,563

- **10 or More Units**
  - 1990: 69,314
  - 2016: 107,663

- **2 to 9 units**
  - 1990: 20,137
  - 2016: 25,942

- **1-Unit, Attached**
  - 1990: 50,536
  - 2016: 73,799

- **1-Unit, Detached**
  - 1990: 153,872
  - 2016: 182,333


STAT Meeting #1
Housing Units Permitted, Forecasted, and Additional Needed

2007 – 2018 average: 2,500

Source: Census Bureau (data includes the municipalities of Rockville and Gaithersburg)
New Housing Unit Density (All Types), 1994-Current

Legend

- Major Highways and US Routes

New Unit Density (Since 1994)

- 0 - 50
- 50 - 250
- 250 - 500
- 500 - 1,000
- 1,000 - 2,000
- 2,000 - 3,000
- 3,000 - 4,000
- 4,000 - 5,000
- 5,000 - 6,000
- 6,000 - 7,000

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

Percentage Units without K12 Students (2018-2019):
Single Family Detached
- 45.08% - 50%
- 50.01% - 60%
- 60.01% - 75%
- 75.01% - 88.81%
- High School Boundaries

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

Enrollment Increase (+11.5%)
No Enrollment Change
Enrollment Decrease (-11.5%)

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

Source: MCPS
Heat Map of Student Residences
2018

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

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

Longest (14+ years)

Shortest (~5 years)

Source: SDAT
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 ¼ mile of a school
• Within ½ 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