

## ENROLLMENT DATA

### A. Basis For Student Enrollment Projections

#### **COUNTY POPULATION TRENDS**

The 2010 Census indicated that St. Mary's County had a total population of 105,151. This represents 1.8% of the total population in the state and ranks the county 12<sup>th</sup>. Within the Southern Maryland Region, St. Mary's County was in the middle with Charles County ranking 11<sup>th</sup> in the state with 146,551 people and Calvert County ranking 15<sup>th</sup> with 88,737 people. Since the 2010 Census, the county is estimated to have grown by 8,366 people or 8%, to a total population of 113,510 as of July 1, 2019. According to the annual Census Bureau estimates, approximately half of this growth was in the three years following the 2010 Census. Growth per year since then has averaged an increase of approximately 700 persons per year. In terms of how the county's growth since the 2010 Census compares to other jurisdictions in the state, the county is ranked 5<sup>th</sup> in the percentage rate of growth at 8%. The highest rate of growth was in Howard County with 13.4%, followed by Charles County at 11.4%. As a region, the Southern Maryland region has the highest percent of growth at 8.5%, with the Suburban Washington region next at 7.3%. This exceeds the 4.7% state growth rate in this time period by 3.8%. County growth patterns prior to this averaged a gain of 1,250 people per year in the 1970's, 1,607 people per year in the 1980's, 1,023 people per year in the 1990's, and 1,894 people per year in the 2000's. The 2020 Census is currently underway and will provide more accurate data than the annual estimates.

Date	Total Resident Population	Percent change from 2010 Census
July 1, 2010	105,761	0.58%
July 1, 2011	107,566	2.30%
July 1, 2012	108,800	3.47%
July 1, 2013	109,224	3.88%
July 1, 2014	109,913	4.53%
July 1, 2015	110,985	5.55%
July 1, 2016	111,750	6.28%
July 1, 2017	112,487	6.98%
July 1, 2018	112,720	7.20%
July 1, 2019	113,510	7.95%

As to how the components of growth since the 2010 Census break down, approximately 69% is attributed to natural increase (births minus deaths) and 31% can be attributed to migration (domestic and international). However, how these factors change annually are considered to be an indicator of the economy and a contributing factor to school enrollments. While the 2018 estimate indicated a loss in migration, the 2019 estimate showed an increase in an amount not seen since 2015. It is possible this shift may be indicative of a positive change in the economy that could lead to future changes in enrollment. A continued increase in migration would be a change in the pattern of recent years where natural increase has accounted for the majority of the annual population increase and fed the trend of increasing secondary enrollment as families remain in the area longer and age in place. It is unclear at this time what the current COVID-19 Pandemic and resulting economic impacts will be and how it will impact the county's economy and population. The greatest concentration of population remains in the 8<sup>th</sup> election district, which includes Lexington Park, California, and Great Mills. Accordingly, the California-Lexington Park region was classified as a Metropolitan Statistical Area (MSA) by the United States Census Bureau in March 2013. Significant concentrations of population are also found in district 3 (Leonardtown), district 4 (which includes Country Lakes and Wicomico Shores), district 5 (Charlotte Hall and Mechanicsville), and district 6 (which includes Hollywood). The county is expected to see continued growth in future years, with the

total population expected to reach 162,900 by 2045. However, the rate of growth will continue to be slower than the past and the projections have been revised downward to reflect this trend. This is indicative of a national trend according to the Census Bureau. St. Mary's County will remain the 12<sup>th</sup> most populous county in the state.

There are also other important demographic characteristics of the community to consider in analyzing population, including birth rate, population distribution by age, housing tenure, and household size. The birth rate fell again in 2018, with the actual total births totaling 1,324. Births are projected to slightly increase in 2019 and continue minimally each year moving forward. Similar to the birth rate, the population distribution by age can also be indicative of anticipated student enrollment. In the 2010 Census there were 23,215 persons age 5-19. The 2018 ACS estimates this age group to total 25,153. State projections indicate that this age group will total 25,299 in 2020. This represents 21% of the total population projected at that time. Historically this age group has been declining as a percentage of the total population, which supports the reduced enrollment growth rate. The lowest percentage this group is projected to represent is 19.8% in 2030. From that point forward it is projected to maintain at 20%. However, it should be noted that the state has not updated enrollment projections since August 2017. As to housing tenure, the ACS for 2018 reports 44.7% of the occupied housing units have been occupied since the 2010 Census. During the same time there has been a total increase in population from domestic and international migration of 2,616 or 2.3% of the current estimated total population. This indicates that a significant portion of the housing units occupied were occupied by existing residents as a result of natural growth. This lends support to the short term increased enrollment at the secondary level. Household size can also be a factor of anticipated enrollment. In the 2010 Census the average household size was 2.72. It is projected to steadily decline, reaching 2.60 by 2045. The 2018 ACS estimate of household size was 2.80 for owner occupied units and 2.43 for renter occupied units. Given the variance of this data from the anticipated trend, other causes must be considered, including the potential for economic conditions to result in the consolidation of families into fewer households.

### ***ECONOMIC TRENDS***

Projected growth is interrelated to the economy of the region. In 2009, the worst year of the Great Recession, when all other counties in the state lost jobs, St. Mary's County saw a modest increase in jobs, ranking it 1<sup>st</sup> in the state. Job gains have continued since that time, with a faster rate of growth in the earlier portion of this time period. The county has gained 4,917 jobs since 2010, an 8.5% increase. In 2018 the county saw a gain of 1,345 jobs or a 2.2% increase, for a total of 62,531 jobs. As a region, Southern Maryland ranks 4<sup>th</sup> in job gains since 2010, with a total of 14,374 new jobs representing a 9.6% increase. The largest job growth in the state since 2010 has been in the Baltimore region, with a gain of 220,269 jobs, followed closely by the Washington Suburban region, with a gain of 158,165 jobs. St. Mary's County is projected to be home to 83,050 jobs by 2045. The estimated per capita income for 2017 is \$54,921, ranking the county 14<sup>th</sup> in the state. In terms of percentage change, the per capita personal income for the county grew by 3% in 2017, approximately .5% less than both the state and national increase. Per capita personal income in the county is projected to reach \$64,913 by 2040.

Another factor of growth in the public schools is new housing construction. St. Mary's County had a fairly high number of building permits issued in the late 1980's. With the increased availability of new housing, especially in the northern areas of the county, migration to



St. Mary's County by those who were willing to commute to the metropolitan areas of employment was encouraged. The 1990 Census counted a total of 25,500 occupied dwelling units in St. Mary's County, with 70% being owner occupied. The 2010 Census indicated 37,600 occupied dwelling units, 72% of which were owner occupied. These rates have remained constant in the ACS' conducted since the 2010 Census, with the 2018 ACS indicating 71% of occupied units being occupied by owners.

The approval of new residential development has slowed in recent years due to the Great Recession, with the number of approved lots dropping from a high of 1,419 lots in 2007 to a low of 163 lots in 2011. There were 175 lots approved in 2019, 4 of which were in the Town of Leonardtown. During this downturn, new housing construction has continued as new homes have been built on the existing inventory of lots of record in accordance with the APFO. In the decade prior to 2008, residential building permits averaged 930 per year. Since that time, both building permits and occupancy permits have been significantly lower. For the past five years building permits have averaged around 400 units per year, while occupancy permits have averaged around 330 units per year. These numbers support a continued use of the inventory of existing lots albeit less than previously experienced. Residential sales data indicates a 2% increase in total sales in 2018, a substantial decrease from 13% in 2017.

In response to these changes in growth, the CSMC rescinded the 2008 annual growth policy in July 2016. As a result of the economic downturn after the policy was adopted in 2008, there has never been a time when the growth caps it established have been close to being reached. Should development conditions change, the policy could always be re-instituted. In addition, the CSMC has also been reviewing the cost of growth from residential development. In 2018 the CSMC approved a five-year phased increase of the impact fee with a tier system where the fee is based on the square footage of the dwelling. As noted previously, the methodology was modified for FY 2021.

### ***NON-PUBLIC SCHOOL ENROLLMENT***

To predict how the private school system(s) will impact the public schools in the future is very complex and subject to a variety of factors, including parental choice and economic conditions. The average percentage of non-public school enrollment over the past 20 years has been approximately 14%. During this time, the percentage has ranged as high as 22.73% in the late 1990's to a low of 11.23% in 2014. Some factors that have influenced these fluctuations have been a tuition increase in 2003 – 2004, the closure of a parochial school in 2009, the closure of a parochial school and re-opening as a private academy in 2015, and the closure of a long time Montessori school in 2016. In 2019, private school enrollment decreased by 89 students and currently represents 14.14% of total enrollment. The future of private school enrollment will depend on the economy and education policies.

In addition to private schools, there is also the option of home school programs. The total number of students enrolled in home school programs for the 2019-2020 school year is 1,175. Home school enrollment has been increasing in recent years, with it representing an average of approximately 975 students per year over the past five years. Both private school and home school enrollments will need to be closely monitored moving forward. The current

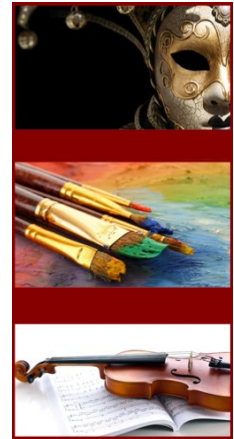
COVID-19 Pandemic and subsequent institution of online learning platforms may also impact this number in the future.

### **EDUCATIONAL PROGRAM FACTORS**

The county's first charter school opened in 2007 - 2008 with 162 students and was expanded in 2010 - 2011 to include 8th grade. In 2019 - 2020, the charter school had a total of 457 students. The school is currently undergoing an expansion into additional space. The capacity for the 2020-2021 school year will be 480, with plans to reach a capacity of 540 over the next three years. Charter schools could also be impacted by changes in education policies in the future.

In addition, the school system offers educational pathways including the STEM Academy at Lexington Park Elementary School, Spring Ridge Middle School, and Great Mills High School; the Gifted and Talented Program; the National Academy of Finance and Academy of Visual and Performing Arts at Chopticon High School; and the Academy of Global and International Studies at Leonardtown High School. The school system also offers the Fairlead Academy program, an alternative high school pathway and career and technology education programs at the JAFCTC.

All of these components play an integral role in predicting future enrollment. Further data on the components included in the basis for enrollment projections may be found in the charts and graphs contained in Appendix B.



### **B. Methodology Used in Making Enrollment Projections**

Student enrollment projections are completed twice a year. Fall projections for the upcoming ten school years are completed based on the official number of students enrolled on September 30th, as verified by the Maryland State Department of Education. The fall enrollment projections are utilized as part of the Superintendent's budget for the next fiscal year, as well as for providing demographic support for the upcoming State Capital Improvements Program. In the spring, MDP issues their ten-year projections. The fall set of projections are analyzed against the MDP projections and the enrollment trend for the current school year, and are updated to reflect any changes that are required. The school system must submit the spring set of projections to MDP for their approval for use in development of the Educational Facilities Master Plan. The school system must be within 5% of the system-wide MDP projections. The spring projections are also used to assist with staffing for the upcoming school year, development of short and long-range capital plans, and for final redistricting decisions, when required.

Both SMCPs and MDP calculate projections based on K-12th enrollment because PreK and Preschool Special Education are program eligibility based. The PreK and Preschool Special Education figures are added as a result of the official September 30th enrollment.

## Cohort Survival Ratio

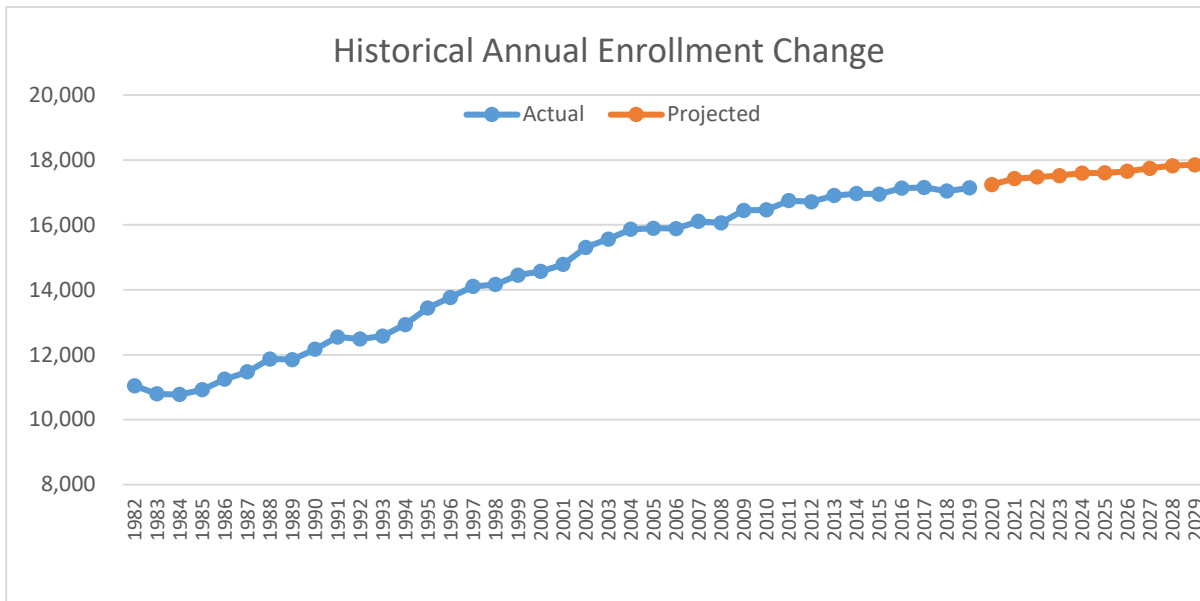
Most districts across the United States use the cohort survival (transition) ratio method as the basis for projecting enrollment. It captures the historic enrollment patterns of a cohort of students as they pass from one grade to the next. It is calculated by dividing the number of students in a particular grade by the number of students from the previous cohort in the previous school year. A cohort transition ratio greater than 100% means there are more students enrolling in a particular grade than there are students moving up a grade from the previous year. A cohort less than 100% means there are less students moving up a grade from the previous year. Since grade-specific transition ratios may vary considerably each year, SMCPS primarily utilizes historical data over a three to five-year period. Redistricting causes a change in the cohort transition ratios for schools and prior year data from other schools can be utilized to reflect the demographics of the student population being moved. The table below is an example of the cohort transition ratio:

	Cohort Survival Ratio Grade 2 to 3			
	September 30 <sup>th</sup> Enrollment		One-Year Average	Three-Year Average
	Grade 2	Grade 3		
2011	99	105	--	--
2012	101	98	0.989	--
2013	102	104	1.029	--
2014	93	99	0.970	0.996

The reliability of the cohort survival method for projections is based on the historical data of the students actually enrolled in a school and the transition of these students over time. The ratios can be changed drastically when an influx or reduction in students occurs in a short period of time as a result of natural disasters, realignment of personnel associated with the military base, or a change in the economy. Over the past 20 years, we have experienced these shifts in student enrollment as a result of the Base Realignment and Closure Acts and the economic downfall that resulted in the creation of multi-generational families living in one home. The industry standard is a +/- 2% annual deviation of the projection for growing systems. The average five-year deviation for SMCPS is -.5%.

School Year	Projected K-12 Enrollment	Actual K-12 Enrollment	Actual Deviation	Standard Allowable Deviation
2015-16	17,175	16,946	(229)	-1.3%
2016-17	17,019	17,128	109	.6%
2017-18	17,338	17,154	(184)	-1.1%
2018-19	17,243	17,043	(200)	-1.2%
2019-20	17,108	17,138	30	.2%

The chart titled “Historical Annual Enrollment Change” is based on the PreK – 12<sup>th</sup> grade enrollment from 1982 to 2019 and projected enrollment for 2020 to 2029. The chart reveals that there has been steady growth in the school system and that the trend will continue for the next ten years, however, at a slower rate than has been previously experienced. The school system has grown by 693 students over the past 10 years, which is a 4.2% increase. The ten year projections are for an additional 715 students or 4.2%, which will then total 17,853 students. For the past five years the entering Kindergarten cohort averaged 1,155 students, while the existing 12<sup>th</sup> grade cohort averaged 1,244 students. This fact highlights the growth that occurs within the school system after students enter school in Kindergarten.



Birth through 12 <sup>th</sup> Grade Retention						
Grade Level	Birth/12 <sup>th</sup> 1997-2014	Birth/12 <sup>th</sup> 1998-2015	Birth/12 <sup>th</sup> 1999-2016	Birth/12 <sup>th</sup> 2000-2017	Birth/12 <sup>th</sup> 2001-2018	Average
<b>Birth Rate</b>	1,207	1,115	1,212	1,095	1,147	1,155
<b>Kindergarten</b>	1,007	1,037	1,160	1,113	1,156	1,095
<b>1<sup>st</sup></b>	1,061	1,096	1,182	1,174	1,162	1,135
<b>2<sup>nd</sup></b>	1,104	1,099	1,215	1,201	1,187	1,161
<b>3<sup>rd</sup></b>	1,085	1,133	1,225	1,220	1,199	1,172
<b>4<sup>th</sup></b>	1,131	1,144	1,271	1,206	1,210	1,192
<b>5<sup>th</sup></b>	1,147	1,186	1,249	1,234	1,220	1,207
<b>6<sup>th</sup></b>	909	912	957	943	933	931
<b>7<sup>th</sup></b>	1,232	1,243	1,308	1,294	1,267	1,269
<b>8<sup>th</sup></b>	1,241	1,242	1,312	1,294	1,259	1,270
<b>9<sup>th</sup></b>	1,336	1,321	1,390	1,418	1,367	1,366
<b>10<sup>th</sup></b>	1,249	1,254	1,307	1,333	1,286	1,286
<b>11<sup>th</sup></b>	1,187	1,253	1,309	1,298	1,253	1,260
<b>12<sup>th</sup></b>	1,171	1,235	1,293	1,282	1,237	1,244

### C. Current Projections

The chart below is the ten-year projections for PreK-12 enrollment for school years 2020-21 through 2029-30, which show a continued increase in enrollment at all levels. The process of projecting student enrollment is a fluid process based on changes in growth patterns and resulting enrollment trends. The official enrollment on September 30, 2019 was 18,083 students in grades PS – 12th. This was an increase of 84 students from the previous year. The projection for September 30, 2020 is for an additional 107 students in grades K-12th. Both SMCPS and MDP calculate projections based on K-12th enrollment because PreK and Preschool Special Education are program eligibility based. The PreK and Preschool Special Education figures are added as a result of the official September 30th enrollment. The spring ten year enrollment projections have an average deviation of (2.32%) from the MDP projections.

Ten-Year Projections						
School Year	PreK	Elementary	Middle	High	K-12 Total	PreK-12 Total
2020-21	720	7,855	4,108	5,282	17,245	17,965
2021-22	720	7,899	4,056	5,471	17,426	18,146
2022-23	720	7,812	4,062	5,600	17,474	18,194
2023-24	720	7,897	4,059	5,563	17,519	18,239
2024-25	720	7,995	4,010	5,591	17,596	18,316
2025-26	720	8,061	3,983	5,557	17,601	18,321
2026-27	720	8,073	4,067	5,509	17,649	18,369
2027-28	720	8,126	4,135	5,483	17,744	18,464
2028-29	720	8,189	4,154	5,478	17,821	18,541
2029-30	720	8,190	4,136	5,527	17,853	18,573