

PLAT MONITORING PROGRAM RESIDENTIAL PLATTING IN DEVELOPING COMMUNITIES IN THE TWIN CITIES REGION, 2023

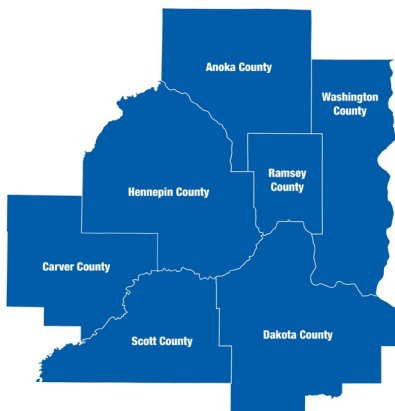


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About the Program

The Plat Monitoring Program (Program) tracks and monitors residential development in 45 communities in the region, mostly located within areas designated as “Suburban Edge,” “Emerging Suburban Edge,” and “Rural Center” in *Thrive MSP 2040* (Figure 1), the metropolitan area’s development guide. The objective of the Program is to measure the success of local implementation of Council policy by providing an annual report on sewer residential development in these communities, including the average density, the mix of new sewer residential development, the number of units platted, the amount of land developed, and the land utilization. This data creates a baseline for land supply and tracks the housing mix and density of new residential developments. Twelve communities participated in the pilot Program in 2001, reporting on sewer residential plats approved in 2000. This pilot Program focused on communities with the corresponding designations of “Developing” and “Rural Center” in the *2030 Regional Development Framework* (Figure 2). The Program continues to grow to cover more communities as the Twin Cities region develops.

The Program provides baseline data on residential development trends in participating communities and was designed to help answer the following questions:

- Is residential development consistent with Metropolitan Council policies?
- How are communities accommodating residential development in comparison to their local comprehensive land use plans?
- What is the mix of housing types that communities are approving each year (single family vs. multi-family)?
- How is residential land being developed within the Metropolitan Urban Service Area (MUSA)?
- What is the lot absorption rate for residential plats in the region?

Since 2001, the Council annually reports on residential development in participating communities using data collected through the Program. The Program assists communities and the Council in assessing a community’s consistency with the Council’s residential density policy, which requires sewer residential development to occur at a minimum density of 3 to 5 units per net developable acre for communities with the Suburban Edge, Emerging Suburban Edge, and Rural Center designations. By maintaining a record of approved sewer subdivisions, the Council and metropolitan communities can evaluate the success of communities in implementing the density policy and the extent to which the wastewater treatment system is being used efficiently. In addition, participating communities receive credit for residential plats meeting the Council’s density policy and gain increased development flexibility within the MUSA for approving

Figure 1. Thrive MSP 2040

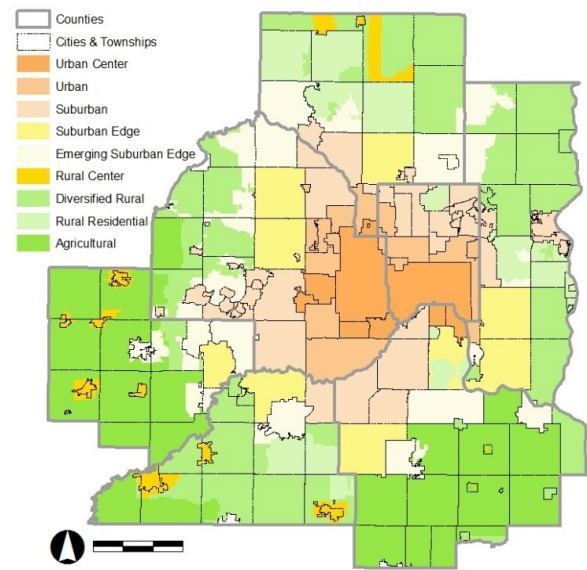
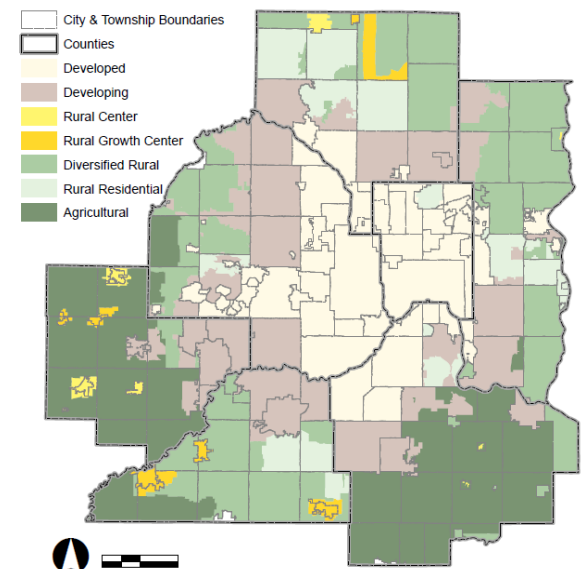


Figure 2. 2030 Regional Development Framework



plats that exceed the density policy. For example, if the overall net density of a participating community is higher than 4 units per acre, that community can approve lower residential densities, so long as the overall net density remains above 3 units per acre. The credit from the Program is crucial information in reviewing comprehensive plan updates and amendments to provide more flexibility for communities when they consider approving lower density developments. It is also a key implementation tool in the Council’s review of sanitary sewer extension permit applications.

History of Program Participants

In 2001, the Metropolitan Council initiated the Plat Monitoring Program with input from the Builders Association of the Twin Cities (BATC), currently known as Housing First Minnesota, and MetroCities (formerly the Association of Metropolitan Municipalities). Participating communities complete an annual summary worksheet and submit copies of plats approved during the calendar year.

The initial 12 volunteer communities were Blaine, Chanhassen, Eden Prairie, Hugo, Inver Grove Heights, Lakeville, Maple Grove, Ramsey, Savage, Shakopee, Waconia, and Woodbury. In 2002, the City of Farmington was added to the Program. As conditions of amendments to expand Metropolitan Urban Service Area (MUSA), Empire Township (now the City of Empire) and the Cities of Andover, Lino Lakes, Medina, Minnetrista, Rogers, Rosemount, and Victoria were added to the Program in 2003. The City of Brooklyn Park was required to report sewer residential plats starting with 2006 plats as a condition of a land use amendment. In 2007, the Cities of Cottage Grove and Orono were required to join the Program as conditions of comprehensive plan amendment requests, while the City of Eagan voluntarily joined the Program.

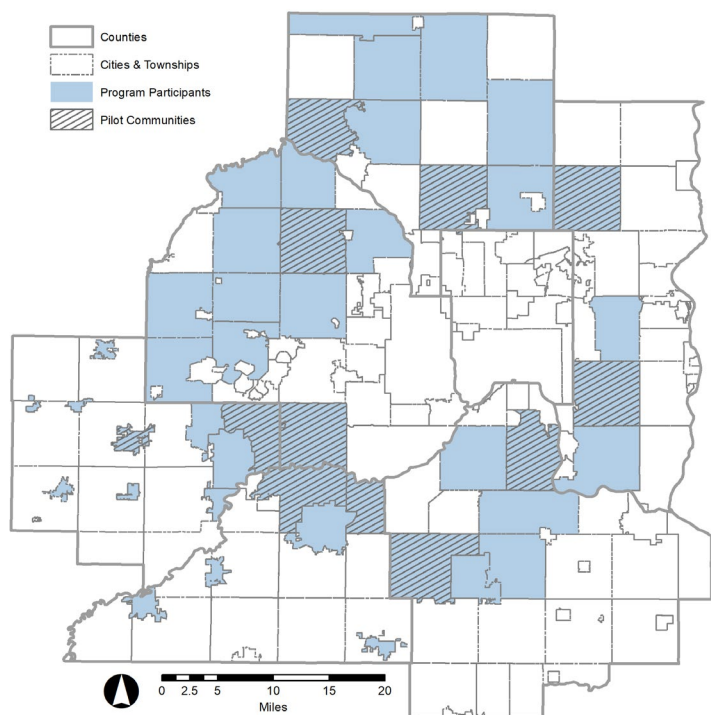
In 2008, as a part of the decennial review of comprehensive plan updates, the Cities of East Bethel, Mayer, and New Germany were added to the Program. Another 18 communities, including a number of communities designated as “Rural Center,” joined the Program as part of the decennial review of their 2030 comprehensive plan updates. These were the Cities of Belle Plaine, Carver, Chaska, Cologne, Columbus, Corcoran, Dayton, Elko New Market, Independence, Jordan, Mayer, Norwood Young America, Nowthen, Oak Grove, Plymouth, Prior Lake, St. Francis, and Watertown. The City of Lake Elmo also joined the Program in 2013. In 2015, the City of Nowthen was dropped from the Program due to the Council ending its plans for long-term sanitary sewer extension in the community.

Analysis

This report analyzes sewer residential development in 45 cities (see Figure 3). It provides an overview of platting activity from the previous year and compares it to past trends based on data submitted since the inception of the Program.

From 2000 to 2023 participating communities have reported an average of 115 plats a year. This year, the Council received data on 93 residential plats from 41 of the 45 participating communities. Of the 41 communities that submitted data, 37

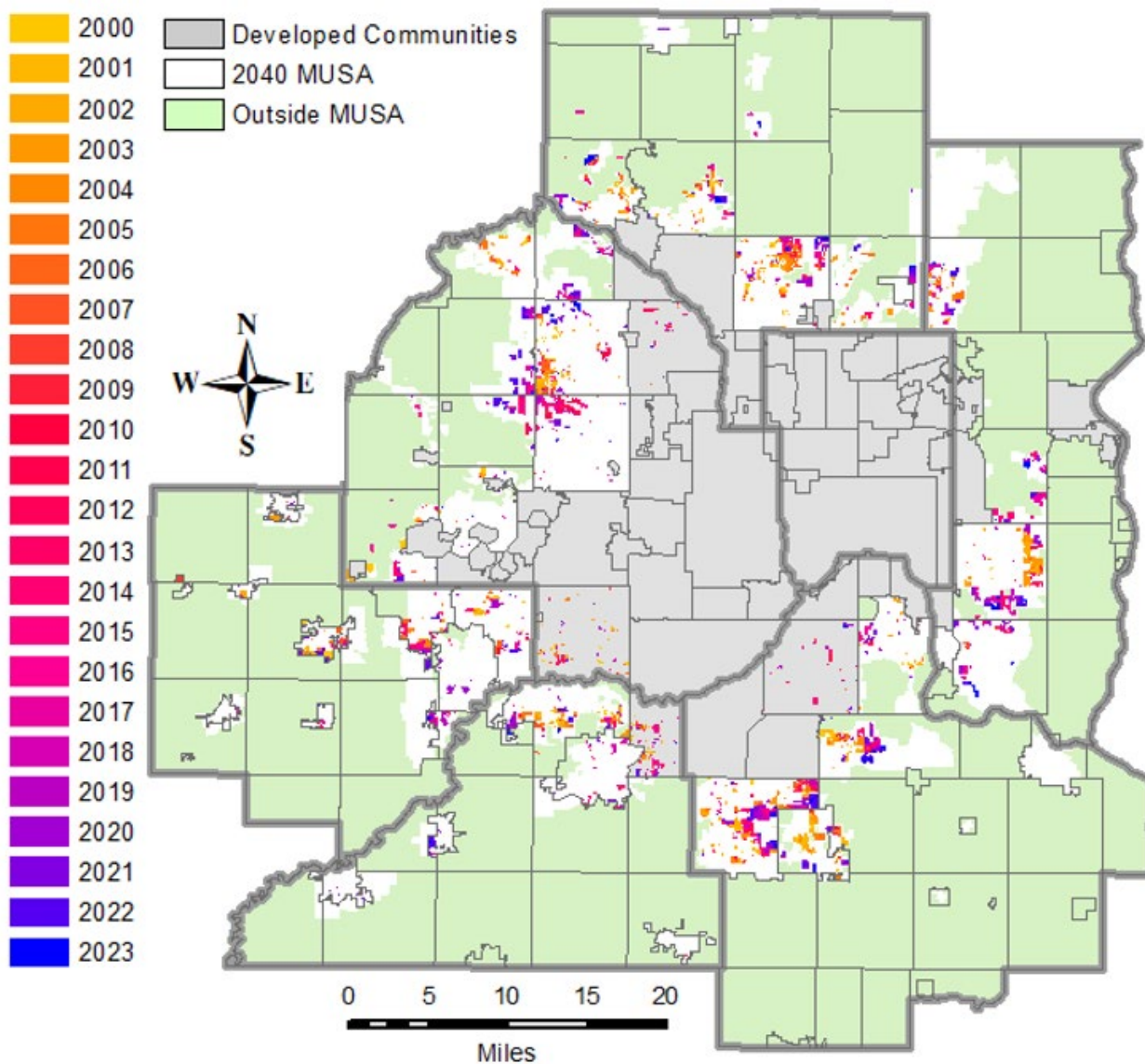
Figure 3. 2023 Program Participants



reported five or less plats, including 10 that reported no new plats. Only 4 communities reported six or more plats, with no community reporting more than 7 plats.

Figure 4 shows all the plats approved in the participating communities between 2000 and 2023 by year. Areas shown in gray are communities with the designations of Urban Center, Urban, and Suburban in *Thrive MSP 2040*, which correspond to the Developed Communities category in the previous development guide, the *2030 Regional Development Framework*. Areas in light green are rural and agricultural communities which are not within MUSA and are mostly not part of the Plat Monitoring Program. The remaining communities are those that are part of the Program and have been approving plats within the sewered areas. Except for the Suburban cities of Brooklyn Park, Eagan, Eden Prairie, and Savage, most participants are Suburban Edge, Emerging Suburban Edge, or Rural Center communities.

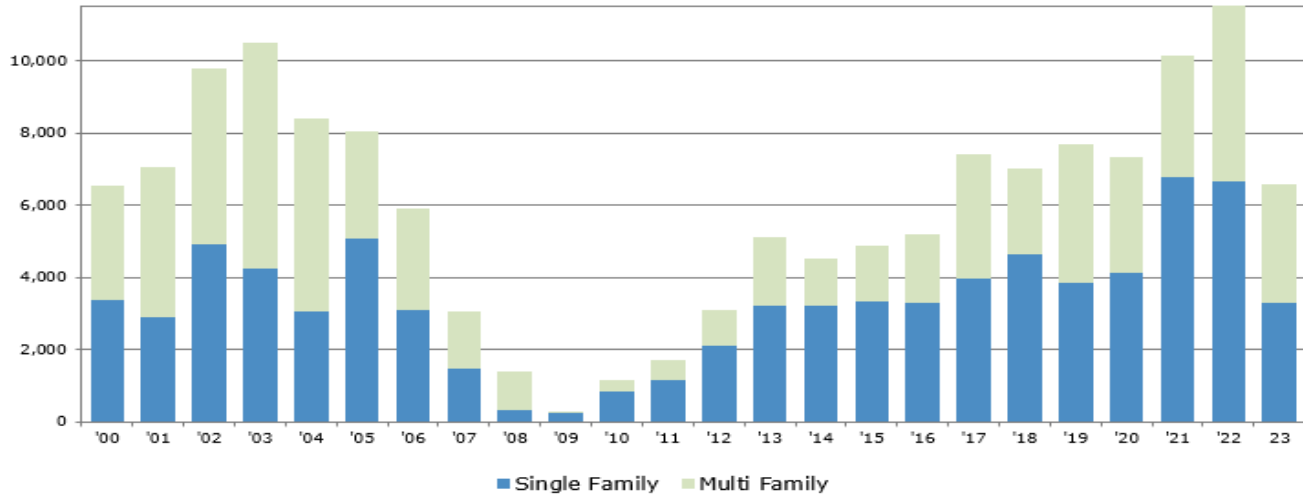
Figure 4. Platting Activity by Year in 7-County Region



Total housing units and housing mix

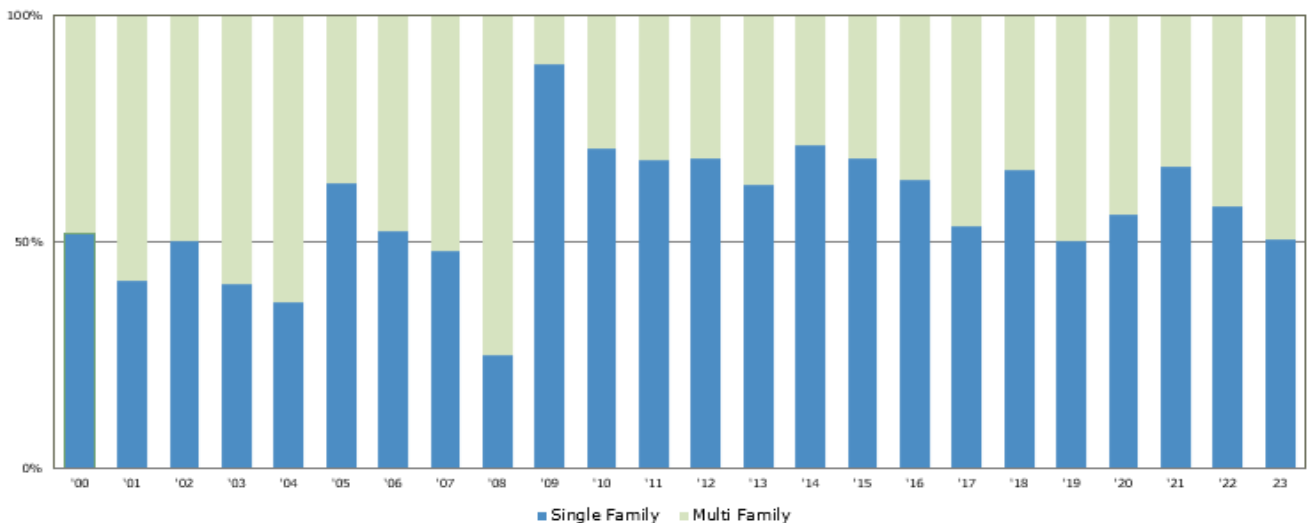
From 2000 to 2023, participant communities recorded an average of 6,008 total single-family and multi-family housing units each year; however, there is a great deal of variation within the reporting period with a low of 286 housing units platted in 2009 and a high of 11,530 housing units platted in 2022. In 2023, 6,568 housing units were platted. While this number is significantly lower than the previous year's total, it is comparable to the 7,000 to 7,500 housing units platted each year between 2017 and 2020. It is currently unclear if the spike in platted housing units observed in 2021 and 2022 or the 2023 decrease in platted housing units is the aberration.

Figure 5. Total Units Platted, 2000-2023



In 2023, 49.6% of the platted units were multi-family (3,257 units) and 50.4% of the platted units were single-family (3,311 units), which is a small deviation from the historic 45% multi-family and 55% single family split observed since the inception of the Program. Comparing 2023 to 2022, multi-family units represent a greater share of the total housing units (up from 42.3%). This shift is the result of the fact that 2023's decrease in platted units was not evenly distributed between multi-family and single-family units, with the number multi-family units decreasing by approximately 33%, whereas the number of single-family units decreased by approximately 50%. Figure 6 shows the variation in housing mix over time.

Figure 6. Housing Mix, 2000-2022



Consistency with local comprehensive plans

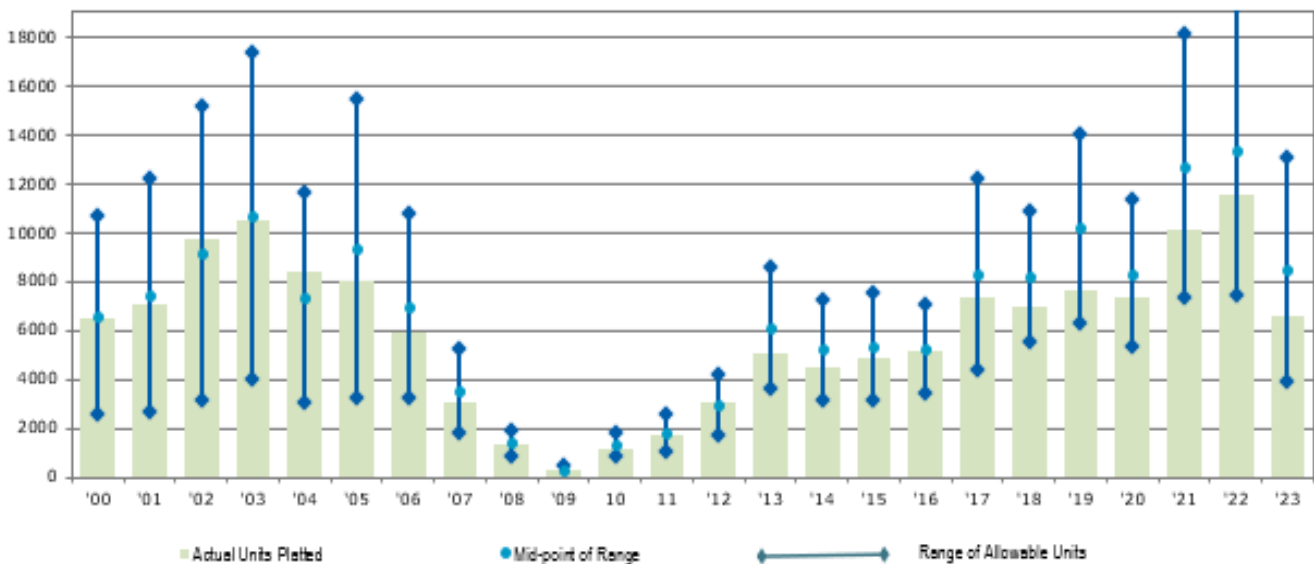
Every year since the start of the Program, participant communities have approved plats that are consistent with the guided densities in their local comprehensive plans. The allowable density is a set range (e.g., 3 to 5 units per acre) determined by the guiding land use assigned to a platted property in the local comprehensive plan. The Council evaluates consistency with local comprehensive plans by checking whether the number of actual units platted is within the range of allowable units. The minimum of this range is the total number of units anticipated if the land was subdivided at the lowest end of the density range. Likewise, the maximum of this range is the total number of units expected if the land was subdivided at the highest end of the density range. Table 1 shows the lowest allowable units, highest allowable units, and actual units platted in 2023.

As shown in Figure 7, the total number of actual units platted in 2023 by all participant communities is within the range of allowable units and slightly under the midpoint of the range (8,056). During the period from 2000 to 2016, the total number of actual units platted each year generally fell near the midpoint or slightly below the midpoint of the range. Starting in 2017, the total number of actual units platted has consistently been below the midpoint of the allowable units. This indicated that for the past seven years communities have been reporting more plats with net densities closer to the minimum of the density range than the maximum.

Table 1. Allowable Units and Actual Units Platted in 2023

Lowest Allowable Units	3,740
Highest Allowable Units	12,372
Actual Units Platted	6,568

Figure 7. Planned and Actual, 2000-2023



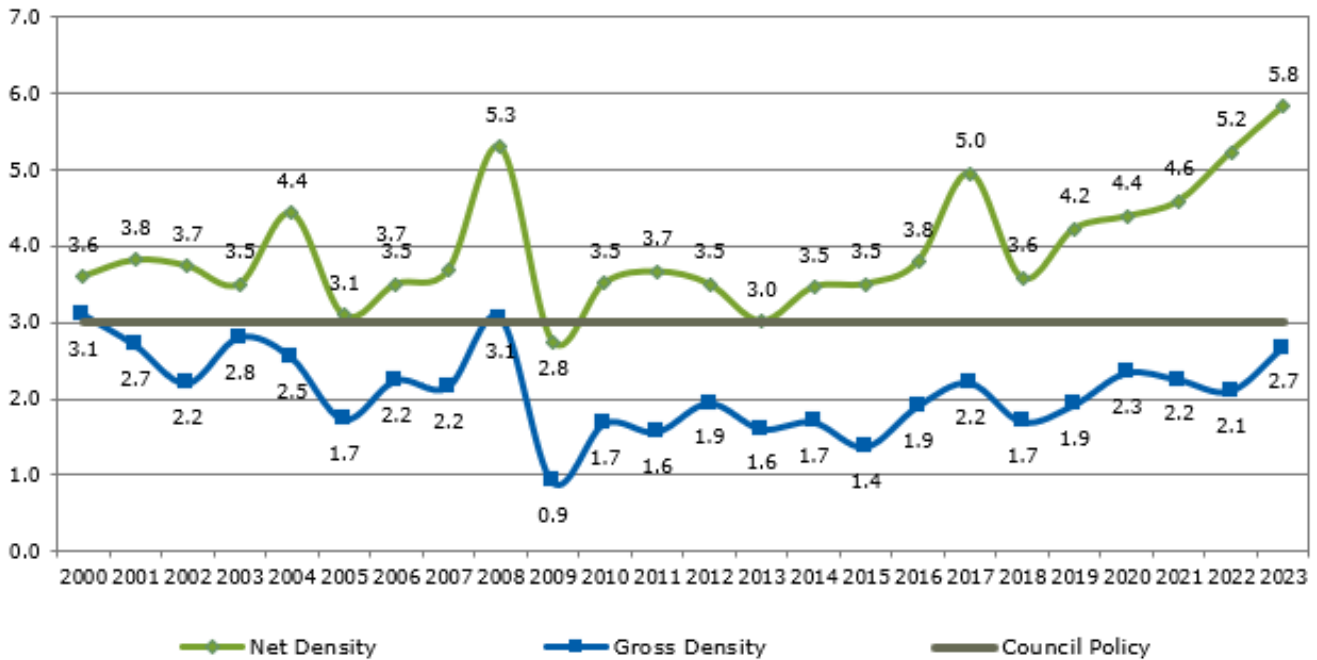
Overall density and Council policy

Thrive MSP 2040 and Council policies require Suburban Edge, Emerging Suburban Edge, and Rural Center communities to develop at an average density of at least 3 units per acre. The Council uses the Plat Monitoring Program to monitor whether platting activity on the developing edge is consistent with this policy.

Overall, the average net density of all plats recorded between 2000 and 2023 is 3.94 units per acre. Additionally, Program participants have collectively platted sewer residential developments at or

above 3 units per acre each year of the program, with the exception of 2009 when the recorded average density was 2.8 units per acre (Figure 8).

Figure 8. Overall Densities, 2000-2023



Since 2009, the overall net density of recorded plats each year has generally increased despite year-to-year fluctuations. In 2023, participant communities reported an overall net density of 5.8 units per acre, surpassing the previously recorded peak of 5.2 units per acre in 2022. Of the plats approved in 2023, five communities reported annual platted net densities below 3 units per acre: Blaine, Chanhassen, Dayton, Eden Prairie, and Orono. This does not include communities that did not approve residential plats in 2023 nor the communities that did not submit data for 2023.

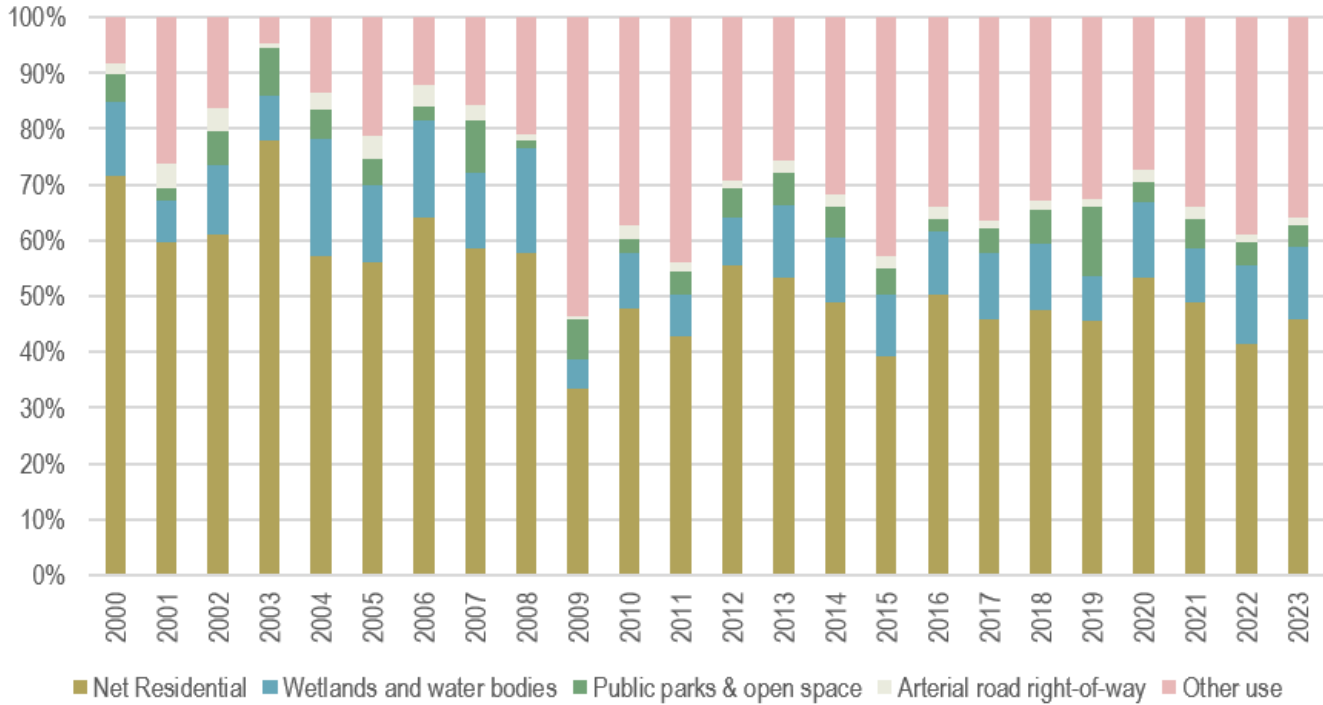
Land utilization

The net developable acres in each plat are calculated based on an analysis of land cover and land uses on that property. Wetlands, natural bodies of water, publicly owned park and open space, arterial road rights-of-way, and land set aside for future development are subtracted from the gross residential acres to determine the net residential area. Communities are encouraged to efficiently utilize developable land when planning for anticipated units to achieve or exceed the minimum required net residential density of 3 units per acre.

Figure 9 shows the breakdown of land consumption from 2000 to 2023. The year 2009 marks the lowest percentage of platted land used for residential development and the highest percentage of land reserved for future development, which is not surprising given that 2009 coincides with the depths of the economic downturn. With decreased housing demand and the economic crisis, about a third of gross residential acres was reserved for future development as outlots (“Other use” in Figure 9). Despite the increase in the share of net residential acres since 2009, the percentage of net residential acres has yet to reach the highest levels seen in 2003 at 79%. In 2023, net developable acres made up 46% of total platted land, which is an increase from 2022 (40%) and average for platting activity in the past 10 years (46%). The percentage of platted land used for the other categories has been fairly consistent over the last decade with wetlands and waterbodies around 12%, arterial right-of-way

around 2%, and public parks and open space around 5%. The 2023 breakdown is within 1% of these totals and most of the year-to-year variation is between the amount of net residential land and land reserved for future development.

Figure 9. Land Consumption by Use, 2000-2023



From a plat to permit

While analyzing platting activity is valuable to understand development patterns in the region, plats are only one step of the development process. For a residential plat to be realized as a development, building permits need to be issued by the local authority.

The Council’s Research department collects annual residential permitting data from around the region. Overlaying plat data with permit information reveals the amount of time that it takes from the initial platting of a lot to the issuance of a building permit. Development proposals can be platted and permitted in the same year or take more than ten years before being constructed. This timeframe, often referred to as lot absorption, can vary based on a variety of factors, most importantly economic stability and housing demand. Since the geocoded permit data only goes back to 2009, the analysis only includes plats permitted in the last 14 years (2009-2023). Tracking this information can help inform growth patterns, land capacity, forecasting, and permitting processes.

The analysis shows a wide range of lot absorption rates with some permits issued the same year the plat was approved (indicated by zero) and others taking over 20 years. Overall, it takes an average of 2.6 years for the platted lots in participating communities to receive building permits. There is a lot of variation within and between individual plats as many factors (desirability of individual lots, product type, builder size, amount of infrastructure/grading associated with the plat, etc.) can all impact how long it takes between recording a plat and beginning to pull building permits.

Just as there is a wide range of lot absorption rates within and between individual plats, there is a lot of variation between and within Program participants. Average lot absorption rates ranges from less than a year for Bell Plaine and St. Francis to over nine years in Elko New Market. It is important to note that

these outliers all approved less than 50 building permits over the course of the analysis and with such a small sample size one very fast or very slow development can significantly impact the average.

Similarly, there is variation between the different Community Designations as shown in Figure 10. The time from platting a site to issuing a permit was the shortest in Suburban communities with an average of 2.25 years and the longest in Rural Center communities with an average of 4.61 years. However, these averages reflect only 7% and 1.4% respectively of all permits issued for residential platted lots between 2009 and 2023. Most of the activity has occurred in Suburban Edge and Emerging Suburban Edge communities, with 51.6% and 39.8% of the building permits issued respectively. The time between platting and permitting was 2.37 years in Suburban Edge and 2.95 years in Emerging Suburban Edge areas. While these differences provide a general sense of the lot absorption rates for communities with similar characteristics, there is a great deal of variation with the categories as well. For example, the communities with the fastest and slowest lot absorption rates mentioned above are Rural Centers. These averages are also heavily influenced by the number of permits issued, for example the lot absorption rate of Lakeville (2.34) with over 6,000 permits issued has a lot more impact on the Suburban Edge’s average lot absorption rate than the lot absorption rate of Rogers (7.23) with 525 permits issued.

Figure 9. Average Duration (Years) by Community Designation

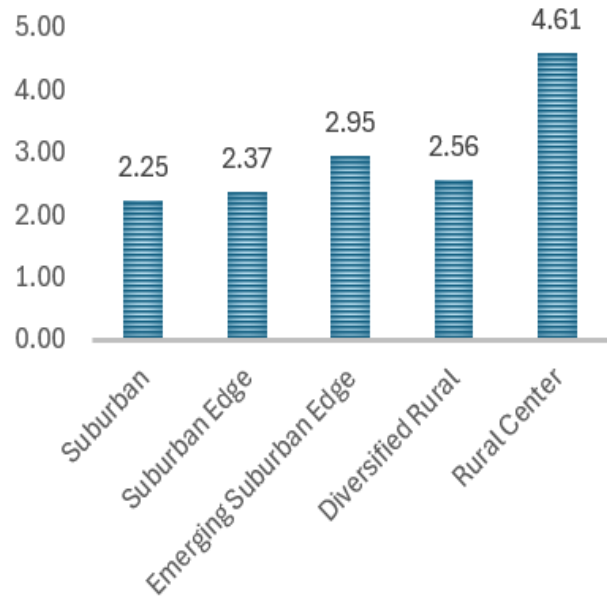
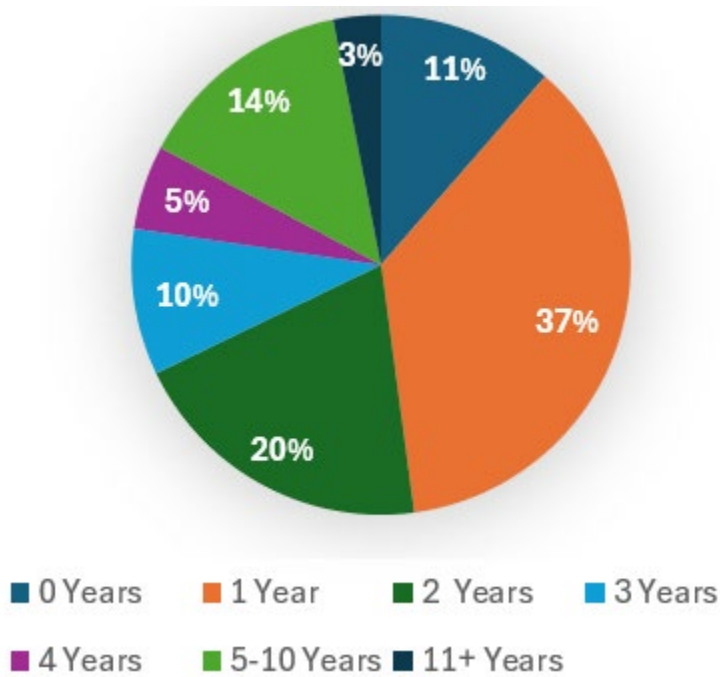


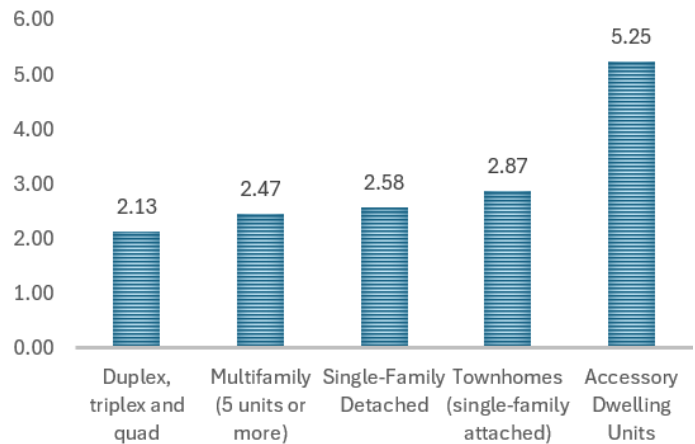
Figure 11. Duration (Years) Breakdown



In terms of general trends, 77% of platted lots have received a building permit within three years. As shown in Figure 11, over 68% of platted lots received building permits in less than two years, 11% within the same year, 37% in one year, and 20% in the second year of the lot being platted. Only 3% of platted lots took longer than 10 years from plat approval to permit issuance. While a short time between the recording of a plat and the issuance of the permit can safely be assumed to represent strong demand and efficient permitting process, longer periods do not necessarily represent the inverse. Most plats will have some lots are less desirable than others or which are bought up by a neighbor to provide a “double yard”. In these cases, the community and development level market may be strong but an individual lot may not be developed for an extended period of time.

In terms of types of housing, as shown in Figure 12, on average communities have permitted Duplex/Triplex/Quad units in the shortest amount of time after platting (just over two years). Not surprisingly, accessory dwelling units which are typically built after the construction of the initial dwelling unit have taken the longest amount of time to be built after platting, averaging over five years. Single-family detached lots have an average lot absorption rate of 2.58 years and townhomes have an average lot absorption rate of 2.87 years. The lot absorption rate from multi-family is 2.47 years.

Figure 10. Average Duration (Years) by Housing Type



County Profiles

The following section shares profiles of each county in the metropolitan area with communities that participate in the Plat Monitoring Program. The profiles highlight the number of residential plats, net residential acres, and housing units for each county in 2023 and between 2000 and 2023. They also include some high-level observations of platting activity within the county but do not provide an in-depth analysis of each individual Program participant.

Anoka County

Andover, Blaine, Columbus, East Bethel, Lino Lakes, Oak Grove, Ramsey, St. Francis

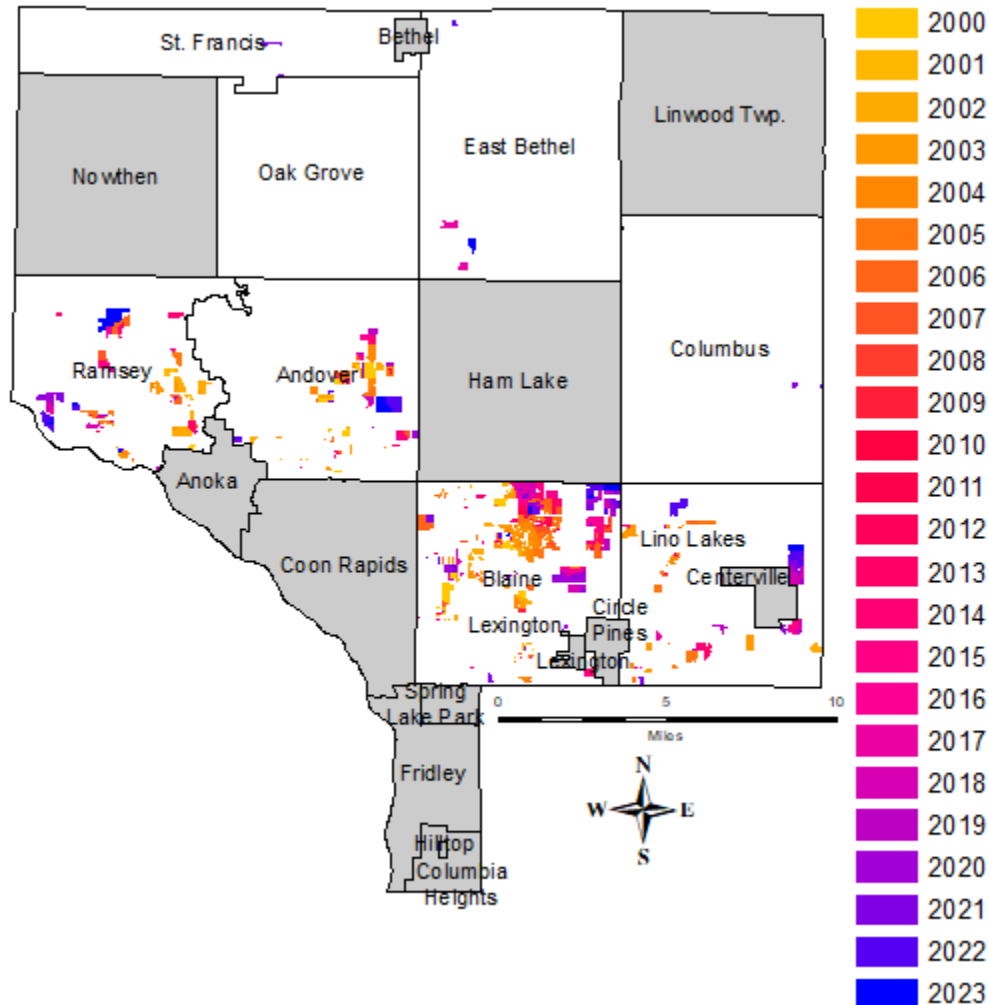
Figure 13 shows platting activity in Anoka County between 2000 and 2023 illustrating the clusters of residential development within the county. During this time, the City of Blaine approved most of its plats in the northern part of the city. The center of the city is where much of the platting activity occurred in the early 2000s, whereas the areas in the northeast corner represent platting activity in the mid- to late-2010s. The map also shows recent platting activity in the City of Lino Lakes near its border with Centerville, along with concentrations of platting activity on the eastern side of Andover and near the Highway 169 corridor in Ramsey.

Table 2. Anoka County Platting Activity

	2023	2000-2023	% of region wide total*
Residential Plats	15 plats	527 plats	19%
Net Residential Acres	212 net acres	6,286 net acres	17%
Total Housing Units	799 units	22,553 units	16%

*Percentage of the region wide total between 2000 and 2023.

Figure 11. Anoka County Platting Activity, 2000-2023



Carver County

Carver, Chanhassen, Chaska, Cologne, Mayer, New Germany, Norwood Young America, Victoria, Waconia, Watertown

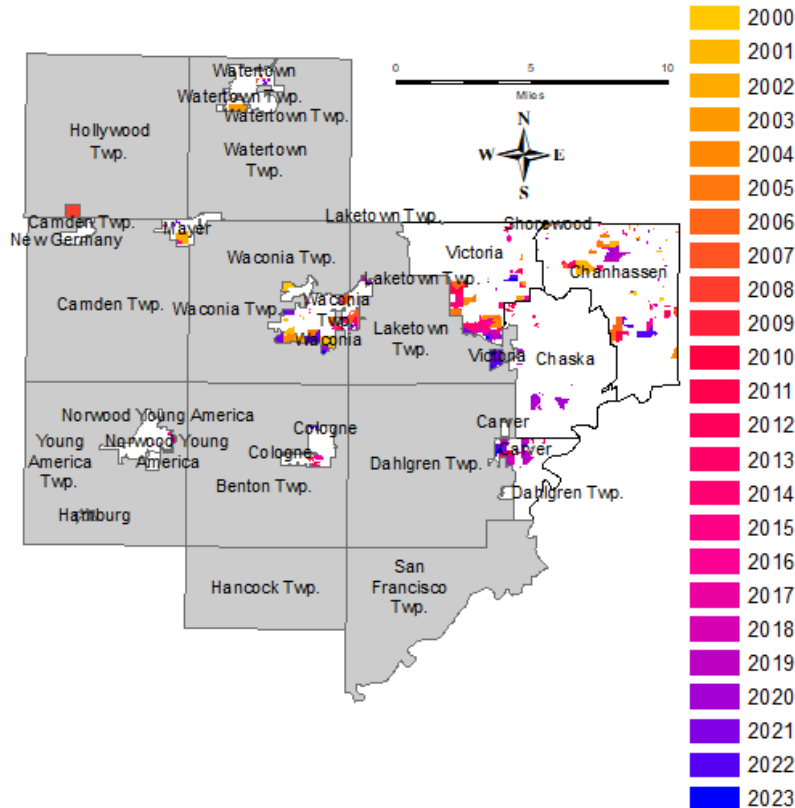
Figure 14 shows platting activity in Carver County between 2000 and 2023. Of the Program participants in Carver County, the Cities of Carver, Victoria, and Waconia have mostly approved plats near the borders they share with neighboring townships. The platting activity in these areas aligns with planned annexation areas within the Townships of Dahlgren, Laketown, and Waconia. Some of the cities have orderly annexation agreements (OAA) with one or multiple townships to facilitate this process, while others do not have these agreements and instead annex additional land to accommodate growth on an ad hoc basis. Chanhassen, which does not have available township land to annex, has mostly approved plats in the undeveloped southern portions of the City. Carver County also has five Rural Center communities that participate in the Plat Monitoring Program that have approved some plats since 2000, but not to the same extent as the larger cities.

Table 3. Carver County Platting Activity

	2023	2000-2023	% of region wide total*
Residential Plats	14 plats	271 plats	10%
Net Residential Acres	116 net acres	3,677 net acres	10%
Total Housing Units	496 units	12,275 units	9%

*Percentage of the region wide total between 2000 and 2023.

Figure 12. Platting Activity in Carver County, 2000-2023



Dakota County

Eagan, Empire, Farmington, Inver Grove Heights, Lakeville, Rosemount

Table 4. Dakota County Platting Activity

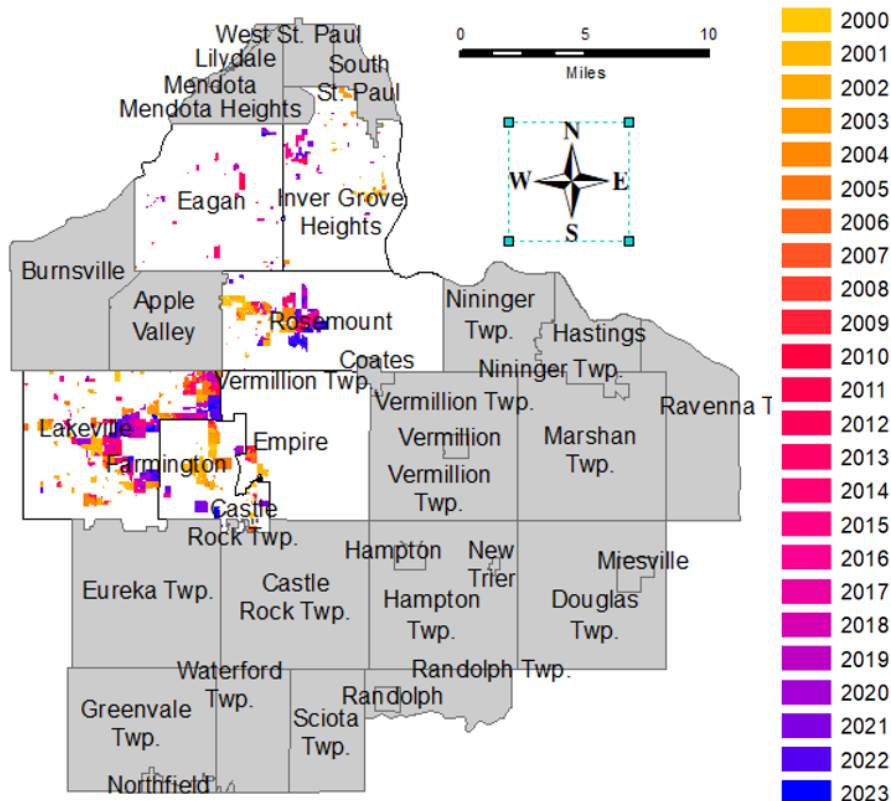
	2023	2000-2023	% of region wide total*
Residential Plats	17 plats	606 plats	22%
Net Residential Acres	236 net acres	8,172 net acres	22%
Total Housing Units	1,795 units	33,106 units	23%

*Percentage of the region wide total between 2000 and 2023.

Figure 15 shows platting activity within Dakota County between 2000 and 2023. Within the City of Rosemount, platting activity in the early 2000s was concentrated in the west side of the city, while more recently development has been moving eastward towards the University of Minnesota's UMore Park. In 2022 and 2023, the City approved plats for some of the first residential development within UMore Park. The development, Amber Fields, is expected to bring nearly 2,000 new housing units to the City along with several commercial users. The developing areas closer to the City's western border with Apple Valley indicate platting activity in the early 2000s, whereas areas closer to the center of the City indicate more recent platting activity in the late 2010s and early 2020s. The City of Lakeville has mostly approved plats on the east side of the City south of Dodd Boulevard. In contrast to the high levels of clustered platting activity in Rosemount and Lakeville, activity in the Cities of Eagan and Inver Grove Heights has been more sporadic indicating that these communities are almost fully built out and may only have a few undeveloped parcels remaining.

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Figure 13. Platting Activity in Dakota County, 2000-2023



Hennepin County

Brooklyn Park, Corcoran, Dayton, Eden Prairie, Independence, Maple Grove, Medina, Minnetrista, Orono, Plymouth, Rogers

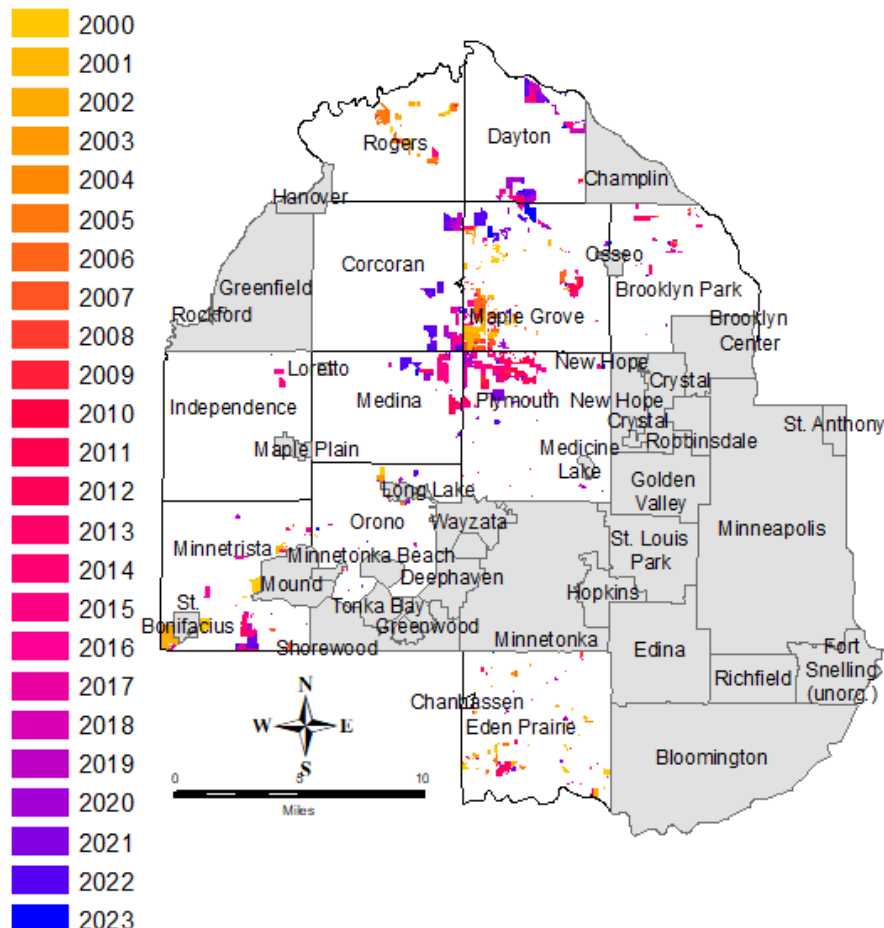
Figure 16 shows platting activity in Hennepin County between 2000 and 2023. Within the county, a significant portion of the platting activity has occurred around the point where the Cities of Corcoran, Maple Grove, Medina, and Plymouth meet. Residential development started concentrating in the southwest corner of Maple Grove in the early 2000s and later moved to northwest Plymouth and northeast Medina in the early- to mid-2010s and into the late 2010s. At this time, platting activity continued to occur in those areas, while also starting to occur more in southeast Corcoran until present day. Outside of this nexus of platting activity, the City of Rogers reported plats in the early- to mid-2000s mostly along the I-94 corridor and the City of Dayton has reported plats near the I-94 corridor in recent years.

Table 5. Hennepin County Platting Activity

	2023	2000-2023	% of region wide total*
Residential Plats	20 plats	695 plats	25%
Net Residential Acres	214 net acres	8,726 net acres	24%
Total Housing Units	1,512 units	34,174 units	24%

*Percentage of the region wide total between 2000 and 2023.

Figure 14. Platting Activity in Hennepin County, 2000-2023



Scott County

Belle Plaine, Elko New Market, Jordan, Prior Lake, Savage, Shakopee

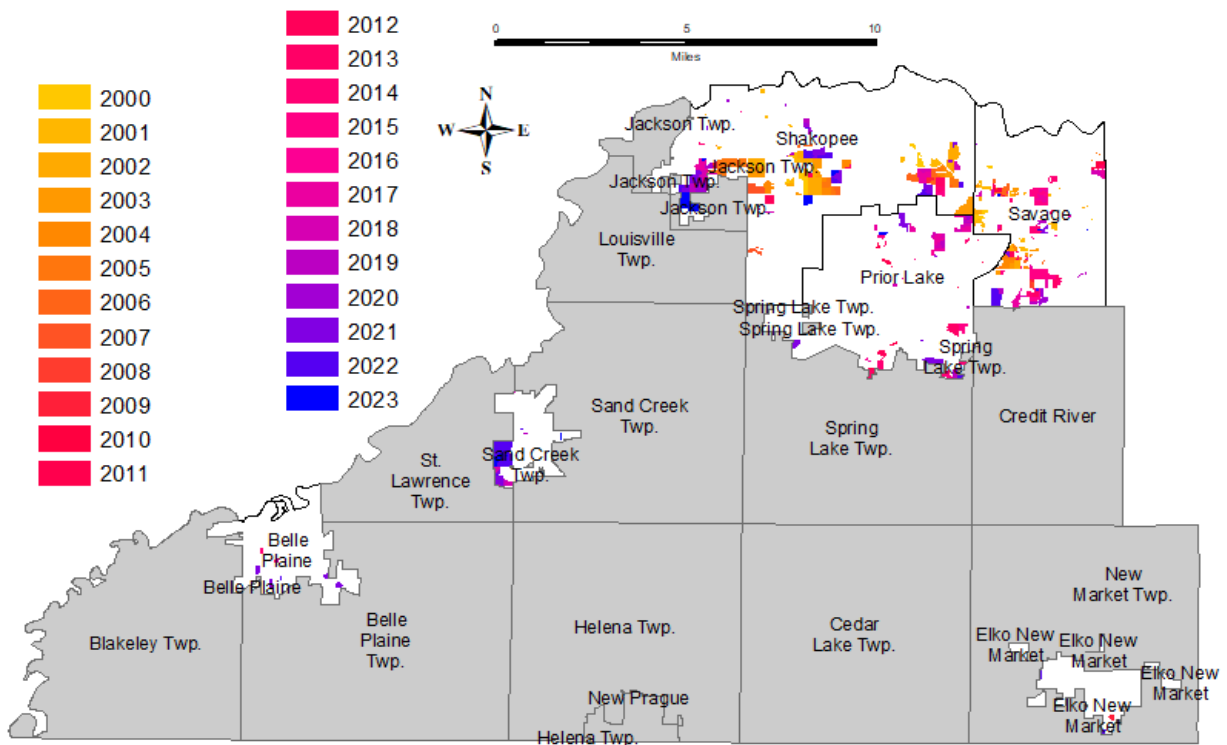
Figure 17 shows platting activity in Scott County between 2000 and 2023. In Shakopee, most residential plats approved during this time are located south of Highway 169 and along 17th Avenue E / Eagle Creek Boulevard. The area between the clusters of plats in the central and eastern parts of the City is mostly held in trust by the Shakopee Mdewakanton Sioux Community. There is also a cluster of more recently approved plats along its western border near the area in which the City has an Orderly Annexation Agreement (OAA) with Jackson Township. Within the City of Savage, residential development concentrates on the west side of the City with more recent development west of the portion of Murphy Hanrehan Park Reserve located within Savage. While the City of Jordan has not seen platting activity to the same extent as other communities in Scott County, the recent activity along its western border is significant when considering its size and status as a rural center community. In 2022-2023, the City approved a series of plats on its southwest border.

Table 6. Scott County Platting Activity

	2023	2000-2023	% of region wide total*
Residential Plats	10 plats	305 plats	11%
Net Residential Acres	112 net acres	3,527 net acres	10%
Total Housing Units	767 units	14,999 units	11%

*Percentage of the region wide total between 2000 and 2023.

Figure 15. Platting Activity in Scott County, 2000-2023



Washington County

Cottage Grove, Hugo, Lake Elmo, Woodbury

Table 7. Washington County Platting Activity

	2023	2000-2023	% of region wide total*
Residential Plats	17 plats	348 plats	13%
Net Residential Acres	238 net acres	6,198 net acres	17%
Total Housing Units	1,199 units	23,833 units	17%

*Percentage of the region wide total between 2000 and 2022.

Figure 16. Platting Activity in Washington County, 2000-2023

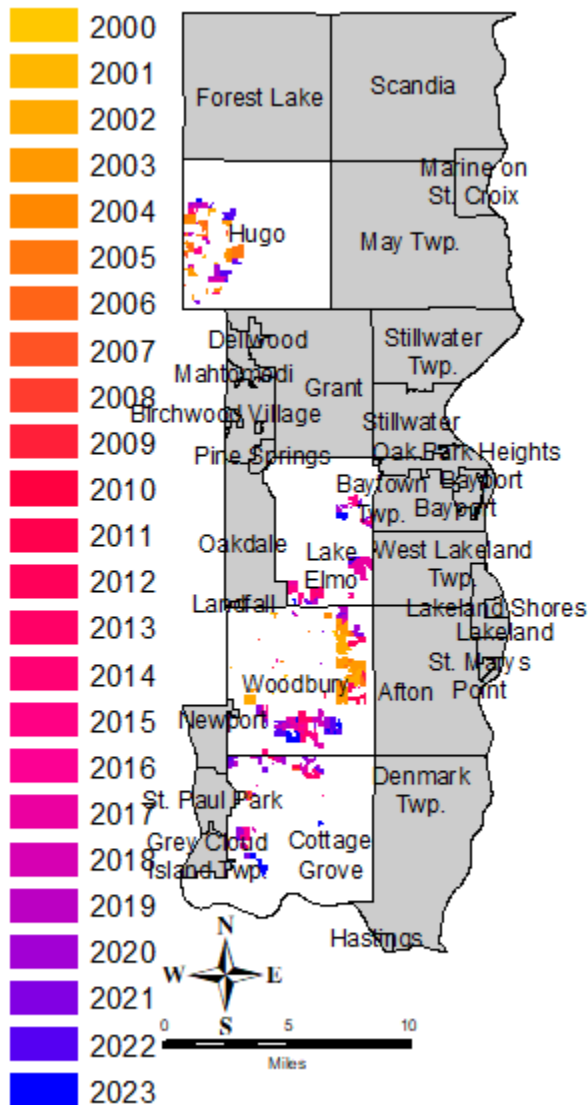


Figure 18 shows platting activity in Washington County between 2000 and 2023. In the City of Woodbury, there are two main concentrations of residential plats: south of Bailey Road and west of Manning Avenue. Development on the eastern side of the City mostly occurred in the early- to mid-2000s, whereas development to the south is more recent. The City’s southern neighbor, Cottage Grove, has also seen recent platting activity near this area along their shared border.

As shown in the map, the City of Hugo’s sewered residential platting activity since 2000 has occurred in the western part of the City along the Highway 61 corridor. This area of the City is connected to the regional wastewater system; therefore, it is understandable that new development would concentrate in the area with access to infrastructure. Given this information, it is also important to note that this Program only captures sewered plats which explains why the map does not show activity on the eastern side of the City since those developments are served by septic systems and are planned to be more rural in character. This also applies to the pattern of platting activity in the City of Lake Elmo along its southern and eastern borders, as well as other communities in the region with only part of the jurisdiction located within the MUSA.



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