

PLAT MONITORING PROGRAM

*RESIDENTIAL PLATTING IN DEVELOPING COMMUNITIES
IN THE TWIN CITIES REGION, 2014*



January 2016

About the Program

The Plat Monitoring Program tracks and monitors development in 46 communities in the region, specifically 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 Plat Monitoring Program is to measure the success of local implementation of Council policy by providing an annual report on sewer residential development in some 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 use consumption. 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. The 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)?

Since 2001, the Council annually reports on residential development in participating communities using data collected through the program. The Program assists communities and the Metropolitan 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

Figure 1. Thrive MSP 2040

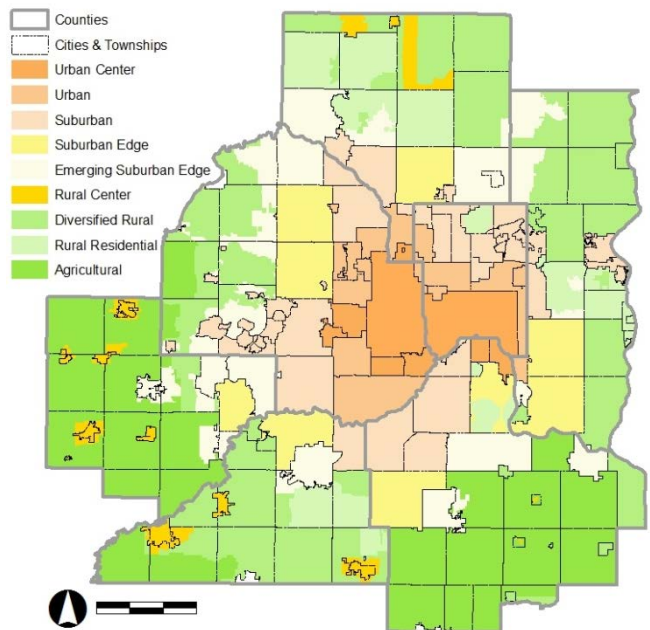
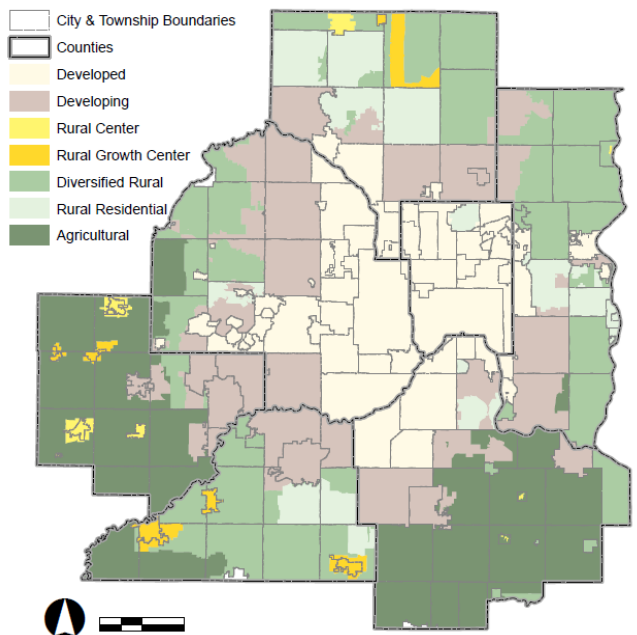


Figure 2. 2030 Regional Development Framework



density policy and receive increased development flexibility within the MUSA for approving 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 the communities as they consider guiding lower density land uses. It is also a key implementation tool in Council’s review of Sanitary Sewer extension permit applications.

History of Program Participants

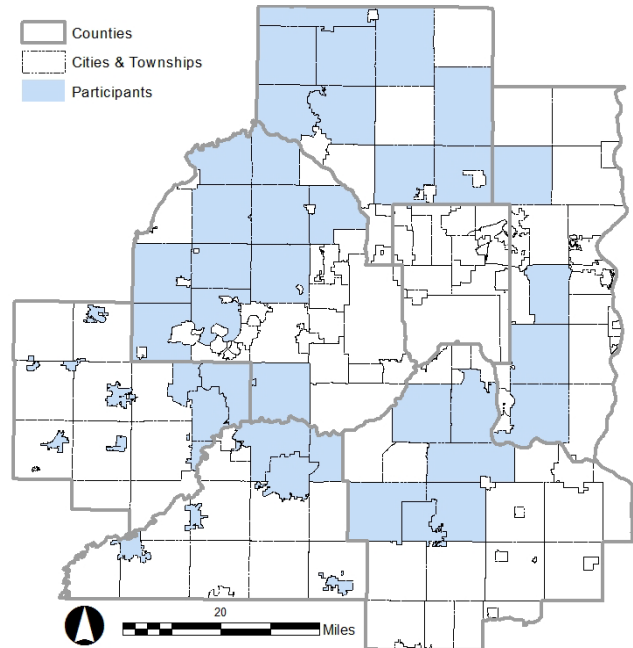
In 2001, the Metropolitan Council initiated the Plat Monitoring Program with input from the Builders Association of the Twin Cities (BATC) and MetroCities (formerly the Association of Metropolitan Municipalities). Participating communities complete an annual summary worksheet and submit copies of plats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

The initial 12 volunteer communities included 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 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 Orono and Cottage Grove were required to join the program as conditions of comprehensive plan amendment (CPA) 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: 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.

This report analyzes sewer residential development in 46 cities and one township (see Figure 3). This report also shows the trends for all the participating communities since the inception of the program for years with submitted data, including year-to-year density and housing mix comparisons.

Figure 3. 2014 Participating Communities



Analysis

From 2000 to 2014, participant communities platted an average of 5,107 single-family and multi-family housing units each year, peaking in 2003 with over 10,000 housing units platted. This number declined from 2004 to 2009, with the lowest number of plats ever recorded in the history of the program when only 286 units were platted. Since 2009, the participating communities have seen an overall increase in the number of platted units, with a slight decline in 2014, recording 4,508 units. A total of 150 plats were recorded by 46 participating communities in 2014.

Total housing units and housing mix

In 2014, communities faced a slight decrease in platting numbers compared to 2013. As shown in Figure 4, platting activity had been increasing steadily since 2009. This increase continued for the single-family plats, but was lower for multi-family units (Figure 4).

During the previous year, 72% of the platted units were single family, for a total of 3,230 units, which is a higher share than 2013. There was, however, a decrease in the proportion of multi-family units platted, from 38% in 2013 to 28% in 2014 with 1,278 units. The composition of housing mix since 2000 (Figure 5) shows that, while there is variability from year to year, overall there is almost an equal number of multi-family and single family units platted over the course of the Program, for a total of 76,608 units.

Figure 4. Total Units Platted, 2000-2014

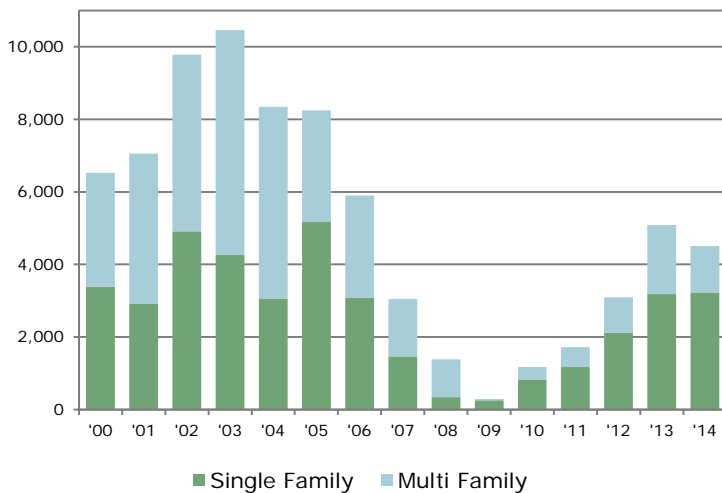
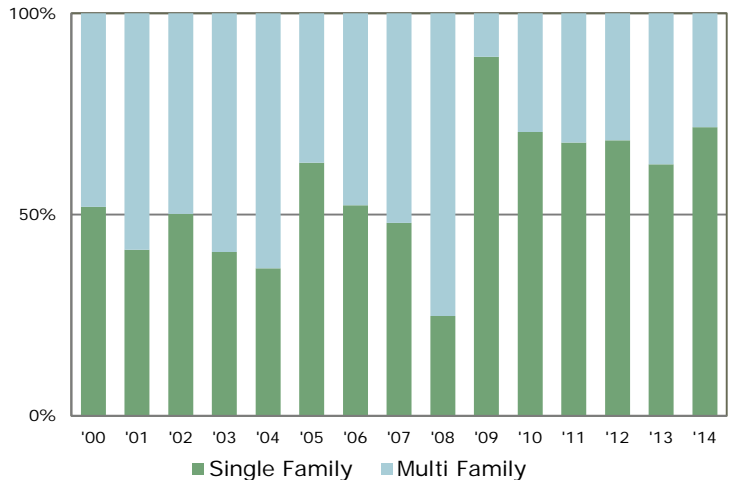


Figure 5. Housing Mix, 2000-2014



Consistency with Local Comprehensive Plans

Every year since the start of the program, participant communities have approved plats that are consistent with the guiding in their local comprehensive plans. The allowable density is measured based on the corresponding land use designation and density range described in local comprehensive plans for the platted properties.

As shown in Figure 6, the actual number of units platted in 2014 is well within the range of overall allowable units for the participant communities as a group. The lowest allowable units is the sum of the number of units anticipated if all 150 plats were subdivided at the lowest allowable density defined in the local comprehensive plan. Likewise, the highest

Figure 6. Number of Units Platted & Allowable Number of Units, 2014

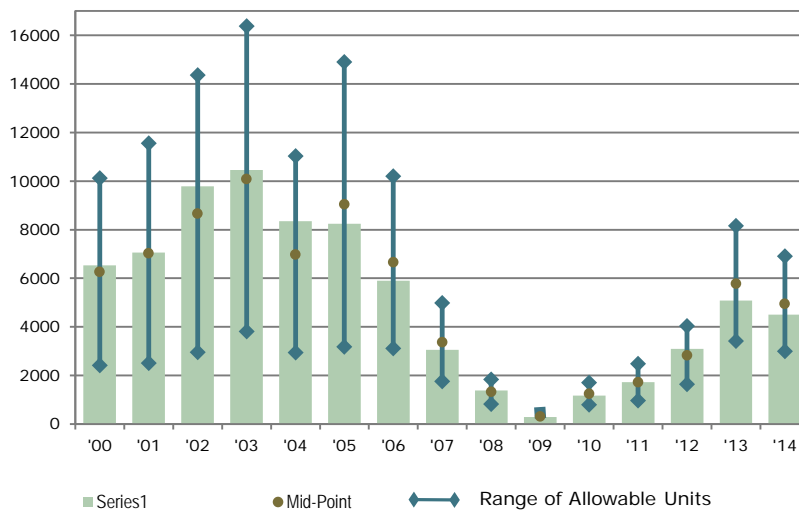
Lowest Allowable Units	2,988
Highest Allowable Units	6,912
Actual Units Allowed	4,508

allowable units would have been expected if all the plats were subdivided at the highest allowable density based on the local comprehensive plan land use designation.

Since 2000, participant communities have generally platted at a density around the mid-point of the overall density range. In 2014 the total number of actual units platted fell just below the mid-point of allowable units, following the same trend in 2013.

The annual fluctuation of the number of units around the mid-point is not significant over the course of the program. However, since 2005, the number of platted units has almost always been below the mid-point of allowable density range, except in 2008 and 2012. This trend shows demand in the market for lower densities, even during the market rebound, as well as reflecting the propensity of some communities encouraging lower density developments.

Figure 7. Planned and Actual Units

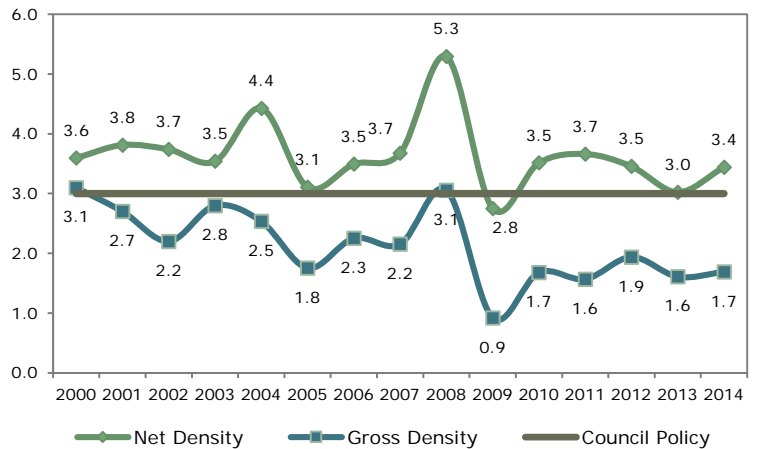


Overall Density and Council Policy

Based on the Council's *Thrive MSP 2040* and Council policies, Suburban Edge, Emerging Suburban Edge, and Rural Center communities are to maintain an average density of at least 3 dwelling units per acre. From 2000 to 2014, Plat Monitoring Program participants, as a group, have generally platted sewer residential developments at or above 3 units per developable acre, with the exception of 2009, when recorded average density fell below 3 units per acre (2.8 units per developable acre).

During the reporting year of 2014, 26 communities had two or fewer plats reported, while only three communities approved over 10 plats. For plats approved in 2014, 16 of the participating communities had net densities below 3 units per acre: Andover, Blaine, Carver, Chanhassen, Cottage Grove, Empire Township, Lakeville, Medina, Minnetrista, Orono, Plymouth, Prior Lake, Rogers, Shakopee, Victoria, and Woodbury. Additionally, 17 communities did not record any plats in 2014, similar to 2013 when 20 participating communities did not approve any plats.

Figure 8. Overall Densities, 2000-2014

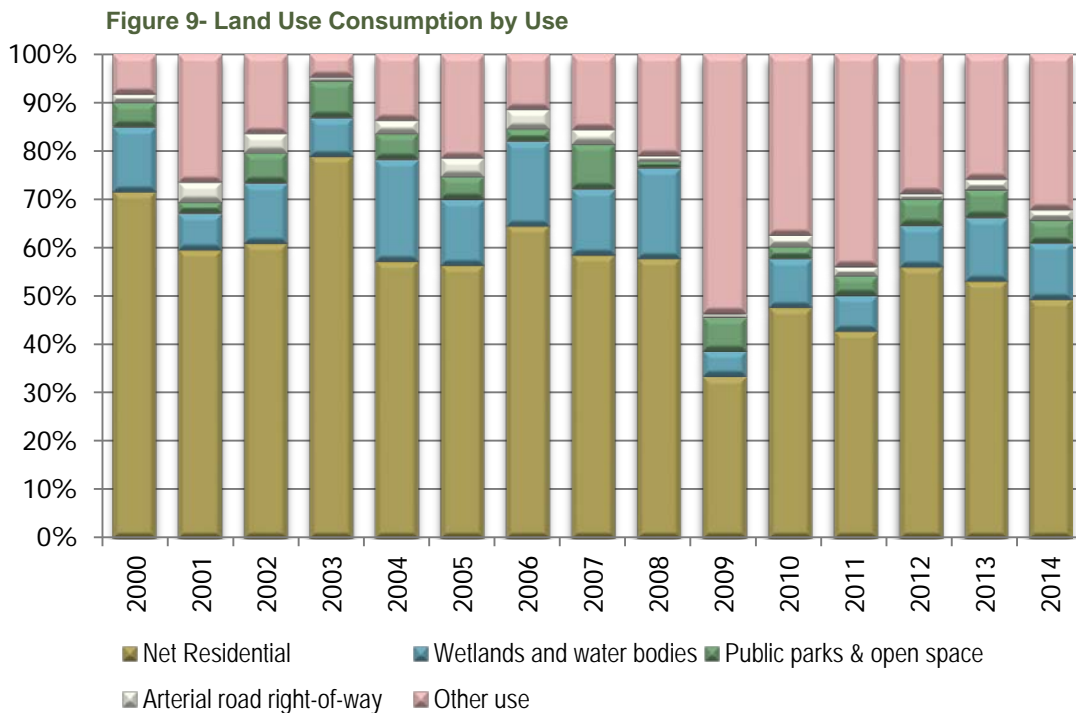


Since 2009, the number of units platted has been increasing, with the overall net density of platted units is 3.4 units per acre in 2014. While this number conforms to the Council policies, there is still a significant gap between 2014’s overall density and the recorded peak of 5.3 units per developable acre in 2008, which is a reflection of change in market production towards larger-lot single family homes in these communities. From 2000 to 2014, the overall average net density of the plats in all participating communities is 3.64 units per acre.

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 right-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 take the most advantage of developable land to plan for anticipated units in order to achieve or exceed the minimum required net residential density of 3 units per acre in their community.

Figure 10 shows the breakdown of land consumption from 2000 to 2014. The year 2009 marks the lowest use of platted land for residential development and highest percentage of land reserved for future development, which is in sync with the economic downturn. With decreased housing demand and the economic crisis, about a third of gross residential acres had been reserved for future development as outlots (“Other use” category in Figure 9). Despite the increase in net residential acres in 2014, the percentage of net residential acres has yet to reach the higher levels seen in 2003.



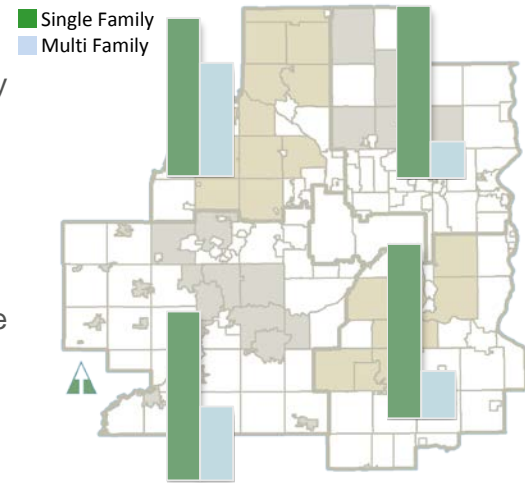
Density by Community

In 2014, communities submitted a total of 146 plats. These plats were relatively evenly distributed around the region. Over 30 plats were approved in each quadrant of the region. The composition of multi-family and single-family housing is also very similar and almost equal in the region and between the four quadrants.

The attached 2014 Plat Monitoring Program Summary Sheet outlines the number of submitted plats, number of units platted, housing mix, and the average net density for each community and for all communities overall. Most of the participating communities have been developing with an average net density of 3 units per acre or above.

Based on the submitted data since the beginning of the program and the history of communities' participation, 10 of participating communities have an **overall** density falling below 3 units per acre since their involvement in the program: Carver, Cologne, Dayton, Empire Township, Medina, Minnetrista, New Germany, Norwood Young America, Prior Lake, and Victoria. Some of these recorded densities are low due to the short timeframe of their participation and reduced levels of development in recent years. Six of these communities have been a part of the Program only since 2009. The others have mostly joined the Program around 2003. A total of nine communities have not submitted any approved plats during their participation in the program. Almost all of these participants have joined the program in 2009, during the housing market downturn.

Figure 10. Units Platted by Regional Quadrants in 2014



New Participants

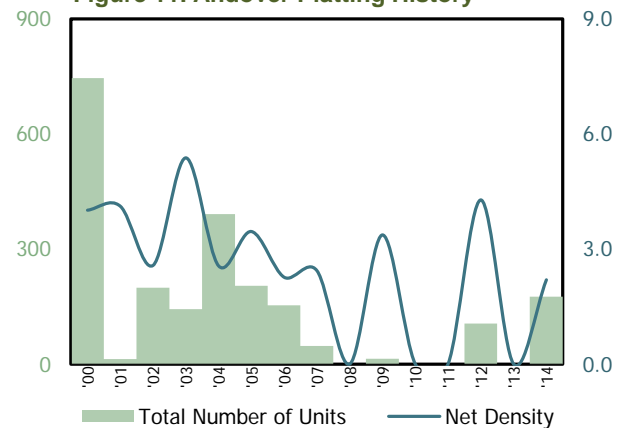
No new participants joined the Program in 2014. Below are a few examples of participating communities and their platting and density pattern since the beginning of the Program.

City of Andover

Andover has been part of the Plat Monitoring Program since 2003, but has subsequently reported platting activity going back to 2000. The overall net density of the plats reported during the Program is 3.13 units per acre. The City of Andover joined the program voluntarily and has approved a total of 50 plats since.

The City's net density has fluctuated during the Program between a low of 2.2 du/ac in 2014 and high of 5.4 du/ac in 2003, while recording no plats several times and resulting in no recorded density during those years. During 2014, the City approved 5 plats with a total 176 single family units on 80.2 net developable acres, resulting in a net density of 2.2 units per acre. Andover experienced downward platting activity since the market downturn and is still recovering from its effects.

Figure 11. Andover Platting History



City of Maple Grove

Maple Grove voluntarily joined the Program in 2000 and has reported platting activity since then. The City has approved a total of 117 plats since 2000, reporting an overall net density of 4.31 dwelling units per acre. This platting activity has resulted in a total of 7,624 units, with 40% single family and 60% multi-family residential units.

The City did not report any platting activity in 2009, consistent with the overall market conditions in the region. Although the number of units platted is recovering from the market downturn, it has yet to reach the high numbers of over 1,000 units in 2006. In 2014 the City approved 8 plats with 449 residential units, resulting in a net density of 12.6 du/ac, which is lower than the previous year of 16 du/ac.

City of Rosemount

The City of Rosemount was added to the Plat Monitoring Program as a condition of an amendment to expand the Metropolitan urban Service Area (MUSA) in 2003, and has reported platting activity back to 2000. Rosemount has approved a total of 55 plats since 2000, with an overall net density of 4.04 units per acre. The only year throughout the Program with no plats submitted was 2010, but there has been a slight annual increase in the number of units platted since. The City has platted a total of 3,622 units over a total of 895.6 net developable land.

2014 marked a high net density of 7 units per acre for the City, which is comparable to the highest density recorded through the Program in 2005 of 7.3 units per acre.

City of Savage

The City of Savage also joined the Program in 2000 as a pilot participant, reporting a total of 76 approved plats in that time period. The overall net density of these plats is 4.16 units per acre. These plats resulted in a total of 2,654 residential units, which are mostly multi-family.

Platting activity in the City of Savage has been steady since the beginning of the Program. The number of units platted reached the lowest number of 28 units in 2009, reflecting the market conditions in that year. The number of platted units has been rising since, with the highest total number of units in 2014 of 432 single family and multi-family dwellings. The net density of development reached the highest of 8.9 units per acre, which is a significant jump from the previous year with 2.5 units per acre.

Figure 12. Maple Grove Platting History

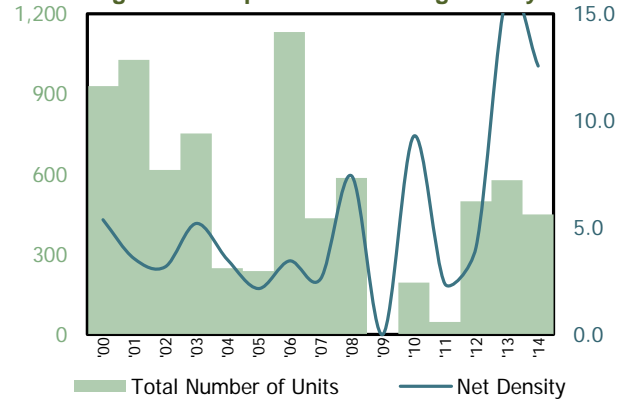


Figure 13. Rosemount Platting History

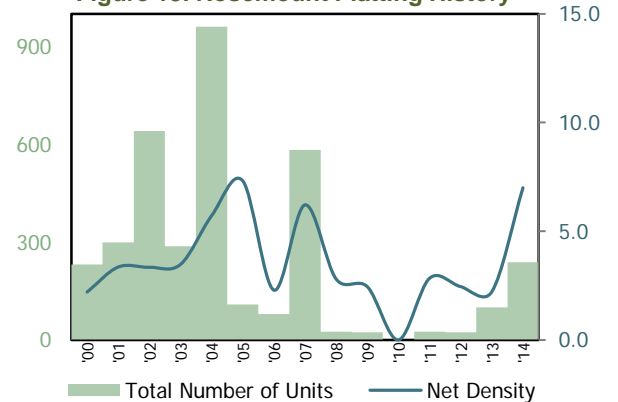
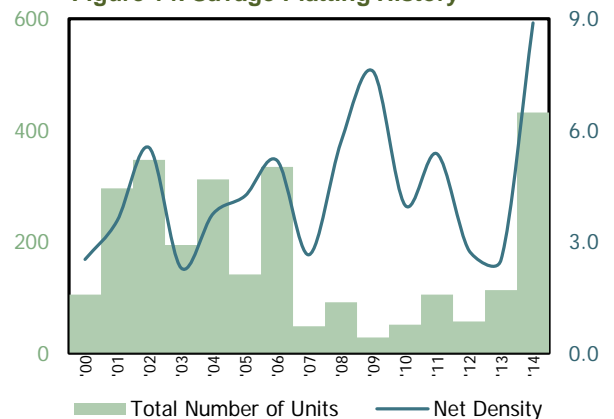


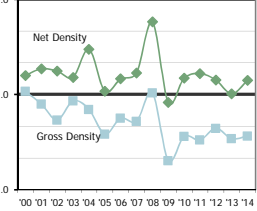
Figure 14. Savage Platting History



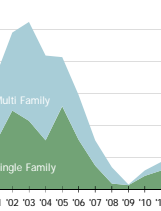
Plat Monitoring Program: 2014 Summary

2014 SNAPSHOT	
Participating Communities	46
Total Number of Plats	146
Gross Acres Platted	2,667.3
Net Acres Platted	1,309.0
Number of Units Platted	4,508
Single Family	3,230
Multi-Family	1,278
Housing Mix	
Single Family	72%
Multi-Family	28%
Average Net Density ('00-'14)	3.64

Overall Net and Gross Density

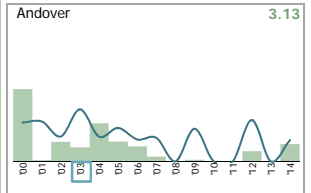


Total Units Platted



Number of Units Platted and Net Density by Community

- Number of Housing Units
- Annual Net Density
- Overall Net Density
- Year Community joined the program





390 Robert Street North
St Paul, MN 55101-1805

651.602.1000
TTY 651.291.0904
public.info@metc.state.mn.us
metro council.org