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# RESIDENTIAL DEVELOPMENT RESEARCH REPORT

FALL 2023

PREPARED FOR:  
CONEWAGO VALLEY SCHOOL DISTRICT

PREPARED BY:  
The logo for PowerSchool, featuring a stylized blue 'P' icon followed by the text 'PowerSchool' in a blue sans-serif font.

SUBMITTED: APRIL 24, 2023

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# CONEWAGO VALLEY SCHOOL DISTRICT

## EXECUTIVE SUMMARY

### NEW RESIDENTIAL DEVELOPMENT – FALL 2023

Predictive Enrollment Analytics is pleased to present this report of findings to the Conewago Valley School District. Based on information collected from the local planning department(s) and developer(s) as of August 2022, it is anticipated that the district could potentially experience the construction and occupation of 896 new dwelling units over the next 10 years. This total unit count includes 779 Single Family Detached units, 117 Single Family Attached units, and 0 Multifamily units.

### STUDENT GENERATION RATE ASSUMPTIONS

The student generation rates applied to these projections are our 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 0.00 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 reflects both new students in a given year plus the matriculation of previous years' students from one grade to the next (this number removes students who will have matriculated out of the district).

Students Generated by Residential Development (Moderate DU Scenario)										
	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
Aggregate		221	371	451	478	483	486	491	497	503
Annual	85	138	161	100	58	39	39	39	39	39

Students Generated by Residential Development (Conservative DU Scenario)										
	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
Aggregate		187	361	516	631	696	715	733	751	768
Annual	85	105	183	173	146	104	62	60	60	60

### 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 **Predictive Enrollment Analytics** Team

April 24, 2023

# CONEWAGO VALLEY SCHOOL DISTRICT

## RESIDENTIAL DEVELOPMENT RESEARCH METHODOLOGY AND DATA

### RESEARCH METHODOLOGY

The 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 August 2022, it is anticipated that the district could potentially experience the construction and occupation of 896 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.

New Dwelling Units by Unit Type	
Unit Type	# of Units
Single Family Detached	779
Single Family Attached	117
<b>Totals:</b>	<b>896</b>

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 Conewago Valley School District (Moderate DU Scenario)												
Project Name	Unit Type	Unit										Total
		2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	
Bridges of Abbottstown	SFD	7	0	0	0	0	0	0	0	0	0	7
Bridgeview	SFD	1	0	0	0	0	0	0	0	0	0	1
Chapel Meadows	SFD	0	0	84	83	0	0	0	0	0	0	167
Chapel Ridge	SFA	50	46	0	0	0	0	0	0	0	0	96
Eagle Rock	SFD	0	52	37	0	0	0	0	0	0	0	89
Eagle View	SFD	50	50	46	0	0	0	0	0	0	0	146
Keys Crossing	SFD	0	0	0	0	31	0	0	0	0	0	31
Oxen Country Meadows	SFD	0	35	0	0	0	0	0	0	0	0	35
Oxford Pointe	SFD	23	0	0	0	0	0	0	0	0	0	23
Quarry Oaks at Cambrian Hills	SFD	24	40	40	0	0	0	0	0	0	0	104
Simme Valley Estates	SFD	8	0	0	0	0	0	0	0	0	0	8
Summerfield	SFD	0	0	50	50	10	0	0	0	0	0	110
Sutton Run	SFD	0	42	16	0	0	0	0	0	0	0	58
The Residence on Church	SFA	21	0	0	0	0	0	0	0	0	0	21
<b>Totals:</b>		<b>184</b>	<b>265</b>	<b>273</b>	<b>133</b>	<b>41</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>896</b>

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.

Proposed Dwelling Units within the Conewago Valley School District (Conservative DU Scenario)												
Project Name	Unit Type	Year										Total
		2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	
Bridges of Abbottstown	SFD	5	2	0	0	0	0	0	0	0	0	7
Bridgeview	SFD	1	0	0	0	0	0	0	0	0	0	1
Chapel Meadows	SFD	0	0	67	67	33	0	0	0	0	0	167
Chapel Ridge	SFA	40	36	20	0	0	0	0	0	0	0	96
Eagle Rock	SFD	0	42	27	20	0	0	0	0	0	0	89
Eagle View	SFD	40	40	40	26	0	0	0	0	0	0	146
Keys Crossing	SFD	0	0	0	0	25	6	0	0	0	0	31
Oxen Country Meadows	SFD	0	28	7	0	0	0	0	0	0	0	35
Oxford Pointe	SFD	18	5	0	0	0	0	0	0	0	0	23
Quarry Oaks at Cambrian Hills	SFD	19	32	32	21	0	0	0	0	0	0	104
Simme Valley Estates	SFD	7	1	0	0	0	0	0	0	0	0	8
Summerfield	SFD	0	0	40	40	20	10	0	0	0	0	110
Sutton Run	SFD	0	32	14	12	0	0	0	0	0	0	58
The Residence on Church	SFA	17	4	0	0	0	0	0	0	0	0	21
Totals:		147	222	247	186	78	16	0	0	0	0	896

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.

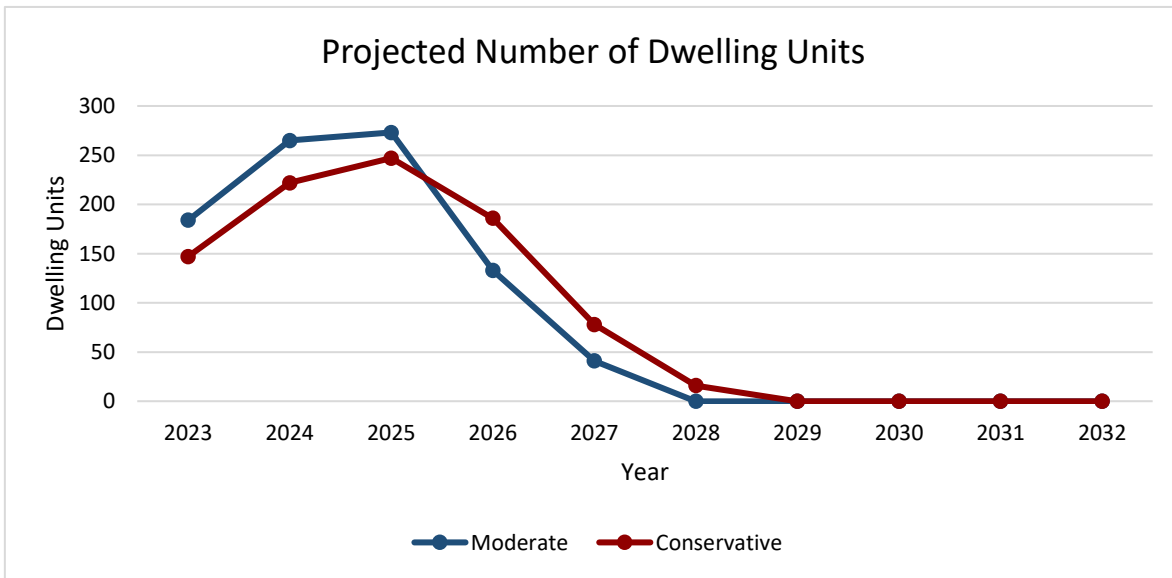


FIGURE 4

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.

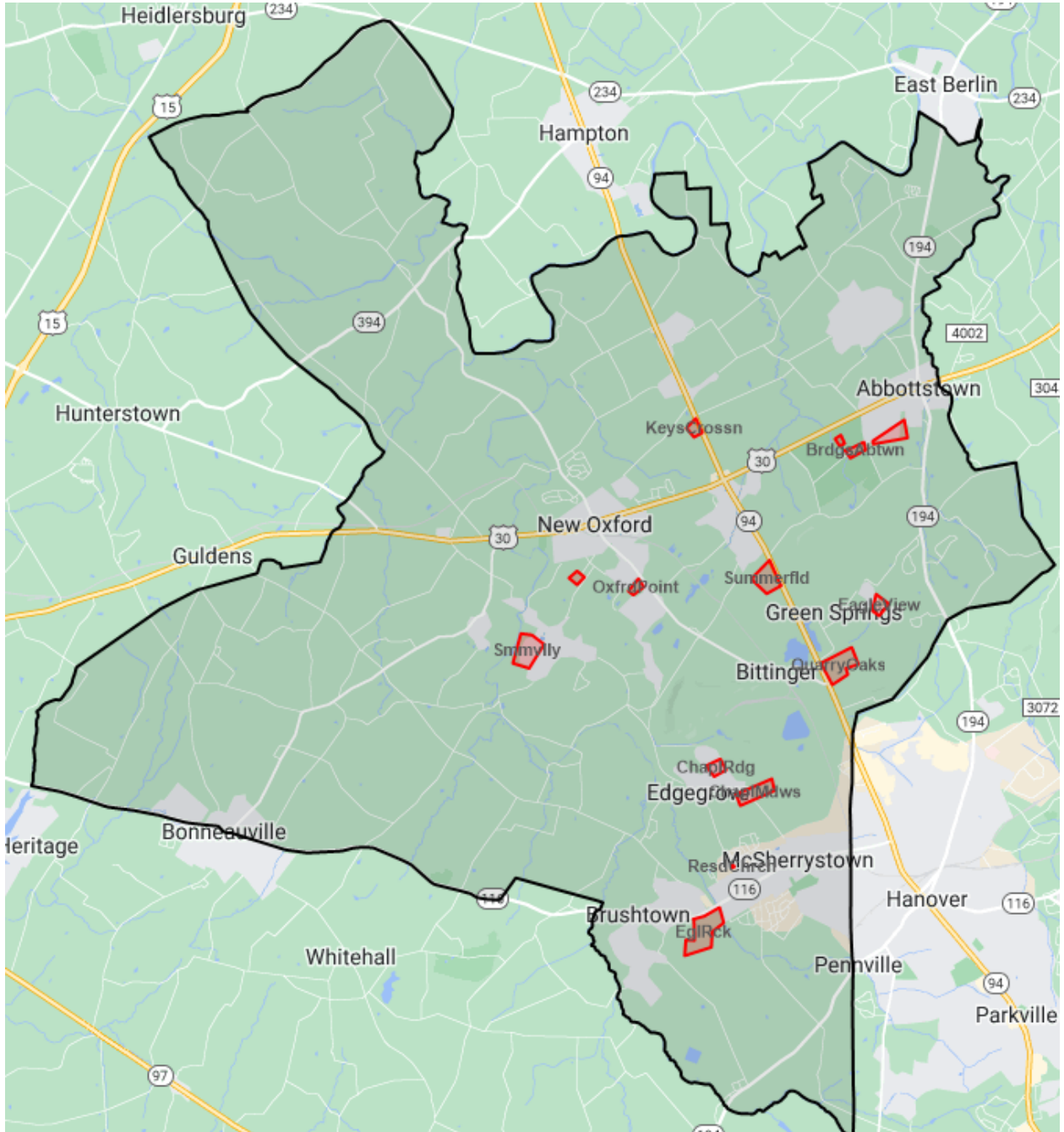


FIGURE 5

## 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 our 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-5, 6-8, 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.

<b>Student Generation Rates by Unit Type &amp; School Level</b>			
<b>School Level</b>	<b>SFD Units</b>	<b>SFA Units</b>	<b>MF Units</b>
Elementary School (K-5)	0.30	0.21	n/a
Middle School (6-8)	0.08	0.07	n/a
High School (9-12)	0.14	0.09	n/a
Totals:	0.52	0.37	0.00

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	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
K	7	19	31	37	39	39	39	39	39	39
1	8	20	33	38	39	39	39	39	39	39
2	8	20	33	39	40	39	39	39	39	39
3	7	19	33	39	41	40	39	39	39	39
4	7	18	31	38	41	41	40	39	39	39
5	6	16	28	35	40	41	41	40	39	39
6	5	14	25	32	37	40	41	41	40	39
7	8	17	26	31	34	37	40	41	41	40
8	6	17	27	31	32	34	37	40	41	41
9	7	17	29	32	33	32	34	37	40	41
10	7	17	28	34	34	33	32	34	37	40
11	7	17	29	34	36	34	33	32	34	37
12	2	10	21	30	34	36	34	33	32	34
Elementary:	43	112	188	226	239	238	236	234	233	232
Middle:	19	48	78	94	103	110	117	121	121	119
High:	22	61	106	131	137	135	133	135	143	151
Total:	85	221	371	451	478	483	486	491	497	503

FIGURE 7

Projected Students from New Residential Development (Conservative DU Scenario)										
Grade	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
K	8	17	33	46	55	60	60	60	60	60
1	9	18	35	48	57	60	60	60	60	60
2	9	19	35	49	58	61	61	60	60	60
3	8	18	35	48	58	62	62	61	60	60
4	8	17	32	47	57	63	62	62	61	60
5	6	15	29	43	54	61	63	62	62	61
6	6	13	26	39	50	58	61	63	62	62
7	5	12	23	35	45	53	58	61	63	62
8	4	10	20	30	40	48	53	58	61	63
9	7	12	23	31	38	44	48	53	58	61
10	7	14	25	34	39	42	44	48	53	58
11	7	14	27	36	42	42	42	44	48	53
12	2	9	19	31	38	43	43	42	44	48
Elementary:	48	104	199	281	340	367	368	365	363	361
Middle:	15	34	69	103	135	158	172	181	186	187
High:	22	49	93	131	156	170	176	186	203	220
Total:	85	187	361	516	631	696	715	733	751	768

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.

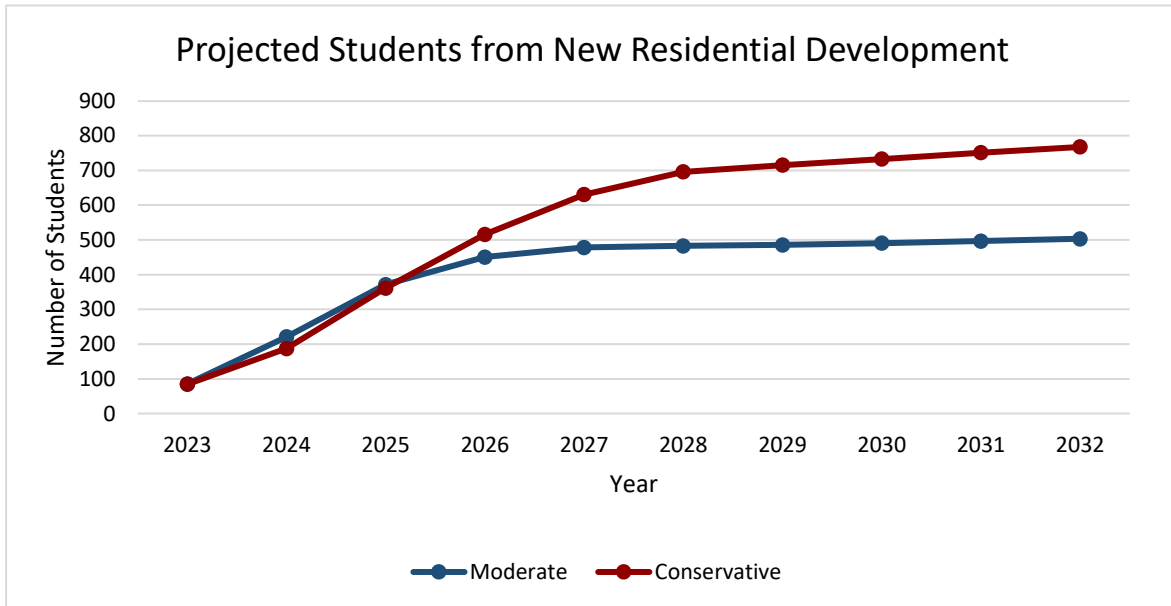


FIGURE 9

### 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 Predictive Enrollment Analytics, 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 Predictive Enrollment Analytics 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 Predictive Enrollment Analytics regarding any questions or suggestions that may arise regarding this report.

Respectfully Prepared and Submitted by:

The **Predictive Enrollment Analytics** Team

April 24, 2023

APPENDIX A

STUDENT GENERATION RATE ASSUMPTIONS

Student Generation Rates (Moderate DU Scenario)											
Unit Type	School Level	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
SFD	Elementary	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30	0.30
SFD	Middle	0.08	0.08	0.08	0.08	0.08	0.08	0.08	0.08	0.08	0.08
SFD	High	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.14
SFA	Elementary	0.21	0.21	0.21	0.21	0.21	0.21	0.21	0.21	0.21	0.21
SFA	Middle	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07
SFA	High	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09

Student Generation Rates (Conservative DU Scenario)											
Unit Type	School Level	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
SFD	Elementary	0.30	0.30	0.30	0.29	0.29	0.29	0.29	0.29	0.29	0.28
SFD	Middle	0.08	0.08	0.08	0.08	0.08	0.08	0.08	0.08	0.08	0.08
SFD	High	0.14	0.14	0.14	0.14	0.14	0.14	0.14	0.13	0.13	0.13
SFA	Elementary	0.21	0.21	0.21	0.21	0.21	0.20	0.20	0.20	0.20	0.20
SFA	Middle	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07	0.07
SFA	High	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09	0.09