

PLAT MONITORING PROGRAM RESIDENTIAL PLATTING IN DEVELOPING COMMUNITIES IN THE TWIN CITIES REGION, 2022

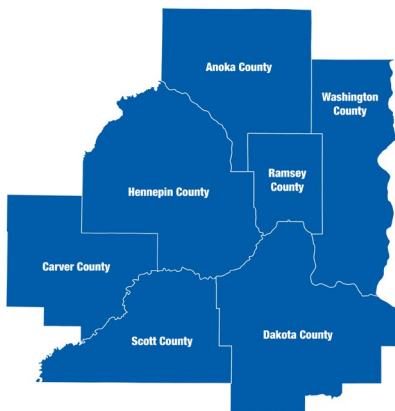


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About the Program

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 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 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. 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)?
- 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

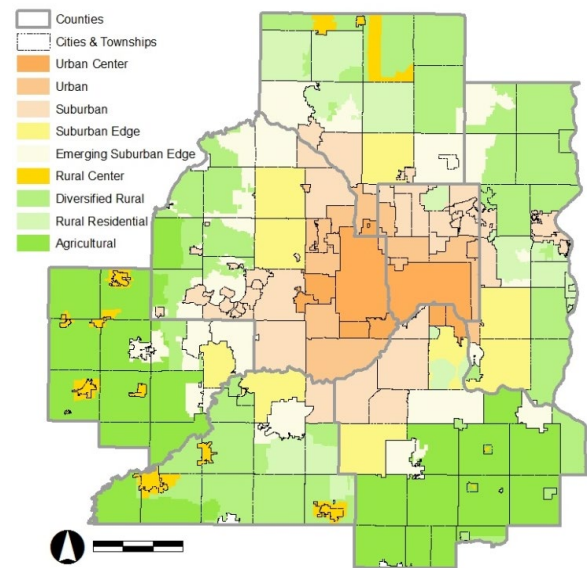
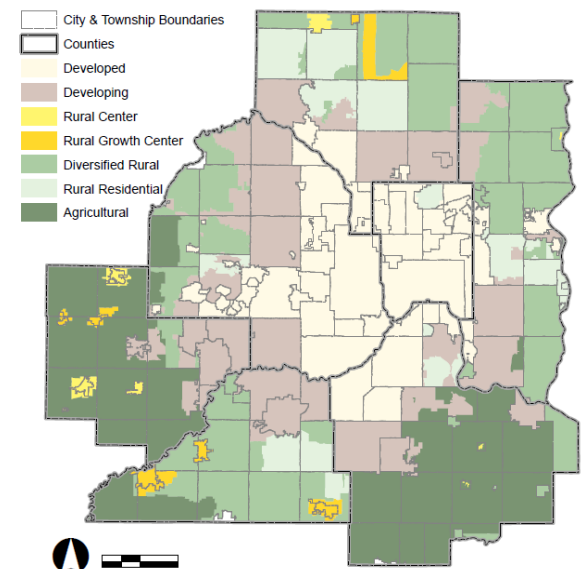


Figure 2. 2030 Regional Development Framework



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 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 (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 sewered 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.

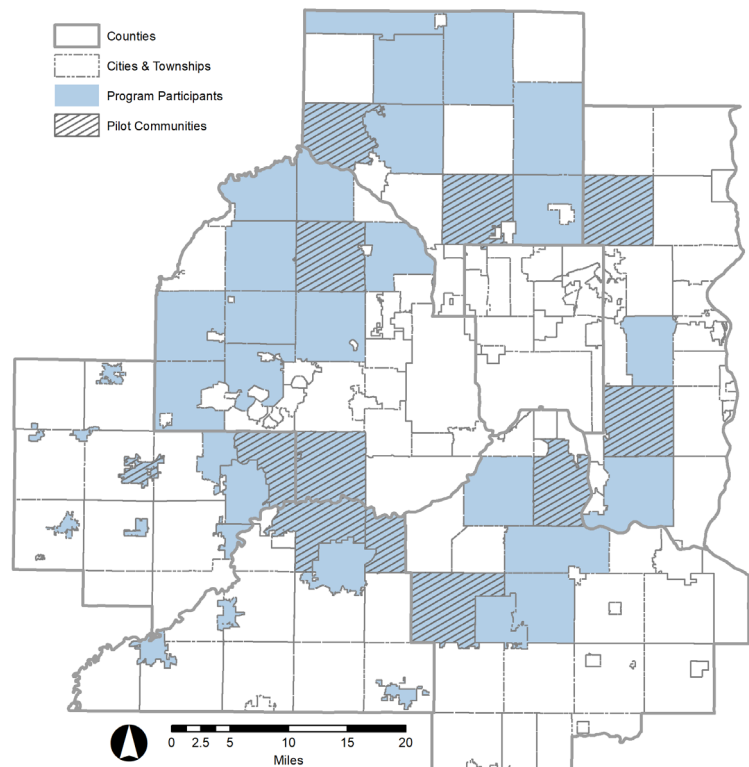
In 2008, as a part of the decennial review of comprehensive plan updates, the Cities of East Bethel, Mayer, and New Germany were added to the Program. Another 18 communities, including a number of communities designated as “Rural Center,” joined the Program as part of the decennial review of their 2030 comprehensive plan updates: 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 sewered 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 2022, participant communities recorded an average of 115

Figure 3. 2022 Program Participants

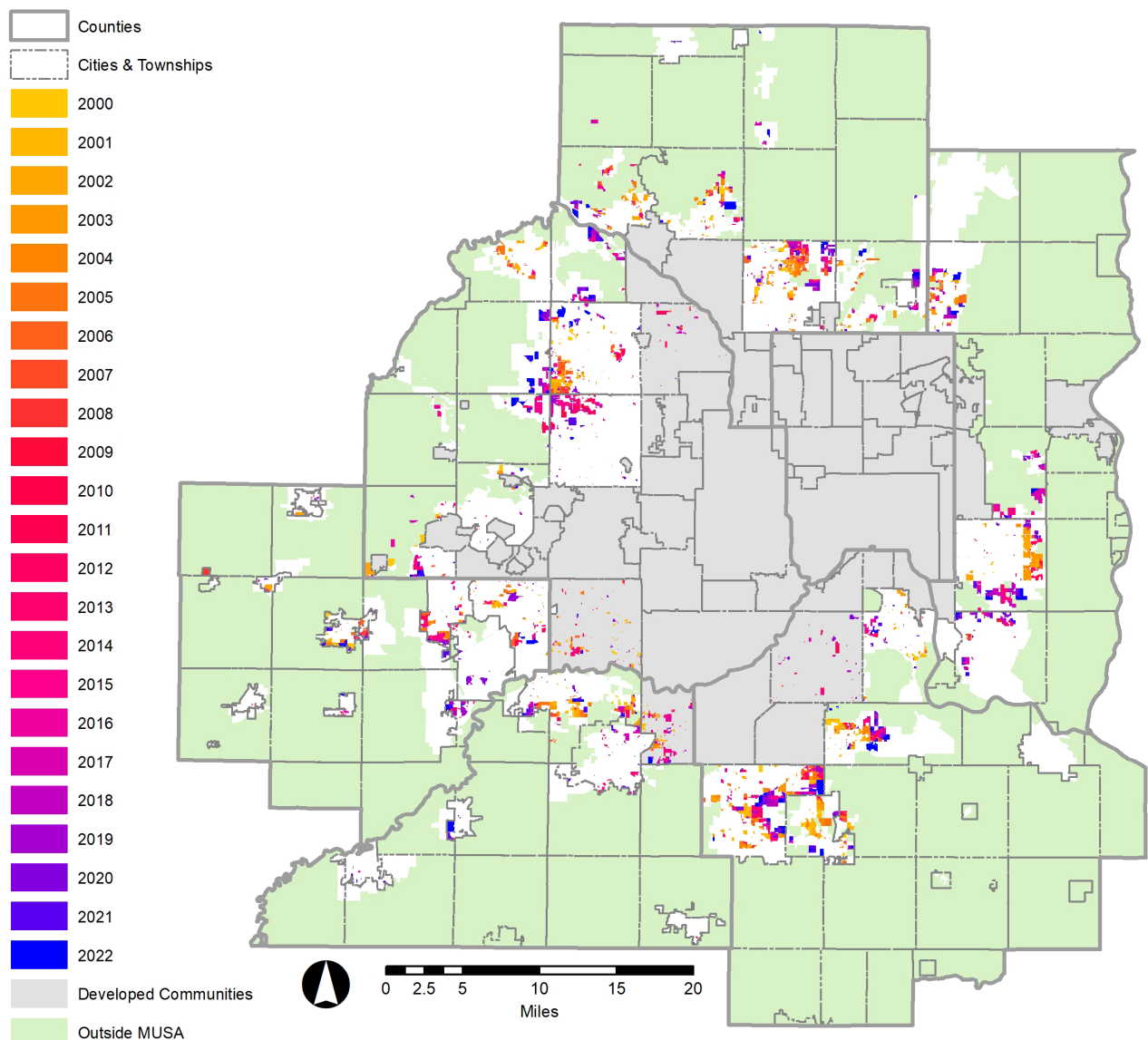


total plats and 5,968 total single-family and multi-family housing units each year. After peaking in 2003 with over 10,000 housing units platted, this number declined until 2009 when participants platted only 286 total units. This was the lowest number of units recorded for a single year in the history of the Program. Since 2009, participant communities have seen an overall increase in the number of platted units. In 2022, communities continued this trend by recording a total of 151 plats consisting of 11,187 housing units.

This year, the Council received data on 2022 residential platting activity from 39 participant communities. Of these 39 communities, the majority (30) reported five or fewer plats, which includes six communities that did not record sewer residential plats in 2022. Nine communities reported six or more plats, with the City of Rosemount reporting the highest number of plats (17).

Figure 4 shows all the plats approved in the participating communities between 2000 and 2022 by year. Areas shown in gray are communities with the designations of Urban Center, Urban, and Suburban in

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



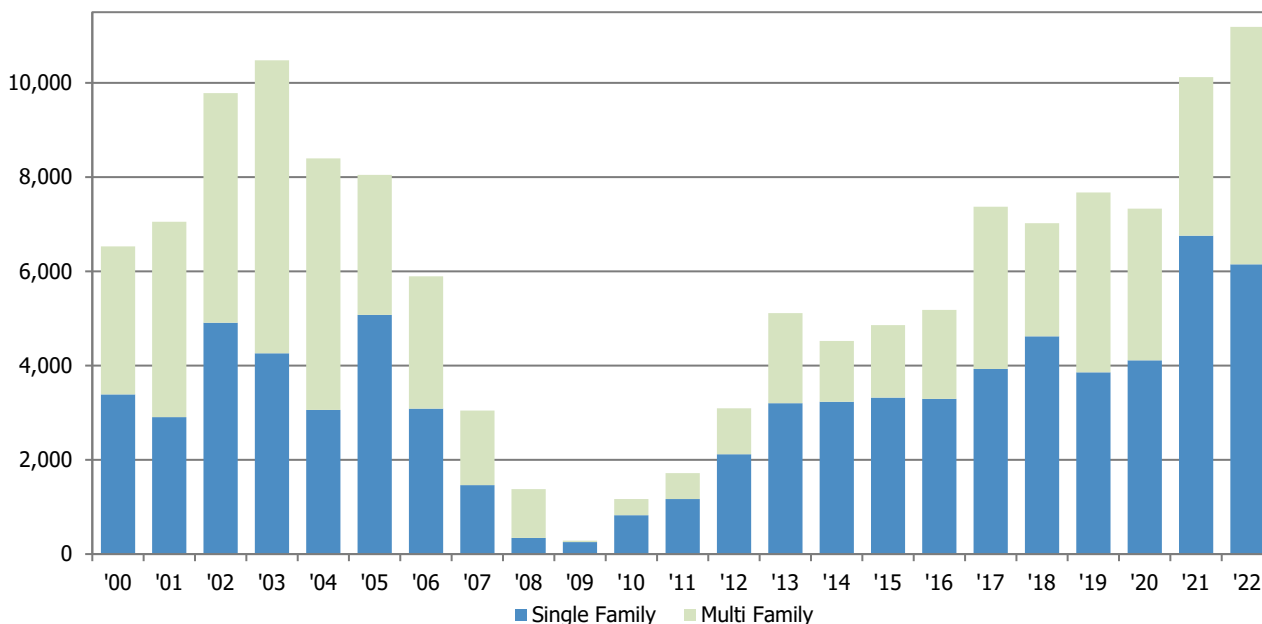
Thrive MSP 2040, which correspond to the Developed Communities category in the previous development guide, the *2030 Regional Development Framework*. Areas in light green are rural and agricultural communities which are not within MUSA and are mostly not part of the Plat Monitoring Program. The remaining communities are those that are part of the Program and have been approving plats within the sewered areas. With the exception of the Suburban cities of Brooklyn Park, Eagan, Eden Prairie, and Savage, most participants are Suburban Edge, Emerging Suburban Edge, or Rural Center communities.

Total housing units and housing mix

As mentioned above, communities reported a total of 151 plats consisting of 11,187 residential units in 2022. This is the highest number of units platted in a single year since the inception of the program, which surpasses the previous peak in 2003 with over 10,000 housing units platted.

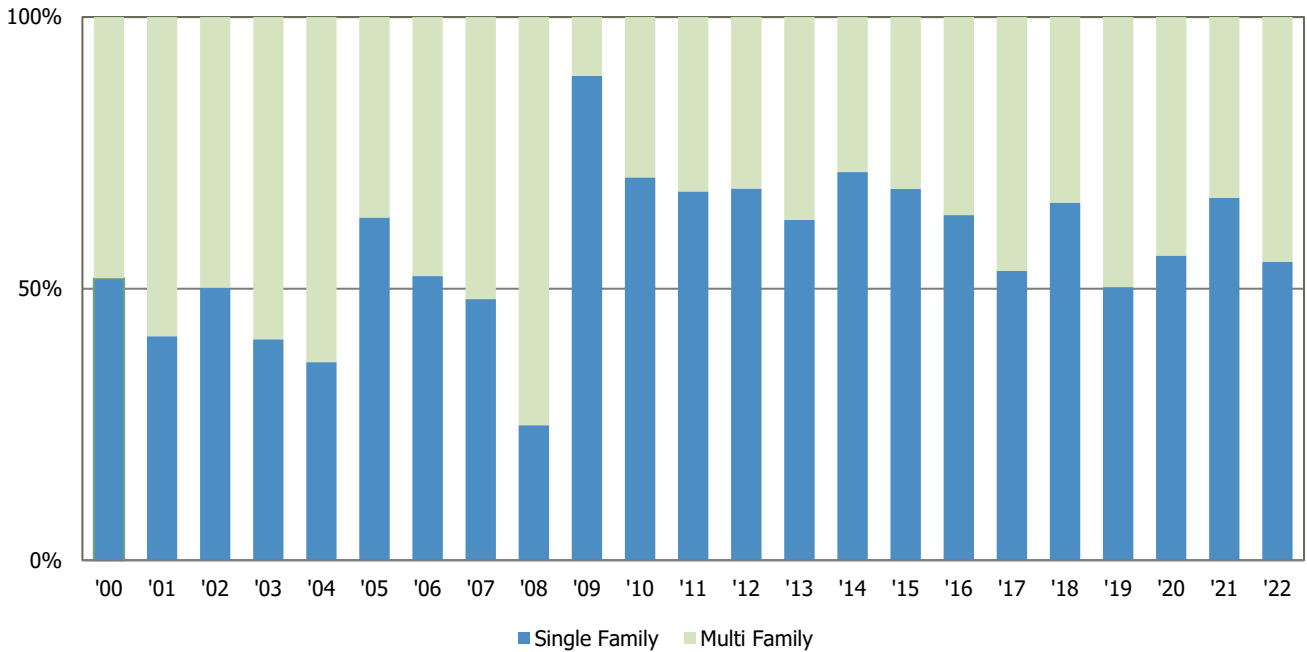
Despite reporting fewer residential plats than in 2021, Program participants platted over 1,000 more units in 2022 compared to the previous year. As shown in Figure 5, this information aligns with the steady increase in platting activity since 2009. Recent increases could be attributed to the thriving housing market despite the supply chain and labor challenges caused by the COVID-19 pandemic.

Figure 5. Total Units Platted, 2000-2022



In 2022, 45% of the platted units were multi-family (5,037 units) and 55% of the platted units were single-family (6,150 units), which matches the overall housing mix since the inception of the Program. Compared to 2021, multi-family units represent a greater share of total housing units in 2022, as shown by a nearly 1,700-unit increase in multi-family units and nearly 600-unit decrease in single-family units. Despite this year-to-year variability, Figure 6 shows a nearly equal number of multi-family and single-family units platted over the course of the Program. Since 2000, participant communities have platted a total of 137,258 units.

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 2022.

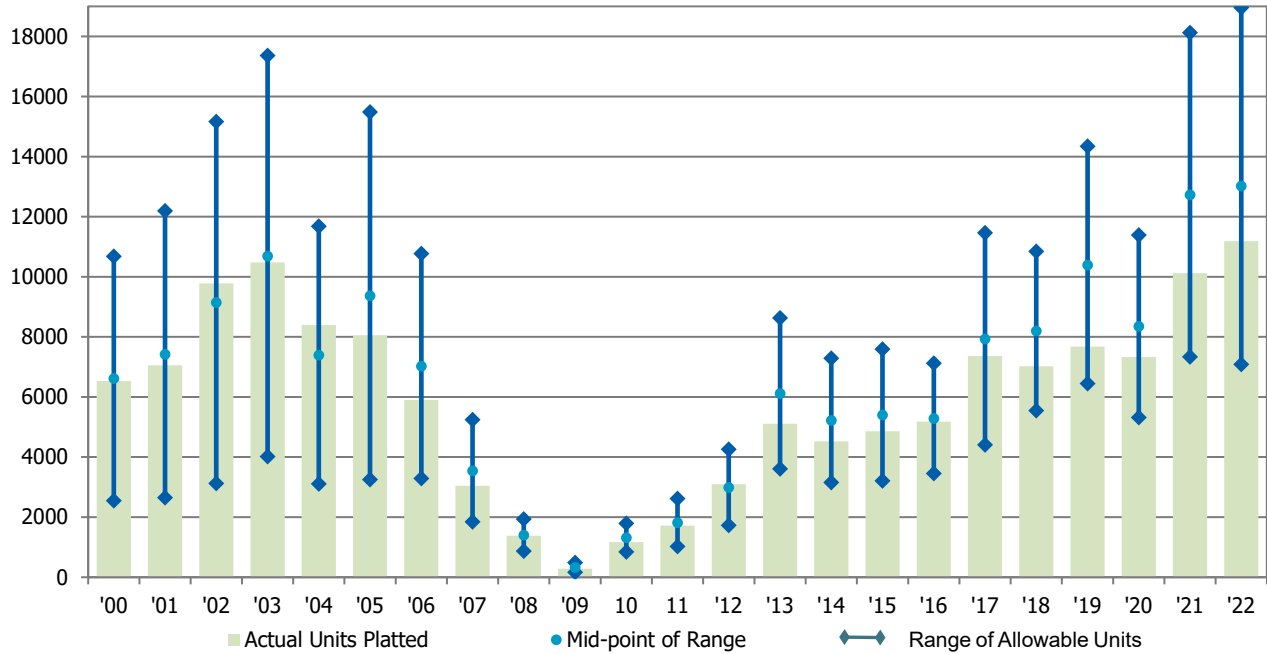
As shown in Figure 7, the total number of actual units platted in 2022 by all participant communities is within the range of allowable units and slightly under the midpoint of the range (12,336). Since 2000, the total number of actual units platted each year has generally fallen near the midpoint of the allowable range. It varies year-to-year whether the actual units platted is above or below the midpoint; however, these fluctuations are not significant over the course of the Program.

Table 1. Allowable Units and Actual Units Platted in 2022

Lowest Allowable Units	6,712
Highest Allowable Units	17,960
Actual Units Platted	11,187

For the past six years, the total number of actual units platted has been below the midpoint of allowable units, indicating that communities are reporting more plats with net densities closer to the minimum of the density range rather than the maximum.

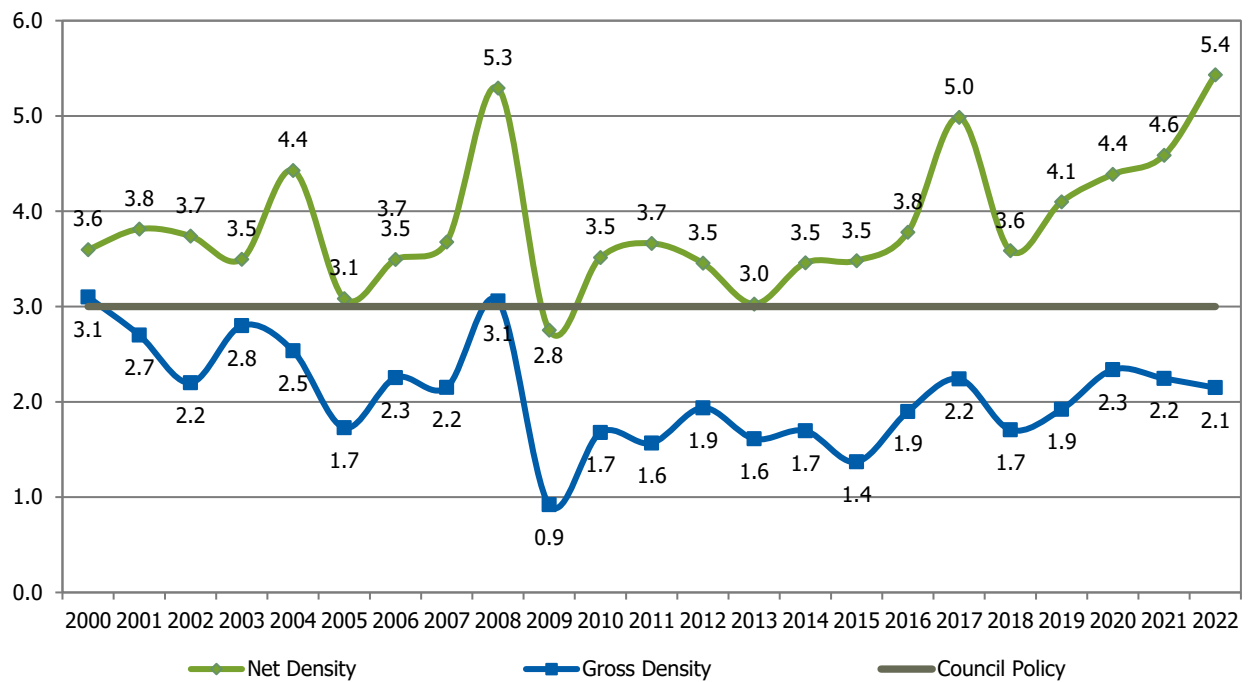
Figure 7. Planned and Actual



Overall density and Council policy

Thrive MSP 2040 and Council policies require Suburban Edge, Emerging Suburban Edge, and Rural Center communities to maintain 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.

Figure 8. Overall Densities, 2000-2022



Overall, the average net density of all plats recorded between 2000 and 2022 is 3.9 units per acre. Additionally, Program participants have collectively platted sewered 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).

Since 2009, the overall net density of recorded plats each year has generally increased despite year-to-year fluctuations. In 2022, participant communities reported an overall net density of 5.4 units per acre, surpassing the previously recorded peak of 5.3 units per acre in 2008. Of the plats approved in 2022, nine communities reported annual platted net densities below 3 units per acre: Blaine, Carver, Chanhassen, Dayton, Eagan, Hugo, Prior Lake, Orono, and Savage. This does not include communities that did not approve residential plats in 2022 nor the communities that did not submit data for 2022.

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 take the most advantage of 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 2022. 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 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” 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

Figure 9. Land Consumption by Use



2003 at 79%. In 2022, net developable acres made up 40% of total platted land, which is a decrease from 2021 (49%) and below average for platting activity in the past 10 years (47%). Along with the decrease in percentage of net developable acres, a slightly larger proportion of platted land was reserved for future development and other uses in 2022 (38%) compared to previous years (e.g., 34% in 2021, 27% in 2020, and 31% in 2019).

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 activity around the region. Overlaying plat data with permit information reveals the amount of time that it takes from the initial platting of a site to the development being built. 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 13 years (2009-2022).

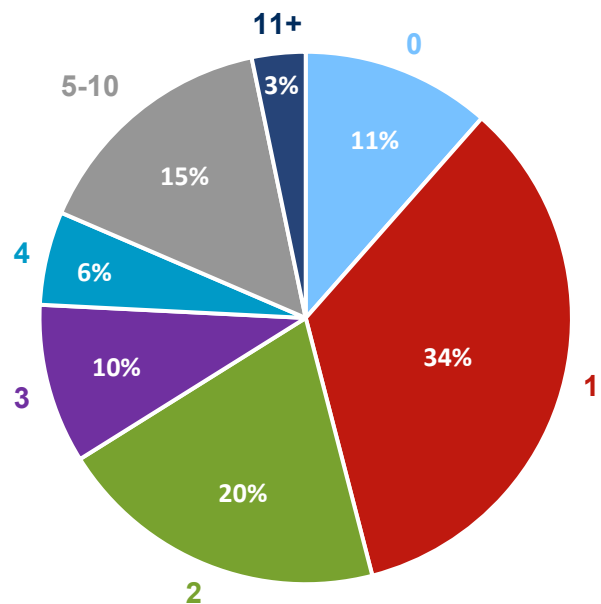
The analysis shows a wide range of lot absorption rates with some permits issued the same year the plat was approved (indicated by zero) and others taking up to 20 years. Overall, it has taken an average of 2.7 years for the platted lots in participating communities to receive building permits within the same time frame.

Similar to the wide range of lot absorption rates for individual plats, there is variation in the average duration from platting to permitting among Program participants. Average duration ranges from within the same year in Belle Plaine and St. Francis to nine years in Elko New Market. It is also important to acknowledge the variation in the number of plats approved and permits issued in each community, given its potential impact on a community’s average lot absorption rate. For instance, some communities have approved fewer than 100 building permits, whereas others have approved several thousand.

Lot absorption shows the availability of platted lots and the community’s capacity to issue building permits, if the demand is there. The longer the lot absorption, the more platted land is readily available for permitting and development. Shorter lot absorption shows a stronger demand and rapid growth in an area. Tracking this information can help inform growth patterns, land capacity, forecasting, and permitting processes.

While there is a wide range of lot absorption between communities, most plats have taken up to three years to develop (76%). As shown in Figure 10, over 66% of plats received development permits in less than two years: 11% within the same year, 34% in one year, and 20% within two years of the lot being platted. Similar to

Figure 10. Duration (Years) Breakdown



2021, only 3% of plats had a time period of longer than 10 years from plat approval to permit issuance. These results reemphasize the overall conclusion of a strong market demand in the developing suburbs in the metro area.

As previously mentioned, Program participants represent several community designations. The time from platting a site to issuing a permit was the shortest in Suburban communities with an average of 2.3 years and the longest in Rural Center communities with an average of 5.3 years. However, these averages reflect only 7% and 1% respectively of all permits issued for residential plats between 2009 and 2022. Most of the activity has occurred in Suburban Edge and Emerging Suburban Edge communities, with 51% and 40% of the overall platting and building activities respectively. The time between platting and permitting was 2.5 years in Suburban Edge and 3.1 years in Emerging Suburban Edge areas.

In terms of types of housing, as shown in Figure 12, communities have permitted Duplex/Triplex/Quad units in the shortest amount of time after platting (within two years). Townhomes (single-family attached) have taken the most amount of time with an average of 3.1 years. Single-Family Detached units represent the majority of issued permits (84%) and have taken an average of 2.7 years between platting and permitting.

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 2022 and between 2000 and 2022. They also include some high-level observations of platting activity within the county but do not provide an in-depth analysis of each Program participant.

Figure 11. Average Duration (Years) by Community Designation

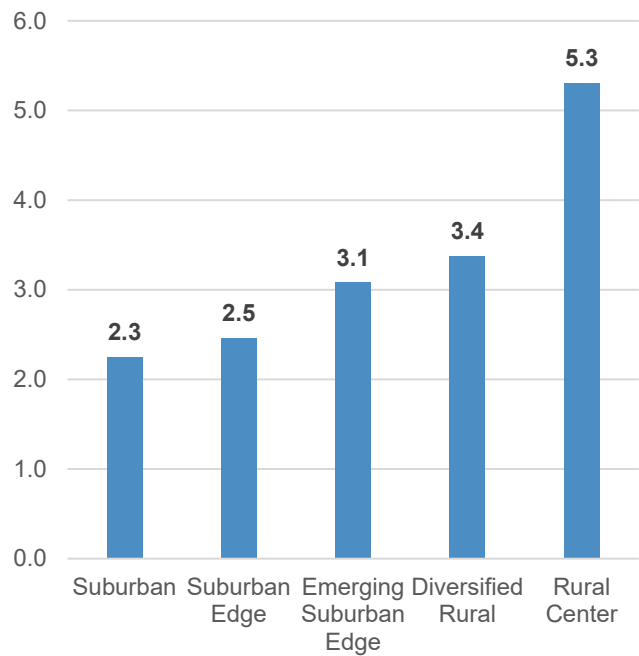
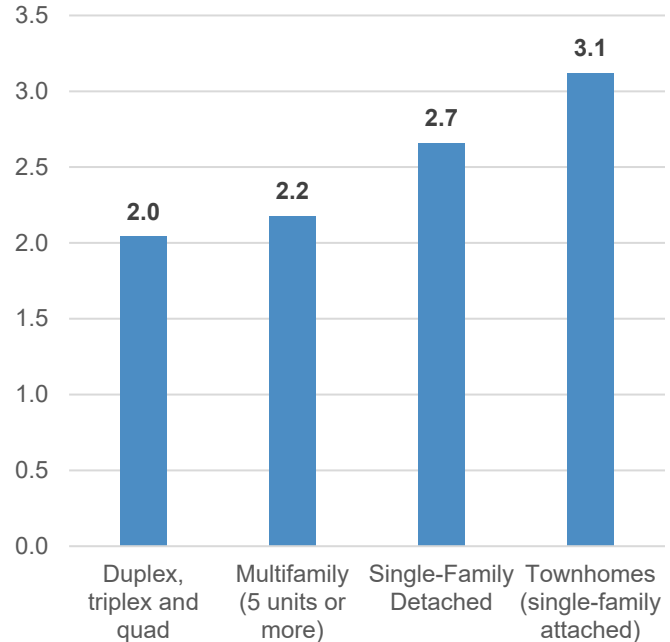


Figure 12. Average Duration (Years) by Housing Type



Anoka County

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

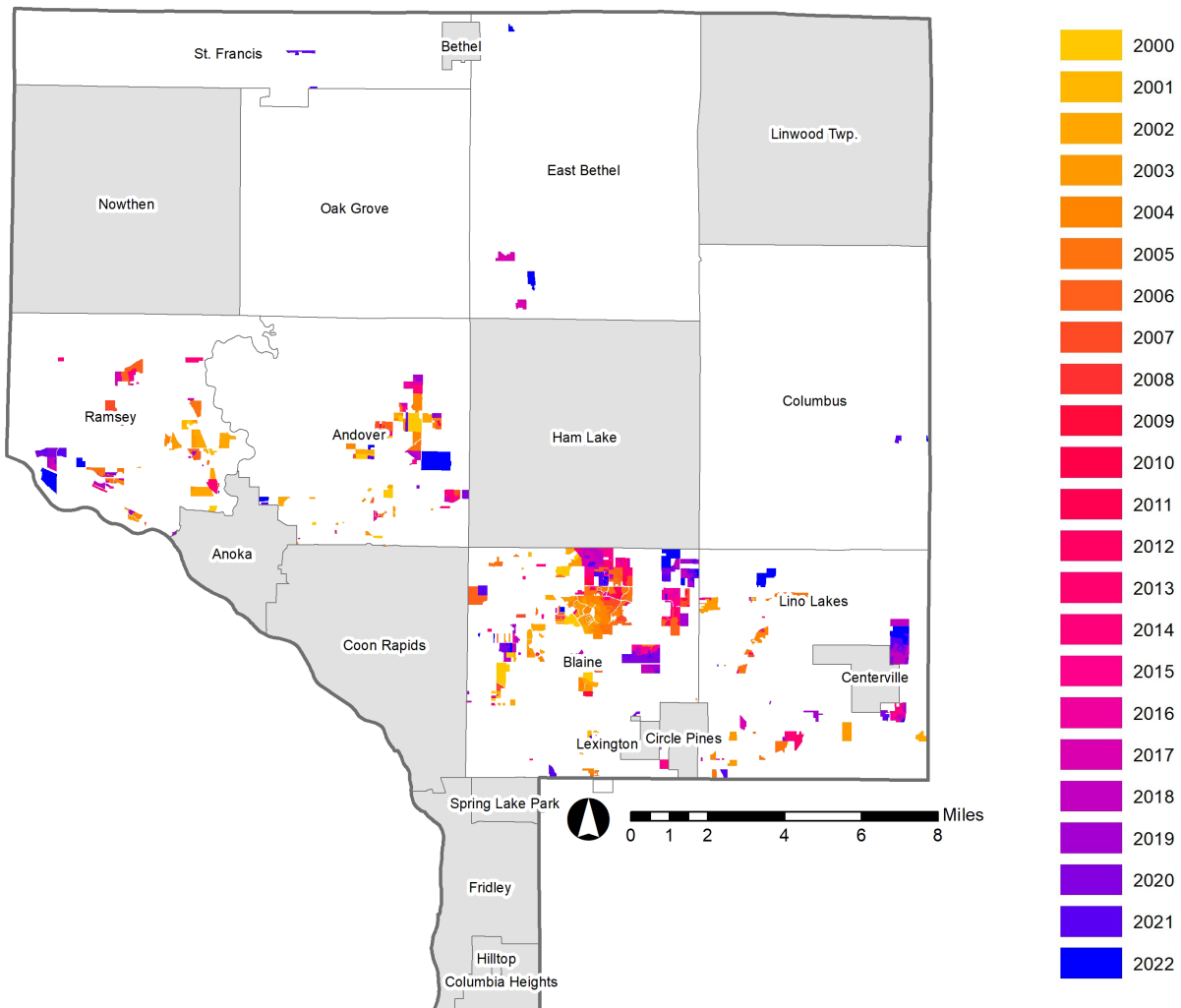
Figure 13 shows platting activity in Anoka County between 2000 and 2022 illustrating the clusters of residential development within the county. During this time, the City of Blaine approved most of its plats in the northern part of the city. The center of the city is where much of the platting activity 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

	2022	2000-2022	% of region wide total*
Residential Plats	21 plats	512 plats	19%
Net Residential Acres	320 net acres	6,008 net acres	17%
Total Housing Units	1,438 units	21,583 units	16%

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

Figure 13. Anoka County Platting Activity, 2000-2022



Carver County

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

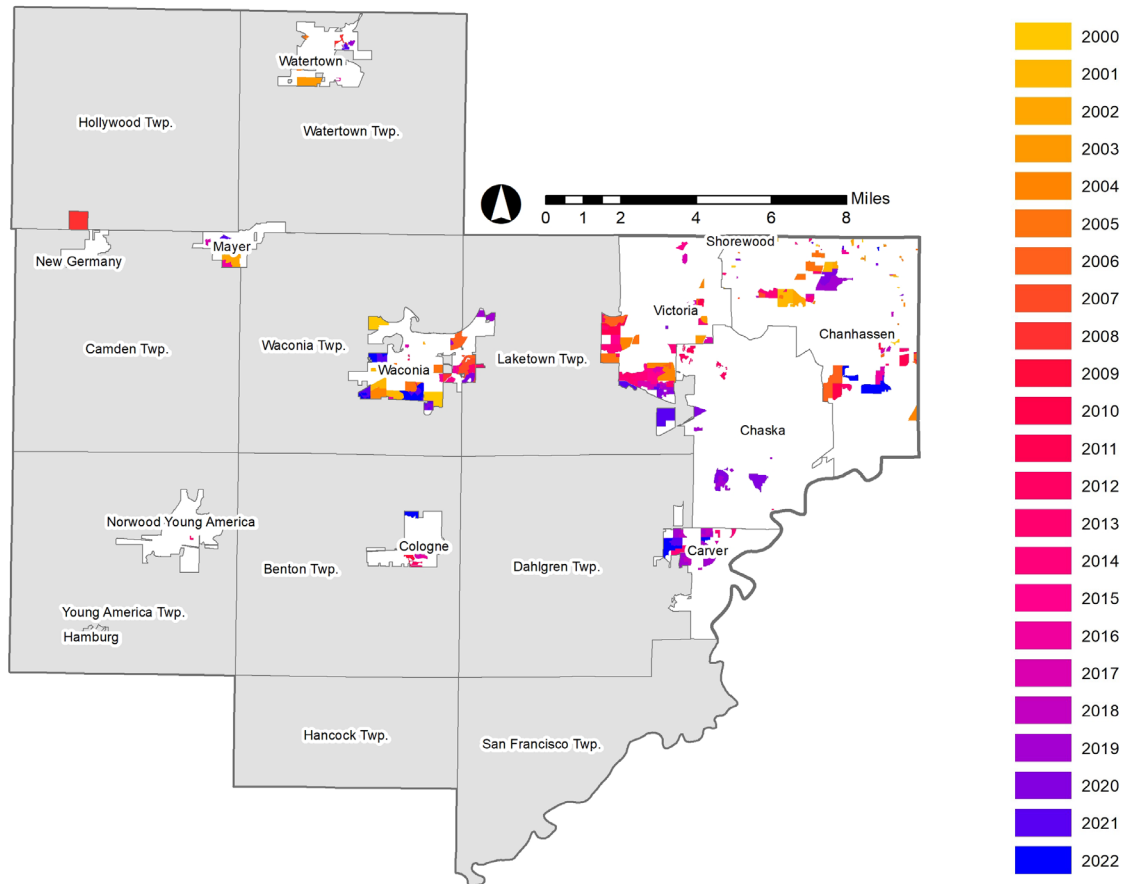
Figure 14 shows platting activity in Carver County between 2000 and 2022. Of the Program participants in Carver County, the Cities of Carver, Victoria, and Waconia have mostly approved plats near the borders they share with neighboring townships. The platting activity in these areas seem to align with annexation areas with the Townships of Dahlgren, Laketown, and Waconia, which may indicate less available land for greenfield development in other parts of the community. 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. 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

	2022	2000-2022	% of region wide total*
Residential Plats	11 plats	255 plats	10%
Net Residential Acres	146 net acres	3,543 net acres	10%
Total Housing Units	492 units	11,737 units	9%

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

Figure 14. Platting Activity in Carver County, 2000-2022



Dakota County

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

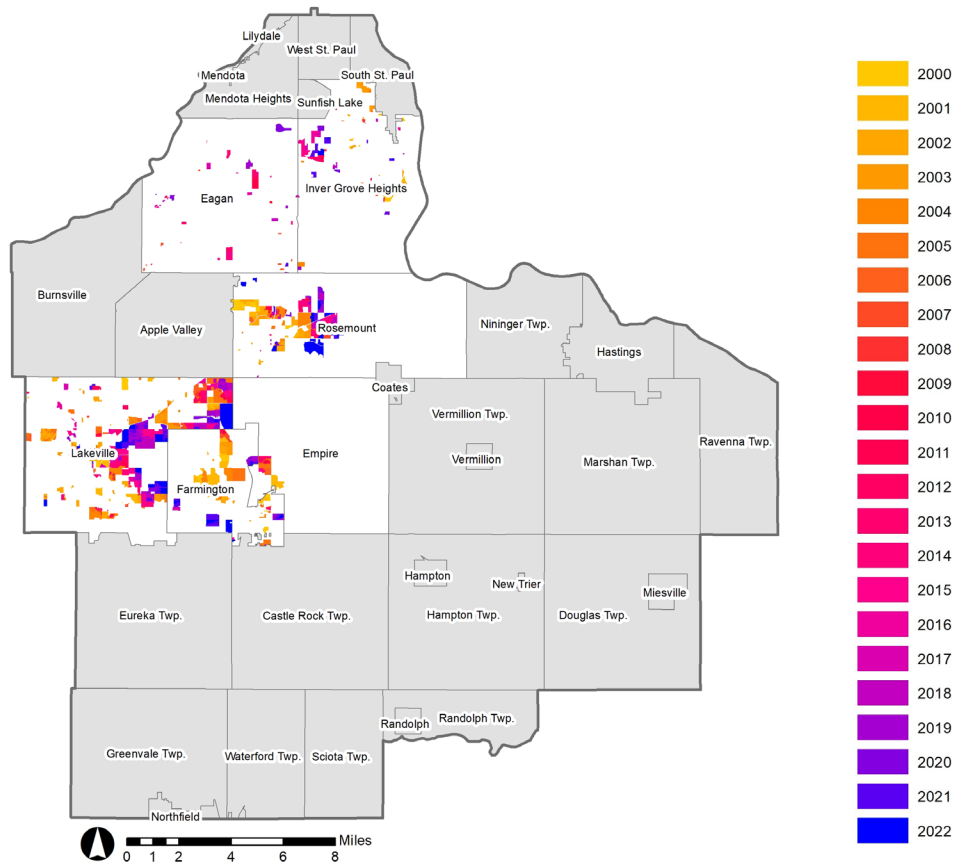
Figure 15 shows platting activity within Dakota County between 2000 and 2022. Within the City of Rosemount, platting activity in the early 2000s was concentrated in the west side of the city, while more recently development has been moving eastward towards the University of Minnesota’s UMore Park. In 2022, 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.

Table 4. Dakota County Platting Activity

	2022	2000-2022	% of region wide total*
Residential Plats	39 plats	589 plats	22%
Net Residential Acres	397 net acres	7,936 net acres	22%
Total Housing Units	3,118 units	32,491 units	24%

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

Figure 15. Platting Activity in Dakota County, 2000-2022



Hennepin County

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

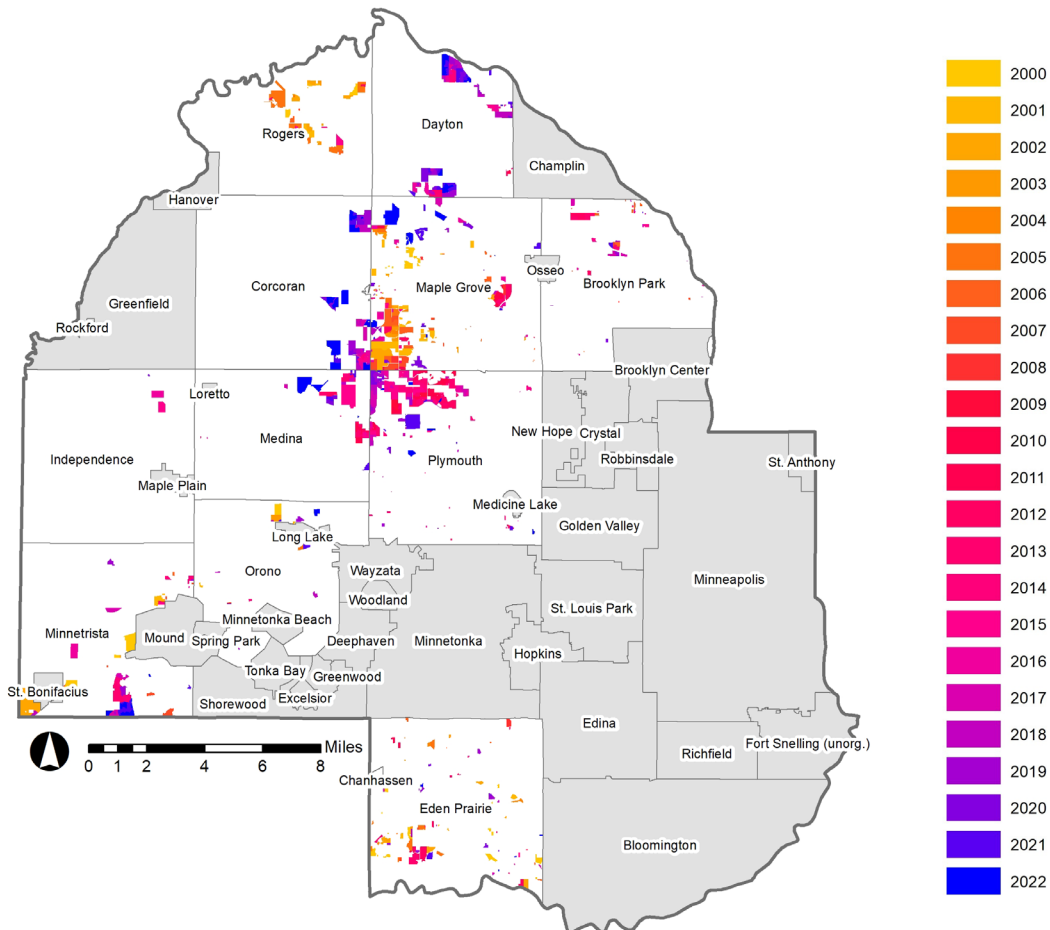
Figure 16 shows platting activity in Hennepin County between 2000 and 2022. Within the county, a significant portion of the platting activity has occurred around the point where the Cities of Corcoran, Maple Grove, Medina, and Plymouth meet. Residential development started concentrating in the southwest 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.

Table 5. Hennepin County Platting Activity

	2022	2000-2022	% of region wide total*
Residential Plats	45 plats	675 plats	25%
Net Residential Acres	632 net acres	8,512 net acres	24%
Total Housing Units	3,585 units	33,665 units	25%

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

Figure 16. Platting Activity in Hennepin County, 2000-2022



Scott County

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

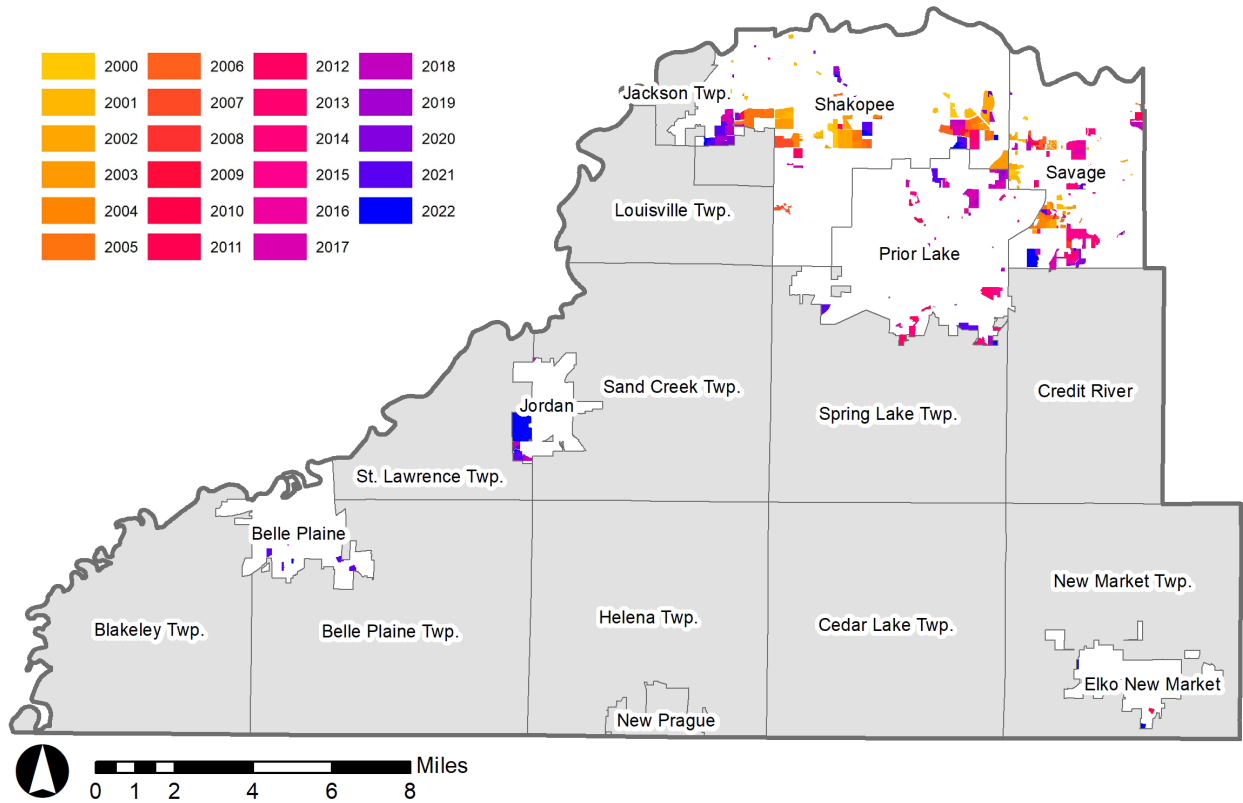
Figure 17 shows platting activity in Scott County between 2000 and 2022. In Shakopee, most residential plats approved during this time are located south of Highway 169 and along 17th Avenue E / Eagle Creek Boulevard. The area between the clusters of plats in the central and eastern parts of the city 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 the size of the small, rural center community. In 2022, the City approved a plat for a six phase residential development with 381 units on a nearly 233-acre parcel annexed from St. Lawrence Township.

Table 6. Scott County Platting Activity

	2022	2000-2022	% of region wide total*
Residential Plats	15 plats	295 plats	11%
Net Residential Acres	175 net acres	3,415 net acres	10%
Total Housing Units	1,039 units	14,658 units	11%

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

Figure 17. Platting Activity in Scott County, 2000-2022



Washington County

Cottage Grove, Hugo, Lake Elmo, Woodbury

Table 7. Washington County Platting Activity

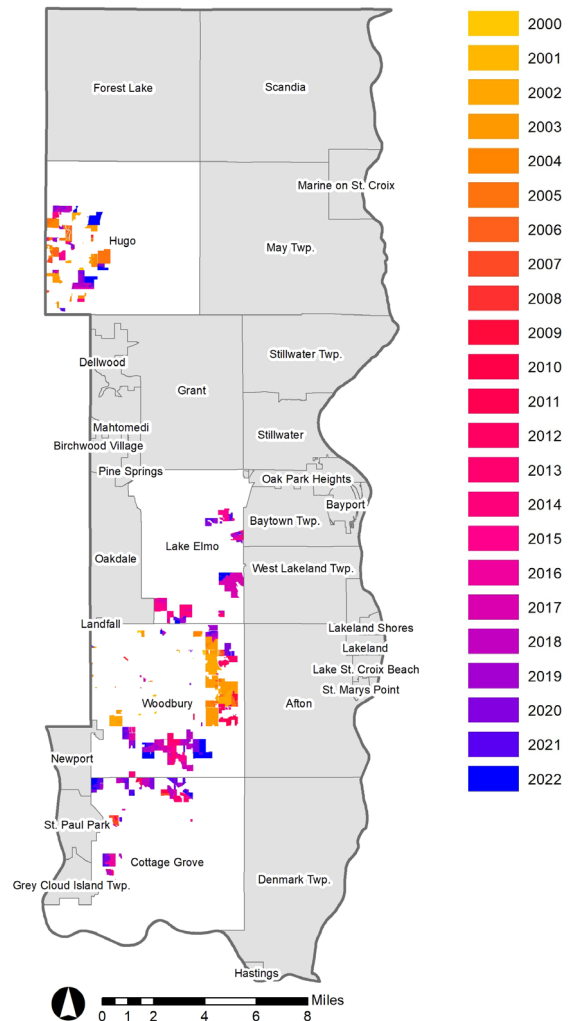
	2022	2000-2022	% of region wide total*
Residential Plats	20 plats	330 plats	12%
Net Residential Acres	390 net acres	5,954 net acres	17%
Total Housing Units	1,515 units	23,124 units	17%

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

Figure 18 shows platting activity in Washington County between 2000 and 2022. 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 an 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.

Figure 18. Platting Activity in Washington County, 2000-2022





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