

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 113,777. 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. 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. This region contains Frederick County, which is the fastest growing county at 16.4%. This is followed

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	113,999	0.20%
July 1, 2021	114,650	0.77%
July 1, 2022	114,783	0.88%
July 1, 2023	115,281	1.32%

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 1.32% or 1,504 persons since the April 1, 2020 Census count.

The 2020 Census Demographic and Housing Characteristics File was released in May 2023. The total population in the state grew by 7% between 2010 and 2020. Comparatively, St. Mary's County grew by 8.2% during the same time period. Regionally, the Southern Maryland Region is the second fastest growing region in the state at 9.6%. The highest rate of growth took place in the Suburban Washington Region, with an 11.2% increase. Individually, the highest rate of growth occurred in Frederick County followed by Howard County. Since the 2020 Census count as of April 1, 2020, the total population of the state is estimated to have increased very incrementally but not enough to register a change in percentage, while St.

Mary's County is estimated to have grown by 1.3%. The estimated total population of the county is 115,281 as of July 1, 2023. Regionally, Southern Maryland is the fastest growing region in the state since the 2020 Census, with an estimated growth of 2.4%. The metropolitan regions of Baltimore and Suburban Washington which typically have the highest growth rates have posted small declines, with the Upper and Lower Eastern Shore regions seeing small but positive growth (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.

To break down the estimated growth in the Southern Maryland Region, at 1.3% St. Mary's County trails behind Calvert County at 2.1% and Charles County at 3.2%. The actual number of persons represented by the increase is 1,504. This growth is primarily the result of natural increase (births minus deaths), with it representing 75%. International migration represented 28% of the 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 lingering impacts to enrollment based on 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 2022 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 held rather than adjusted downward in 2023, possibly indicating a potential shift toward a pattern of growth in the future. The total births for 2027 is projected to be 1,470. 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 2022 One Year American Community Survey (ACS) estimates this age group to total 22,573, 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 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 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. 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 2022 reports a total of 46,481 housing units, an increase of 277 units over 2021. 95.5% of these units are estimated to be occupied. Of the total estimated 46,481 units, approximately 40% have been constructed since 2000. The Census Bureau estimates show that between the 2020 Census and the July 2022 estimates, there has been a total increase in population from domestic and international migration of 274 or 18%. 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 2022 One Year ACS estimate of household size was 2.75. The larger 2022 household size may indicate the consolidation of families into few 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. Based on data from the Bureau of Economic Analysis, 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. The 2023 PCI will be telling as to how the economy is moving and consequently what may be expected in terms of enrollment. 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. State projections show the county will have 74,000 jobs by 2040 and a per capita income of \$64,913.

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.

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 2022 there were 169 lots recorded and in 2023 there were 63 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 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. The first phase of construction including 74 townhouses is slated to begin in the summer of 2024. 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 1,084 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 under 300 units per year, while occupancy permits have averaged just under 200 units per year. While these are the averages for the past five years, the number of building permits and occupancy permits did increase again in 2023 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. Per MDP, 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. This level was not sustained however, dropping to 1,700 in 2022. The median home price in 2022 was \$365,000, which is up \$20,000 from 2021. This is a little lower than the statewide median price of \$375,000 and significantly lower than the median price in Calvert and Charles counties, which are both approximately \$415,000. According to the Southern Maryland Association of Realtors data for March 2024, the number of home sales in the county is down 29.55% from a year ago and the average sales price is up 2.86% at \$422,144. Sales are down much more in St. Mary's (30%) than in Calvert and Charles counties, which had decreases of 5% and 15% respectively. The average sales price for both Calvert and Charles counties is approximately \$40,000 more than in St. Mary's. 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. The impacts of the new tax are not known at this time but will need to be monitored for any consequences it may have on 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 2023, per the Maryland State Department of Education (MSDE) Nonpublic School Enrollment student publication, there are 40 non-public schools in the county with a total enrollment of 2,739 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 2023-2024 enrollments depict an increase of 252 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 more recently 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.

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 2023-2024 school year is 1,348. The average home school enrollment over the past five years has been approximately 1,300 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 is only available to students in grades 9-12.

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 is being discontinued beginning with the 2024-2025 school year.

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:

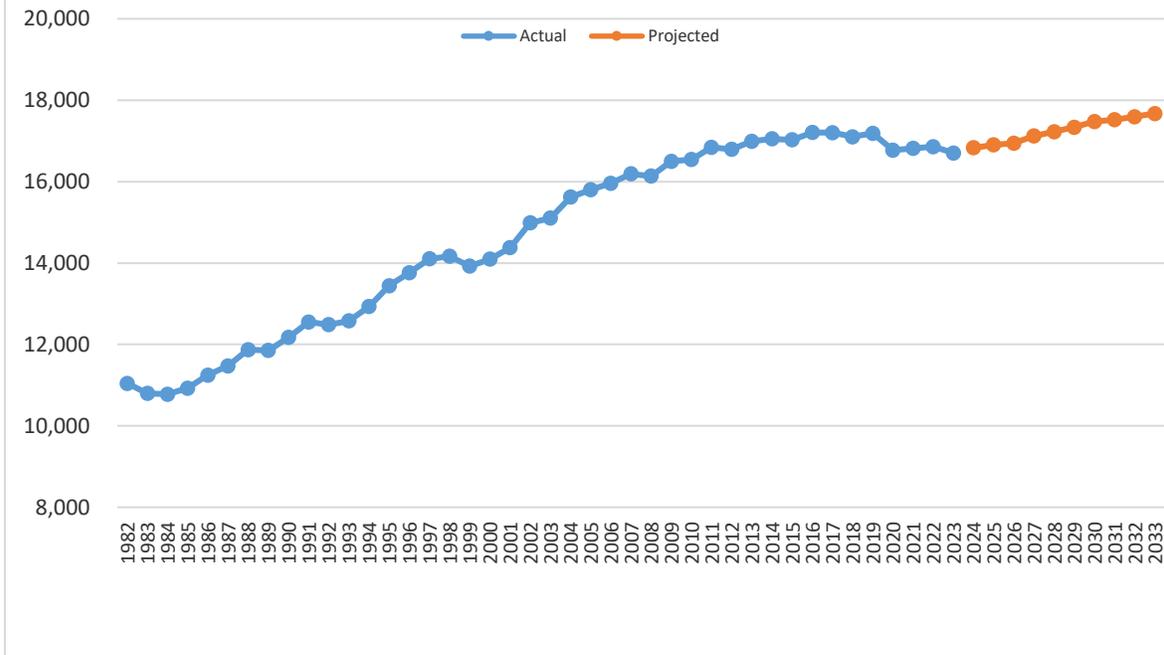
	September 30 th Enrollment		Cohort Survival Ratio Grade 2 to 3	
	Grade 2	Grade 3	One-Year Average	Three-Year Average
2011	99	105	--	--
2012	101	98	0.989	--
2013	102	104	1.029	--
2014	93	99	0.970	0.996

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 -1.3%.

School Year	Projected K-12 Enrollment	Actual K-12 Enrollment	Actual Deviation		Standard Allowable Deviation	
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%
2023-24	16,948	16,706	(242)	-1.4%	339	2%

The chart titled “Historical Annual Enrollment Change” is based on the K – 12th grade enrollment from 1982 to 2023 and projected enrollment for 2024 to 2033. 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 2022 but fell by just over 150 students in 2023 and remains below pre-pandemic levels. Overall, in the past ten years the school system has decreased by 289 students. Going forward, the enrollment projections show enrollment increasing annually each year, with the total enrollment projected to reach pre-pandemic levels by 2028. The ten year projections are for an additional 969 students or just under 6% which will then total 17,674 students. For the past five years the entering Kindergarten cohort averaged 1,393 students, while the existing 12th grade cohort averaged 1,242 students. This correlates with the flat growth experienced since 2016 and COVID-19 Pandemic enrollment loss and will change as enrollment returns.

Historical Annual Enrollment Change



Birth through 12 th Grade Retention						
Grade Level	Birth/12 th 2002-2019	Birth/12 th 2003-2020	Birth/12 th 2004-2021	Birth/12 th 2005-2022	Birth/12 th 2006-2023	Average
Birth Rate	1,347	1,351	1,384	1,439	1,443	1,393
Kindergarten	1,263	1,143	1,162	1,143	1,133	1,178
1st	1,235	1,224	1,248	1,232	1,190	1,235
2nd	1,281	1,218	1,233	1,286	1,252	1,255
3rd	1,331	1,237	1,240	1,254	1,326	1,266
4th	1,338	1,264	1,227	1,267	1,260	1,274
5th	1,331	1,314	1,279	1,256	1,276	1,295
6th	1,368	1,294	1,312	1,279	1,250	1,313
7th	1,416	1,363	1,306	1,317	1,296	1,351
8th	1,339	1,419	1,376	1,326	1,282	1,365
9th	1,534	1,456	1,650	1,547	1,519	1,547
10th	1,261	1,375	1,313	1,468	1,411	1,354
11th	1,196	1,157	1,242	1,211	1,329	1,202
12th	1,245	1,260	1,187	1,274	1,182	1,242

C. Current Projections

The chart below is the ten-year projections for PreK-12 enrollment for school years 2024-25 through 2033-34. 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, 2023 was 17,256 students in grades PS – 12th, which is a decrease of 237 from the previous year. The projection for September 30, 2024 is for an additional 130 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 1.60% from the MDP projections. Enrollment is projected to increase slowly and return to pre-pandemic levels by 2028.

Ten-Year Projections						
School Year	PreK	Elementary	Middle	High	K-12 Total	PreK-12 Total
2024-25	420	7,879	3,851	5,526	16,836	17,256
2025-26	420	7,874	3,975	5,476	16,905	17,325
2026-27	420	7,811	4,101	5,456	16,948	17,368
2027-28	420	7,816	4,163	5,566	17,125	17,545
2028-29	420	7,857	4,094	5,698	17,229	17,649
2029-30	420	7,938	4,026	5,793	17,337	17,757
2030-31	420	8,037	4,023	5,841	17,481	17,901
2031-32	420	8,089	4,061	5,791	17,521	17,941
2032-33	420	8,144	4,125	5,746	17,595	18,015
2033-34	420	8,174	4,169	5,751	17,674	18,094