

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 measured between the 2010 and 2020 Censuses is in general agreement with the percentage increase from the Census Bureau annual estimates as shown in the adjacent chart. 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 over this time period.

Annual Census Bureau Population Estimates		
Date	Total Resident Population	Percent change from Census
2010 Census	105,146	N/A
July 1, 2010	105,755	0.57%
July 1, 2011	107,501	2.23%
July 1, 2012	108,688	3.36%
July 1, 2013	109,054	3.71%
July 1, 2014	109,697	4.32%
July 1, 2015	110,720	5.30%
July 1, 2016	111,444	5.98%
July 1, 2017	112,114	6.62%
July 1, 2018	112,364	6.86%
July 1, 2019	113,109	7.57%
2020 Census	113,777	N/A
July 1, 2020	113,992	0.19%
July 1, 2021	114,567	0.69%
July 1, 2022	114,841	0.93%
July 1, 2023	115,242	1.29%
July 1, 2024	116,216	2.14%
July 1, 2025	116,692	2.56%

Looking at the annual estimates between the 2010 and 2020 Censuses, it appears that the highest growth was in the early part of the ten year cycle and tapered off approaching 2020. This is in agreement with the annual estimates completed since the 2020 Census, with it being estimated that the county has grown by 2.6% or 2,915 persons since the April 1, 2020 Census count. The Town of Leonardtown continues to grow, with an estimated 4% increase between the 2020 Census and the 2024 population estimate. The estimated total population of the county is 116,692 as of July 1, 2025. Regionally, Southern Maryland is the second fastest growing region in the state since the 2020 Census, with an estimated growth of 3.9%. The highest growing region is the Upper Eastern Shore at 4.1%, with the Lower Eastern Shore region at 3.1%. (See Chart 2 in Appendix B) This is in contrast to the historic patterns of growth with the Baltimore and Suburban Washington regions leading the state in population growth. This shift in growth within the state is similar to the geographical population distributions seen nationally and is believed to be one of the lingering impacts of the Covid-19 pandemic.

To break down the estimated growth in the Southern Maryland Region, at 2.6% St. Mary's County is nearly 1% ahead of Calvert County at 1.8% and at approximately half of Charles County at 6.0%. The actual number of persons represented by the increase is 2,915. This growth is primarily the result of natural increase (births minus deaths), with it representing 66%. International migration represented 25% of the growth and domestic migration represented 6% of the growth. (See Chart 3 in Appendix B) Migration remains positive but is much less a factor in population growth than it has been in the past. These components of population change are considered to be an indicator of the economy and a contributing factor to school enrollments. While growth in neighboring counties is clearly the result of 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, 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, with consideration of future implementation of the findings of the 2026 facility utilization study. At the same time, staff will also be monitoring proposed developments, construction 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 remain as issued in 2025; however, public school enrollment projections were revised downward in the Spring of 2026. The total county population is projected to be 116,730 in 2025 and to grow to 152,330 by 2050. Southern Maryland is projected to be the fastest growing region in the state, with St. Mary's County and Charles County basically at the same percentage increase over the period, with Calvert County far behind. (See Chart 1 in Appendix B).

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 2023 is the most recent data available from the Maryland Department of Health Vital Statistics Administration. The total number of resident births was 1,320, which was down by 121 from 2022. In correlation to actual data, the birth rate projections issued by MDP were adjusted downward by 30 in the first year and 60 in each succeeding year. The total births for 2030 is projected to be 1,380. 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 2024 One Year American Community Survey (ACS) estimates this age group to total 22,186, which is less than the previous year's estimate and 1,527 less than the 2020 Census. These ACS estimates support the lowering of birth rates and school enrollment projections issued by the state in the Spring of 2026. These numbers are also in

general alignment with the state's total population projection of 23,145 for this age group in 2025. 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% were occupied and 3,715 or 8.2% were vacant. Of the 41,845 occupied units, 29,797 or 71.2% were owner occupied. The One Year ACS for 2024 reports a total of 46,949 housing units, an increase of 305 units over 2023. 92.3% of these units are estimated to be occupied. Of the total estimated 46,949 units, approximately 37% have been constructed since 2000, with 3.5% of those units having been constructed since 2020. This is in line with the predominant increase in population coming from natural growth, but again does not align with 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 2050. The 2024 One Year ACS estimate of household size was 2.79 for owner occupied units and 2.16 for renter occupied units. The numbers indicate a slight increase in the average size of occupied units and a decrease in the size of renter occupied units. Household size is impacted by both 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 2024 county PCI at \$73,314. Regionally, this compares to \$79,588 in Calvert County and \$70,211 in Charles County. The state 2024 PCI is \$79,259. 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 2024 One Year ACS the estimated total number of occupied housing units is 43,329, with 75% being owner occupied.

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. The number of recorded lots remained under 100 for 2022, 2023, & 2024 within the unincorporated county. In 2025 this number increased dramatically to a total of 1,256 lots in the unincorporated county and 36 lots in the incorporated Town of Leonardtown. Most of the county total resulted from the approval of the Stewart's Grant planned unit development with 1,084 lots. The lots recorded within the Town of Leonardtown represented an additional phase of the Meadows at Town Run II development. The county has experienced an increase in development project reviews over the past year and there is reason to believe a large mixed-use development within the Town of Leonardtown will be moving forward as well as other additional annexed properties. While enrollment is down and sufficient school capacity exists at this time, the increase in project reviews should continue to be monitored for future 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 216 units per year, while occupancy permits have averaged 172 units per year. Both building and occupancy permits decreased slightly in 2025. These are indicators that support the projection of flat and declining 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 approval 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, 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 leveling to approximately 1,200 units in both 2023 and 2024. In 2024 approximately 75% of the sales were attributable to detached single family homes. 2025 data was not yet available. The median sale value in 2024 was \$410,000 which is up \$20,000 from 2023. This is slightly lower than the statewide median price of \$415,000 and also lower than the median price in Calvert and Charles counties, which were \$451,000 and \$436,000 respectively. According to the Southern Maryland Association of Realtors data for March 2026, the number of home sales in the county is up 12.99% from a year ago and the average sold price is down by 10.64% at \$438,467. Sales are up by 18.18% in Calvert County and down by 3.78% in Charles County. The average sold price is up by 4.67% in Calvert County and down by 3.38% in Charles County, with the prices being \$471,000 and \$435,000 respectively. Home prices

amongst the Southern Maryland counties are closer than in previous years, with St. Mary's falling in the middle. The average number of days on the market increased in all three counties. Per the Maryland Realtors, statewide home sales fell by 4.4%% in March 2026 and the average price rose by 4.9% to \$513,997. 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. The new excise tax replaced the former impact fee and applies to both residential and commercial development. It includes assessments for parks, roads, public schools, and public safety. In 2026 the excise tax ordinance was amended to clarify that it applies to the Town of Leonardtown, which is a municipality within the county, and to change the timing of collection from issuance of the building permit to issuance of the occupancy permit. The amendment to the excise tax stems from the fact that the Town of Leonardtown rescinded their impact fee ordinance in July 2023 and did not implement an ordinance for collection of the new excise tax. As of the writing of this document, the Town of Leonardtown has introduced a new ordinance to collect school impact fees separate from the county. The proposed ordinance specifically states that school impact fees collected shall only be used for capital costs of improvements to the county's public schools that are reasonably necessary to accommodate new residential development in the town. A public hearing on the proposed ordinance is scheduled for June 2026.

NON-PUBLIC SCHOOL ENROLLMENT

As of September 2025, per the Maryland State Department of Education (MSDE) Nonpublic School Enrollment student publication, there are 28 non-public schools in the county with a total enrollment of 2,629 students. It should be noted that this information is based on a voluntary survey of private schools by MSDE and that not all schools respond each year. The enrollment and analysis provided here is based on the information available from MSDE. 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 2025-2026 enrollments depict an decrease of 388 over the previous school year. Factors that have influenced fluctuations in private school enrollment over time include tuition increases, closures of longtime parochial and Montessori schools, the opening of new schools/academies, and the protocols for the COVID-19 Pandemic. In the case of the 2025-2026 school year, it would appear to be a lack of reporting by all non-public schools, in particular one of the larger private schools. The apparent decrease is likely not accurate based on this. The majority of nonpublic school enrollment in the county 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 many factors will likely have impacts, including the economy and federal legislation.

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 2025-2026 school year is 1,583. The average home school enrollment over the past five years

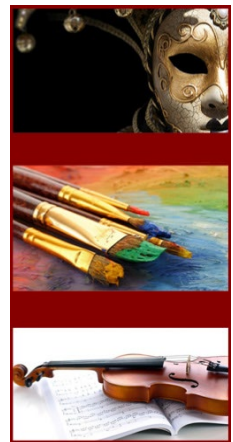
has been approximately 1,400 students per year. There is a total student enrollment of 20,389 in the county, with 16,522 or 81% attending SMCPs school facilities.

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 was moved to a relocatable unit on the campus of Leonardtown High School. The facility the virtual academy was previously housed in was leased from the county and the lease was terminated as of June 30, 2025.

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 (GIS) and National Academy of Finance (AoF) will expand to all three comprehensive high schools beginning in the 2026-2027 school year. The Virtual Academy continues as an option for students in grades 9-12. The STEM-for-All program will continue to be offered once each quarter across all grades at all elementary schools.



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

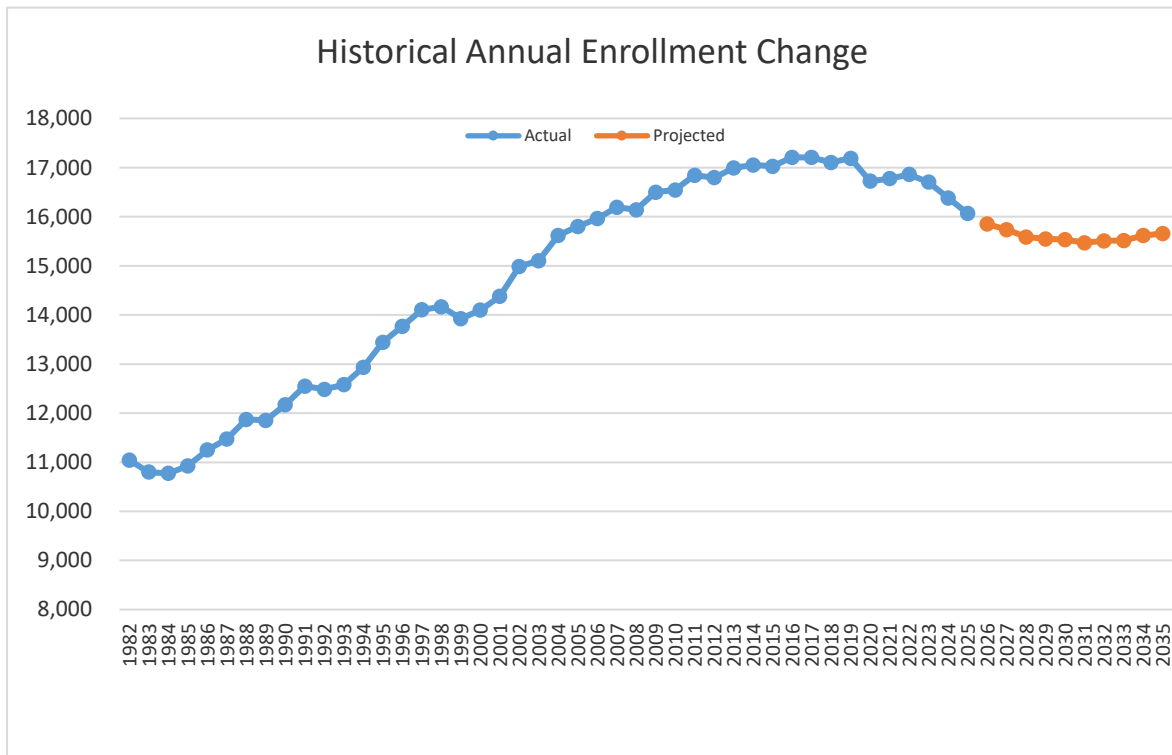
Most districts across the United States use the cohort survival (transition) ratio method as the basis for projecting enrollment. It captures the historic enrollment patterns of a cohort of students as they pass from one grade to the next. It is calculated by dividing the number of students in a particular 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
2022	99	105	--	--
2023	101	98	0.989	--
2024	102	104	1.029	--
2025	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 - 1.6%.

School Year	Projected K-12 Enrollment	Actual K-12 Enrollment	Actual Deviation		Standard Allowable Deviation	
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%
2025-26	16,207	16,068	(139)	-0.9%	324	2%

The chart titled “Historical Annual Enrollment Change” is based on the K – 12th grade enrollment from 1982 to 2025 and projected enrollment for 2026 to 2035. The chart reveals that there was steady growth up until 2016, at which time enrollment became flat. Enrollment dropped by over 400 students in 2020 attributed to the COVID-19 Pandemic. While enrollment increased slightly in the first couple of years after the COVID-19 Pandemic, it has steadily declined since 2023. Enrollment is projected to continue to decline through 2032, with modest increases in the years through 2035 which is the end of the projection period. Even in 2035 the total enrollment will not exceed pre-pandemic levels. The ten year projections are for the loss of 410 students or approximately a decrease of 2.5% for a total of 15,658 students. For the past five years the entering Kindergarten cohort averaged 1,440 students, while the existing 12th grade cohort averaged 1,243 students. This correlates with the flat growth to declining enrollment experienced and will change when enrollment increases.



Birth through 12 th Grade Retention						
Grade Level	Birth/12 th 2004-2021	Birth/12 th 2005-2022	Birth/12 th 2006-2023	Birth/12 th 2007-2024	Birth/12 th 2008-2025	Average
Birth Rate	1,384	1,439	1,443	1,498	1,434	1,440
Kindergarten	1,162	1,143	1,133	1,103	1,142	1,137
1st	1,248	1,232	1,190	1,152	1,135	1,191
2nd	1,233	1,286	1,252	1,210	1,136	1,223
3rd	1,240	1,254	1,326	1,242	1,204	1,253
4th	1,227	1,267	1,260	1,298	1,227	1,256
5th	1,279	1,256	1,276	1,271	1,310	1,278
6th	1,312	1,279	1,250	1,252	1,255	1,270
7th	1,306	1,317	1,296	1,224	1,253	1,279
8th	1,376	1,326	1,282	1,289	1,202	1,295
9th	1,650	1,547	1,519	1,430	1,390	1,507
10th	1,313	1,468	1,411	1,355	1,318	1,373
11th	1,242	1,211	1,329	1,237	1,245	1,253
12th	1,187	1,274	1,182	1,319	1,251	1,243

C. Current Projections

The chart below is the ten-year projections for PreK-12 enrollment for school years 2026-27 through 2035-36. 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, 2025 was 16,581 students in grades PS – 12th, which is a decrease of 332 from the previous year. The projection for September 30, 2026 is for a decrease of 218 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 -3.97% from the MDP projections. Enrollment is projected to continue to decline for the majority of the projection period, with a small amount of growth at the end of the period. The components of enrollment change will be monitored for any changes indicating a change in this pattern.

Ten-Year Projections						
School Year	PreK	Elementary	Middle	High	K-12 Total	PreK-12 Total
2026-27	520	7,613	3,738	5,019	15,850	16,370
2027-28	520	7,643	3,715	4,898	15,736	16,256
2028-29	520	7,598	3,699	4,811	15,588	16,108
2029-30	520	7,645	3,662	4,760	15,547	16,067
2030-31	520	7,704	3,564	4,787	15,535	16,055
2031-32	520	7,706	3,529	4,754	15,469	15,989
2032-33	520	7,711	3,594	4,722	15,507	16,027
2033-34	520	7,701	3,675	4,660	15,516	16,036
2034-35	520	7,792	3,719	4,624	15,615	16,135
2035-36	520	7,848	3,676	4,654	15,658	16,178