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 113,775. 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 166,617 people and Calvert County ranking 15th with 92,783 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. 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 is in 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.

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	**113,775**	**N/A**
July 1, 2020	113,987	0.18%
July 1, 2021	114,664	0.78%
July 1, 2022	114,877	0.97%

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. 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 in alignment with the annual estimates completed since the 2020 Census, with it being estimated that the county has grown by .97% or 1,102 persons since the April 1, 2020 Census count. The 2020 Census data is continuing to be released. At this time only the apportionment and redistricting data has been issued. The first round of the demographics and housing characteristics data is due to be released at the end of May 2023.

Until further 2020 Census data is released, the annual estimates since the 2020 Census and American Community Survey (ACS) data is utilized to analyze population and housing data. The annual estimates indicate a shift from the findings of the 2020 Census. The total population of the state has declined and the typical regions and jurisdictions for the highest growth in many instances saw declines. The highest rate of growth since the 2020 Census is estimated to be in the Southern Maryland region at 1.7%. This is followed closely by the upper

and lower Eastern Shore regions, with metropolitan regions of Baltimore and Suburban Washington posting small declines (See Chart 4 in Appendix B). It would appear that the geographical distributions seen nationally related to the Covid-19 pandemic are materializing in proportion within the state of Maryland. St. Mary's County has experienced an estimated growth of 1,102 persons since the 2020 Census. This is a 1% growth rate and lower than the other jurisdictions in the region, with Calvert and Charles counties posting 1.9% and 2.1% respectively. The growth that was experienced in the county is primarily the result of natural increase (births minus deaths), with it representing 75%. International migration represented 21% of the remaining growth, with there being a decrease in domestic migration. This data is considered to be an indicator of the economy and a contributing factor to school enrollments. While the growth in the Eastern Shore regions is clearly from domestic migration, the growth in St. Mary's County is predominantly from natural increase. This pattern is reflected in enrollment, with the biggest increases being seen at the secondary level indicating that families are remaining in the area longer and aging in place rather than moving in and starting families. The recent increase in the amount of residential development projects under review may however be signaling a change to this pattern of growth and possible changes in the county's economy. However, this information must also be balanced with the aftermath of the COVID-19 pandemic. Residential development projects and enrollment will need to be closely monitored for shifts in the county's growth patterns and potential impacts to 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 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 6 (which includes Hollywood) and district 3 (which includes the Town of Leonardtown). The county is expected to experience growth in future years, with the total population expected to reach 159,520 by 2050. However, the rate of growth will continue to be slow and the enrollment projections reflect this. St. Mary's County is projected to remain the 12th 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. Birth data by month for 2021 was not available from the Maryland Department of Health Vital Statistics Administration as of the time of this document. The birth rate projections issued by MDP were once again adjusted downward in 2022, with future years beyond 2021 again decreased by 30 per year. The total births for 2026 is projected to be 1,460. Similar to birth rate, the population distribution by age can also be indicative of anticipated student enrollment. While the 2020 Census demographic and housing data is not available yet, in the 2010 Census there were 23,215 persons age 5-19. The 2021 One Year ACS estimates this age group to total 22,132, with approximately a 1% margin of error. The last state projections by age group indicated that this age group would total 24,184 in 2020. The ACS estimates support the reduction in 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 preliminary total population projections, 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 would 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. The One Year ACS for 2021 reports a total of 46,204 housing units, an increase of 644 units. 42,078 of these units are estimated to be occupied, with 27% having been occupied since 2019. The Census Bureau estimates show that between the 2020 Census and the July 2021 estimates, there has been a total increase in population from domestic and

international migration of 187 or 17%. This indicates that the majority of the housing units occupied were occupied by existing residents as a result of natural growth. This supports the age in place scenario and resulting increased enrollment at the secondary level. Household size can also be a factor of anticipated 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 2021 One Year ACS estimate of household size was 2.75 for owner occupied units and 2.37 for renter occupied units. Given the variance in the household size of owner occupied units, other causes must be considered, including the potential for economic or other conditions to result in the consolidation of families into fewer households. 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 2010. Based on date from the Bureau of Economic Analysis, the county gained 7,501 jobs between 2011 and 2021 equating to a 12.9% increase. This ranks the county 10th in the state in the number of jobs gained and 8th in the state in percentage change of jobs. This compares to 9.4% at the state level and 14.2% 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 11.1%. The county was virtually tied with Charles County in contributing to the region's gains, with Calvert a distant third. The largest job growth in the state since 2010 has been in the Baltimore region, with a gain of 161,069 jobs, led by Anne Arundel and Howard counties with 15.1% and 14% growth respectively. The county per capita income (PCI) for 2021 is $60,333, ranking it 12th in the state. This is a 2.2% increase from 2020. This compares to a PCI of $64,054 for the state and $58,848 for the nation. The county PCI growth over the past eleven years has been slow, with the end of the period seeing the largest gains. During this time the PCI grew by 15.2% or $7,971. The 2021 income gain for the county was just below the average statewide percentage increase of 2.19%. Regionally, the county ranks similarly to Charles County in ranking of percentage increase by year, with Calvert County consistently placing significantly higher. The last available state projections place per capita income in the county at $64,913 by 2040, which seems low given current data.

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. While this level of detail is not available yet from the 2020 Census, the 2021 One Year ACS estimates that there are 42,078 occupied dwelling units with 31,926 or just over 75% being owner occupied, confirming that the ownership rate remains constant.

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, with the COVID-19 Pandemic impacting this as well

toward the end of the period. In 2022 there were 169 lots recorded within the unincorporated county. While there were no new lots recorded with the town of Leonardtown in 2022, buildout of existing recent developments continues and the Meadows at Town Run II received concept approval in January 2022. This project includes an additional 303 units within the town, including 12 single family homes, 147 townhouses, and 144 apartments. There have also been several recent submissions for new residential development projects within the county. One of these includes the buildout of an existing planned unit development containing 1,122 residential units. With the increase in recorded lots and the multiple development projects under review in both the county and town of Leonardtown, there will need to be close monitoring of the impacts to school capacity. While the 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 just over 300 units per year, while occupancy permits have averaged around 220 units per year. While these are the averages for the past five years, the number of building permits and occupancy permits did increase in 2022 and is another indicator to monitor for changing school capacity needs. 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. While residential home sales 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. The median home price in 2021 was $345,000. This is a little lower than the statewide median price of $360,000 and significantly lower than the median price in Calvert and Charles counties, which were $390,000 and $380,000 respectively. According to the Southern Maryland Association of Realtors in early 2023, residential sales in the county have cooled, with both the number of sales and the median prices decreasing. 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 has also been reviewing the cost of growth from residential development. As referenced previously, in 2021 the CSMC was authorized by the legislature to repeal the impact fee and establish an excise tax and in May of 2023 the CSMC approved the implementation of an excise tax beginning in July 2023. The excise tax approved includes an assessment for public safety and applies to commercial development.

NON-PUBLIC SCHOOL ENROLLMENT

As of September 2022, 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 2,433 students. Private school enrollment in the county has averaged approximately 14% over the past twenty years, from a high of 18.23% in the early 2000's to a low of 11.23% in 2014. 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 more recently the protocols for the COVID-19 Pandemic. A new Catholic high school known as The Chesterton Academy of St. Mary's opened in the 2021-2022

school year and is reported to have and enrollment of 35 students for the 2022-2023 school year.

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 total number of students enrolled in home school programs for the 2022-2023 school year is 1,227. The average home school enrollment over the past five years has been approximately 1,200 students per year.

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 will only be available to students in grades 9-12.

These decisions as well as the new private high school have all impacted non-public school enrollment.

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 2021-2022, the charter school had a total of 498 students. The school recently underwent several years of capacity expansion and for the 2023-2024 school year will have a total capacity of 540 students. The 2022-2023 official enrollment for the Chesapeake Public Charter School was 519 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 school system also offers the Fairlead Academy program, an alternative high school pathway and career and technology education programs at the JAFCTC. This program is located adjacent to Dr. James A. Forrest Career and Technology Center and includes students in grades 10–12. The Virtual Academy will continue for the 2023-2024 school year but the grades served will change from grades 3-12 to 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.
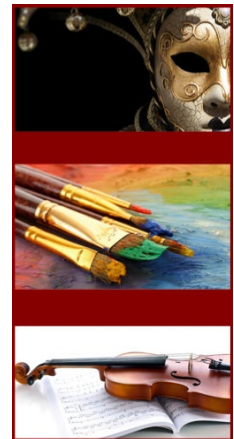
In summary, all of these components play an integral role in predicting future enrollment. Further data on the components included in the basis for enrollment projections may be found in the charts and graphs contained in Appendix B.

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.

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 -1.2%.

School Year	Projected K-12 Enrollment	Actual K-12 Enrollment	Actual Deviation		Standard Allowable Deviation	
2018-19	17,243	17,106	(138)	-0.8%	345	2%
2019-20	17,108	17,189	81	0.5%	342	2%
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%

The chart titled "Historical Annual Enrollment Change" is based on the K – 12th grade enrollment from 1982 to 2022 and projected enrollment for 2023 to 2032. The chart reveals that there was steady growth up until 2016, at which time enrollment became flat. There was a notable drop of just over 400 students in 2020 attributed to the COVID-19 Pandemic. The enrollment came back up slightly in 2021 and continued that trend in 2022; however, it remains below pre-pandemic levels. Overall, in the past ten years the school system has grown by 64 students. Going forward, the enrollment projections show enrollment increasing by approximately 100 students per year, with total enrollment projected to reach pre-pandemic levels by 2026. The ten year projections are for an additional 908 students or just over 5% which will then total 17,768 students. For the past five years the entering Kindergarten cohort averaged 1,334 students, while the existing 12th grade cohort averaged 1,240 students. This correlates with the flat growth experienced since 2016 and COVID-19 Pandemic enrollment loss and will change as enrollment returns.
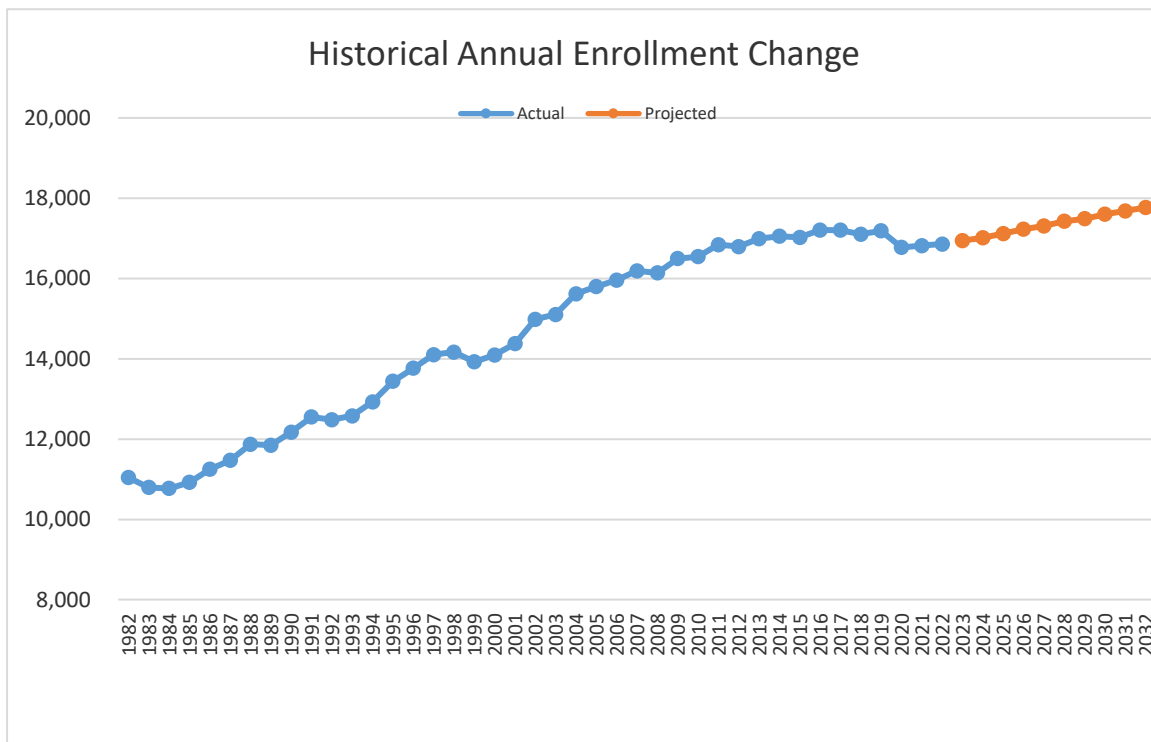
	Birth through 12th Grade Retention					
Grade Level	Birth/12th 2001-2018	Birth/12th 2002-2019	Birth/12th 2003-2020	Birth/12th 2004-2021	Birth/12th 2005-2022	Average
Birth Rate	1,147	1,347	1,351	1,384	1,439	1,334
Kindergarten	1,191	1,263	1,143	1,162	1,143	1,180
1st	1,268	1,235	1,224	1,248	1,232	1,241
2nd	1,297	1,281	1,218	1,233	1,286	1,263
3rd	1,319	1,331	1,237	1,240	1,254	1,276
4th	1,353	1,338	1,264	1,227	1,267	1,290
5th	1,365	1,331	1,314	1,279	1,256	1,309
6th	1,413	1,368	1,294	1,312	1,279	1,333
7th	1,346	1,416	1,363	1,306	1,317	1,350
8th	1,334	1,339	1,419	1,376	1,326	1,359
9th	1,423	1,534	1,456	1,650	1,547	1,522
10th	1,287	1,261	1,375	1,313	1,468	1,341
11th	1,212	1,196	1,157	1,242	1,211	1,204
12th	1,235	1,245	1,260	1,187	1,274	1,240

C.   Current Projections

The chart below is the ten-year projections for PreK-12 enrollment for school years 2023-24 through 2032-33. 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, 2022 was 17,493 students in grades PS – 12th, which is an increase of 13 from the previous year. The projection for September 30, 2023 is for an additional 88 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 3.93% from the MDP projections. Enrollment is projected to increase slowly and return to pre-pandemic levels by 2026.

Ten-Year Projections						
School Year	PreK	Elementary	Middle	High	K-12 Total	PreK-12 Total
2023-24	420	7,426	3,963	5,559	16,948	17,368
2024-25	420	7,398	3,985	5,630	17,013	17,433
2025-26	420	7,435	4,097	5,591	17,123	17,543
2026-27	420	7,411	4,164	5,653	17,228	17,648
2027-28	420	7,419	4,168	5,724	17,311	17,731
2028-29	420	7,511	4,079	5,838	17,428	17,848
2029-30	420	7,631	3,991	5,868	17,490	17,910
2030-31	420	7,755	4,008	5,841	17,604	18,024
2031-32	420	7,821	4,094	5,770	17,685	18,105
2032-33	420	7,859	4,188	5,721	17,768	18,188