

Demographics

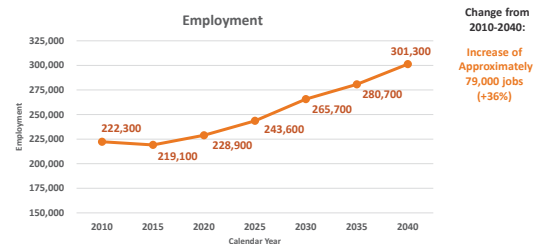
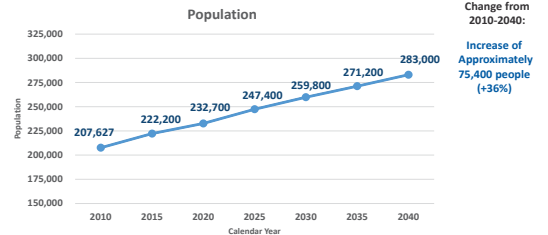
Did you know ?

Arlington County forecasts that its population will grow from 216,700 today to 283,000 in 2040.

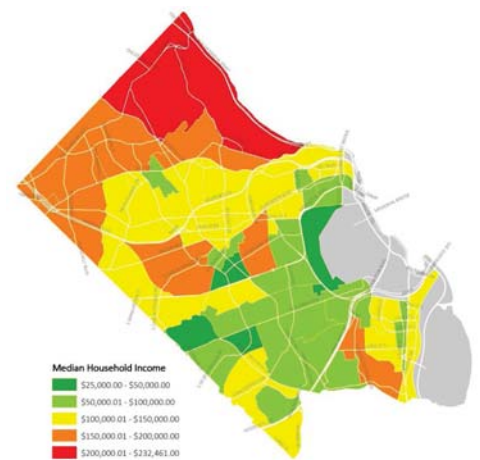
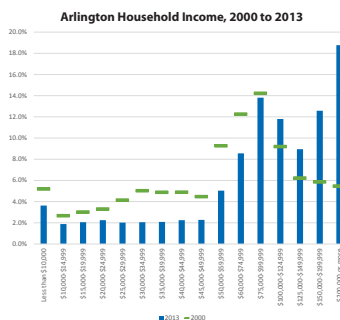
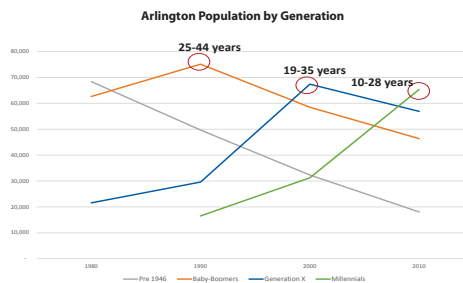
The County's demographics have been shifting over the last 15 years.

How will demographic changes affect facility needs?

- Employment is forecasted to grow from 219,100 today to 301,300 in 2040.
- The County forecasts future population and employment based on County plans and policies.
- The forecasts meet the Metropolitan Washington Council of Governments' requirements under the Clear Air Act.
- Arlington's growth will affect public service delivery and facility needs.



- Millennials (generation born 1982-2000) have become the dominant generation in Arlington.
- The fastest growing cohorts in the County are 35 - 44 year olds, 0 - 5 year olds, and 65+ year olds.
- In 2000 the largest share of Arlington households had incomes between \$75,000 and \$99,999 (about \$100,000-\$135,000 in 2013 dollars). In 2013, the largest share of households had incomes of \$200,000 or more.
- Median incomes vary widely by neighborhoods within the County.



Demographics

Did you know ?

Arlington Public Schools' PreK-12 enrollment has increased from 18,411 students in 2005 to 24,529 in 2014.

School enrollment is projected to exceed 30,000 students by 2024.

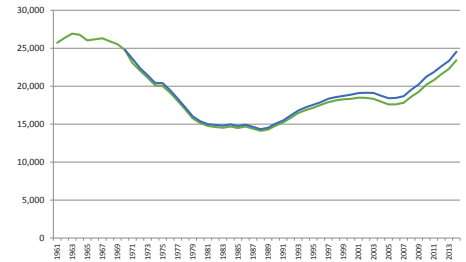
How will demographic changes affect facility needs?

- APS enrollment has not been this high since the 1960s
- This school year the largest classes are Kindergarten, 1st, and 2nd grades. The smallest classes are 10th, 11th, and 12th grades.
- The number of births to county residents has been increasing since 2006, and the ratio of Kindergarten enrollment to births five years prior has increased from 55% in 2005 to 75% in 2014.
- From 2005 to 2013, 57% of the increase in student enrollment came from single-family housing and 42% of the increase came from multi-family housing.

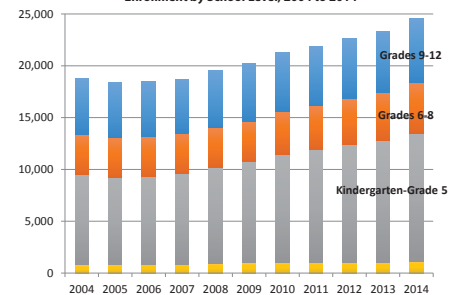
Birth to Kindergarten Capture Rate

Birth Year	Kindergarten School Year	Resident Live Births	Kindergarten Cohort	% Change Birth to KG Ratio
2000	2005	2,715	1,501	55%
2001	2006	2,814	1,627	58%
2002	2007	2,686	1,610	60%
2003	2008	2,659	1,697	64%
2004	2009	2,810	1,924	68%
2005	2010	2,809	2,003	71%
2006	2011	2,561	1,968	77%
2007	2012	2,778	2,179	78%
2008	2013	2,924	2,139	73%
2009	2014 (Today)	2,935	2,196	75%

APS Enrollment, 1961 to 2014



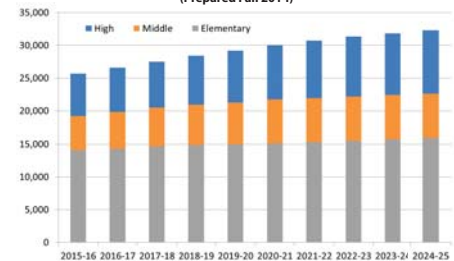
Enrollment by School Level, 2004 to 2014



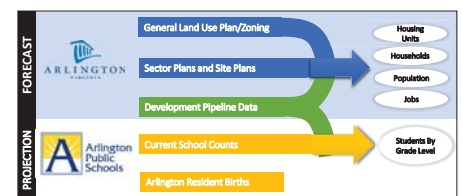
APS Student Generation Factor (Students per Housing Unit) by Housing Type

Housing Type	2005-06	2008-09	2013-14
Single Family Detached	0.36	0.40	0.42
Duplex	0.45	0.45	0.38
Apartment – Garden	0.25	0.26	0.29
Townhouse	0.10	0.12	0.13
Condo – Garden	0.07	0.07	0.09
Apartment – Elevator	0.06	0.06	0.08
Condo – Elevator	0.04	0.03	0.03

Ten Year Student Enrollment Projections (Prepared Fall 2014)



- APS will need to increase school capacity to accommodate the projected growth.
- The County Government does not project school enrollment, but it does provide housing data that APS uses in its projections.
- A team of third-party consultants (Statistical Forecasting and RLS Demographics) reviewed APS' projection methodology and the County's forecasting methodology and confirmed that they are both valid and appropriate.
- The consultants also recommended steps that could improve accuracy and transparency.



Economic Sustainability

Did you know ?

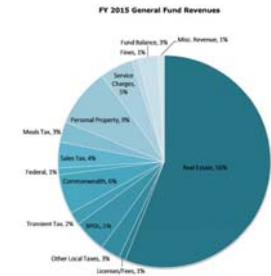
Arlington County has a 50/50 split between commercial and residential real estate tax revenues.

The County's vision and planning efforts from the 1970s have supported the balance between commercial and residential revenues.

Federal sequestration and Base Realignment and Closure (BRAC) have contributed to a loss of 4,700 federal jobs in Arlington since February 2010.

How will the County and Schools pay for new facilities?

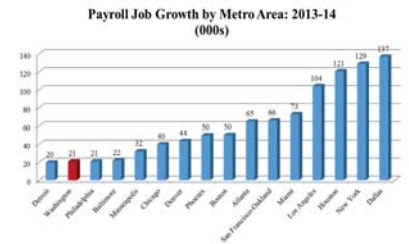
- 56% of the County's total budget comes from real estate taxes.
- The balance between residential and commercial provides revenue stability when one market sector is weak.
- The high proportion of commercial revenues compared to other counties in the region (ex. Fairfax County is 25% commercial) increases our ability to maintain a high level of services and benefits residential taxpayers.



- The County's plans to target growth in the Metro corridors have led to a successful mix of commercial and residential development.
- In addition to economic benefits, this vision has helped to protect the character of single-family neighborhoods, balance the transportation network and create walkable urban neighborhoods.
- \$27.5 billion of the County's total \$57.5 billion in assessed real estate value is in the Metro corridors, which is 11% of total land.



- This is a regional issue. The Washington metro area posted the second lowest job growth among all major metro areas in the nation in 2014.
- Arlington's office vacancy rate is 10% above its 15-year historical average.
- The County is losing about \$34 million in annual tax revenues as a result of the increase in office vacancy.



Each 1% of Office Occupancy is Worth \$3.4 million in Local Taxes



Facilities

Did you know ?

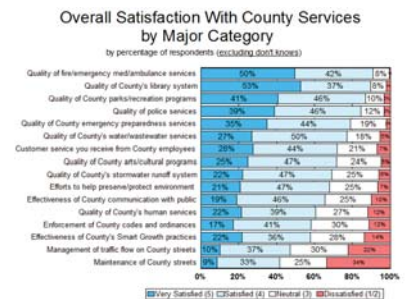
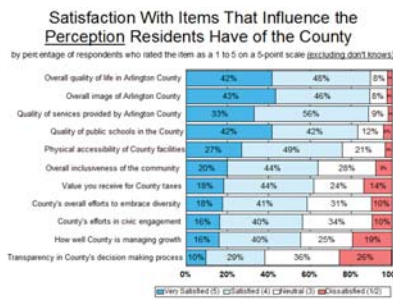
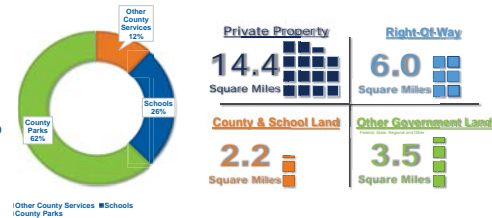
The County and Schools own 2.2* square miles out of 26.2 square miles in the County.

The County estimates that it will need an additional 13 – 18 acres to support forecasted growth.

The Public Spaces Master Plan (PSMP) is in the process of being updated.

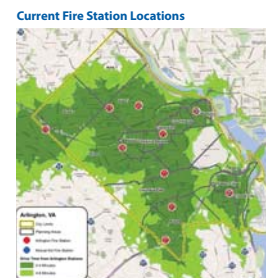
What are the County and Schools' current facility needs?

- Schools, parks and all County facilities providing services share this 2.2 square miles.
- Arlington's forecasted growth increases demand for public services, which require land and facility space.
- The 2015 Resident Satisfaction Survey found that 89% of Arlington residents are satisfied or very satisfied with the quality of County services. 84% are satisfied or very satisfied with the quality of public schools.

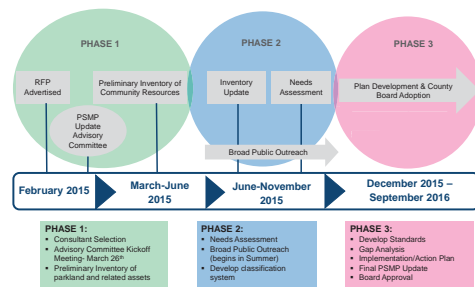


*Does not include right-of-way

- The ART bus fleet is expected to grow from 65 vehicles today to 90 in 2022. Additional parking and maintenance facilities will require 2 - 3 acres.
- High capacity transit for Columbia Pike and Crystal City will likely need 4 - 5 acres for parking/storage and maintenance.
- One new fire station and three relocated stations are planned to accommodate growth and improve response times to 4 minutes for 80% of service calls.
- The 42-acre Trades Center currently supports County infrastructure services, Parks and APS maintenance, and County and APS parking. Additional storage space is needed to improve incident response time.



PSMP Updated Tentative Timeline



Facilities

Did you know ?

Arlington Public Schools has immediate and long term capacity needs.

What are the County and Schools' current facility needs?

- APS currently has a deficit of seats at the elementary, middle, and high levels.
- Even with proposed new schools, additions and renovations, most schools are projected to be over capacity in 2019.
- There are limited options for sites to construct new schools.
- Enrollment growth exceeds the County's debt capacity to add new seats.
- APS will also need additional space for bus and vehicle storage and maintenance.

Discovery Elementary School: Completion September 2015
New net zero energy school providing 630 seats



Abingdon Elementary School: Completion September 2017
Additions, plus renovation providing 136 new seats.



McKinley Elementary School: Completion September 2016
27,000 sq. ft. addition, plus renovation providing 241 new seats.



Wilson School: Completion September 2019
New location for H-B Woodlawn & Stratford program with 775 seats.



Elementary School – 2019 Projected Seat Deficit of 1,685*

School	September 2015			September 2019	
	Capacity	Projected	Relocatables	Capacity	Projected
Northeast	2,995	3,198	20	2,995	3,330
Northwest	4,366	4,706	47	4,607	4,961
Southeast	2,377	2,595	10	2,377	2,905
Southwest	3,153	3,535	28	3,289	3,760
Elementary School Total	12,891	14,034	105	13,268	14,956

Middle School – 2019 Projected Seat Deficit of 224

School	September 2015			September 2019	
	Capacity	Projected	Relocatables	Capacity	Projected
Gunston	932	937	0	932	1,258
Jefferson	982	888	1	982	1,111
Kenmore	985	949	0	985	1,139
Stratford & H-B Woodlawn Renovation 2019, New M.S.	227	227	0	1,000	-
Swanson	948	1035	6	948	1,210
Williamsburg	997	1131	12	997	1,373
Wilson <i>New facility 2019, new home for H-B Woodlawn and Stratford</i>	-	-	-	250	227
Middle School Total	5,071	5,167	19	6,094	6,318

High School - 2019 Projected Seat Deficit of 1,007

School	September 2015			September 2019	
	Capacity	Projected	Relocatables	Capacity	Projected
Stratford & H-B Woodlawn, Renovation 2019, New M.S.	390	397	0	-	-
Wakefield	1,903	1810	0	1,903	2,259
Washington-Lee	1,900	2213	8	2,200	2,637
Yorktown	1,879	1758	0	1,879	2,125
Wilson	-	-	-	429	397
High School Total	6,072	6178	8	6,411	7,418

Stratford Middle School: Completion September 2019
Additions, plus renovation creating new 1,000 seat Middle School.

