ENROLLMENT DATA

A. Basis For Student Enrollment Projections

COUNTY POPULATION TRENDS

The 2020 Census indicated that St. Mary's County had a total population of 113,778. This represents 1.8% of the total population in the state and ranks the county 12th. Within the Southern Maryland Region, St. Mary's County was in the middle with Charles County ranking 10th in the state with 166,621 people and Calvert County ranking 15th with 92,789 people. Comparing the 2020 Census to the 2010 Census, the county has grown by 8.2% and ranks 7th in percentage growth in the state (See Chart 1 in Appendix B). It should be noted that an important area of growth within the county is in Leonardtown, the only incorporated town. The town of Leonardtown grew by 1,633 persons or 55.7% between 2010 and 2020. The county rate of growth measured in the 2020 Census is in general agreement with the percentage increase from the Census Bureau annual estimates as shown in the adjacent chart. However, this percentage growth ranks the county a little lower in comparison to other jurisdictions than was anticipated by the estimates. As a region, Southern Maryland ranked second in growth at 9.6%. The fastest growing region is the Washington Suburban Region with 11.2% growth. This region contains Frederick County, which is the fastest growing county at 16.4%. This is followed closely by Howard County with 15.8% and is a flipping of positions for the two fastest growing counties in the state. The county growth from 2010 to 2020 represents an average annual gain of 863 persons. 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. This slower rate of growth is in alignment with enrollment patterns and other demographic factors.

Annual Census Bureau Population Estimates		
Date	Total Resident Population	Percent change from Census
2010 Census	**105,151**	**N/A**
July 1, 2010	105,772	0.59%
July 1, 2011	107,589	2.32%
July 1, 2012	108,847	3.51%
July 1, 2013	109,284	3.93%
July 1, 2014	109,998	4.61%
July 1, 2015	111,092	5.65%
July 1, 2016	111,886	6.41%
July 1, 2017	112,627	7.11%
July 1, 2018	112,948	7.42%
July 1, 2019	113,764	8.19%
July 1, 2020	114,687	9.07%
2020 Census	**113,777**	**N/A**
July 1, 2020	114,006	0.20%
July 1, 2021	114,674	0.79%
July 1, 2022	115,001	1.07%
July 1, 2023	115,479	1.50%
July 1, 2024	116,469	2.37%

Looking at the annual estimates, it appears that the highest growth was in the early part of the ten year cycle and tapered off approaching 2020. This is generally in alignment with the annual estimates completed since the 2020 Census, with it being estimated that the county has grown by 2.4% or 2,692 persons since the April 1, 2020 Census count. The estimated total population of the county is 116,489 as of July 1, 2024. Regionally, Southern Maryland is the second fastest growing region in the state since the 2020 Census, with an estimated growth of 3.4%. The highest growing region is the Upper Eastern Shore at 3.5%, with the Lower Eastern Shore region at 2.7%. This is in contrast to the historic patterns of growth with the Baltimore and Suburban Washington regions leading the state in population growth (See Chart 4 in Appendix B). This shift in growth within the state is similar to the geographical population distributions seen nationally following the Covid-19 pandemic.

To break down the estimated growth in the Southern Maryland Region, at 2.4% St. Mary's County is slightly ahead of Calvert County at 2.3% and at approximately half of Charles County at 4.7%. The actual number of persons represented by the increase is 2,692. This growth is primarily the result of natural increase (births minus deaths), with it representing 59%. International migration represented 28% of the growth and domestic migration represented 10% of the growth. These percentages changed from the last estimated totals in that domestic migration has become positive rather than negative. This data is considered to be an indicator of the economy and a contributing factor to school enrollments. While growth in the neighboring counties is clearly from domestic migration, the growth in St. Mary's County is predominantly from natural increase. This growth pattern is in contrast to developing and projected enrollment trends that show secondary enrollment decreasing and elementary enrollment being the only student population sector that will grow over the projection period. It would be typical to see secondary enrollment increase with the majority of population growth attributable to natural increase, the expectation being that families age in place. During this very uncertain time in terms of the regional job market, looming federal education policy changes, and state and local financial concerns, it is expected that total enrollment will continue to be flat throughout and beyond the projection period. Staff will be monitoring and analyzing enrollment in terms of utilization of facilities and working to maximize efficiency of facilities during this time of flat growth, all while continuing to monitor development trends and other indicators so that the school system is prepared should conditions change and impact capacity needs.

The greatest concentration of population remains in the 8th election district, which includes Lexington Park, California, and Great Mills. Accordingly, the California-Lexington Park region is classified as a Metropolitan Statistical Area (MSA) by the United States Census Bureau. Significant concentrations of population are also found in district 6 (which includes Hollywood) and district 3 (which includes the Town of Leonardtown). The state population projections were revised downward in the Spring of 2025. The total county population is projected to be 116,730 in 2025 and to grow to 152,330 by 2050. This if down from the previous projection in December 2022 when the projection was for 122,230 total persons in 2025 and 159,520 by 2050. Southern Maryland is projected to be the fastest growing region in the state in these latest projections, with St. Mary's County slightly leading over Charles County in the projected percentage increase (See Chart 5 in Appendix B). However, as noted, the amount of population growth has continued to be reduced and this is reflected in projected school enrollments.

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. Birth data by month for 2022 is the most recent data available from the Maryland Department of Health Vital Statistics Administration. The total number of resident births was 1,441, which was up by 41 from 2021. While the birth rate projections issued by MDP were held rather than adjusted downward in 2023, they were decreased in each year of the projection period in 2024. The total births for 2029 is projected to be 1,430, which is less than the last year of actual data. Similar to 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. In the 2020 Census there were 23,713 persons age 5-19. This minimal increase is in alignment with what was experienced in actual student enrollment. The 2023 One Year American Community Survey (ACS) estimates this age group to total 22,220, which is below the 2020 Census. The ACS estimates support the flat birth rates and enrollment projections by the state and are validated by the actual reduced enrollment growth experienced in recent years.

While the state has issued new preliminary total population projections in the Spring of 2025, they have not been broken down by age group. However, based on the reduction in projected total population as well as births, a decrease in the school age population is to be expected as well. As to housing, the 2020 Census shows a total of 45,560 total housing units. This is an increase of 4,278 units or 10.4% from the 2010 Census. Of this total, 41,845 units or 91.8% are occupied and 3,715 or 8.2% are vacant. Of the 41,845 occupied units, 29,797 or 71.2% are owner occupied. The One Year ACS for 2023 reports a total of 46,644 housing units, an increase of 163 units over 2022. 92.7% of these units are estimated to be occupied. Of the total estimated 46,644 units, approximately 33% have been constructed since 2000. This is in line with the predominant increase in population coming from natural growth, but again doesn't explain the decrease in secondary enrollment. Household size can also be a factor in projecting enrollment. In the 2020 Census the average household size was 2.66. This is down from the 2010 average household size of 2.72. Household size is projected to steadily decline, reaching 2.62 by 2045. The 2023 One Year ACS estimate of household size was 2.73 for owner occupied units and 2.29 for renter occupied units. The larger 2023 household size for owner occupied units may indicate the consolidation of families into fewer households for any number of reasons including cost and availability of housing in the county. All of these demographic factors must be closely monitored for any indications of a change in growth and consequently potential enrollment patterns.

ECONOMIC TRENDS

Projected growth is interrelated to the economy of the region. The county has had annual job gains since 2012. Per the Maryland Department of Planning, the county gained 8,485 jobs between 2012 and 2022 equating to a 14.5% increase. This ranks the county 11th in the state in the number of jobs gained and 10th in the state in percentage change of jobs, with a total of 66,988 jobs in 2022. This compares to 13% at the state level and 18.7% at the national level over the same time period. As a region, Southern Maryland ranks 3rd in the total number of job gains and 1st in the percentage change at 15.7%. The region is led by Charles County, which was ranked 2nd in percentage change in the state. The largest job growth in the state since 2012 has been in the Baltimore region, with a gain of 217,900 jobs, led by Anne Arundel and Howard counties with 18.6% and 15.1% growth respectively. The county per capita income (PCI) for 2022 is $66,146, ranking it 11th in the state. This is a 1.6% increase from 2021. This compares to a PCI of $70,228 for the state and $65,470 for the nation. The county's PCI growth over the past ten years has been strongest from the mid to late period, however, in 2022 the increase was much more modest. This lower amount of annual increase in 2022 was consistent in the region, with Calvert actually decreasing. Over the past ten years, the county's PCI grew by $16,876 or 34.25%. This is higher than both of the other two counties in the region, with Calvert County only increasing by 8.55% of the time period. While there is no updated economic available from the Maryland State Data Center, the U.S. Bureau of Economic Analysis (BEA) lists the 2023 county PCI at $70,353. Regionally, this compares to $76,018 in Calvert County and $66,642 in Charles County. The state 2023 PCI is $75,391. While the number of jobs can be a more direct factor in enrollment, the PCI can impact enrollment indirectly by impacting the ability to choose options other than public school. As of November 2023, county employment data is no longer available from the BEA due to budget constraints. The most recent state projections in 2022 show the county will have 74,000 jobs by 2040.

Another factor of growth in the public schools is new housing construction. St. Mary's County had a 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. The 2020 Census counted a total of 41,845 occupied dwelling units, with 71% being owner occupied and confirming the ownership rate remains constant. As of the 2023 One Year ACS the estimated total number of housing units is 46,644.

The approval of new residential development remained slow in the years following the Great Recession, with the number of recorded lots dropping from a high of 1,419 lots in 2007 to a low of 46 lots in both 2020 and 2021. In 2023 there were 63 lots recorded and in 2024 there were 59 lots recorded within the unincorporated county. While there were no new lots recorded with the town of Leonardtown in 2022 or 2023, buildout of recently approved developments continues. The largest project is The Meadows at Town Run II which is currently under construction. This project includes an additional 303 units within the town, including 12 single family homes, 147 townhouses, and 144 apartments. The first phase of construction consisted of the construction of the main road through the property. Phase 2 which includes 74 townhouses has been approved. There have also been several recent submissions for new residential development projects within the county. One of these includes the buildout of an approved planned unit development containing 1,084 residential units. While enrollment is down and sufficient school capacity exists at this time, the increase in project reviews should continue to be monitored for impacts to school capacity. While new lot recordation rates have been down in recent years, 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 237 units per year, while occupancy permits have averaged 200 units per year. While occupancy permits went up marginally in 2024, there was a drop in building permits. These indicators support the projection of overall flat enrollment over the next several years. While adequate public facilities is determined at final approval of a development project, there is a time delay between that and the occupancy of the new units, which is why all aspects of the development process need to be monitored for the generation of capacity needs so that proper planning can be completed; however, capacity the need for additional capacity is not projected at this time.

Per MDP, while residential home sales in the county had averaged just above 1,500 units per year between 2016 and 2020, sales jumped to approximately 2,300 units in 2021 which was a 400 unit increase over the previous year. This level was not sustained however, dropping to 1,700 in 2022 and dropping further in 2023 to just over 1,200. Approximately 79% of the sales were attributable to detached single family homes. The median sale value in 2023 was $390,000 which is up $25,000 from 2022. This is a little lower than the statewide median price of $400,000 and also lower than the median price in Calvert and Charles counties, which were $425,000 and $415,000 respectively. According to the Southern Maryland Association of Realtors data for March 2025, the number of home sales in the county is down 17.2% from a

year ago and the average sold price is up 16.24% at $490,683. Sales are down but less so in Calvert County where sales are down by 12.5% compared to a year ago. However, sales are up by 8.19% in Charles County compared to a year ago. Home prices continue to be cheaper in St. Mary's but by less of a margin than last year, with the average sold price in Calvert County being $526,228 and $494,414 in Charles County. Per the Maryland Realtors, statewide home sales fell by 10% in March 2025 average price rose by 3.2% to $488,315. Home sales data is yet another way to monitor growth in the community.

In response to previous years of slow 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 was never a time when the growth caps it established were close to being reached. However, should development conditions change, and public facilities needs dictate, the policy could be re-instituted. The CSMC implemented a new excise tax in July 2023. This new tax replaces the former impact fee and applies to both residential and commercial development. It includes assessments for parks, roads, public schools, and public safety. There is not enough data at this time to determine the impacts of the new tax, but this will need to be monitored for any consequences it may have on housing and resulting student enrollment. The Town of Leonardtown rescinded their impact fee and is developing a process for the collection of fees within the town.

NON-PUBLIC SCHOOL ENROLLMENT

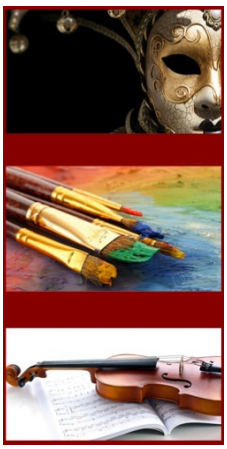
As of September 2024, per the Maryland State Department of Education (MSDE) Nonpublic School Enrollment student publication, there are 35 non-public schools in the county with a total enrollment of 3,017 students. Private school enrollment in the county has averaged approximately 14% over the past twenty years, from a high of 16.97% in the mid 2000's to a low of 11.23% in 2014. The 2024-2025 enrollments depict an increase of 278 over the previous school year. Factors that have influenced fluctuations in private school enrollment include tuition increases, closures of longtime parochial and Montessori schools, the opening of new schools/academies, and the protocols for the COVID-19 Pandemic. The majority of nonpublic school enrollment is within two large private schools, followed by mid range long-standing church affiliated schools. The remainder of the enrollment is made up of smaller preschool/daycare facilities and Amish/Mennonite schools. Nonpublic school enrollment will be closely monitored moving forward as legislation is being put forth at the federal level to facilitate school choice.

In addition to private schools, there is also the option of home school programs. This option has been utilized by more students in recent years, even prior to the COVID-19 Pandemic. The preliminary total number of students enrolled in home school programs for the 2024-2025 school year is 1,470. The average home school enrollment over the past five years has been approximately 1,300 students per year. There is a total student enrollment of 20,987 in the county, with 16,861 or 80% attending SMCPS school facilities.

SMCPS returned to full in-person learning for the 2021-2022 school year and implemented an all virtual academy beginning in the 2021-2022 school year. Beginning in the 2023-2024 school year the virtual academy is only available to students in grades 9-12. For the 2025-2026 school year the virtual academy will be moved to a relocatable unit on the campus of Leonardtown High School. The facility the virtual academy was housed in was leased from the county and will be returned to the county.

EDUCATIONAL PROGRAM FACTORS

The county's first charter school opened in 2007-2008 with 162 students. The school underwent several years of expansion to accommodate the projected increase in students. In the 2023-2024 school year the school reached a total enrollment of 540 students. Enrollment in the charter school is determined by a lottery process.



In addition, the school system offers educational pathways including the Science, Technology, Engineering, and Math (STEM) Academy at 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 Virtual Academy continues as an option for students in grades 9-12. The STEM program will continue to be offered at all elementary schools. In addition, all three high schools offer a Freshman Academy program. The Fairlead Academy program which was located adjacent to the Dr. James A. Forrest Career and Technology Center and served grades 10-12 was discontinued in the 2024-2025 school year. At the time of this publication, there are plans to review facility utilization in the entire system which may result in changes to these educational pathways in the future.

In summary, 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 MSDE. 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 EFMP. 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 (PSSE) are program eligibility based. The PreK and PSSE figures are added as a result of the official September 30th enrollment.

SMCPS is expected to continue PreK expansion as part of the implementation of Blueprint, with the level of that expansion depending on Blueprint funding and/or other funding streams. The expectation is that all four year olds up to 600% of the federal poverty level will be

served in the next few years, with that being expanded to three year olds in the future. While SMCPS has asked childcare providers to participate, at this time MSDE has no interested or eligible childcare providers participating in the Blueprint.

Cohort Survival Ratio

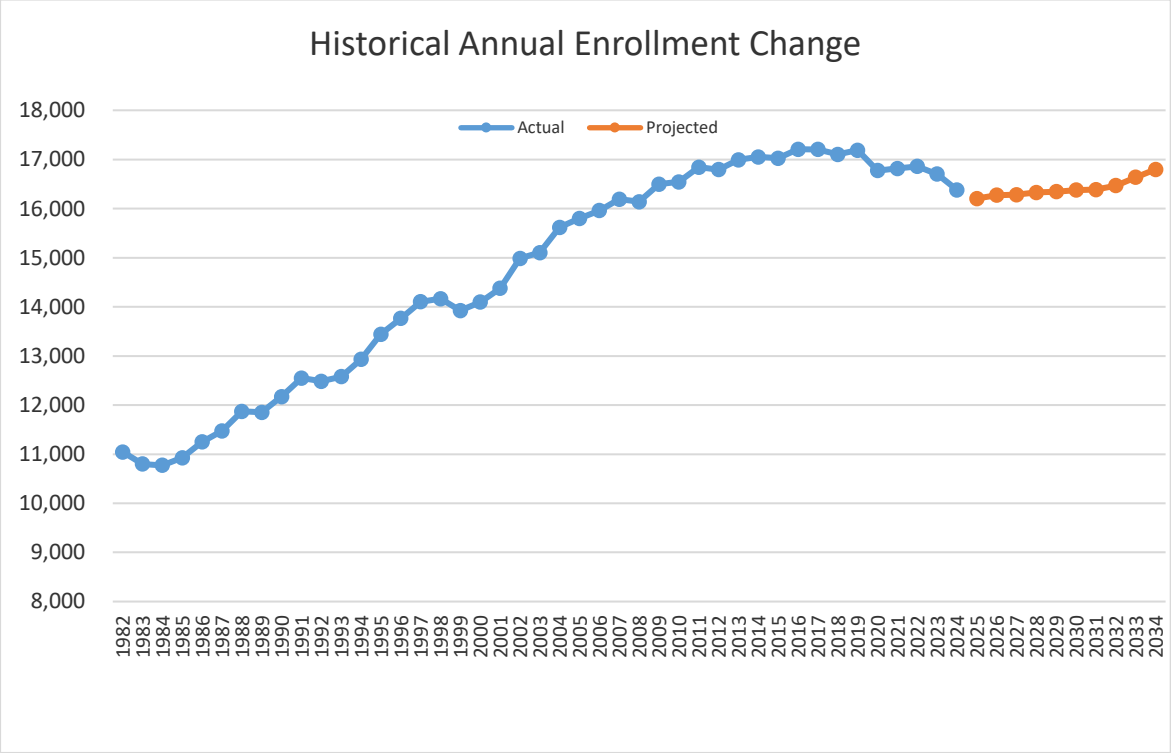
Most districts across the United States use the cohort survival (transition) ratio method as the basis for projecting enrollment. It captures the historic enrollment patterns of a cohort of students as they pass from one grade to the next. It is calculated by dividing the number of students in a particular 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:

	September 30th Enrollment		Cohort Survival Ratio Grade 2 to 3	
	Grade 2	Grade 3	One-Year Average	Three-Year Average
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 plus years, we have experienced these shifts in student enrollment as a result of the Base Realignment and Closure Acts, the Great Recession of 2008, and the COVID-19 Pandemic. The industry standard is a +/- 2% annual deviation of the projection for growing systems. The average five-year deviation for SMCPS is -1.9%.

School Year	Projected K-12 Enrollment	Actual K-12 Enrollment	Actual Deviation		Standard Allowable Deviation	
2020-21	17,245	16,777	(468)	-2.7%	345	2%
2021-22	17,267	16,819	(449)	-2.6%	345	2%
2022-23	16,909	16,860	(49)	-0.3%	338	2%
2023-24	16,948	16,706	(242)	-1.4%	339	2%
2024-25	16,836	16,382	(454)	-2.7%	337	2%

The chart titled “Historical Annual Enrollment Change” is based on the K – 12th grade enrollment from 1982 to 2024 and projected enrollment for 2025 to 2034. The chart reveals that there was steady growth up until 2016, at which time enrollment became flat. Enrollment dropped by just over 400 students in 2020 attributed to the COVID-19 Pandemic. While enrollment has increased slightly in a couple of years since then, it remains below pre-pandemic levels and while it will increase, it is not projected to exceed pre-pandemic levels during the projection period ending in 2034. The ten year projections are for an additional 418 students or approximately 2.5% which will then total 16,800 students. For the past five years the entering Kindergarten cohort averaged 1,423 students, while the existing 12th grade cohort averaged 1,226 students. This correlates with the flat growth experienced since 2016 and enrollment losses since that time and will change when enrollment increases.



Birth through 12th Grade Retention						
Grade Level	Birth/12th 2003-2020	Birth/12th 2004-2021	Birth/12th 2005-2022	Birth/12th 2006-2023	Birth/12th 2007-2024	Average
Birth Rate	1,351	1,384	1,439	1,443	1,498	1,423
Kindergarten	1,143	1,162	1,143	1,133	1,103	1,145
1st	1,224	1,248	1,232	1,190	1,152	1,224
2nd	1,218	1,233	1,286	1,252	1,210	1,247
3rd	1,237	1,240	1,254	1,326	1,242	1,264
4th	1,264	1,227	1,267	1,260	1,298	1,255
5th	1,314	1,279	1,256	1,276	1,271	1,281
6th	1,294	1,312	1,279	1,250	1,252	1,284
7th	1,363	1,306	1,317	1,296	1,224	1,321
8th	1,419	1,376	1,326	1,282	1,289	1,351
9th	1,456	1,650	1,547	1,519	1,430	1,543
10th	1,375	1,313	1,468	1,411	1,355	1,392
11th	1,157	1,242	1,211	1,329	1,237	1,235
12th	1,260	1,187	1,274	1,182	1,319	1,226

C. Current Projections

The chart below is the ten-year projections for PreK-12 enrollment for school years 2025-26 through 2034-35. The projecting of student enrollment is a fluid process based on changes in growth patterns and resulting enrollment trends. The official enrollment on September 30, 2024 was 16,913 students in grades PS – 12th, which is a decrease of 343 from the previous year. The projection for September 30, 2025 is for a decrease of 175 students in grades K-12th. Both SMCPS and MDP calculate projections based on K-12th enrollment because PreK and PSSE are program eligibility based. The PreK and PSSE figures are added as a result of the official September 30th enrollment. The spring ten year enrollment projections have an average deviation of -1.68% from the MDP projections. Enrollment is projected to remain flat for the majority of the projection period and may be close to reaching pre-pandemic levels by the end of the projection period. The impacts of the federal workforce reductions will need to be monitored for future impacts to the enrollment projections.

Ten-Year Projections

School Year	PreK	Elementary	Middle	High	K-12 Total	PreK-12 Total
2025-26	420	7,752	3,760	5,115	16,207	16,627
2026-27	420	7,750	3,870	5,073	16,273	16,693
2027-28	420	7,819	3,817	5,067	16,283	16,703
2028-29	420	7,894	3,755	5,100	16,329	16,749
2029-30	420	8,010	3,662	5,094	16,346	16,766
2030-31	420	8,105	3,661	5,034	16,380	16,800
2031-32	420	8,159	3,709	4,942	16,390	16,810
2032-33	420	8,207	3,796	4,888	16,471	16,891
2033-34	420	8,253	3,862	4,944	16,639	17,059
2034-35	420	8,296	3,889	5,035	16,800	17,220