

PLANNING
DEPARTMENT

FISCAL IMPACT OF GROWTH

PROJECT BRIEFING

 THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION
Prince George's County Planning Department

May 26, 2026



Presentation Agenda

1. About the Study

- Key Questions and Goals
- Analysis Process and Structure

2. Key Findings

- Growth Patterns
- Development Patterns
- Infrastructure Adequacy
- Development Incentives
- Future Growth
- Fiscal Impact



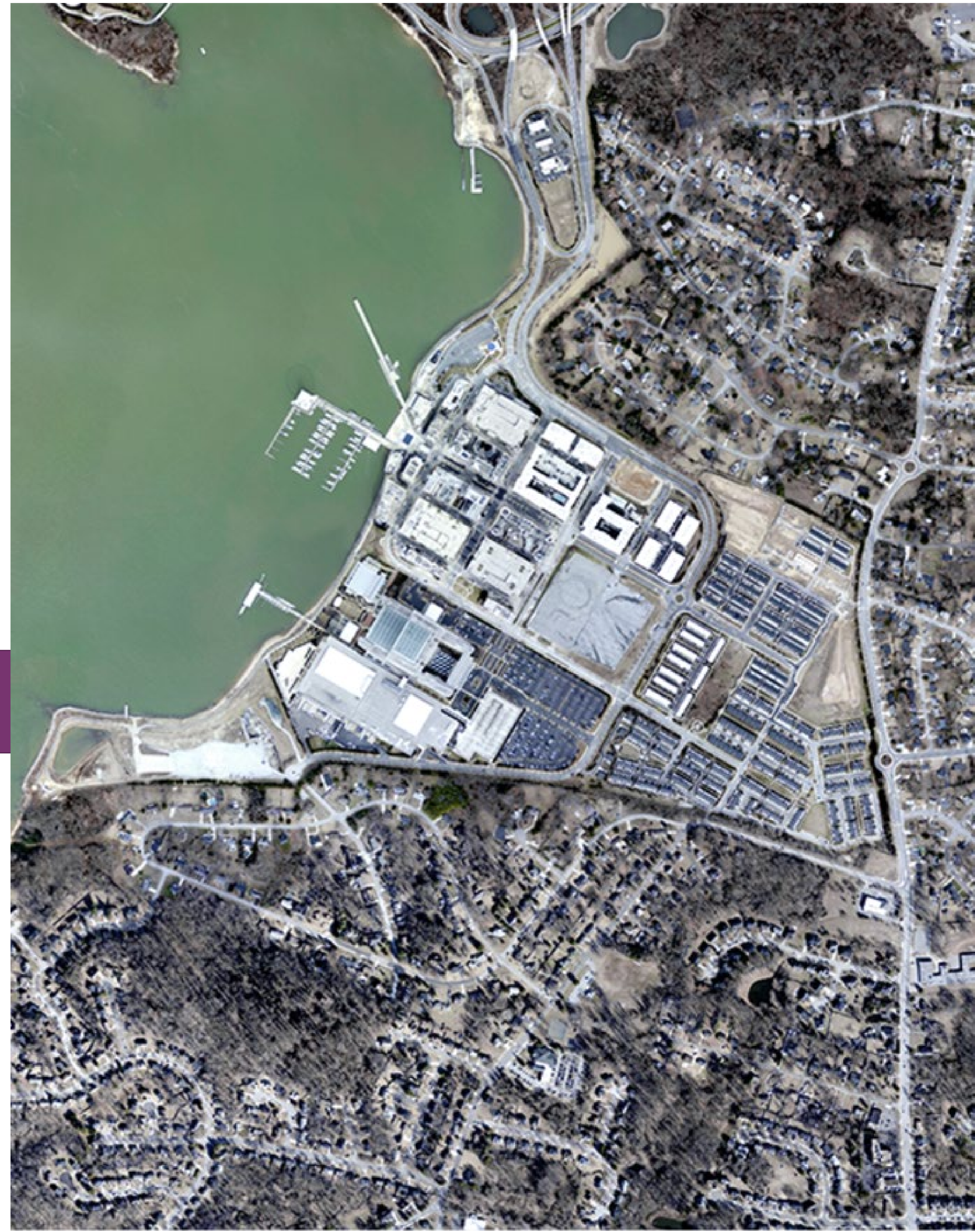
PLANNING
DEPARTMENT

FISCAL IMPACT OF GROWTH

ABOUT THE STUDY

 THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION
Prince George's County Planning Department

May 26, 2026



Expertise and Project Roles



Econsult Solutions, Inc. (ESI)

Project Role

- Economic and Fiscal Analysis Lead
- Project Management / Deliverables



WGI Engineering (WGI)

Project Role

- Infrastructure Analysis Lead



Jon Stover & Associates (JS&A)

Project Role

- Development Incentives Lead

Key Questions About Growth

Historic Patterns of Growth (2014-2023)



How have development patterns impacted Prince George's County's balance of new revenue generation, including property tax, income tax and other sources, and the added costs to build infrastructure and deliver services?

Future Patterns of Growth (2024-2033)



How will anticipated population and employment growth influence the type and location of real estate development, and in turn County revenues and expenditures?

Infrastructure Adequacy



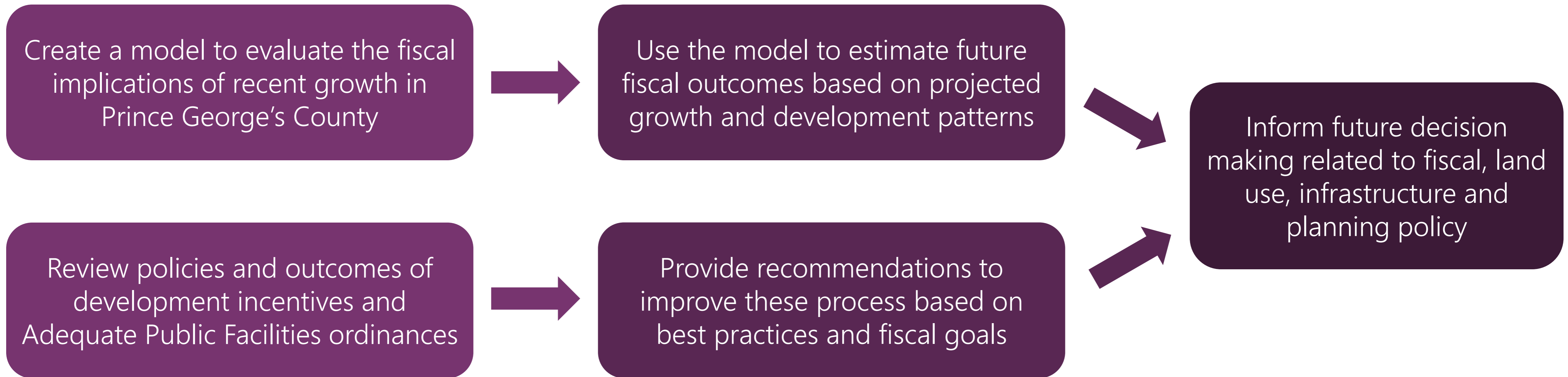
What are the implications of growth for the County's level of service provision and costs for existing and new infrastructure?

Development Incentives



How can development incentives be leveraged to help encourage growth patterns that align with the County's planning goals?

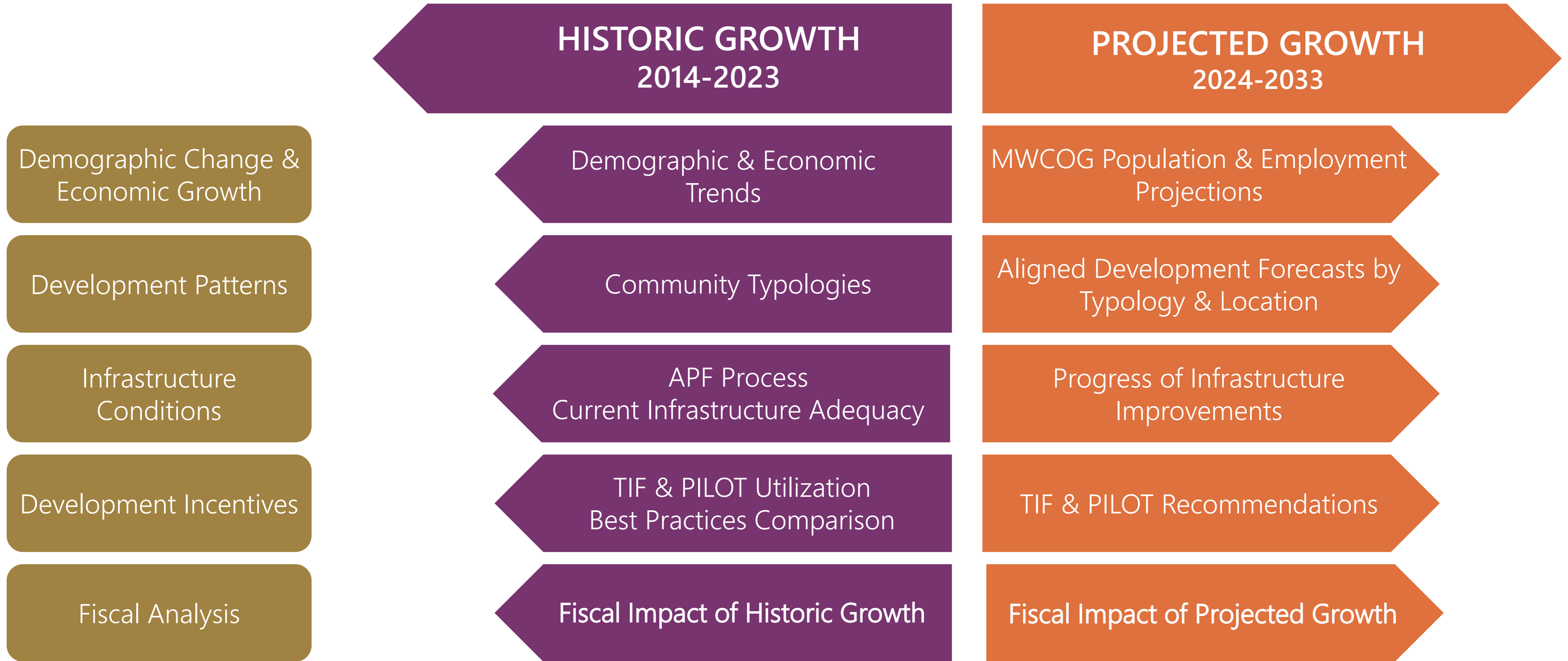
Goals and Objectives



The study does not:

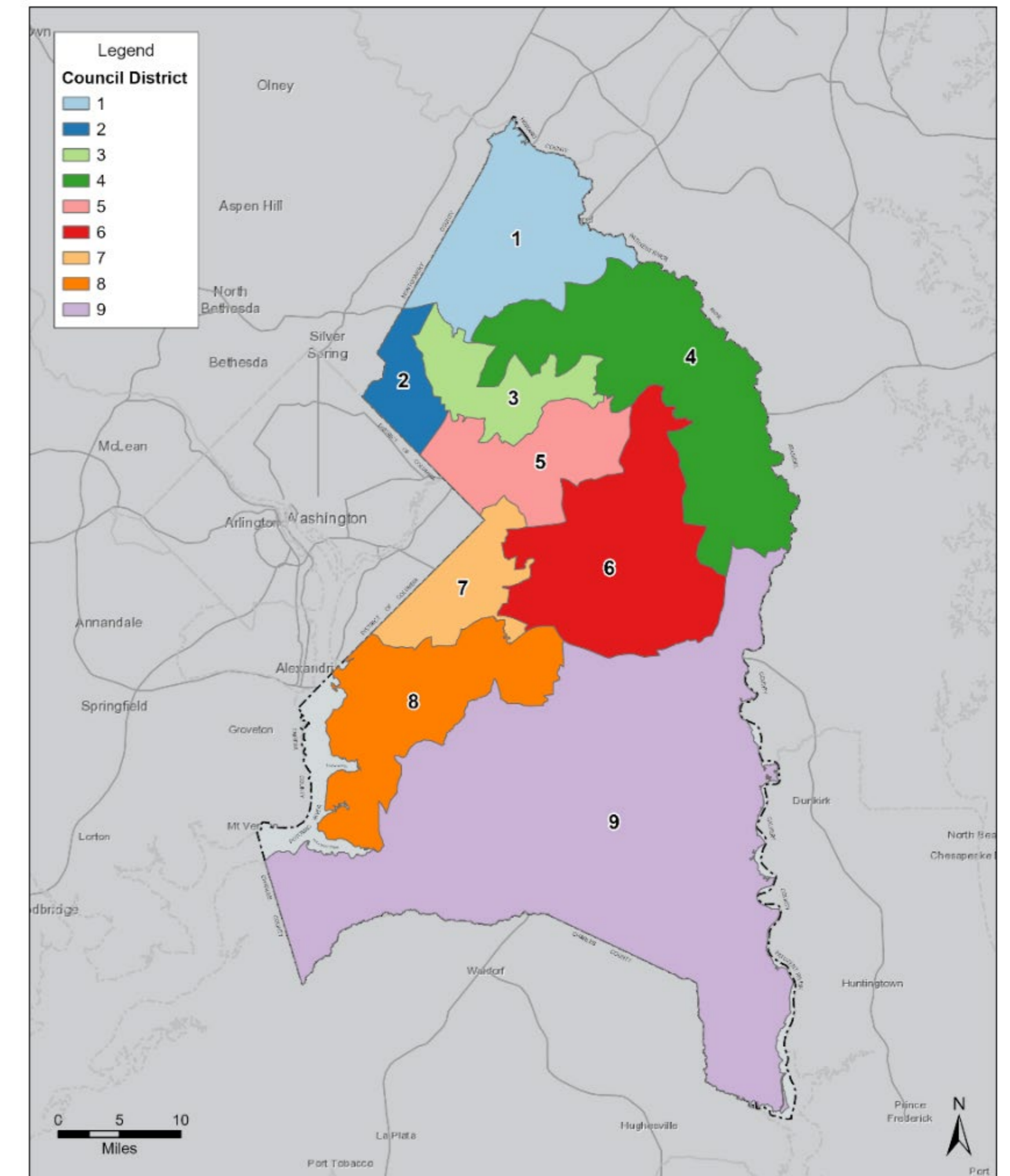
- Evaluate agency policy, procedures, and systems (e.g., internal audit).
- Establish a future budget for the County.
- Provide specific recommendations regarding development approaches or growth targets.

Analysis and Report Structure



Process and Limitations

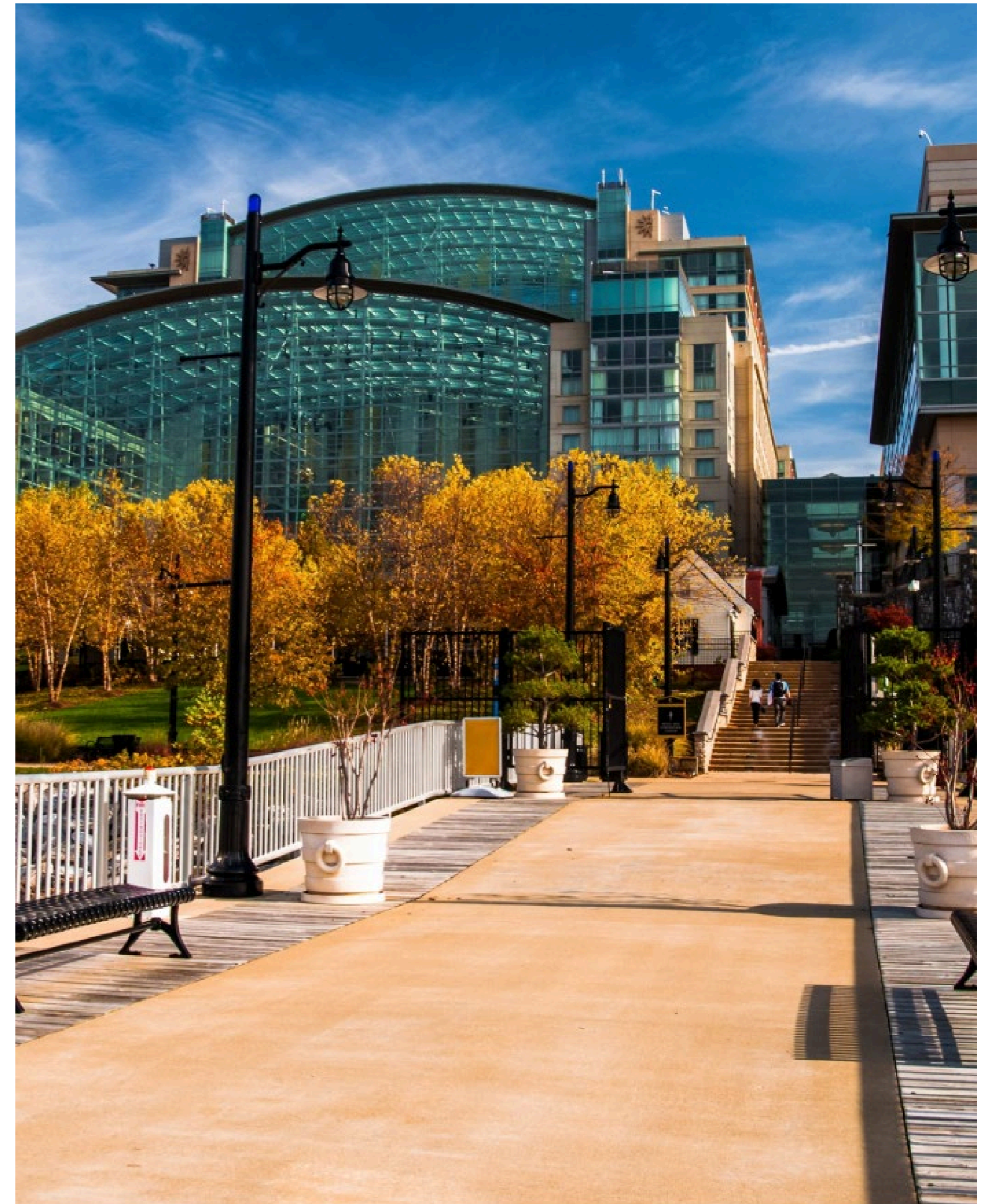
- Data are analyzed at the Countywide level, and where possible, allocated spatially by Council District
- Information inputs include:
 - Federal data sets (demographic and economic)
 - County public budget and development / parcel datasets
 - Custom departmental data and interviews
 - Prior County planning studies and documents
- Data availability was a limitation for certain analysis (notably transportation level of service and development incentives) that the consulting team expected to be able to perform
- Report is currently in draft form, under review by staff



Study Orientation

The approach taken in this study to analyze the fiscal implications of countywide growth differs in approach from site-specific fiscal analysis of individual development projects:

- **“Top down” rather than “bottom up”:** This analysis considers the full General Fund budget and allocates a proportion of revenues and costs to growth.
 - Site-specific analyses generally do not account for services that operate at scale
- **Net growth:** This analysis defines growth over a ten-year period by the *net* change in County population, employment, income and other key variables.
 - Site specific analyses often implicitly assume all activity in a development is net new and may not account for downstream impacts on housing or employment market
 - Method used by this study captures net growth by incorporating intra County sociodemographic dynamics and establishing the relationship between growth and development.



PLANNING
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FISCAL IMPACT OF GROWTH

KEY FINDINGS

 THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION
Prince George's County Planning Department

May 26, 2026



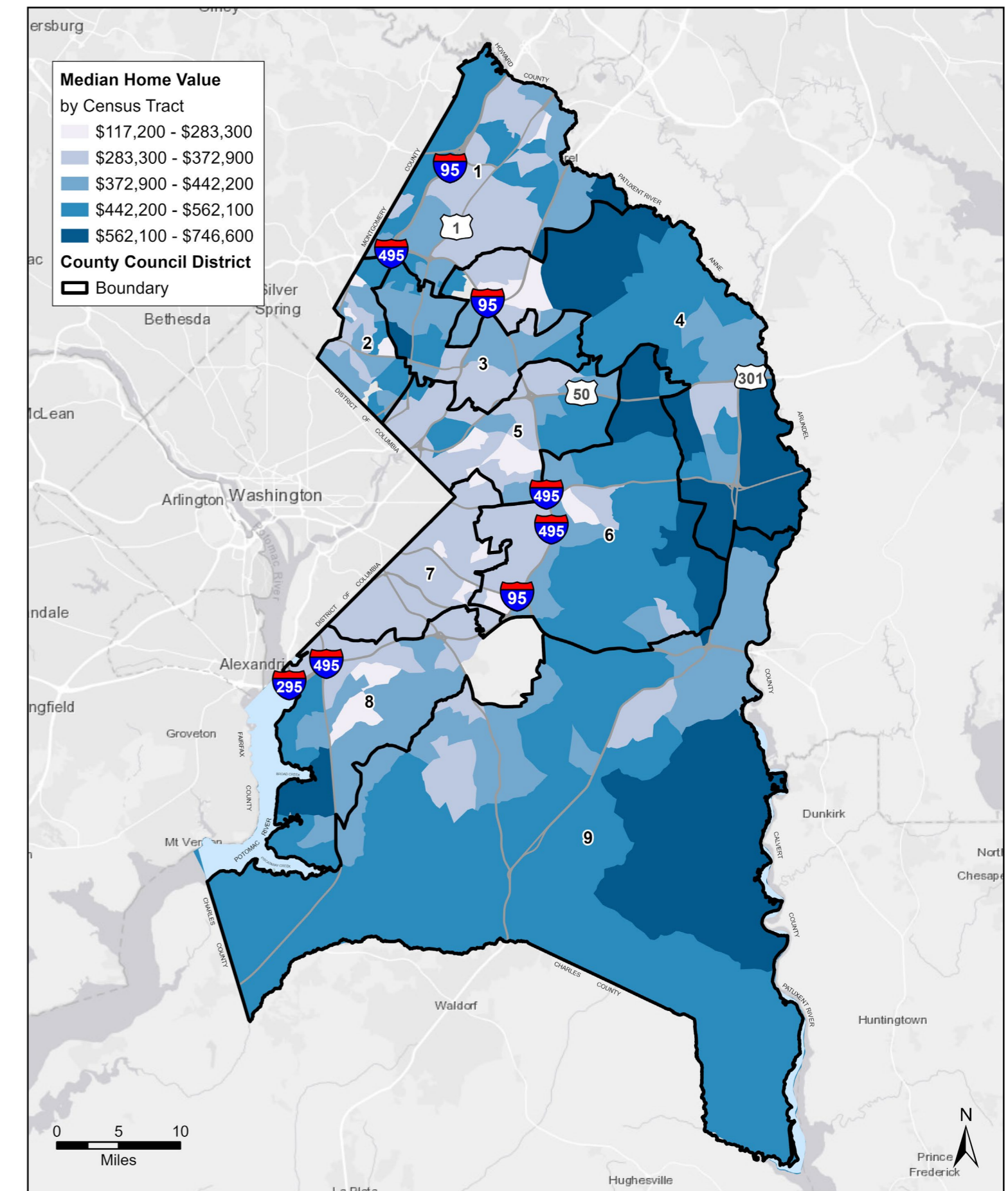
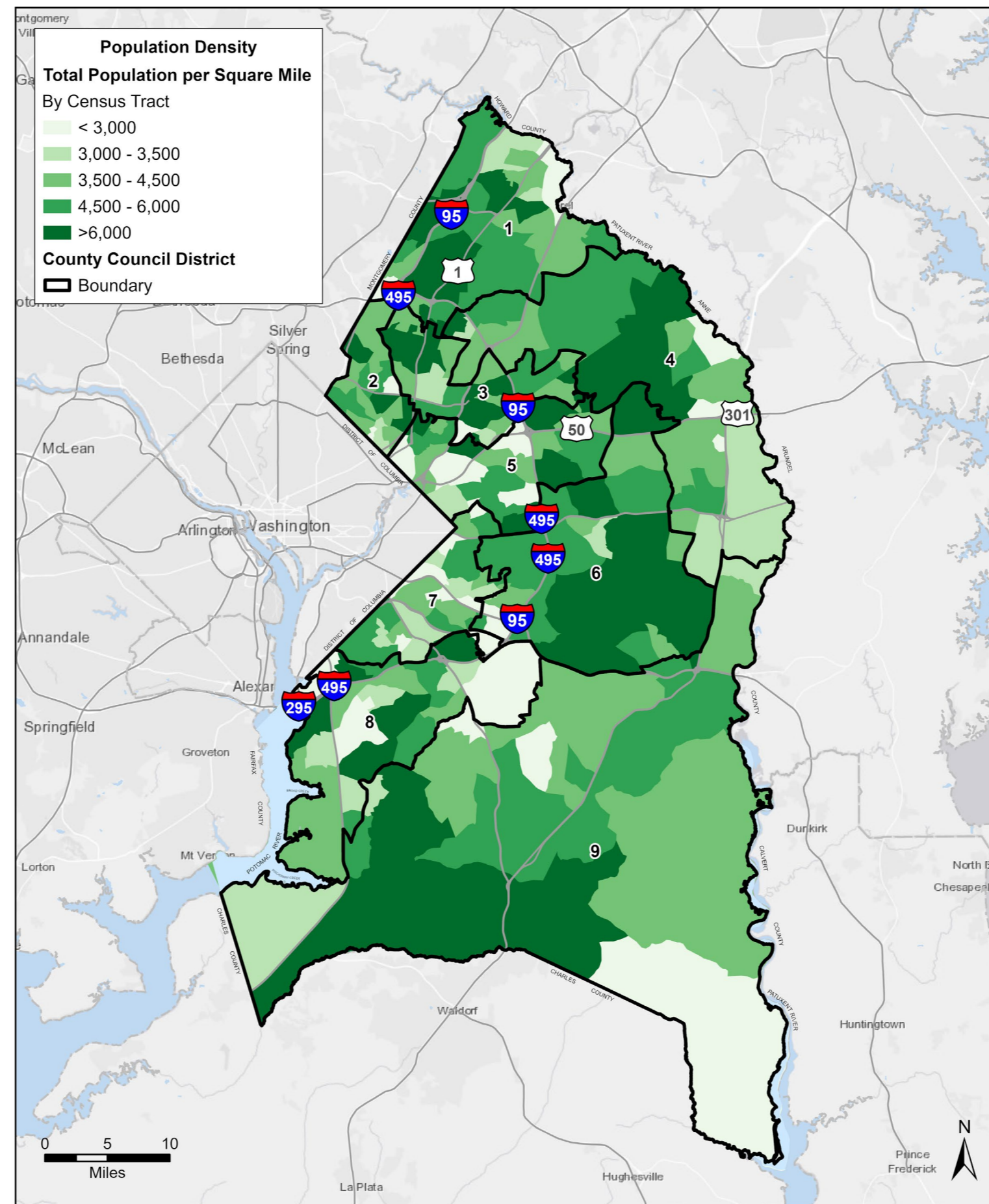
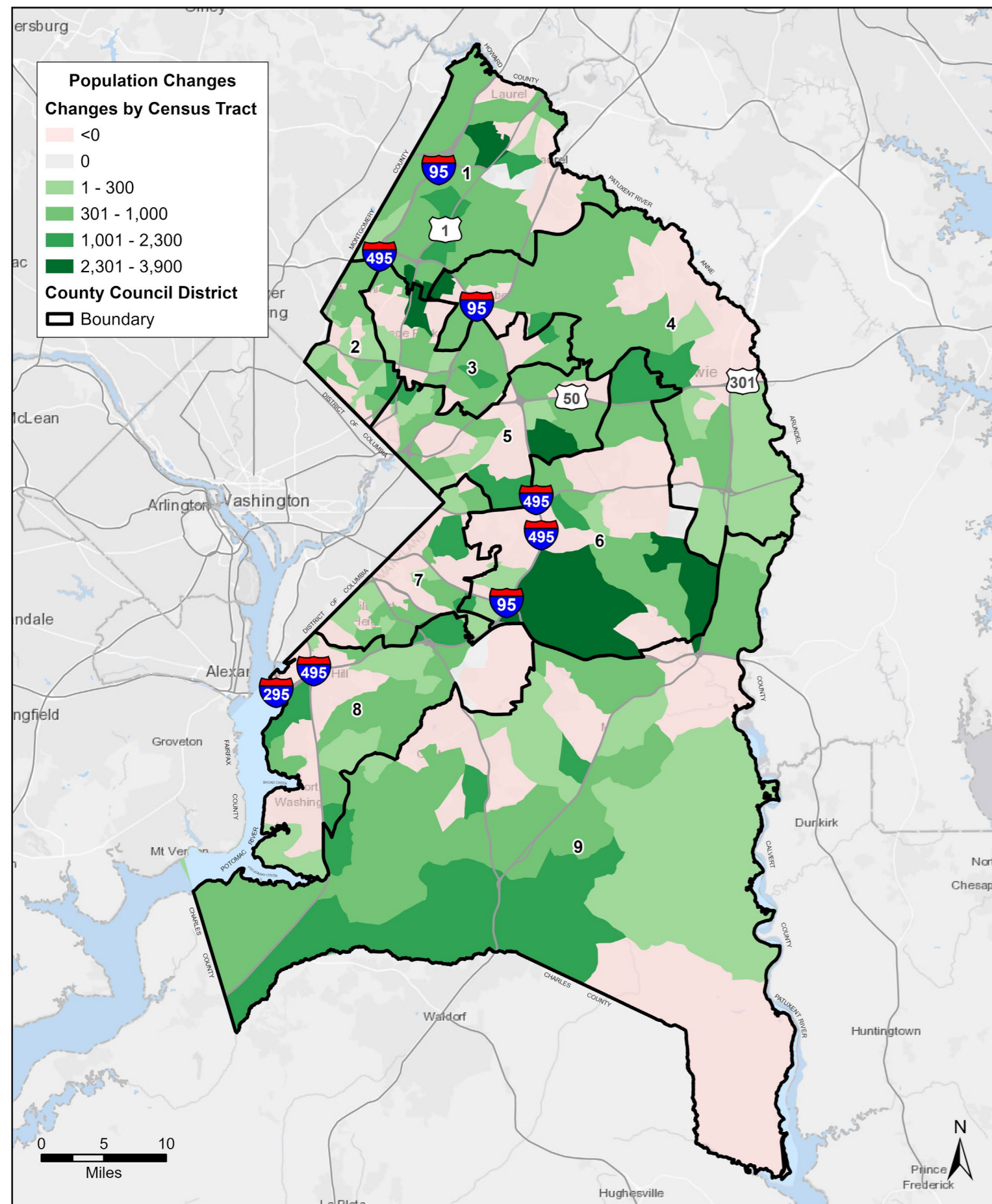
KEY FINDINGS: GROWTH PATTERNS

Population Growth Patterns

Population Change, 2014-2023

Population Density, 2023

Median Home Value, 2023



Population Composition

Population Growth by Age & Council District, 2014-2023

Population Band	Council District									County
	1	2	3	4	5	6	7	8	9	
Total Population Chg 2014-2023	12,835	2,404	8,781	6,933	11,324	14,012	336	4,839	9,249	70,711
Total Population % Chg 2014-2023	13%	2%	9%	7%	12%	14%	0%	5%	9%	8%
School Aged Children (5-17) Net Chg 2014-2023	1,978	1,513	937	740	2,100	(170)	(3,028)	(1,205)	(1,319)	1,545
School Aged % Chg 2014-2023	14%	13%	8%	5%	14%	-1%	-22%	-10%	-9%	1%
Working Age Population (16-64) Net Chg 2014-2023	6,045	(3,142)	3,825	2,473	3,563	4,259	(1,896)	(1,270)	2,592	16,448
Working Age % Chg 2014-2023	9%	-4%	5%	4%	5%	6%	-3%	-2%	4%	3%
Elderly Population (65+) Net Chg 2014-2023	5,249	3,181	3,510	5,390	4,640	7,459	4,570	5,434	7,382	46,815
Elderly % Chg 2014-2023	49%	44%	46%	50%	47%	70%	47%	44%	61%	51%

Household Characteristics

Household Characteristics by Council District, 2014-2023

Household Characteristics	Council District									County
	1	2	3	4	5	6	7	8	9	
Households 2023	42,284	33,193	30,940	38,318	37,640	44,144	40,662	38,199	39,114	344,495
HH Change 2014-2023	16%	7%	13%	13%	12%	19%	13%	9%	13%	16%
Average Household Size 2023	2.70	3.07	3.46	2.72	2.87	2.57	2.25	2.67	2.88	2.77
Avg HH Size Change, 2014-2023	(4%)	(4%)	12%	(7%)	(3%)	(7%)	(13%)	(3%)	(2%)	(4%)
Owner Occupied Share 2023	51%	37%	57%	74%	58%	78%	46%	65%	92%	62%
Renter Occupied Share 2023	49%	63%	43%	26%	42%	22%	54%	35%	8%	38%
Median Home Value 2023	\$404,406	\$392,954	\$408,327	\$448,441	\$396,020	\$427,850	\$325,028	\$391,638	\$456,949	\$404,300
Real Home Value Chg, 2014-2023	19%	35%	30%	20%	28%	20%	25%	21%	17%	22%
Median Income 2023	\$97,899	\$84,142	\$94,880	\$128,566	\$97,345	\$122,086	\$78,940	\$109,087	\$131,935	\$100,708
Real Median Income Chg, 2014-2023	11%	9%	12%	6%	3%	3%	1%	5%	(1%)	7%

Commuter Flows

Change in Commuter Flows, 2014-2023

Job Inflow / Outflow	2014	2023	% Change
Employed in Prince George's County	304,840	318,010	4%
Workers Living in Prince George's County	414,298	428,448	3%
Net Inflow / (Outflow)	-109,458	-110,438	1%

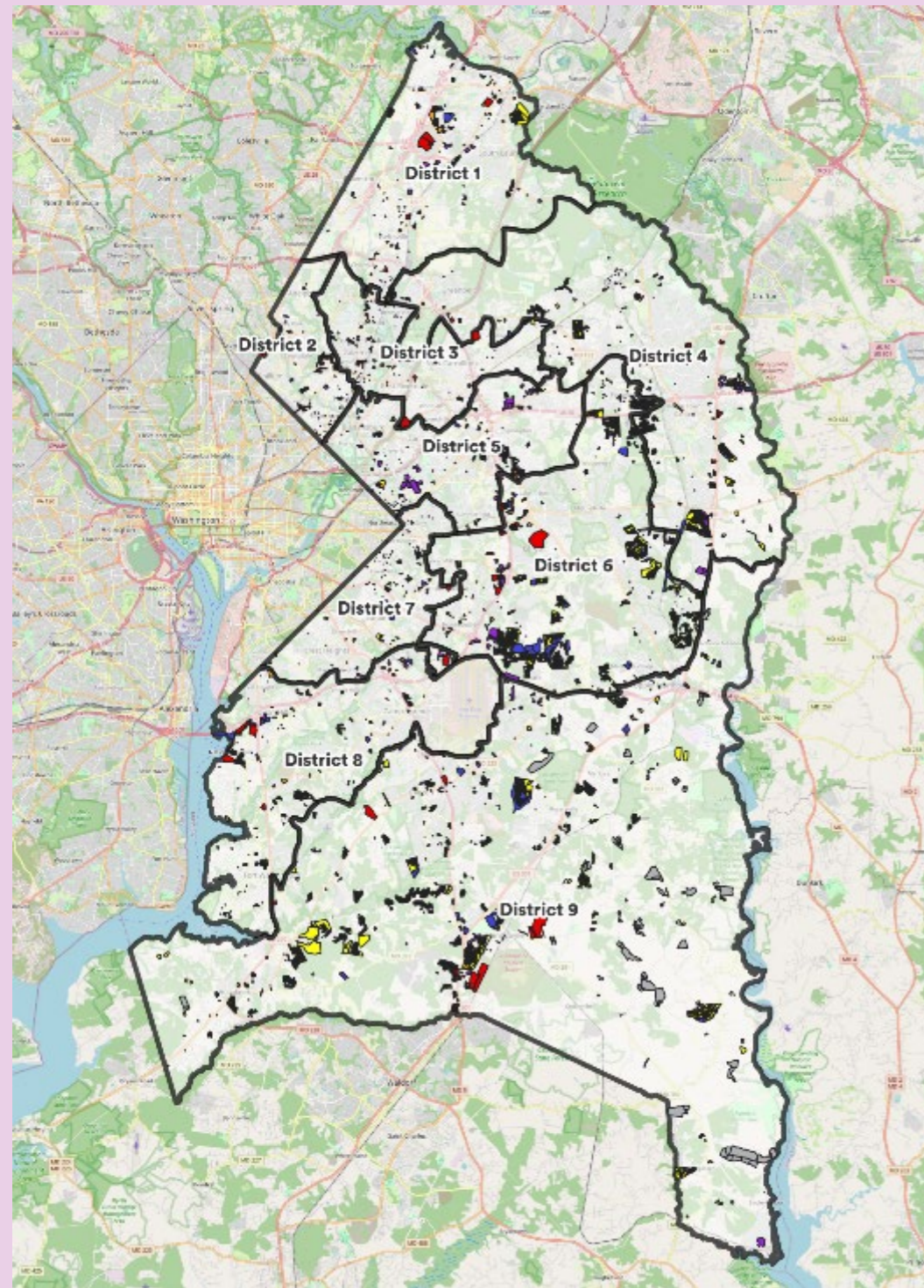
Live / Work Status	2014	2023	% Change
Live and Work in Prince George's County	117,332	117,980	1%
Live in Prince George's County + Work Outside (Out-Commuter)	296,966	310,468	5%
Live Outside + Work in Prince George's County (In-Commuter)	187,508	200,030	7%

Ratio of Employed Residents to Jobs Located in District, 2023

Council District	Employed Residents (2023)	Jobs In District (2023)	Resident Workers / Jobs Ratio
District 1	50,358	52,910	0.95
District 2	37,766	17,252	2.19
District 3	39,915	52,283	0.76
District 4	57,524	43,902	1.31
District 5	45,488	43,377	1.05
District 6	49,406	45,053	1.10
District 7	49,336	16,004	3.08
District 8	45,241	29,466	1.54
District 9	53,414	17,763	3.01
County	428,448	318,010	1.35

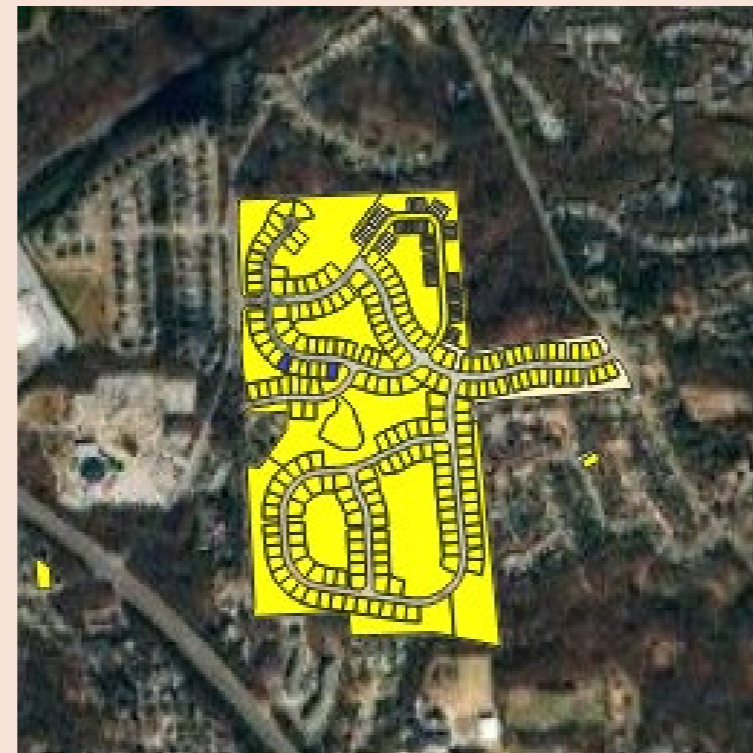
Community Typologies: Attributes

Property Type



Land Use from SDAT Assessment

Development Intensity



Residential Subdivision

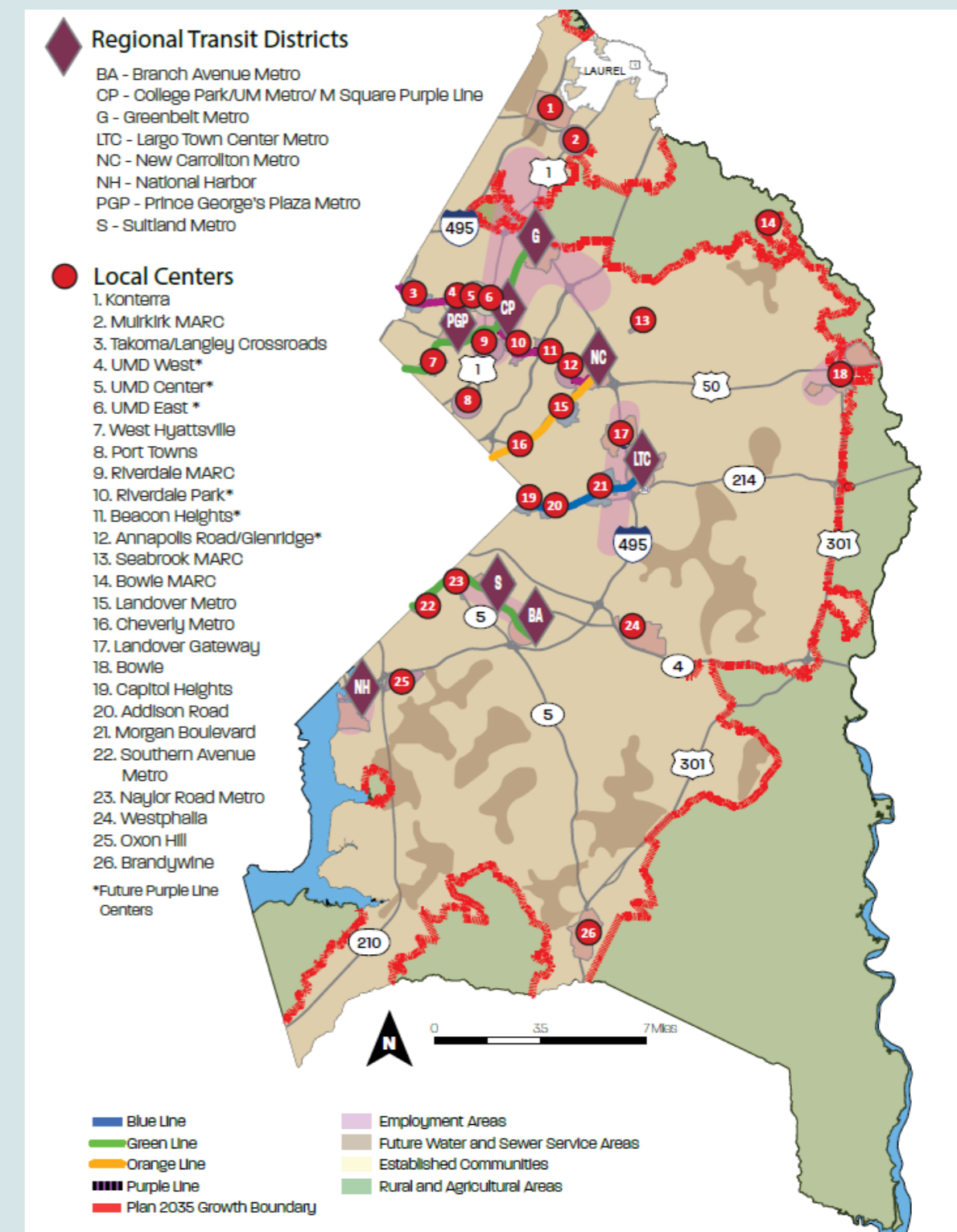
- Built on vacant land
- Spatially clustered
- No previous infrastructure in place



Residential Infill

- Built in established community
- Spatially scattered
- Infrastructure in place from previous development

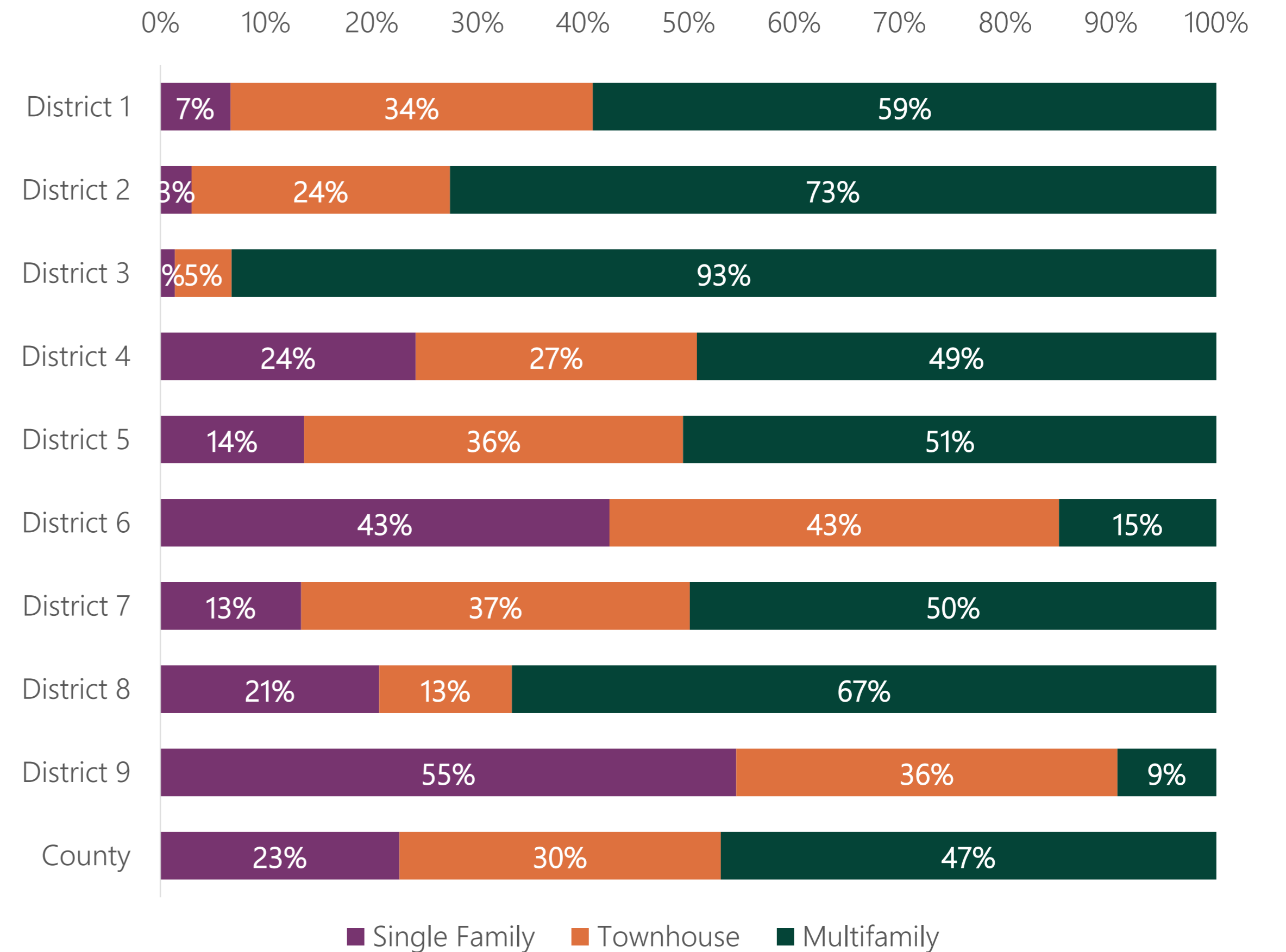
Growth Policy Area



Residential Development

Total Dwelling Units Built 2014-2023 by Council District and Type

Council District	Single Family	Townhouse	Multifamily	Total
District 1	263	1,359	2,339	3,961
District 2	71	590	1,749	2,410
District 3	45	177	3,074	3,296
District 4	625	688	1,271	2,584
District 5	339	894	1,258	2,491
District 6	1,969	1,971	690	4,630
District 7	258	712	965	1,935
District 8	399	242	1,285	1,926
District 9	2,392	1,584	411	4,387
County	6,377	8,571	13,224	28,172



Non-Residential Growth & Development Value

Non-Residential Development SF by Council District, 2014-2023

Council District	Structure Area (000s SF)		
	Commercial	Industrial	Other
District 1	737	1,432	710
District 2	557	0	285
District 3	2,256	106	530
District 4	916	1,413	471
District 5	632	3,381	402
District 6	1,475	2,127	2,041
District 7	262	649	213
District 8	6,616	1,240	458
District 9	687	748	1,951
County	14,137	11,096	7,062

Development and Taxable Value by Type and Policy Area, 2014-2023

Type	Housing Units			Structure Area (000s SF)		
	Single-Family	Townhouse	Multifamily	Commercial	Industrial	Other
Units / Structure Area ('000 SF)	6,377	8,571	13,226	14,137	11,096	7,062
Regional Transit District	<1%	6%	30%	52%	17%	9%
Local Transit Center	<1%	5%	6%	1%	-	3%
Neighborhood Center	1%	8%	1%	1%	2%	1%
Campus Center	<1%	-	6%	2%	-	2%
Town Center	5%	12%	6%	2%	7%	6%
Outside Centers	93%	68%	52%	41%	75%	81%
Total Taxable Value (\$M)	\$4,216	\$3,905	\$3,561	\$4,360	\$1,699	\$21
Regional Transit District	<1%	6%	37%	54%	16%	<1%
Local Transit Center	<1%	5%	5%	1%	-	-
Neighborhood Center	1%	8%	<1%	1%	2%	-
Campus Center	<1%	-	12%	7%	-	-
Town Center	5%	12%	5%	3%	7%	-
Outside Centers	94%	69%	41%	36%	74%	100%

Adequate Public Facilities Evaluation

APF Evaluation Process:

1. **Overview of Adequate Public Facilities (APF) Regulations** : Summary of applicability, review procedures and approval processes under Prince George's County's APF framework.
2. **Comparison to Peer Maryland Jurisdictions**: Overview of adopted Level of Service (LOS) standards, mitigation mechanisms, and exemptions in Howard County and Montgomery County.
3. **Current Infrastructure Adequacy in Prince George's County**: Summary of existing infrastructure capacity and current adequacy based on adopted LOS standards outlined in the APF regulations.
4. **Projected Growth & 2033 Infrastructure Adequacy** : Summary of projected population and housing growth over the next 10 years and the anticipated impact on infrastructure adequacy through 2033.
5. **Constraints and Considerations**: Summary of analytical limitations, data constraints, and key forward-looking policy considerations influencing future adequacy determinations.

Current Infrastructure Adequacy Review

Parks & Recreation	Police	Fire and Rescue	School	Water & Sewer
<p>29,717 acres of parks in the County for population of 947,430</p> <ul style="list-style-type: none"> 656 acres in Transit-Oriented/Activity Center Zones and Employment Areas 29,062 acres in all other zones 	<p>LOS Standard</p> <ul style="list-style-type: none"> A maximum of 10 minutes total for emergency calls A maximum of 25 minutes total for non-emergency calls for service. <p>2023 Data Review:</p> <ul style="list-style-type: none"> 2 divisions exceed emergency LOS (V – 10.3 min; VII – 10.6 min) No divisions exceed non-emergency LOS 	<p>Fire and EMS Department tracks 4- and 8-minute drive times from each station.</p> <p>Current coverage:</p> <ul style="list-style-type: none"> 57,605 acres or 18% of County land is within a 4-minute response time of a Fire/EMS station. 178,546 acres or 56% of County land is within an 8-minute response time 	<p>13% (31 out of 231) of schools are considered overutilized ($\geq 105\%$ utilization)</p> <ul style="list-style-type: none"> Clusters 1 (33%) & 2 (28%) have the most overutilized schools Elementary schools are the most frequently overutilized, with 4 of 6 clusters have at least one overutilized elementary school 	<ul style="list-style-type: none"> 66.7% of the County is in Sustainable Growth Tier 1 or 2 and open for all subdivision types 1.7% of the County is in Sustainable Growth Tier 3 and open for subdivision with on-site sewer 31.9% of the County is in Sustainable Growth Tier 4, limited to minor subdivision with on-site sewer and no planned future community system

Policy Constraints and Considerations

Research & Analysis Constraints

- Transportation (Vehicular) – insufficient comprehensive LOS data
- Transportation (Bike/Pedestrian) – limited measurable LOS framework
- Fire/EMS – evaluated at a high-level due to limited available data

Regulatory Limit

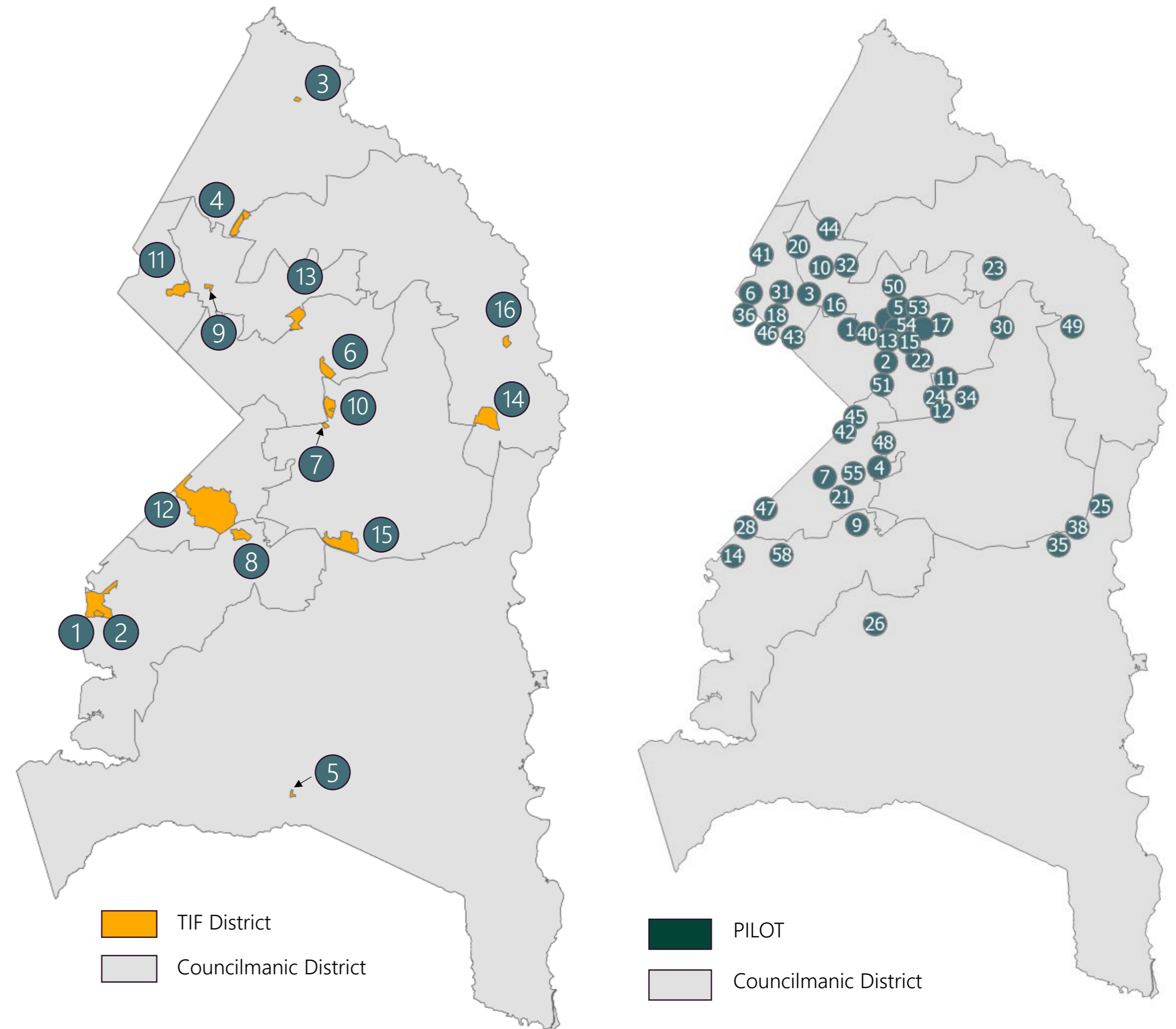
- Under current Subdivision Regulations, water and sewer are not classified as APF facilities.
 - Adequacy review is limited to determining proposed Subdivision service eligibility, not capacity testing.

Policy Considerations

- Establish a formal APF review committee and timeline to regularly re-evaluate APF standards
- Consider measurable LOS requirements for non-motor vehicle transportation
- Establish a formalized process for the systematic collection, monitoring, and evaluation of housing unit types to ensure that student generation rates are accurately reflected in the periodic updating of pupil yield studies
- Eliminate response time LOS requirement for police and fire facilities
 - Consider staffing ratios e.g., 1 sworn officer per 1,000 residents, call volume, total square feet of fire Stations
- Establish method(s) for distribution of collected APF mitigation fees
- Exempt affordable housing from APF requirements.

TIF and PILOT Evaluation Methodology

1. **Overview of Current TIF and PILOT Policies:** Summary of existing legislation and processes in Prince George’s County.
2. **Historic Use of TIFs and PILOTs in Prince George’s County:** Summary of TIFs and PILOTs and examples of how TIFs and PILOTs have been applied locally.
3. **Case Studies of TIFs and PILOTs in Prince George’s County:** Summary of key TIFs and PILOTs.
4. **Best Practices for the Use of TIFs and PILOTs from Other Jurisdictions:** Summary of common structures, uses, implementation processes, and best practices.
5. **Implications for Prince George’s County:** Lessons from the historic analysis and national norms and best practices.
6. **Strategic Recommendations:** Summary of how TIFs and PILOTs can support infrastructure, housing, and economic development priorities.



TIF and PILOT Evaluations: Summary

TIF Evaluation Summary

1. Program administration has evolved over time.
2. TIFs are selectively used for complex projects.
3. Alignment with broader development goals varies.
4. Transit-oriented opportunities are emerging.
5. Data collection and evaluation remain limited.

PILOT Evaluation Summary

1. Program processes differ by project.
2. Most jurisdictions seek to limit term lengths.
3. Oversight structures vary but are increasingly formalized.
4. Long-term tracking is an opportunity area.
5. Data collection and evaluation remain limited.

TIF & PILOT Program Recommendations

Recommendation	Tax Increment Financing	Payment in Lieu of Taxes
<p>Establish a Clear and Distinct Purpose for TIF and PILOT Programs</p>	<p>A TIF is used to finance an <u>infrastructure project</u> that (a) enables a desired type of real estate development that could not occur “but for” the subsidy and (b) <u>boosts surrounding property values</u> such that the increase in property taxes (“increment”) can pay back the debt incurred to fund the initial infrastructure investment.</p>	<p>A PILOT is used to support desired real estate development that would not be feasible without tax relief— particularly building <u>affordable housing</u> or <u>attracting or retaining a major employer</u>. (May have a negative future net fiscal impact.)</p>
<p>Set Clear Parameters as to When a Project Should be Eligible</p>	<p>The TIF program should:</p> <ul style="list-style-type: none"> • Fund infrastructure linked with enabling a particular corresponding development project. • Demonstrate ability to repay initial cost with increment. • Demonstrate a future positive or neutral fiscal impact. • Consider defining eligible project types, locations, and land uses where TIF may be applied. 	<p>The PILOT program should:</p> <ul style="list-style-type: none"> • Provide a land use or tenant with substantial public benefits that would not locate within the County if not for the subsidy: particularly affordable housing or a major employer.
<p>Refine the Review and Approval Process</p>	<p>The TIF program should:</p> <ul style="list-style-type: none"> • Continue to refine a clear and consistent applications process to vet project market and financial feasibility, “but-for” link between the infrastructure investment and project funding gap, and tax increment generation • If a project can meet these standards, it should be approved. 	<p>The PILOT program should:</p> <ul style="list-style-type: none"> • Establish typical term lengths (e.g., 20–30 years for affordable housing projects and 5-10 years for commercial projects) and financial limits to protect long-term revenues. • Document term lengths, compliance requirements, and renewal procedures.
<p>Enhance Program Clarity and Transparency</p>	<p>The TIF program should:</p> <ul style="list-style-type: none"> • Maintain a public, structured approval process on a rolling basis. • Standardize review materials, timelines, and financial analyses. 	<p>The PILOT program should:</p> <ul style="list-style-type: none"> • Maintain a public, structured approval process on a rolling basis. • Standardize review materials, timelines, and financial analyses.

Projected Growth: Development Scenario

- Based on Metro Washington COG Cooperative Forecasts of Population and Employment
- Translated to development scenario consistent with forecasted population and employment growth and spatial patterns

Projected Development Scenario by Council District and Land Use, 2024-2033

Council District	Housing Units				Structure Area (000s SF)			
	Single-Family	Townhouse	Multifamily	Total Units	Commercial	Industrial	Other	Total SF
District 1	156	780	2,183	3,118	390	561	689	1,641
District 2	-	345	1,954	2,299	147	166	163	476
District 3	-	161	3,067	3,229	464	92	417	973
District 4	791	1,186	1,976	3,953	937	486	1,564	2,986
District 5	314	629	2,201	3,144	2,626	237	-	2,863
District 6	1,627	3,254	3,254	8,134	1,917	610	1,720	4,247
District 7	149	594	2,229	2,972	1,092	1,098	757	2,947
District 8	120	180	901	1,202	1,133	137	1,507	2,776
District 9	1,320	2,200	880	4,401	1,440	440	2,030	3,910
County Growth 2024-2033 (proj.)	4,477	9,330	18,646	32,452	9,387	3,509	8,134	21,030
County Growth 2014-2023	6,377	8,571	13,224	28,172	14,137	11,096	7,062	32,295

Future Infrastructure Needs

- Projected population and employment growth compared against anticipated infrastructure capacity and adopted Level of Service (LOS) standards.
- Under this scenario, infrastructure adequacy will vary across the County, with faster-growing Districts likely to experience greater pressure on public facilities and requiring continued capital investment and policy adjustments to maintain service levels.

Projected Level of Service by District, 2033

	Park	Police	Schools	Water
	New Park Area Needed	Projected Emergency Response Time	Student Growth	New Water Demand
Council District	(Acres)	(Mins)	(Pupils)	(Million Gallon per Day)
District 1	224	11.05	982	0.33
District 2	161	10.49	717	0.24
District 3	292	11.22	1,013	0.34
District 4	362	11.02	1,304	0.44
District 5	258	11.17	1011	0.34
District 6	686	12.29	2,666	0.90
District 7	207	11.02	939	0.32
District 8	107	10.34	388	0.13
District 9	392	11.11	1,480	0.50
County	2,691	11.27	10,501	3.53

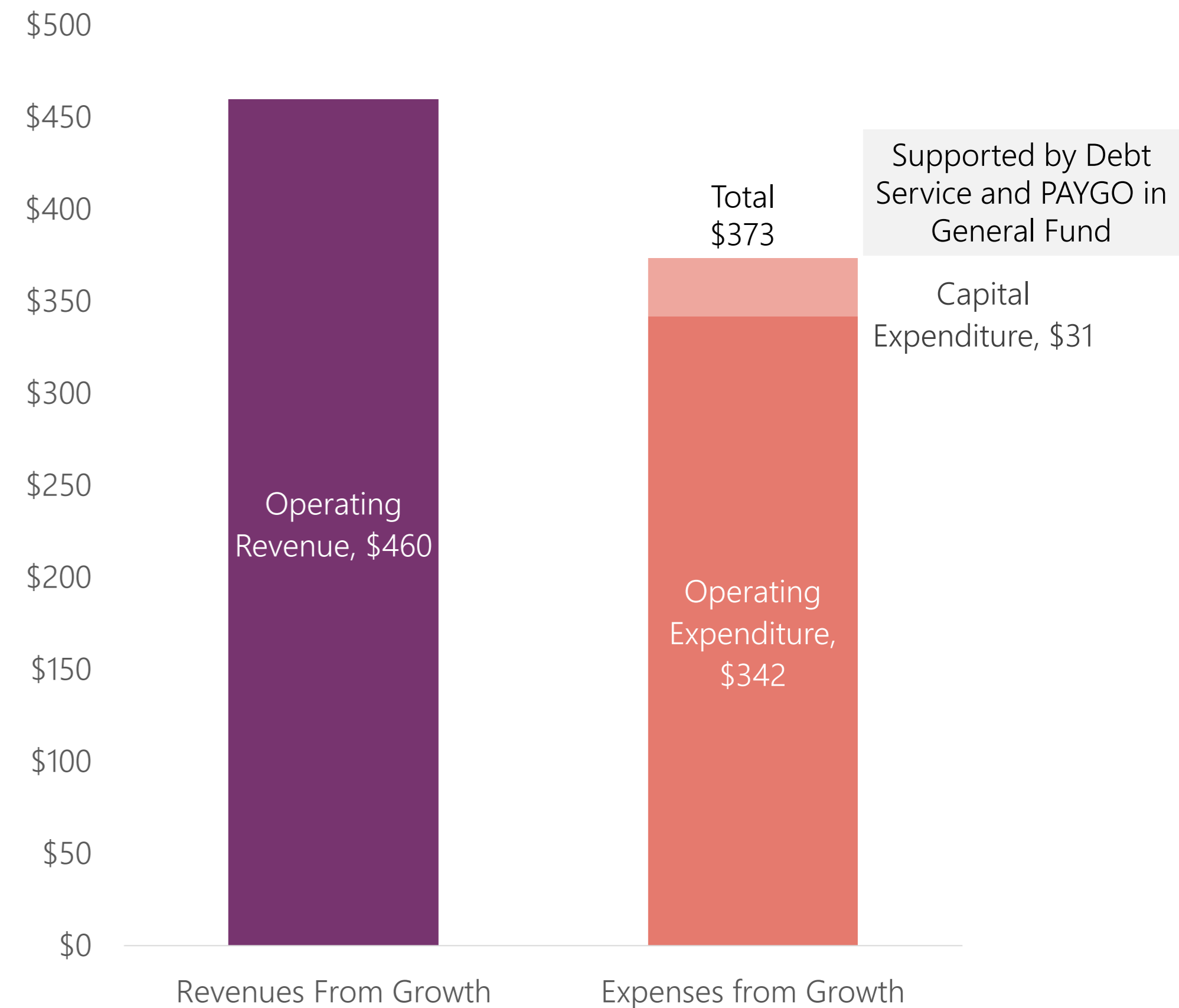


Fiscal Impact From Growth by Land Use Type

Estimated FY 2023 Revenue and Expenditure From Development by Land Use – All Sources

Land Use Type	Revenue (\$M)	Expenditure (\$M)	Revenue / Expenditure Ratio
Single-Family	\$107.2	\$87.9	1.22
Townhouse	\$109.6	\$92.6	1.18
Multifamily	\$131.0	\$129.3	1.01
Commercial	\$65.1	\$39.1	1.66
Industrial	\$37.1	\$10.9	3.39
Other	\$9.8	\$13.4	0.73
Total	\$459.8	\$373.2	1.23

Annual Revenue / Expense



Fiscal Impact From Growth: Revenue / Expense Ratio

Historical Revenue / Expense Ratio by Council District

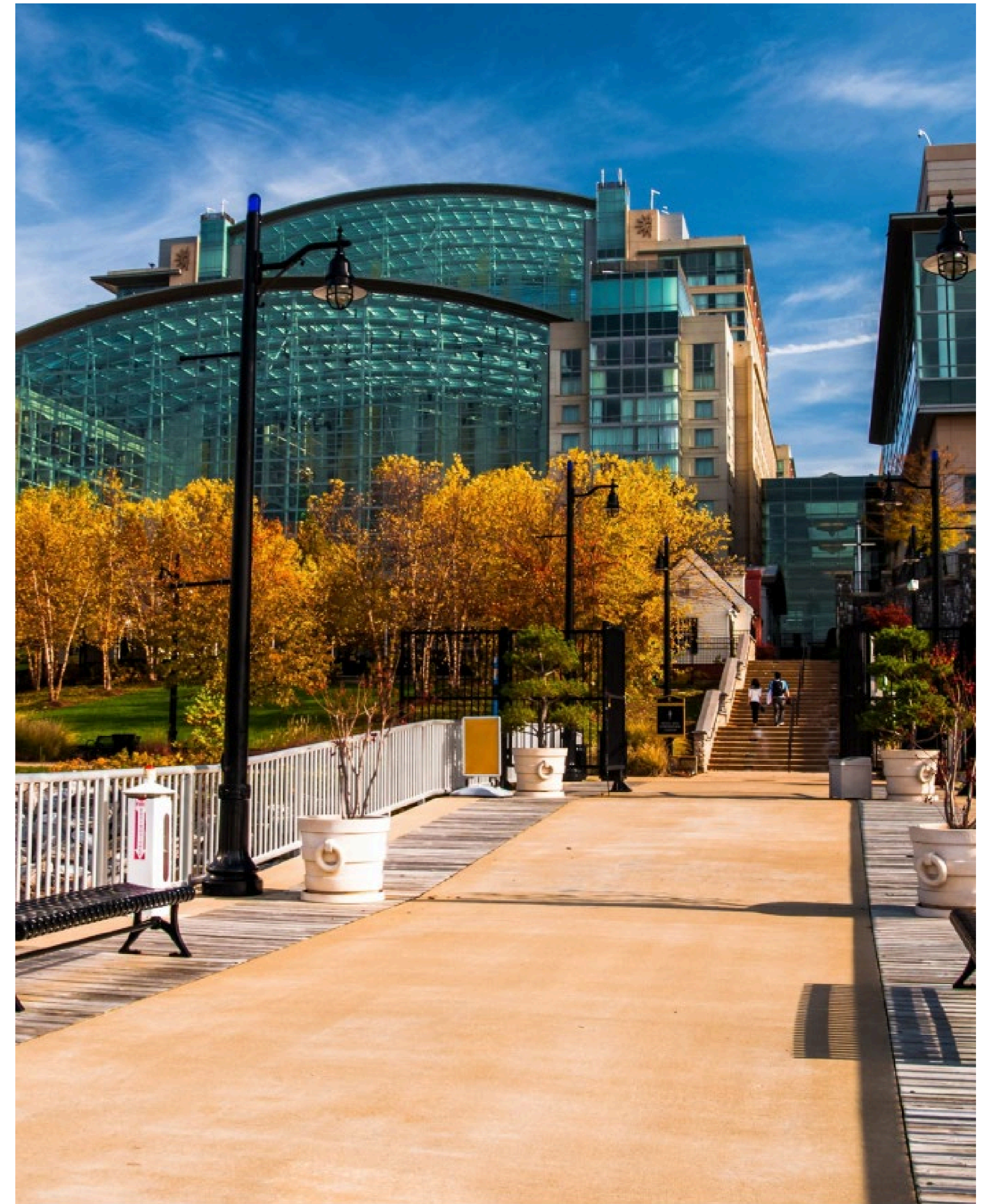
	Council District									County
	1	2	3	4	5	6	7	8	9	
Annualized Revenues	\$44.2	\$28.9	\$47.7	\$48.5	\$43.7	\$98.5	\$16.8	\$57.9	\$71.3	\$459.8
Annualized Expenditures	\$38.3	\$28.3	\$43.5	\$36.3	\$29.8	\$77.3	\$16.6	\$42.6	\$54.2	\$373.2
Revenue / (Expenditure + Infrastructure Cost) Ratio	1.15	1.02	1.10	1.34	1.47	1.27	1.01	1.36	1.32	1.23

Projected Revenue / Expense Ratio by Council District

	1	2	3	4	5	6	7	8	9	County
Annualized Revenues	\$37.0	\$23.7	\$32.5	\$62.0	\$56.0	\$115.0	\$42.2	\$20.5	\$76.5	\$465.4
Annualized Expenditures	\$33.6	\$23.8	\$27.6	\$46.4	\$42.1	\$84.2	\$44.9	\$17.7	\$55.5	\$375.9
Revenue / (Expenditure + Infrastructure Cost) Ratio	1.10	1.00	1.18	1.33	1.33	1.37	0.94	1.16	1.38	1.24

Study Takeaways

- **Growth is not inherently fiscally positive or negative but varies by location.** Historic analysis shows that fiscal efficiency varies across areas based on development patterns, property values, and service demands. Therefore, **future fiscal performance depends on how and where growth occurs.**
- **Infrastructure planning is critical to fiscal sustainability.** Aligning capital investments, Adequate Public Facilities (APF) policies, and development approvals will be essential to ensuring infrastructure capacity keeps pace with projected growth.
- **Development incentives should be more clearly structured and evaluated.** Strengthening eligibility criteria, oversight, and data tracking for TIF and PILOT programs can improve transparency, fiscal accountability, and alignment with County development priorities.
- **Fiscal analysis can help to guide future growth strategy.** Land use typologies linking development patterns to fiscal outcomes provide policymakers with a tool to evaluate growth and guide development toward fiscally resilient outcomes.



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FISCAL IMPACT OF GROWTH

QUESTION & ANSWER

 THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION
Prince George's County Planning Department

May 26, 2026

Ethan Conner-Ross

Courtney Powell

Jon Stover

 **ESI** ECONSULT
SOLUTIONS INC.
economics | strategy | insight

 **W WGI**

 **JS&A**

