
RESIDENTIAL DEVELOPMENT RESEARCH REPORT

FALL 2021

PREPARED FOR:
ELIZABETHTOWN AREA SCHOOL DISTRICT

PREPARED BY:
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Enrollment Impact Specialists

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ELIZABETHTOWN AREA SCHOOL DISTRICT

EXECUTIVE SUMMARY

NEW RESIDENTIAL DEVELOPMENT – FALL 2021

DecisionInsite is pleased to present this report of findings to the Elizabethtown Area School District. Based on information collected from the local planning department(s) and developer(s) as of January 2021, it is anticipated that the district could potentially experience the construction and occupation of 1,514 new dwelling units over the next 10 years. This total unit count includes 633 Single Family Detached units, 497 Single Family Attached units, and 384 Multifamily units.

STUDENT GENERATION RATE ASSUMPTIONS

The student generation rates applied to these projections are DecisionInsite's default rates, which have been prepared based on a comprehensive review of recently-constructed dwelling units with similar characteristics. The total across all grade ranges for the district (K-12), is 0.52 for Single Family Detached units, 0.37 for Single Family Attached units, and 0.30 for Multifamily units.

ANTICIPATED IMPACT OF NEW RESIDENTIAL DEVELOPMENT

Both a Moderate and Conservative Dwelling Unit ("DU") Scenario have been generated for the district. The 10-year projection of K-12 students generated by proposed new residential development for the Moderate and Conservative DU Scenarios are shown in the tables below. The "Annual" row projects the number of students new to the district from these units, in a given year. The "Aggregate" row projects the accumulated increase in students served by the district through the year indicated.

Students Generated by Residential Development (Moderate DU Scenario)										
	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Aggregate		135	302	396	420	502	591	683	710	719
Annual	27	109	172	108	50	111	118	125	68	57

Students Generated by Residential Development (Conservative DU Scenario)										
	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Aggregate		89	211	311	376	437	488	536	584	631
Annual	18	72	126	109	84	86	78	78	81	84

MORE INFORMATION

A richer and more comprehensive review is contained in the Residential Development Research Report accompanying this Executive Summary. A wealth of more detailed information and analysis is also quickly and easily accessible online.

Respectfully Prepared and Submitted by:

The **DecisionInsite** Team

January 29, 2021

ELIZABETHTOWN AREA SCHOOL DISTRICT

RESIDENTIAL DEVELOPMENT RESEARCH METHODOLOGY AND DATA

RESEARCH METHODOLOGY

The DecisionInsite residential research team works with the school district's local planning department(s) to compile a list of all active residential development projects within the district. When putting together this list of projects, we include only active, non-senior residential projects larger than 10 units. We believe this to be the most efficient way to build a picture of the district's future residential changes, since smaller projects would generally have a negligible impact on the district. These active projects would include developments either currently under construction, those with active entitlements, or any proposed future projects.

We then follow up with developers to gather as much information as possible on the project's unit type(s), planned build-out unit counts, construction schedules, etc. From these data, we create two scenarios. The Moderate DU Scenario is directly based on information provided by the planning departments and developers regarding anticipated construction schedules and unit occupancies. The Conservative DU Scenario is derived from the Moderate's by assuming occupancies will occur over a longer period. Because of this, the unit totals in the Conservative DU Scenario may be less than those of the Moderate DU Scenario if they are pushed out beyond the next 10 years. Similarly, because of these adjustments, in any given year it may also be possible for the annual number totals of the Conservative DU Scenario to exceed those of the Moderate DU Scenario.

DWELLING UNIT TYPES

New dwelling units are categorized into the following three (3) housing types:

- **Single Family Detached ("SFD")** – Units are stand-alone structures on their own lot with a unique Assessor's parcel number.
- **Single Family Attached ("SFA")** – Units share common walls, usually on both sides of the property, where each is assigned a unique Assessor's parcel number (e.g., townhomes, condominiums, duplexes).
- **Multifamily ("MF")** – Units share common walls in a building or structure designed to house several families in separate housing units. All units are on the same lot with one Assessor's parcel number (e.g., apartments).

ACTIVE RESIDENTIAL DEVELOPMENT PROJECTS WITHIN THE DISTRICT

Based on information collected from the local planning department(s) and developer(s) as of January 2021, it is anticipated that the district could potentially experience the construction and occupation of 1,514 new dwelling units over the next 10 years. The total unit count included in the Moderate DU Scenario is broken out as shown in the table below. Note that the extended phasing period applied to the Conservative DU Scenario results in the total number of new dwelling units being less than originally anticipated.

New Dwelling Units by Unit Type	
Unit Type	# of Units
Single Family Detached	633
Single Family Attached	497
Multifamily	384
Totals:	1,514

FIGURE 1

The two tables below provide the project name, unit type, and anticipated occupancy data for all active, non-senior residential development projects greater than 10 units planned to be occupied over the next 10 years.

This table shows the Moderate DU Scenario which is directly based on information provided by the planning departments and developers regarding anticipated construction schedules and unit occupancies.

Proposed Dwelling Units within the Elizabethtown Area School District (Moderate DU Scenario)												
Project Name	Unit Type	Unit										Total
		2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
Bishop Woods	SFD	7	7	7	7	4	0	0	0	0	0	32
Campus Rd	SFD	0	0	0	0	0	65	65	66	0	0	196
Campus Rd	MF	0	0	0	0	0	95	95	96	0	0	286
Conroy Crossing	SFA	20	20	0	0	0	0	0	0	0	0	40
Featherton Crossing	SFA	7	7	0	0	0	0	0	0	0	0	14
Morris Run	SFA	0	18	0	0	0	0	0	0	0	0	18
Morris Run	MF	0	18	0	0	0	0	0	0	0	0	18
Raffensperger	SFD	0	44	44	0	0	0	0	0	0	0	88
Sheaffer Rd Development	SFA	0	0	150	147	0	0	0	0	0	0	297
Sheaffer Rd Development	MF	0	0	80	0	0	0	0	0	0	0	80
Stoneybrook	SFD	25	25	25	25	25	25	25	25	24	0	224
Westbrook IV	SFA	0	50	50	28	0	0	0	0	0	0	128
Westbrook IV	SFD	0	50	43	0	0	0	0	0	0	0	93
Totals:		59	239	399	207	29	185	185	187	24	0	1514

FIGURE 2

This table shows the Conservative DU Scenario which is derived from the Moderate's by assuming occupancies will occur over a longer period. Note that because of this extended phasing period the total number of new dwelling units is less in the Conservative DU Scenario than in the Moderate DU Scenario.

Proposed Dwelling Units within the Elizabethtown Area School District (Conservative DU Scenario)												
Project Name	Unit Type	Year										Total
		2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	
Bishop Woods	SFD	5	5	5	4	4	4	5	0	0	0	32
Campus Rd	SFD	0	0	0	0	0	39	33	33	33	33	171
Campus Rd	MF	0	0	0	0	0	57	48	48	48	48	249
Conroy Crossing	SFA	13	13	13	1	0	0	0	0	0	0	40
Featherton Crossing	SFA	5	5	4	0	0	0	0	0	0	0	14
Morris Run	SFA	0	12	6	0	0	0	0	0	0	0	18
Morris Run	MF	0	12	6	0	0	0	0	0	0	0	18
Raffensperger	SFD	0	29	29	26	4	0	0	0	0	0	88
Sheaffer Rd Development	SFA	0	0	98	90	90	19	0	0	0	0	297
Sheaffer Rd Development	MF	0	0	52	28	0	0	0	0	0	0	80
Stoneybrook	SFD	16	16	16	15	15	15	13	13	13	13	145
Westbrook IV	SFA	0	33	33	31	31	0	0	0	0	0	128
Westbrook IV	SFD	0	33	33	27	0	0	0	0	0	0	93
Totals:		39	158	295	222	144	134	99	94	94	94	1373

FIGURE 3

The graph below shows the anticipated occupancy data accumulated by year for all active, non-senior residential development projects greater than 10 units planned to be occupied over the next 10 years.

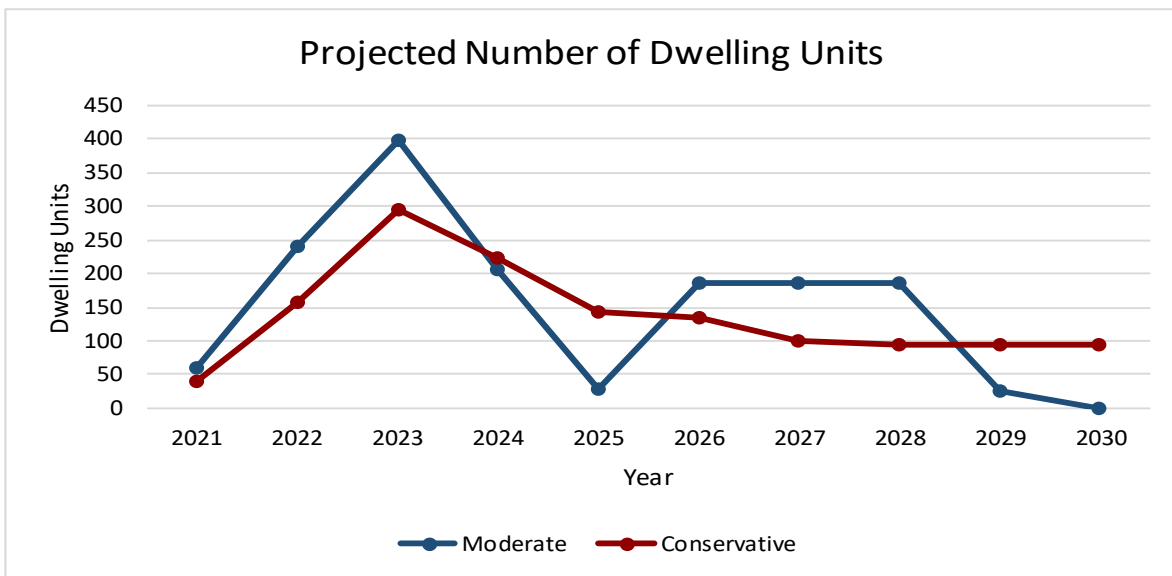


FIGURE 4

The locations of each of these future residential development projects is shown in the map below. Please note that the exact location of these new development projects may be refined as additional information is made available.

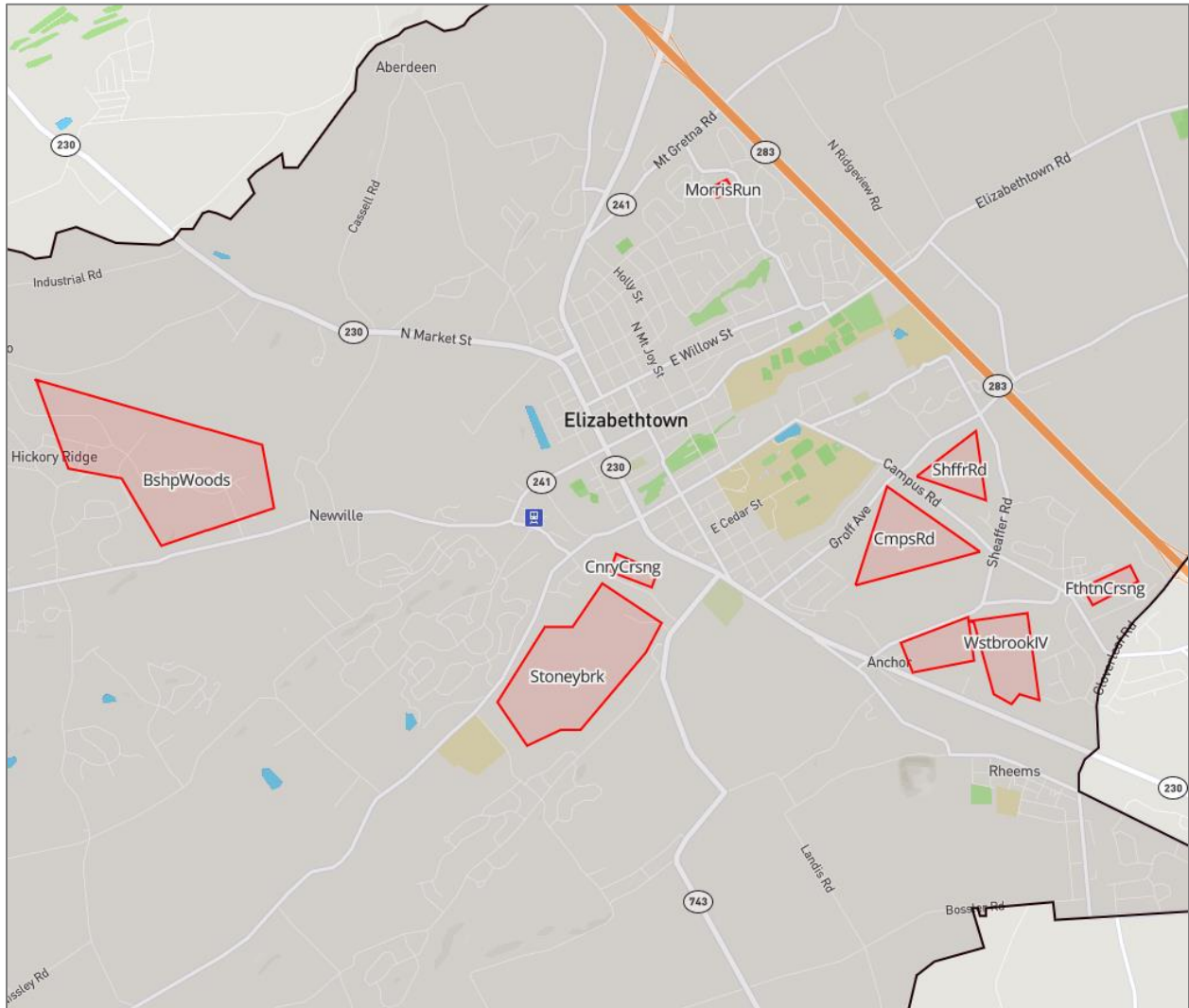


FIGURE 5

STUDENT GENERATION RATE ASSUMPTIONS

Student generation rates are determined for each dwelling unit type for each school level (elementary, middle, and high where applicable). The student generation rates applied to these projections are DecisionInsite's default rates, which have been prepared based on a comprehensive review of recently-constructed dwelling units with similar characteristics. The table below shows the student generation rate assumptions by unit type. Although these student generation rates are broken out by a K-6, 7-8, 9-12 grade configuration, the calculated student impact from new development within the enrollment projection studies will be aligned with each school's defined grade configurations.

Student Generation Rates by Unit Type & School Level			
School Level	SFD Units	SFA Units	MF Units
Elementary School (K-6)	0.33	0.23	0.15
Middle School (7-8)	0.05	0.05	0.05
High School (9-12)	0.14	0.09	0.10
Totals:	0.52	0.37	0.30

FIGURE 6

Typically, the Conservative rates are calculated as a slight adjustment down from the Moderate rates to anticipate a diminution in family size over an extended period. A full list of the student generation rates applied over the next 10 years within the Moderate and Conservative DU Scenarios is shown in Appendix A.

PROJECTED STUDENTS FROM NEW RESIDENTIAL DEVELOPMENT

To calculate the projected student enrollment from the new residential development planned within the district, the number of each unit type was multiplied by the appropriate student generation rates for each of the next 10 years. The geographical location of each project is utilized to calculate the student impact by studyblock, which ultimately determines which schools we would anticipate being impacted. For each school level, students generated by new residential development are distributed across grade levels. These percentages are based on historical patterns where they exist; otherwise, default percentages are used. Furthermore, student matriculation is considered to accurately model the student impact over the enrollment projections studies' 10-year timeframe. The results of these operations for the Moderate and Conservative DU Scenarios are shown in the tables below.

Projected Students from New Residential Development (Moderate DU Scenario)										
Grade	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
K	3	12	27	35	36	43	49	56	57	57
1	3	14	29	36	36	44	50	57	57	57
2	3	13	29	37	37	43	51	57	58	57
3	3	13	28	37	39	44	50	57	58	58
4	2	12	26	35	38	45	50	56	58	58
5	2	10	23	32	36	44	50	55	57	58
6	2	9	21	29	33	41	48	55	56	57
7	2	8	20	27	30	38	46	54	56	56
8	1	7	17	25	27	34	43	50	54	56
9	2	10	20	23	26	34	41	49	51	54
10	2	10	23	26	25	33	41	47	50	51
11	2	10	23	29	27	31	39	47	48	50
12	1	5	15	25	29	29	34	42	48	48
Elementary:	17	84	184	241	256	303	348	393	403	403
Middle:	3	15	38	52	57	72	89	104	110	112
High:	7	36	80	103	107	127	154	186	198	204
Total:	27	135	302	396	420	502	591	683	710	719

FIGURE 7

Projected Students from New Residential Development (Conservative DU Scenario)										
Grade	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
K	2	8	19	27	33	37	41	44	47	50
1	2	9	20	28	33	38	41	44	48	51
2	2	9	21	29	34	38	42	45	48	51
3	2	8	20	29	34	39	42	45	48	51
4	2	8	18	27	34	39	42	45	48	51
5	1	7	16	25	32	38	42	45	47	50
6	1	6	15	22	29	35	40	44	47	50
7	1	6	14	21	26	33	38	43	47	49
8	1	5	12	19	24	29	35	40	45	49
9	1	6	14	19	23	29	33	38	43	48
10	1	7	16	21	24	28	32	36	41	46
11	1	7	16	23	25	28	32	35	39	44
12	0	3	10	19	24	27	29	33	37	41
Elementary:	11	55	129	188	228	263	289	311	332	354
Middle:	2	10	26	40	50	62	72	83	91	98
High:	5	23	56	82	97	112	126	142	160	179
Total:	18	89	211	311	376	437	488	536	584	631

FIGURE 8

The graph below shows the projected student enrollment from the new residential development within the Moderate and Conservative DU Scenarios. More detailed information on the projected numbers of students generated by project and by studyblock can be accessed online.

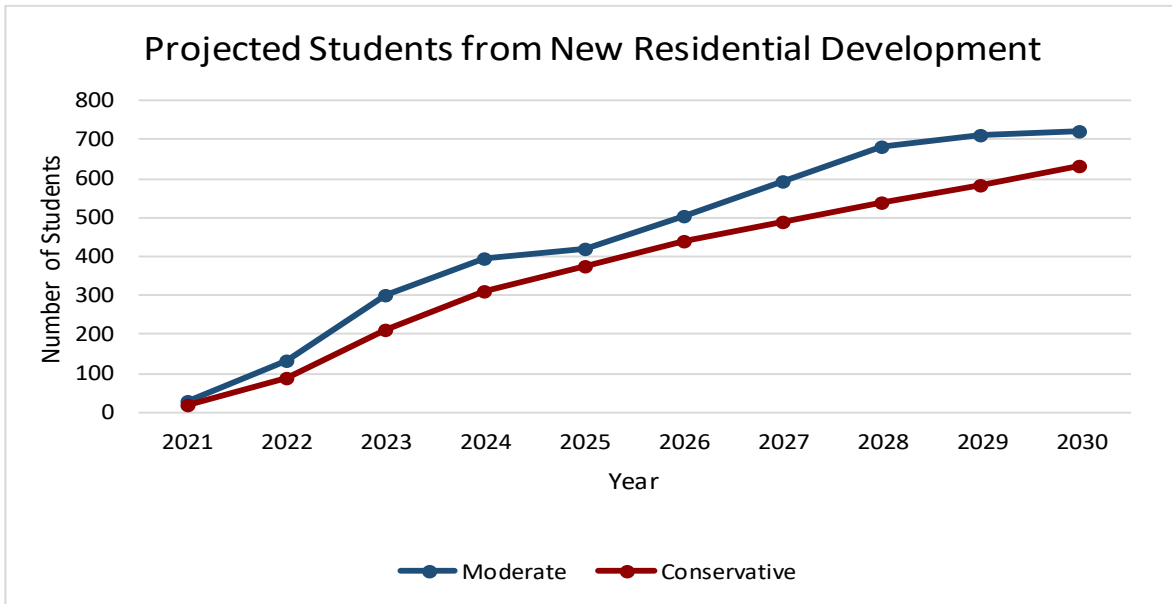


FIGURE 9

ANALYZING/STUDYING/REVIEWING THE RESIDENTIAL DEVELOPMENT RESEARCH REPORT

The projections of district and school enrollment are based on a complex mix of historical data, recent trends, and specific assumptions regarding the future, including new residential development as outlined in this report. At DecisionInsite, we strongly encourage our clients to actively engage with the data with the aim of better understanding, further refining, and using the results to inform decisions about to be made. We believe increased effectiveness for both the district and DecisionInsite comes with increased and welcome dialogue.

Graphs or tables may be copied from the PDF version of this document using the Snapshot Tool inside PDF Reader.

Please do not hesitate to contact DecisionInsite regarding any questions or suggestions that may arise regarding this report.

Respectfully Prepared and Submitted by:

The **DecisionInsite** Team

January 25, 2021

APPENDIX A

STUDENT GENERATION RATE ASSUMPTIONS

Student Generation Rates (Moderate DU Scenario)											
Unit Type	School Level	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
SFD	Elementary	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33	0.33
SFD	Middle	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05
SFD	High	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14
SFA	Elementary	0.23	0.23	0.23	0.23	0.23	0.23	0.23	0.23	0.23	0.23
SFA	Middle	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05
SFA	High	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09
MF	Elementary	0.15	0.15	0.15	0.15	0.15	0.15	0.15	0.15	0.15	0.15
MF	Middle	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05
MF	High	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10

Student Generation Rates (Conservative DU Scenario)											
Unit Type	School Level	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
SFD	Elementary	0.33	0.33	0.33	0.32	0.32	0.32	0.32	0.32	0.32	0.31
SFD	Middle	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05
SFD	High	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.13	0.13	0.13
SFA	Elementary	0.23	0.23	0.23	0.23	0.23	0.22	0.22	0.22	0.22	0.22
SFA	Middle	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05
SFA	High	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09
MF	Elementary	0.15	0.15	0.15	0.15	0.15	0.15	0.15	0.14	0.14	0.14
MF	Middle	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05	0.05
MF	High	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10	0.10