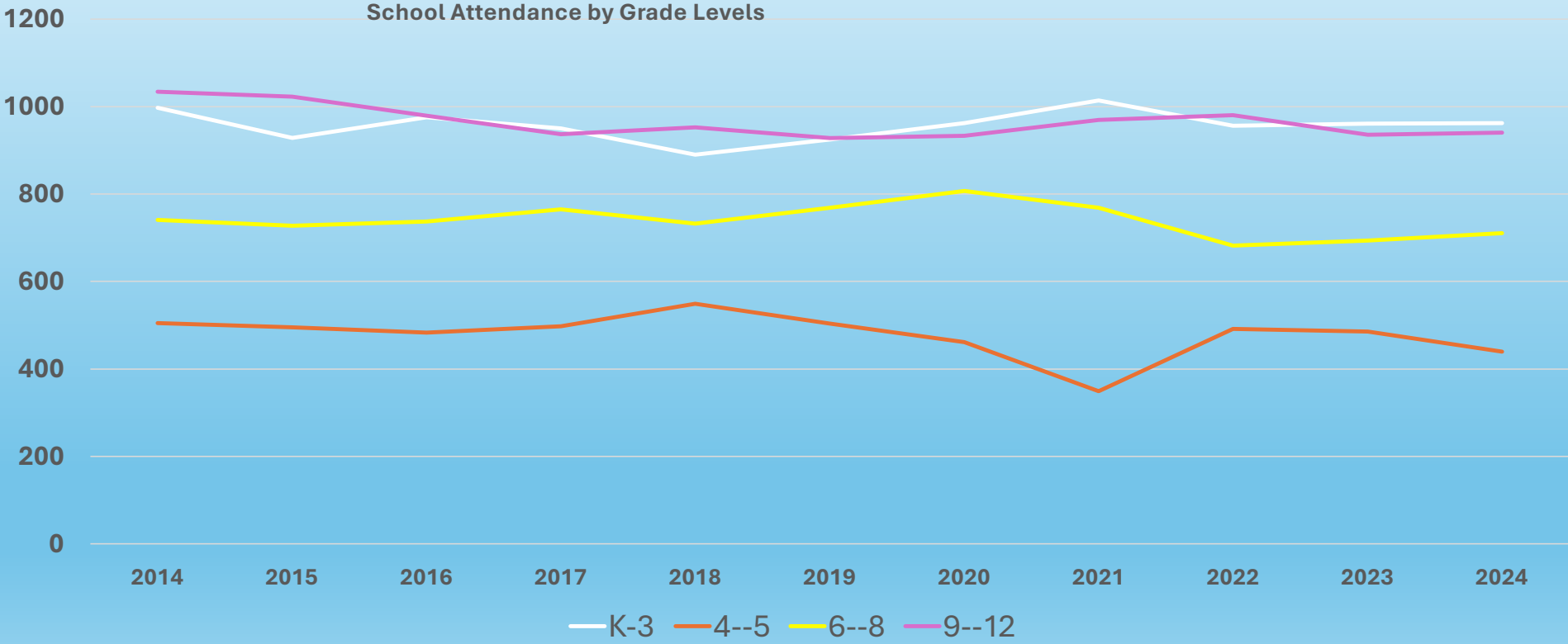


Windham Information

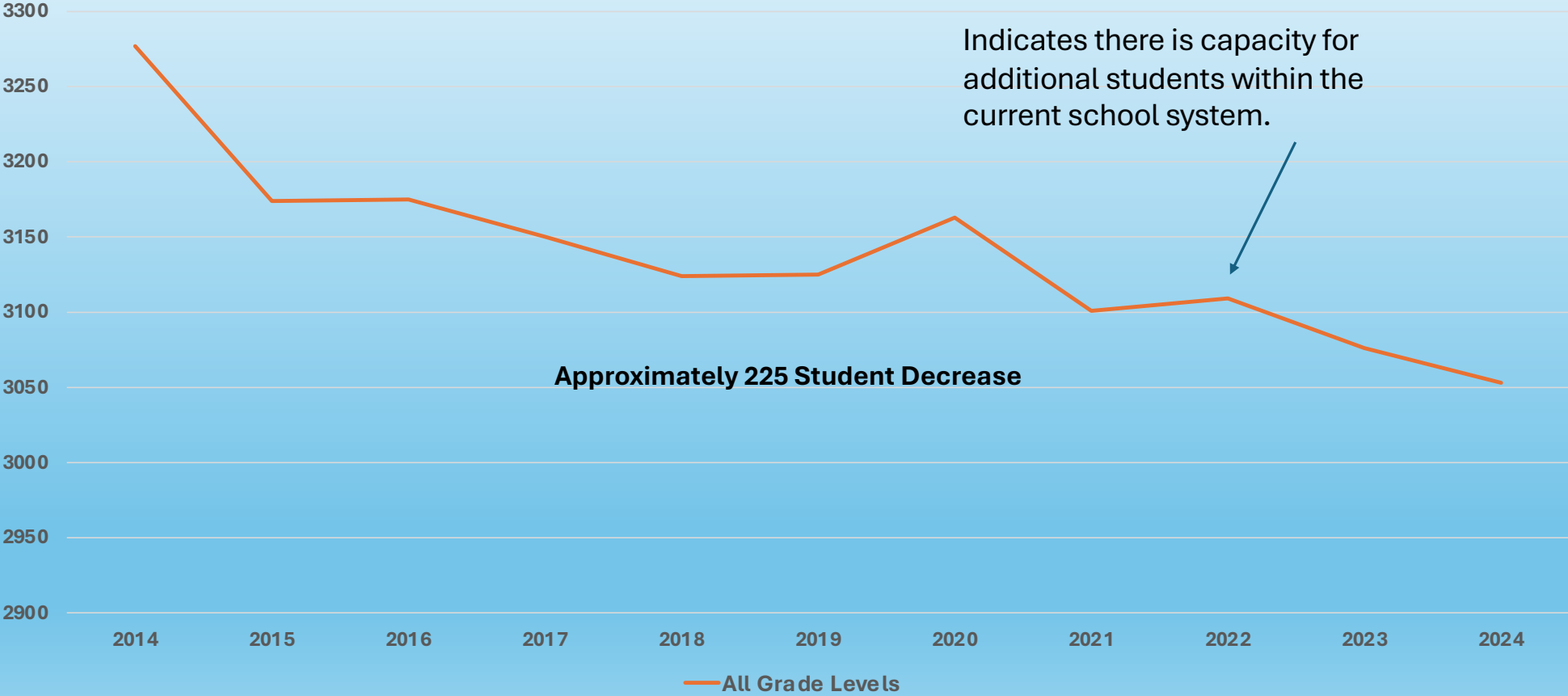
- RSU # 14 School Enrollment
- Police and Fire/EMS call response to larger multi family developments
- Economic Revenue Impacts from Growth
- Traffic Impacts
- State Law on Growth, Windham population, Rates of growth
 - Housing History, Valuation Differences
- Growth Ordinance Summary and recommendations

RSU 14 ENROLLMENT

School Attendance by Grade Levels



Windham School Enrollment over 10 years



Dwelling Unit Type to # of Students in School

Based on projects since 2018 in Windham, Verified Student Count by RSU

Number of Projects	Time Frame	Type	Number of units	Number of students	Zones	Units to one Child in school	Data view
2	2019-2024	Condo	49	14	RM	3.5	3.5 units = 1 or .29 / child per unit
6	2018-2024	Duplex	142	68	RM, FR, C-1, C-2, VC	2.1	2.1 units = 1 or .47/child per unit
3	2021-2023	Multi Unit	85	6	C-1, VC	14	14 units = 1 or .07/child per unit

Single Family is breakdown is not possible due to various factors

POLICE AND FIRE/EMS CALLS

Fire and Ems calls on new developments

Year	Single/Condo	Duplex	Multi	Total		Fire Calls	Ems Calls	Total
2018	0	56	0	56		12	48	60
2019	49	42	0	91		8	19	27
2020	0	0	0	0		0	0	0
2021	0	42	24	66		4	11	15
2022	2	0	30	32		2	2	4
2023	0	0	54	54		4	3	7
2024	18	0	179	197				
	69	140	287	496		30	83	113
Percentage of Total Units				.0509	Percentage of Total Calls			.0283

**Represents
12 housing developments
from 2018-2024 totaling
496 units**

**Below Average
No Impact**

	Totals	% EMS/Fire calls to All Housing Stock
Total Calls Service Fire/EMS (2024)	3985	
Total Housing Units	8843	0.4506

Police Service Calls on new developments

Year	Single/ Condo	Duplex	Multi	Total		Emerg Calls	Routine Calls	Officer Initiated
2018	0	56	0	56		3	22	5
2019	49	42	0	91		0	14	47
2020	0	0	0	0		0	19	10
2021	0	42	24	66		0	0	0
2022	2	0	30	32		0	7	9
2023	0	0	54	54		0	2	0
2024	18	0	179	197		0	1	0
	69	140	287	496		3	65	71
Percentage of Total Units				.1015	Percentage of Total Calls			.0093

Represents
12 housing
developments from
2018-2024 totaling 496
units

Green Highlights
indicate
non-emergency

Below Average
No impact

	Totals	% Police calls to All Housing Stock
Total Calls Service Police (2024)	14,883	
Total Housing Units	8843	1.683

ECONOMIC IMPACTS – REVENUES/IMPACT FEES

(not including consumer economic spending
at local businesses estimated at \$21 million
from new development)

What are Municipal Service Fees and Impact Fees

- Annual Code Enforcement Revenues (2020-2024)

- 2020 \$534,224
- 2021 \$718,055
- 2022 \$549,454
- 2023 \$519,378
- 2024 \$459,058.



Notice the Cyclical nature of permits revenues

- Impact Fees (2020-as of Dec. 2024)

	Avg. Rev.	Balance
• Open Space (residential)	\$ 55,150	\$217,173
• Recreation (residential) (Rev. in late spring)	\$ 122,075	\$ 43,215
• Police and Fire Services (residential & commercial)	\$ 108,524	\$267,634
• Town Hall Services (residential & commercial)	\$ 34,787	\$208,723

3 smaller Impact fees; North Windham Sidewalk & South, Rte. 302 Traffic North= \$148,008

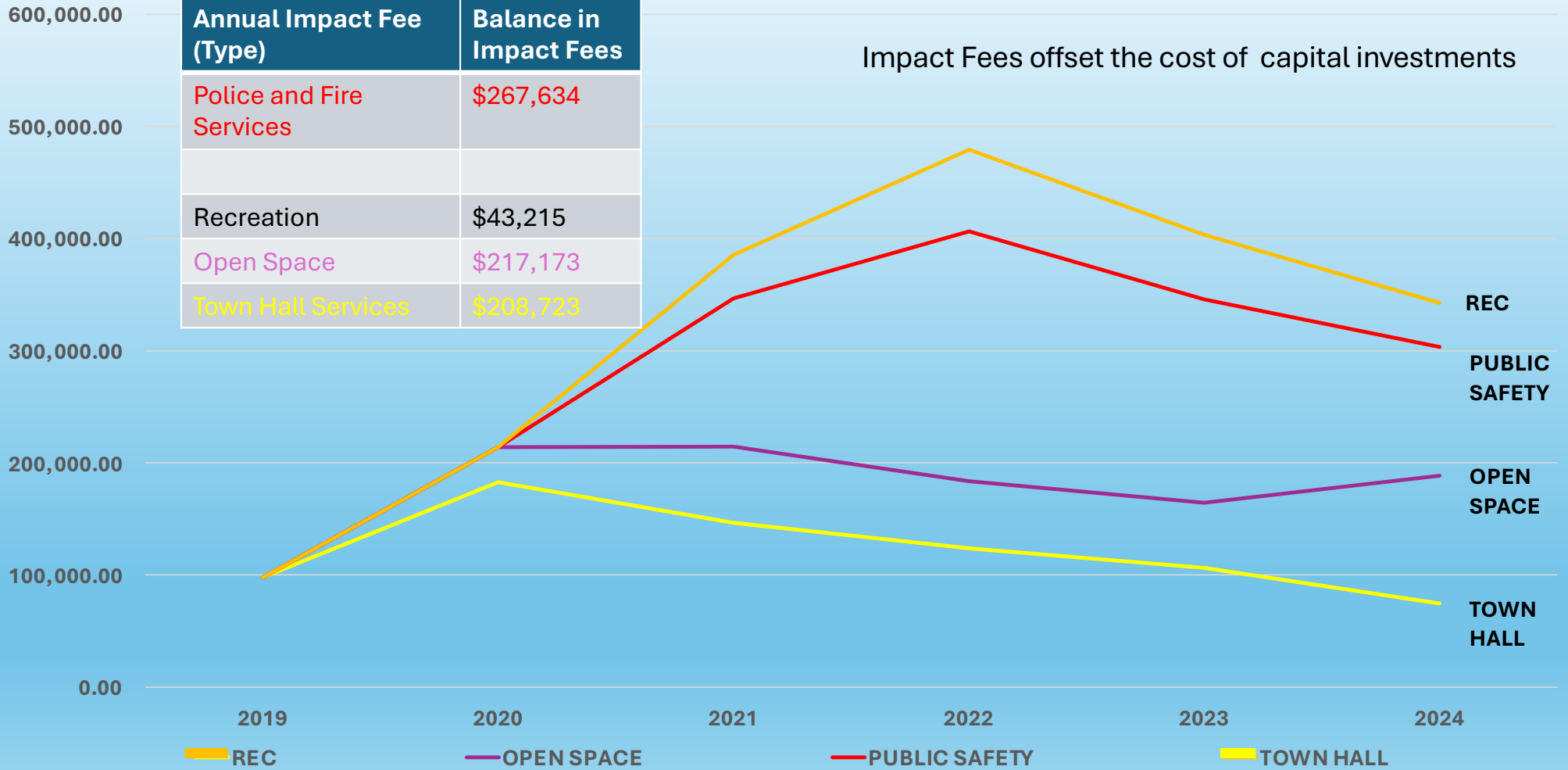
Bond Payments from impact fees

*Lowell Parking lot	\$ 17,400.	REC
*East Windham Conservation	193,033.	Open Space
*Manchester Field Development	99,005.	REC

IMPACT FEES BY TYPE AND YEAR

Impact Fees offset the cost of capital investments

Annual Impact Fee (Type)	Balance in Impact Fees
Police and Fire Services	\$267,634
Recreation	\$43,215
Open Space	\$217,173
Town Hall Services	\$208,723



Impact Fees on Approved and Pending Projects

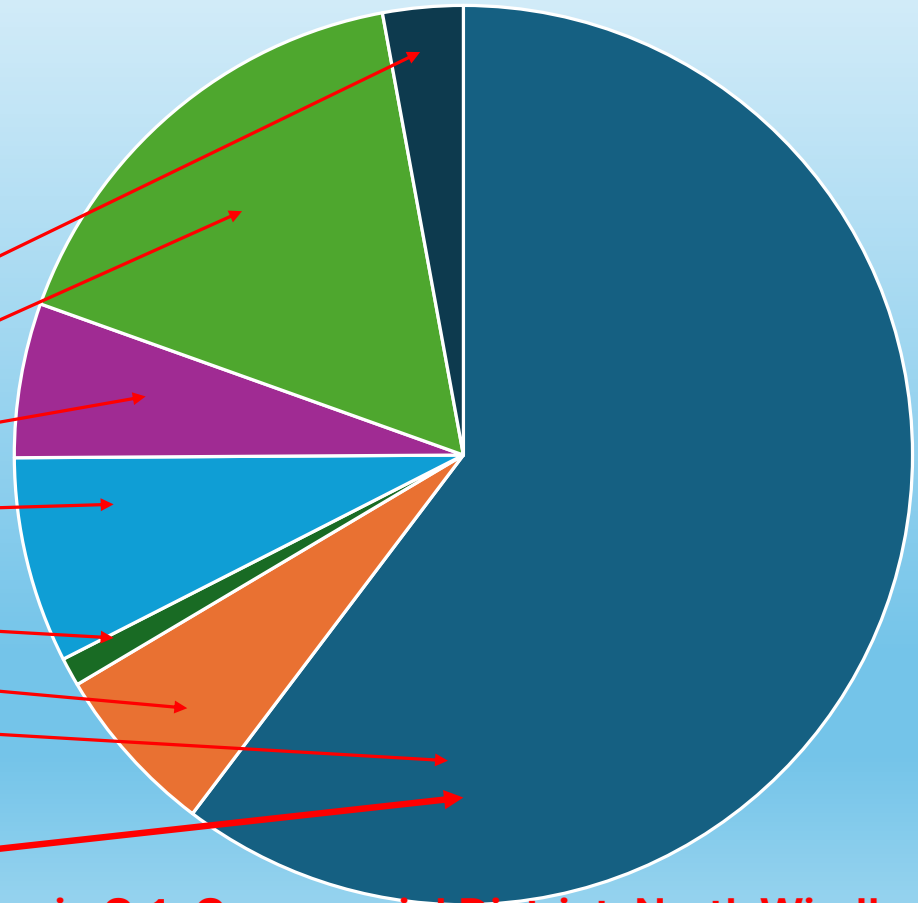
Description	Sewer Connect	Recreation	Open Space	Public Safety	Muni Facilities	TOTAL One Time Fees	Yearly Excise Tax
Recently Completed Projects	\$31,000	\$55,800	\$63,880	\$85,680	\$28,305	\$264,665	\$68,000
Pending Projects	\$2,411,000	\$529,000	\$616,928	\$892,948	\$304,784	\$4,755,260	\$681,600
Total	\$2,442,000	\$585,400	\$680,808	\$978,628	\$333,089	\$5,019,925	\$749,600 Yearly

These numbers represent 10 projects including Condo's, and Apartments, no single-family homes. Single family homes would increase these numbers. These numbers represent the income stream of the ten projects up to 2030.

Sewer Connect Fees (first column above) would be used for expansion of processing with an additional new Membrane Bio Reactor unit. Fees from new businesses only.

Total of all TIF allocations

- Total Annual TIF Availability FY 30/31
- Availability \$ 4,052,671
- New NW Public Safety
- Contingency \$. 117,067
- Sewer Expansion \$. 675,000
- Fire Station 40%. \$. 300,000
- Eco Dev Innovation Ctr \$. 225,000
-
- Smart Lights \$. 41,604
- Contingency \$. 250,000
- NW Sewer Funding. \$. 2,444,000



Sewer project is paid by new building construction in C-1, Commercial District, North Windham

Traffic Impacts

based on North Windham Moves Project
and subsequent analysis of future building

Windham Mobility Traffic Evaluation

- Known future large development project traffic impacts included and analyzed
- Additional speculative development also included that over-estimates impacts
- Projected traffic volume increase would exceed the North Windham Moves Traffic Study estimates
- Assumed 2040 traffic corridor volumes would be exceeded earlier in time if these developments occurred
- North Windham Moves improvements should maintain overall acceptable levels of service and make the NWM project even more critical to proceed
- Currently we have close to 30,000 vehicles per day on Rte. 302, Adding 100 apartment units adds 200 trips per day.
- Staff is working with MDOT officials on this project and the DOT officials have not expressed concerns about negative impacts

State Growth Law, Windham
Population, Rates of Growth (2023),
Housing History,

Maine State Growth Law

- MRS Title 30-A Section 4360 Rate of Growth Ordinances
 - Rate of Growth Reviewed every 3 years
 - Allowed to have different limits on number of building or development permits that are permitted in designated rural areas and designated growth areas.
 - Municipality must adopt the ordinance
 - Must set # of permits for Residential at 105% of mean # of new residential permits issued during last 10 years
 - Affordable housing is exempt from total number of units in calculation
 - Ordinance sets affordable housing units at no less than 10% of mean # for no growth permits
 - Growth areas identified in comp plan can be exempt from permits

#	Municipality	2023 Population	Has a Growth Ordinance?
1	Portland	68,356	no
2	Lewiston	39,876	no
3	Bangor	31,460	no
4	South Portland	27,477	no
5	Auburn	24,310	no
6	Sanford	22,562	no
7	Biddeford	22,357	no
8	Saco	21,326	no
9	Westbrook	20,859	no
10	Brunswick	20,845	no
11	Waterville	15,824	no
12	Augusta	19,220	no
13	Falmouth	12,868	no
14	Orono	12,253	no
15	Kennebunk	11,915	no; repealed
16	Wells	11,855	no; repealed
17	Kittery	10,784	no
18	Cape Elizabeth	9,592	no
19	Old Orchard Beach	9,128	no
20	Freeport	8,781	no
21	Gray	8,395	no
22	Bridgton	5,471	no

Municipalities with or without Growth Ordinances

#	Municipality	2023 Population	Has a Growth Ordinance?
1	Scarborough	24,228	yes; "Rate of Growth Ordinance"
2	Gorham	17,777	yes; "Growth Management"
3	Windham	19,722	yes
4	York	14,216	Growth Policy - part of Comp Plan
5	Standish	10,820	part Land Use
6	Cumberland	8,754	yes; "Growth Management Ordinance"

22 No Growth Ordinance communities and 6 communities with a Growth Ordinance

Selected 2024 Survey Questions

Q9. Please rate your satisfaction with each of the services listed below.

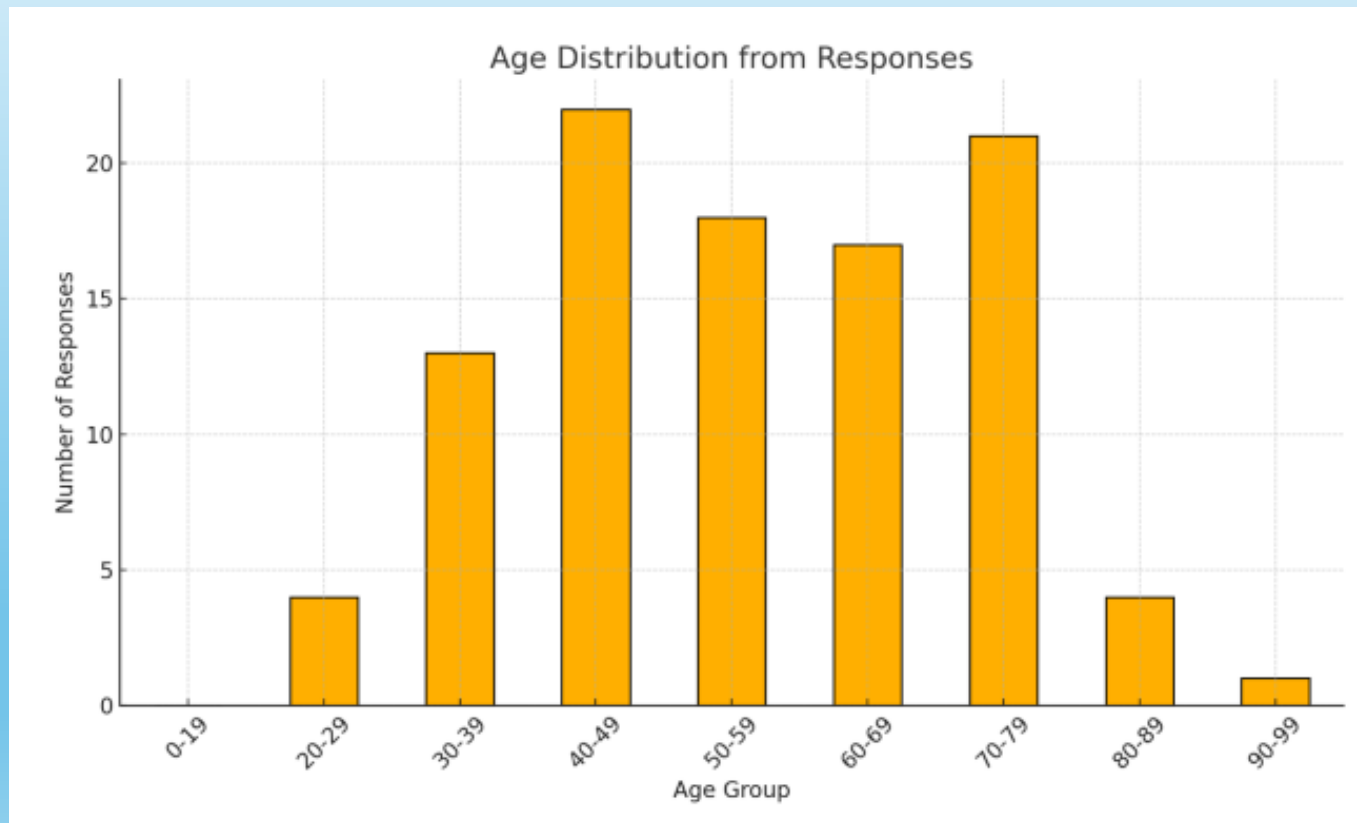
	Much to Slow	Too Slow	Just Right	Too Fast	Much To Fast
Single-family residential development	4%	11%	31%	24%	21%
Multi-family residential development (apartments)	2%	8%	15%	24%	43%
Income restricted affordable housing	12%	21%	16%	8%	19%
Workforce housing options	9%	22%	14%	6%	12%
How well the Town is managing residential growth	3%	19%	20%	31%	26%
Retail and business development	6%	22%	47%	8%	7%

Q25. What are the THREE most significant issues facing Windham over the next five years?

Affordable housing	50%				
Affordability of Town Services (property taxes)	71%				
Pace of community growth/expansion	73%				

Q7. Please rate your satisfaction with each of the services listed below	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Ease of getting around within the Town of Windham	6%	32%	20%	29%	12%
How well the traffic signal system provides for efficiency	4%	26%	21%	31%	18%
Availability of sidewalks	3%	18%	34%	27%	10%
Availability of public parking	13%	49%	26%	6%	2%
Ease of travel by bicycle in Windham	2%	7%	24%	21%	13%
Ease of pedestrian travel in Windham	2%	11%	26%	26%	15%
Availability of bikeways	2%	8%	27%	20%	14%
Availability of Windham's Age-Friendly Ride Share Service	3%	7%	27%	4%	2%

Participation by Age in Survey



What are the potential impacts of no (limited) growth

- With no new construction (or limited) and the resultant increase in valuations would be lowered, additionally revenues from excise and impact fees would be less.

- For example (using standard averages/assumptions)

• Cutting Building permits by 50%		\$15,000,000	
Break out of Revenue/Expenses Sources	Revenues		Contractual Obligations
Reduces intake of Excise taxes	-\$ 20,000		} Approx. 42 cents Incr. per year on mil rate Minimal calculations
• Reduces intake of Impact Fees	-\$150,000		
• Building reduction reduces intake of Fees	-\$ 250,000		
• Municipal Contracted Operational fees.		\$500,000 +/-	

- May create unforeseen unquantifiable concerns.
- Local businesses increase in income potential stymied
 - School enrollment stability
 - **Contractual Obligations are increases in expenses incurred ever year (Unions, Electric, Contracts).**
 - **All calculations exclude School budget determinations**

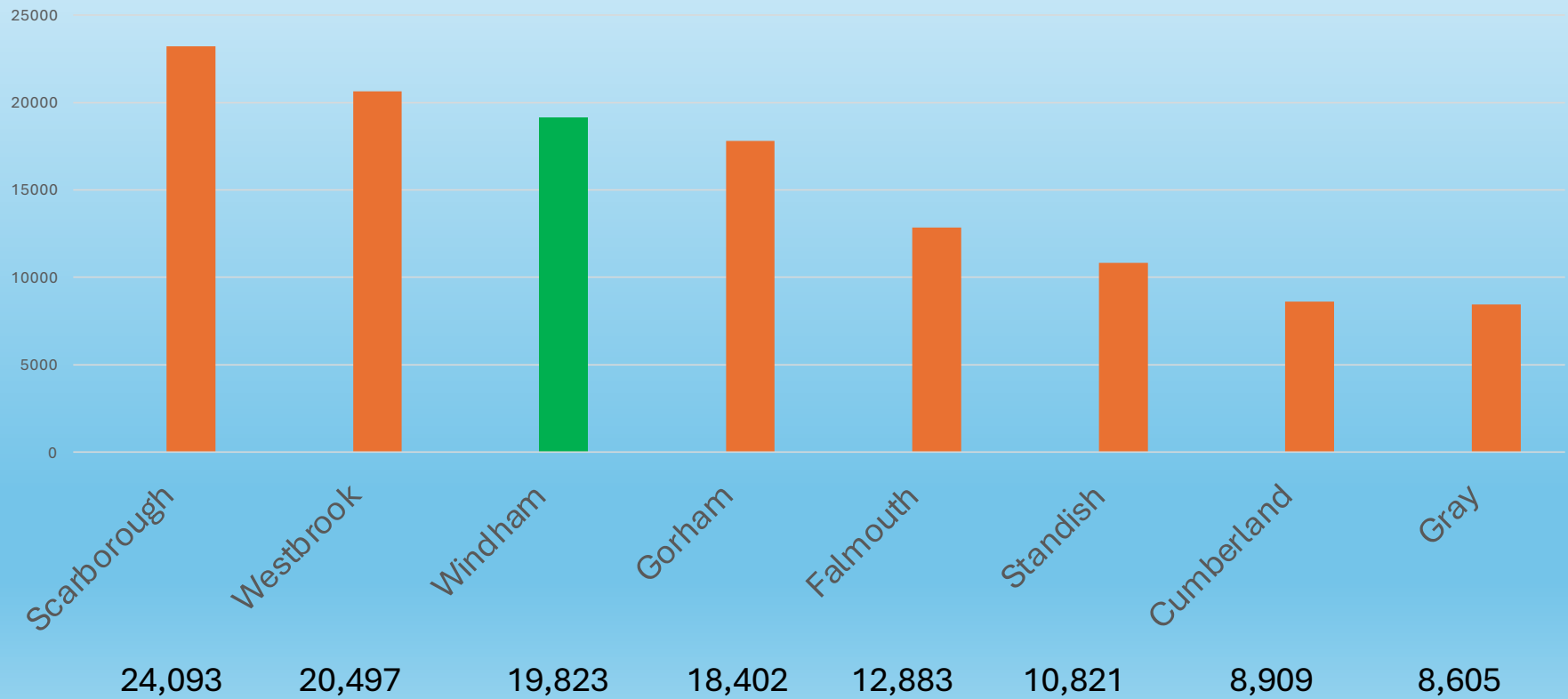
Projected Tax Increase with eliminating new multi-units for Sewer

	mil rate incr.	monthly	12mo incr. based on \$500K Home
Village-172	0.21	9.27	\$111.2
Turning-146	0.18	7.87	\$94.44
Next G-300	0.48	21.55	\$258.6

Residents are not incurring this expense Total = \$464.24

Public Voted in Favor of Sewer in 2022 Yes_ 1499_. No__590__.

Town Populations (2024)

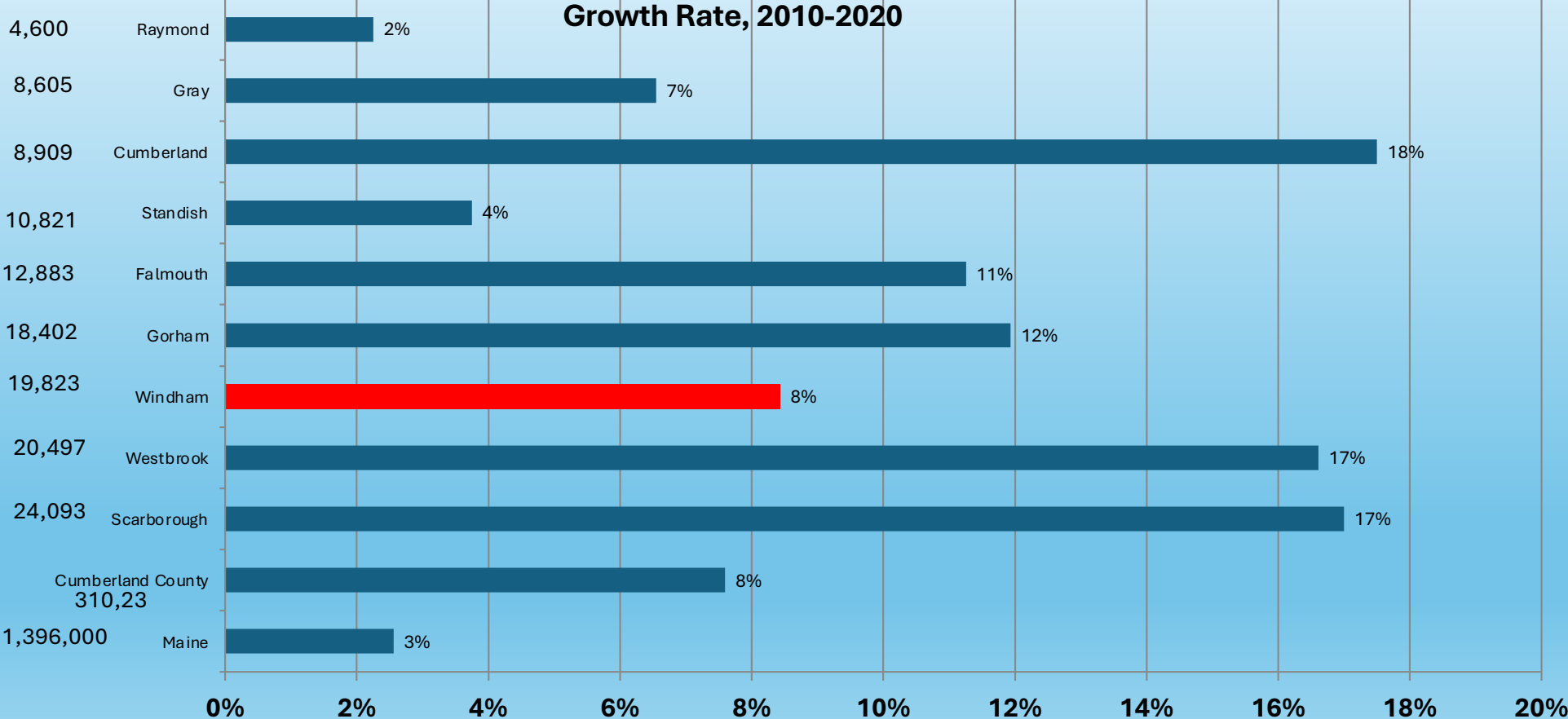


Area Growth Rate

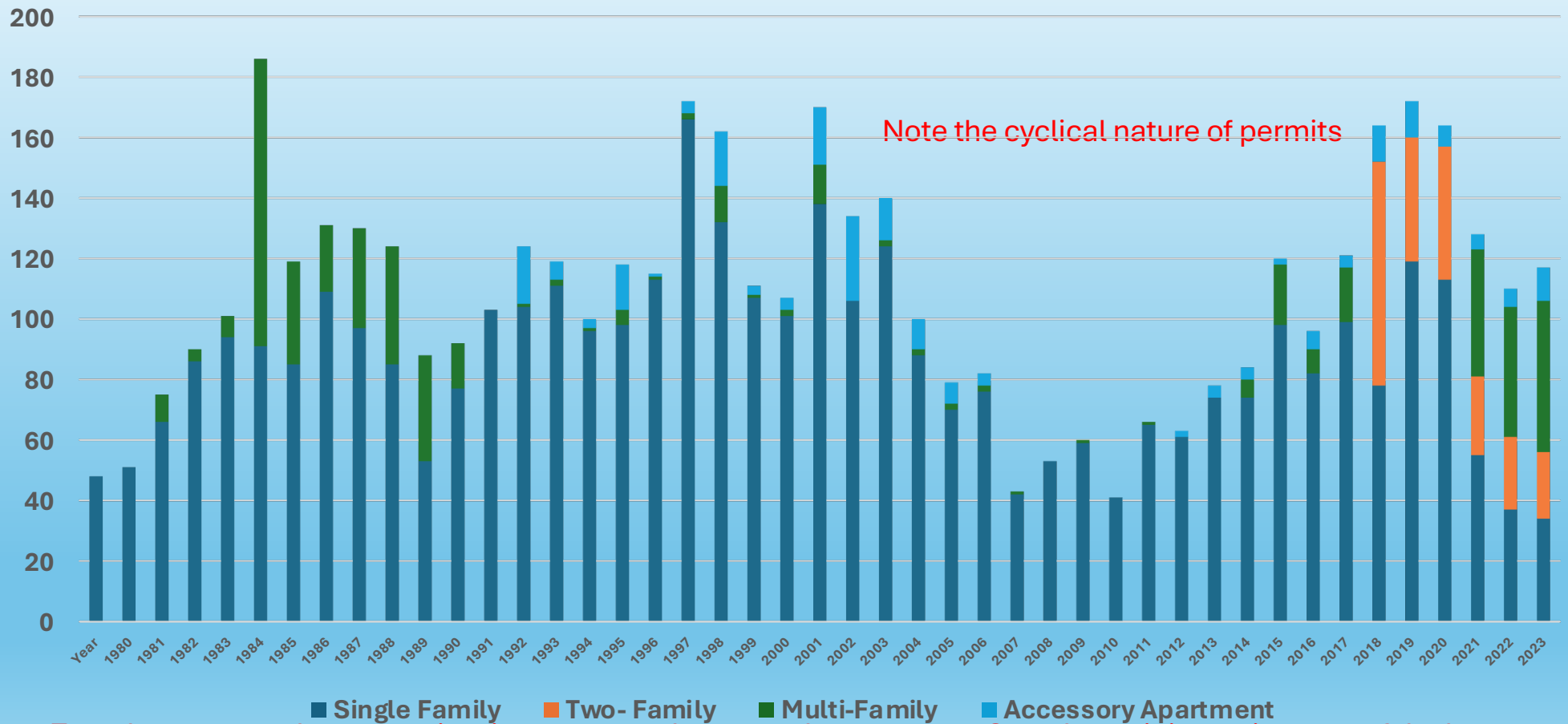
Windham in middle of comparable Towns

Current Population

Growth Rate, 2010-2020

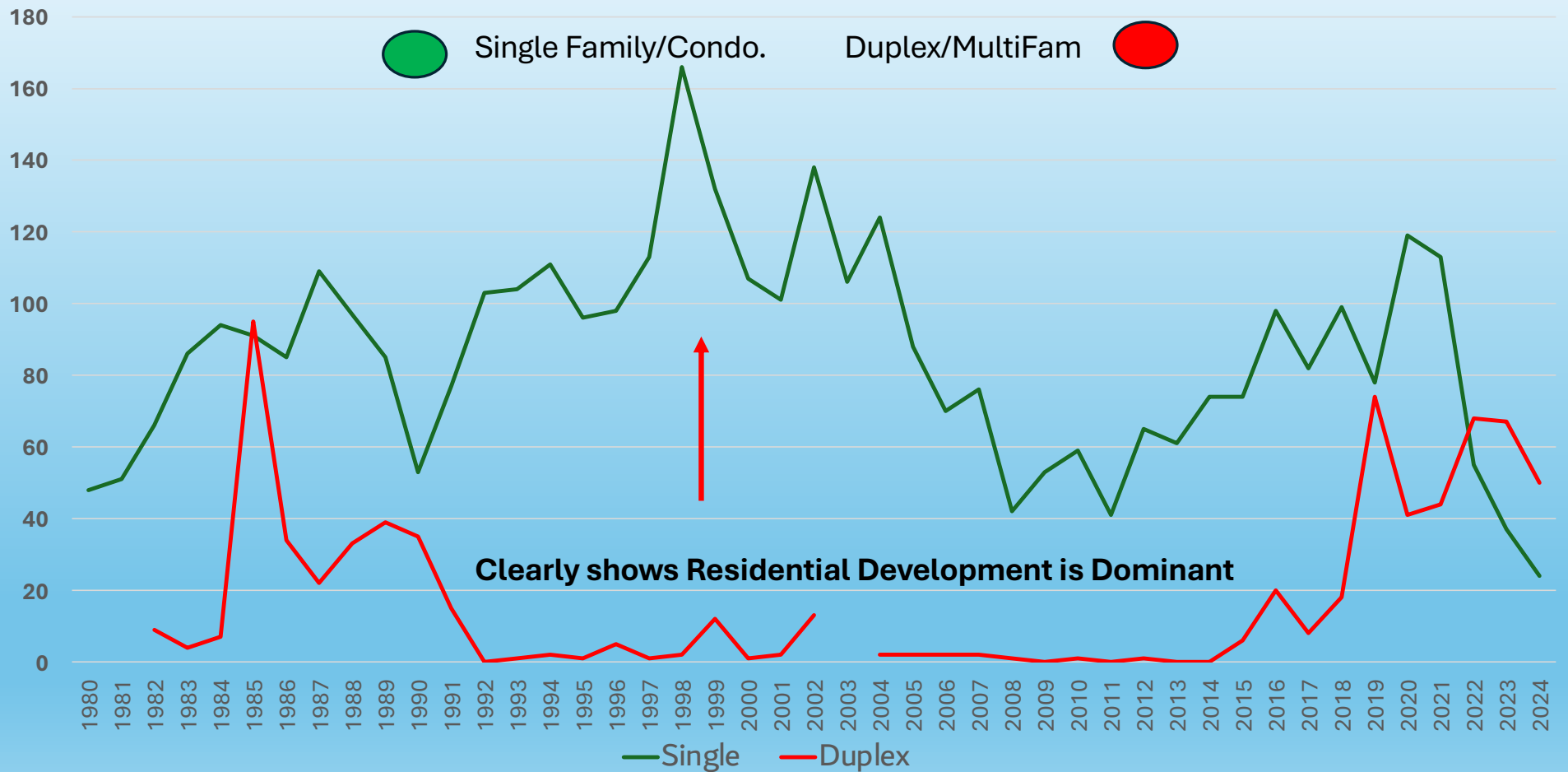


Over 44 years of Housing permits



Town has averaged 107 permits since 1980 and 122 over last 10 years, State law minimum is 105% of the last 10 years equaling 128 units-

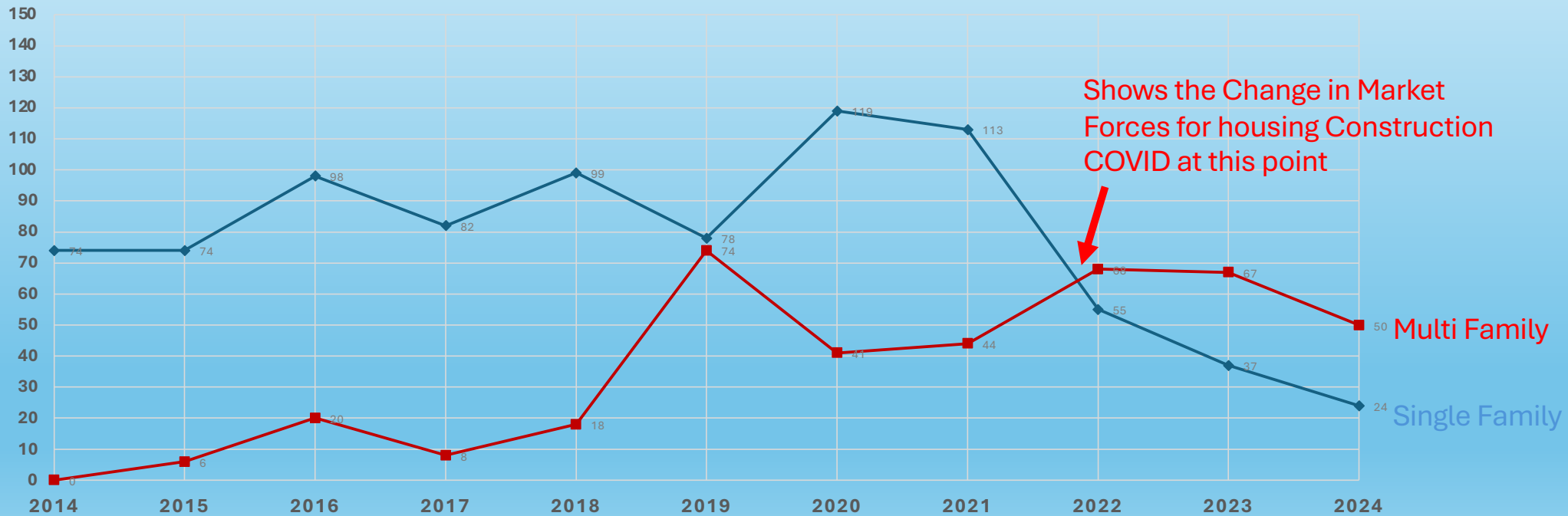
Over Four Decades of Permit History



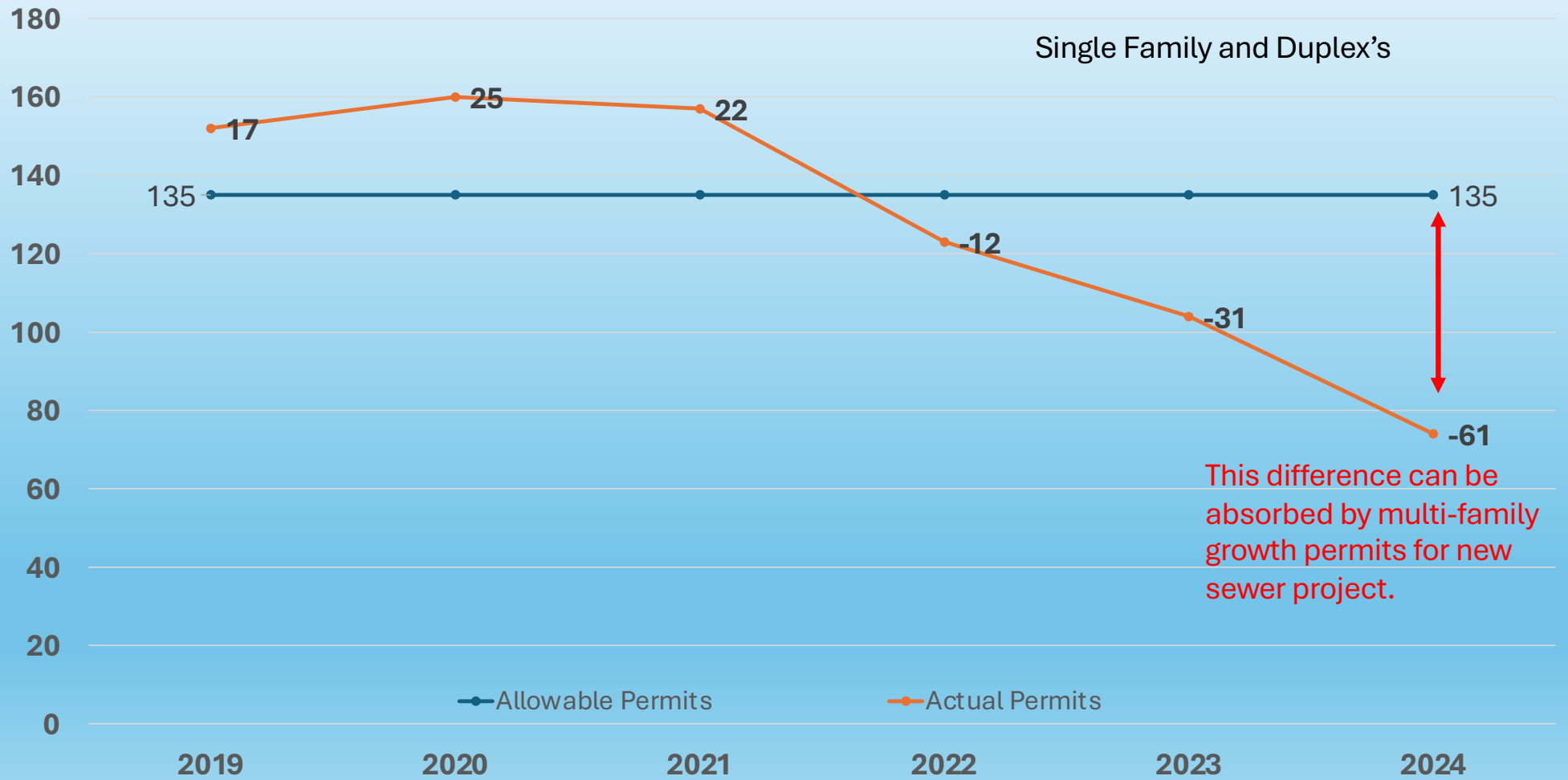
Single Family vs. Multi-Family Units

SINGLE FAMILY VS. MULTI-FAMILY UNITS

◆ Single Family ■ Multi-Family



Housing Permits Above and Below Cap

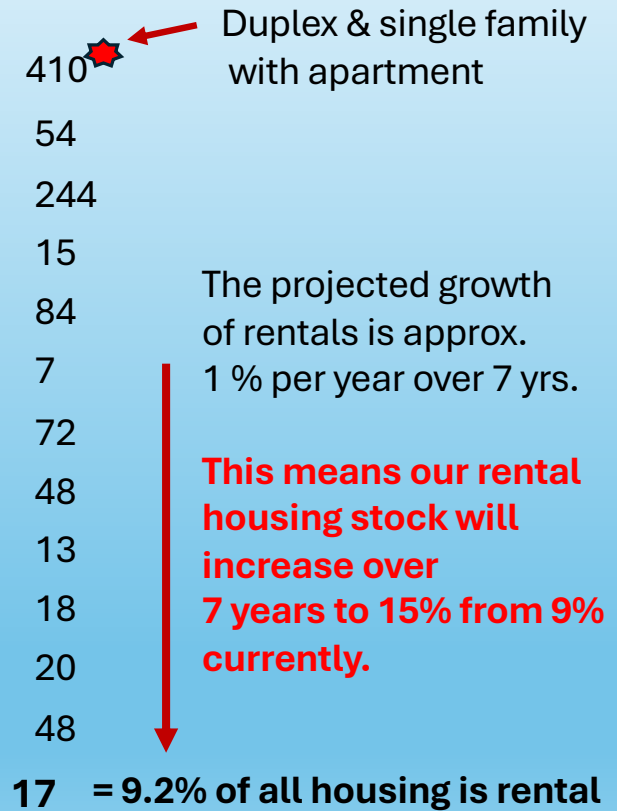


Building Type, Total Units (as of April 1, 2024)

519 condo
 232 mobile H
 6651 single F
 192 single /Apt
 218 duplex

Bldg Type	Bldg Count	Total Units
1-unit	7402	7402
2-unit	410	820
3-unit	18	54
4-unit	61	244
5-unit	3	15
6-unit	14	84
7-unit	1	7
8-unit	9	72
12-unit	4	48
13-unit	1	13
18-unit	1	18
20-unit	1	20
24-unit	2	48
Grand Total	7927	8845

Rentals *



Proposed and Existing Rental units 718 + 817 = 1535 = 15.2% of all housing is rental
 Add Average Growth over 7yrs 490 + 8845 + 718 = Total all units = 10,053

Valuation Differences between Apt vs Home (and Municipal Maintenance Expenses)

- **Apt AV Per Unit** – All three of the completed apartment complexes consist of 2-bedroom units, with the exception of Stockyard that has seven 3-bedroom units in addition to twenty-four 2-bedroom units. You can see that the average assessed value (including land) **per unit ranges from around \$200k-\$240k**. Example-would be 10 units equals \$2,000,000 to \$2,400,000.
- **Single Family AV** – Four single family home comparables of similar quality (Avg or Avg+10), square footage (1200-1400), and year built (2020 or newer) **range from about \$375k-\$400k AV**. This value includes land and several of these include a garage.

Key Takeaways

- Single family homes have a higher value – per unit – compared to an individual apartment unit of the same size. Single Family homes with a public road have a higher maintenance and long-term costs and potential infrastructure investments.
- Apartment buildings obviously generate a much higher value – per parcel – than a single-family dwelling on the same size parcel. Town has less infrastructure costs involved with multi-units. Multi-family units provide greater revenues in excise taxes, and impact fees than single family units.
- For Example- 3 acre parcel a multi family 30 units vs, a 2 single family homes on 3 acres. The difference in valuation, excise revenues, impact fees, equals 30x to 40x in-favor of multi-family.

Growth Ordinance

Provides positives and negatives

- Control of Resources
- Target areas for Growth
- Supports opportunities for needed affordable housing
- May reduce revenue flows
- Not an effective way to manage grow
- Does not work well with cyclical scenarios

Growth Ordinance Recommendations

- Residential and Duplex permits
 - Single Family and Duplex permits total 135 units.
 - Farm zone would take 45 of these permits leaving 90 available permits
(Change should be single family or duplex considered the same)
- **Multi-Family project permits.** (CEO would be allowed to issue up to 5 multi-family permits)
 - Up to 70 units beyond the 135. (this is a new allowance for smaller developments in growth areas only)
- Affordable and Senior Housing perhaps should be exempt in growth areas
- Special Projects greater than 100 units in the Growth Areas
 - Would require approval by the Council with a developer's agreement

Q and A on Growth Permits

Can growth affect the municipal budget?

Growth can positively affect the municipal budget with more revenues. These additional revenues can be used to offset tax rate increases.

(Windham Municipal expenses increase each year by contractual obligations (Fuel, Unions, Service Contracts) in a range of \$450,000 to \$700,000)

Does the Growth Ordinance affect land values?

This can be a difficult question to quantify since this is about supply and demand proving this data would be difficult.

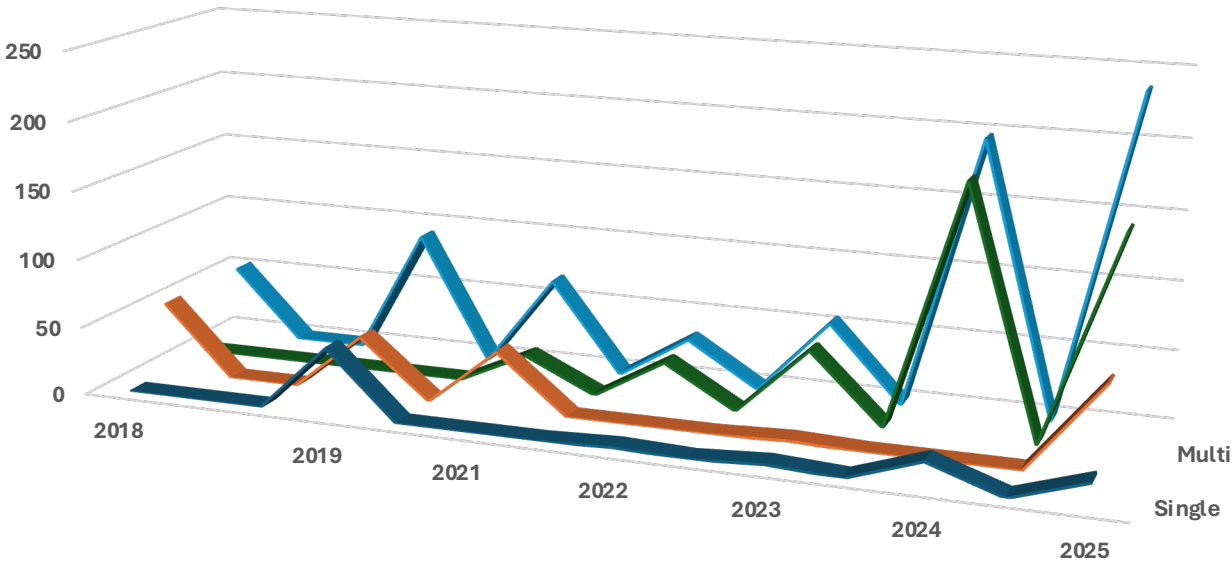
One of the Objectives of the Growth Ordinance was to preserve the F Zone. The Growth ordinance allows 45 permits in the F zone. In the prior two years this number has not been met.

Has Windham had a Growth Ordinance in the Past?

Windham did have a growth ordinance in 1989 which applied to subdivisions and allowed number of permits. This was repealed as being inconsistent with State law in 2012.

END

Subdivisions Approved 2018-2024 (w/proposed 2025)



	Single	Duplex	Multi	Total	
2018	0	52	0	52	
2019	49	42	0	91	
2021	0	42	24	66	
2022	2	0	30	32	
2023	3	2	50	55	
2024	18	0	179	197	No Senior
2025	17	66	154	237	No Sewer

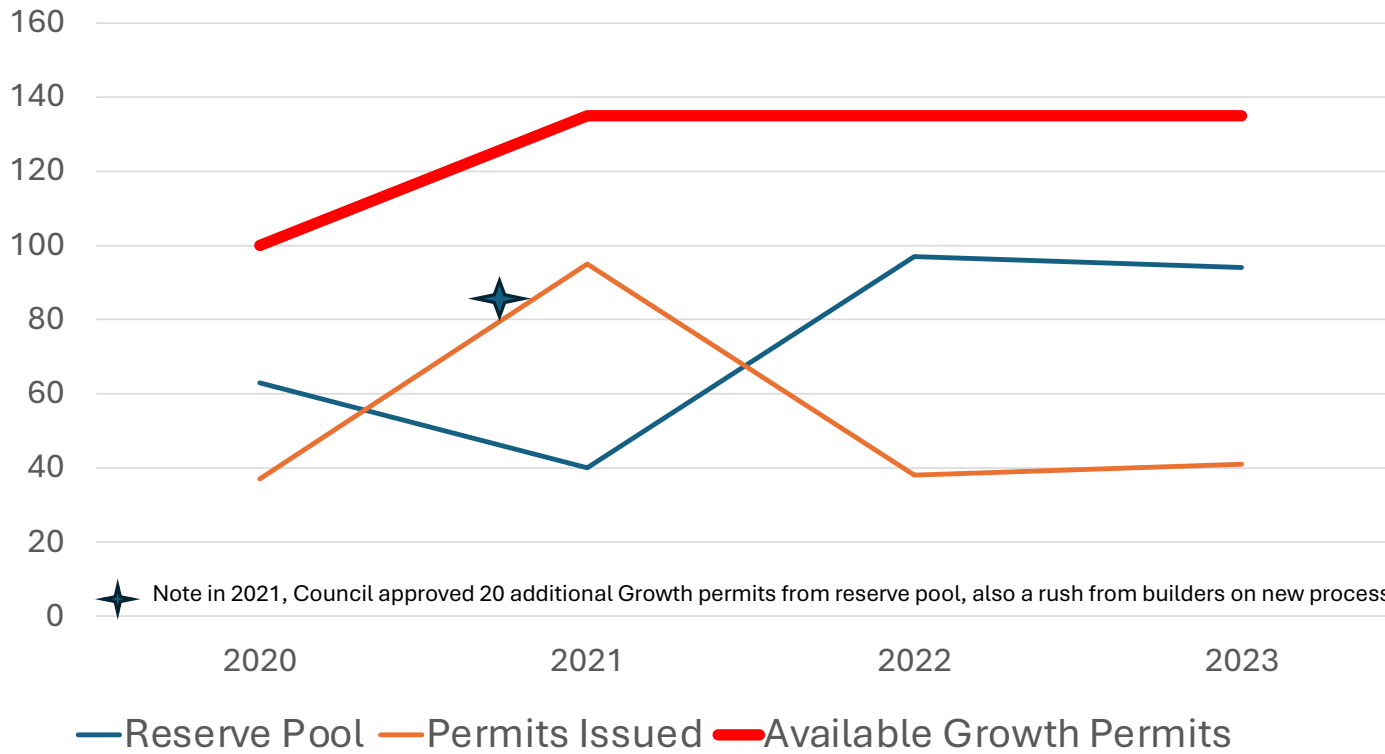
Single

Duplex

Multi

Total

Summary of Growth Permits Issued, Reserve Pool and Capped Permits



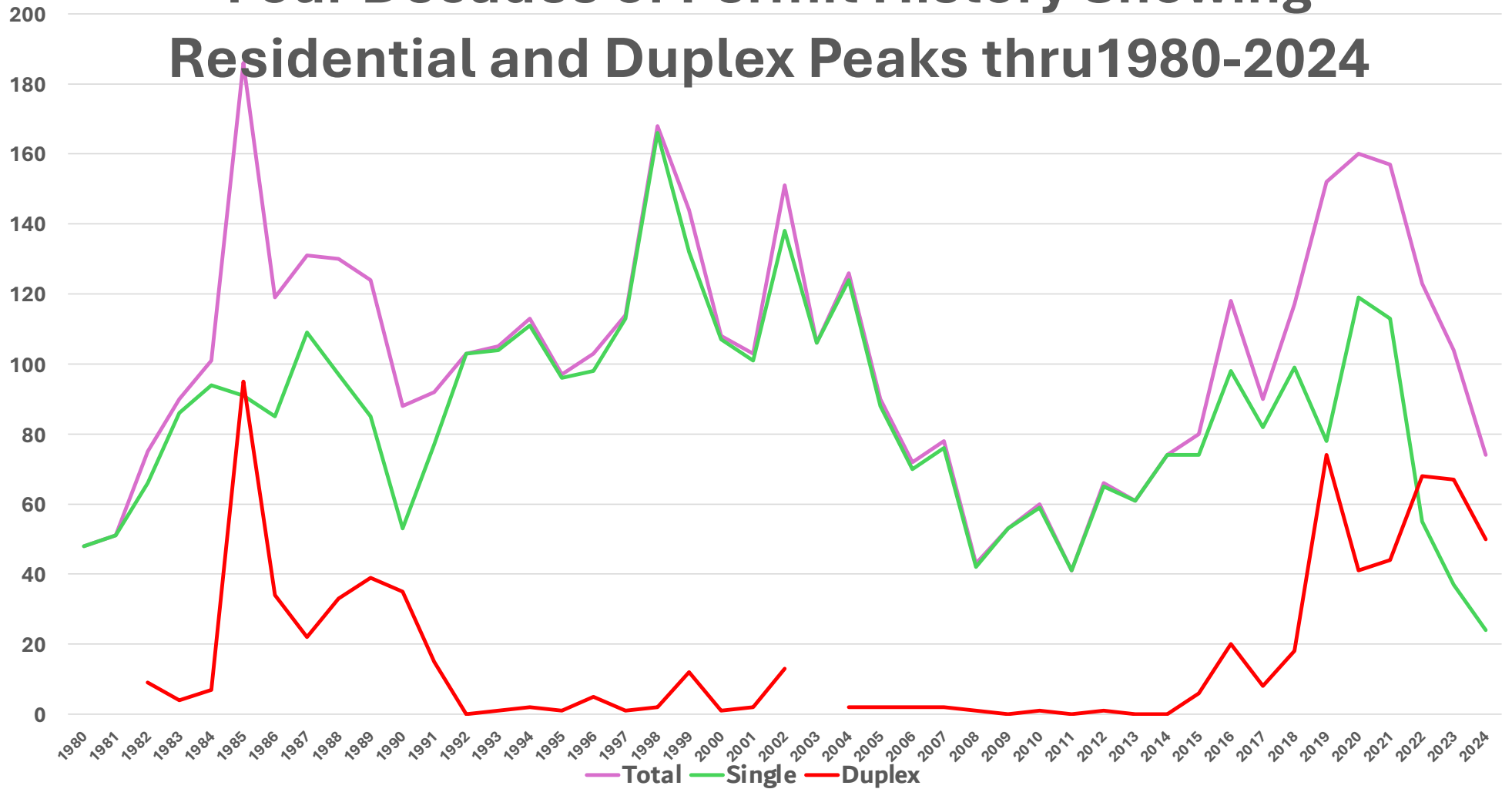
	Reserve Pool	Permits	Available
2020	63	37	100
2021	40	95	135
2022	97	38	135
2023	94	41	135

Single Family vs Duplex Bedroom Counts (2024)

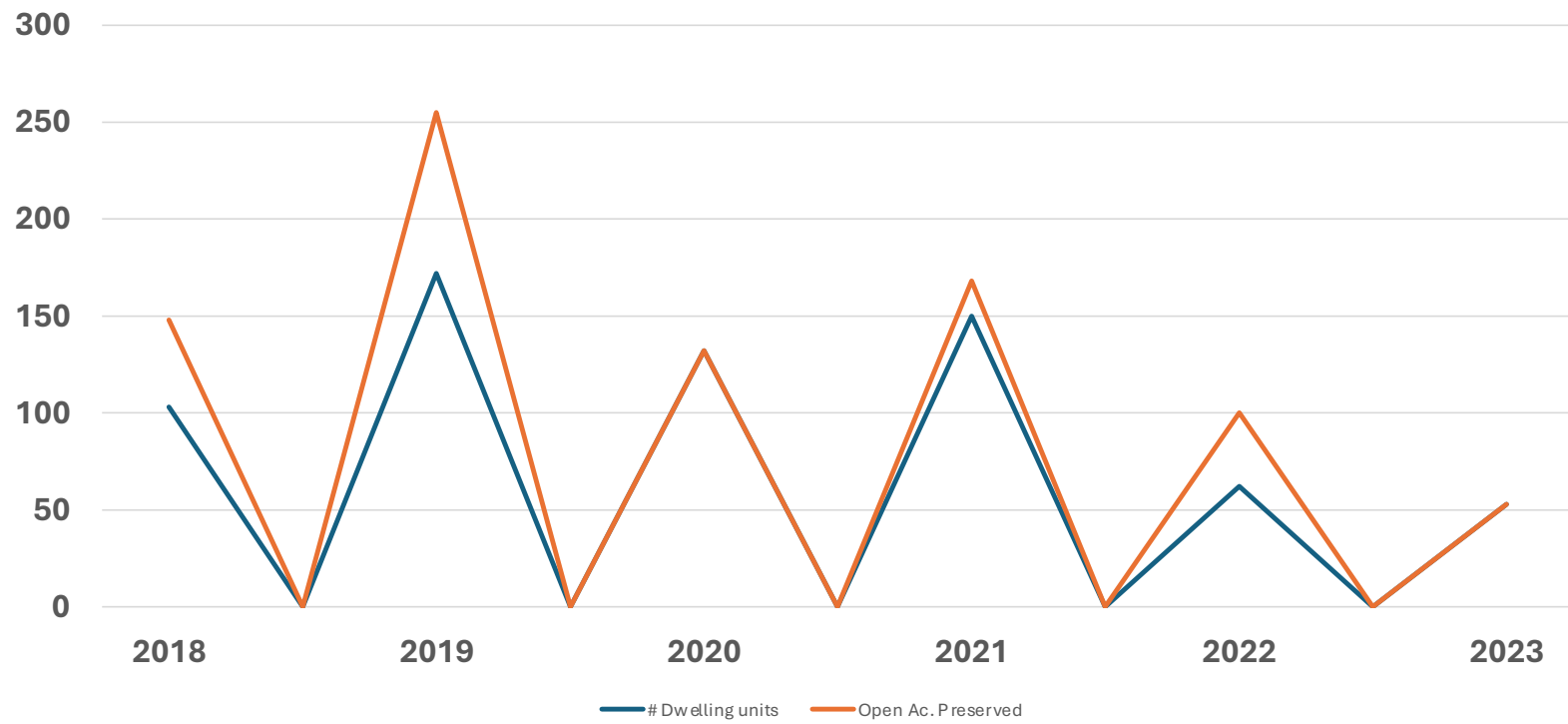
1 Unit Bldg.	Bed Count Per bldging	Bldg Count		% of Total Units
	0	9		0%
	1	334		5%
	2	2049		28%
	3	3912		53%
	4	961		13%
	5	110		1%
	6	22		0%
	7	3		0%
	8	3		0%
	9	1		0%
	Total	7404		
2 Unit Bldg				
	1	1	2	0%
	2	20	40	5%
	3	66	132	17%
	4	186	372	48%
	5	44		11%
	6	71		18%
	7	2		1%
	Total	390		

Bulk of duplex's have 3 to 6 bedrooms vs. newer developments have 2 bedrooms

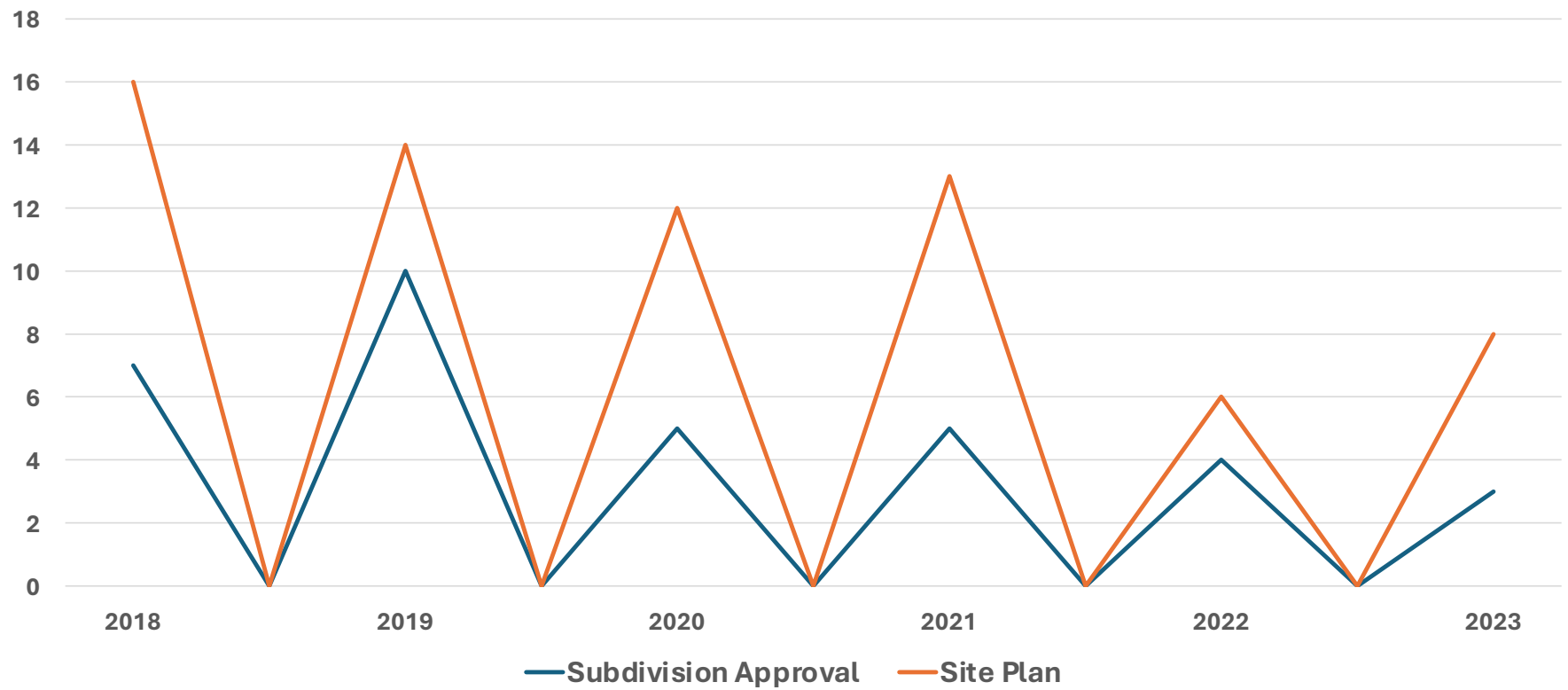
Four Decades of Permit History Showing Residential and Duplex Peaks thru 1980-2024



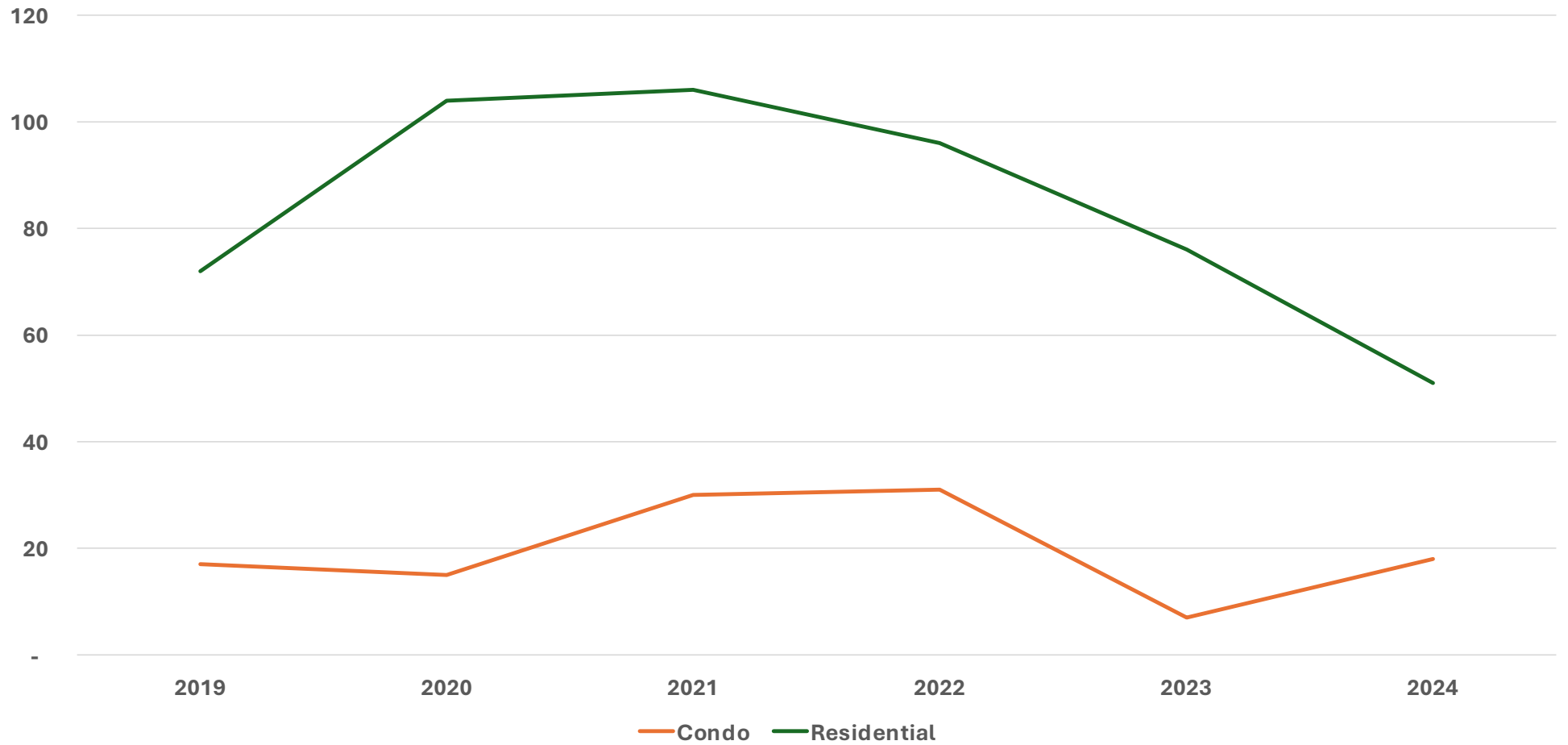
Subdivision Units Approved and Acreas Preserved



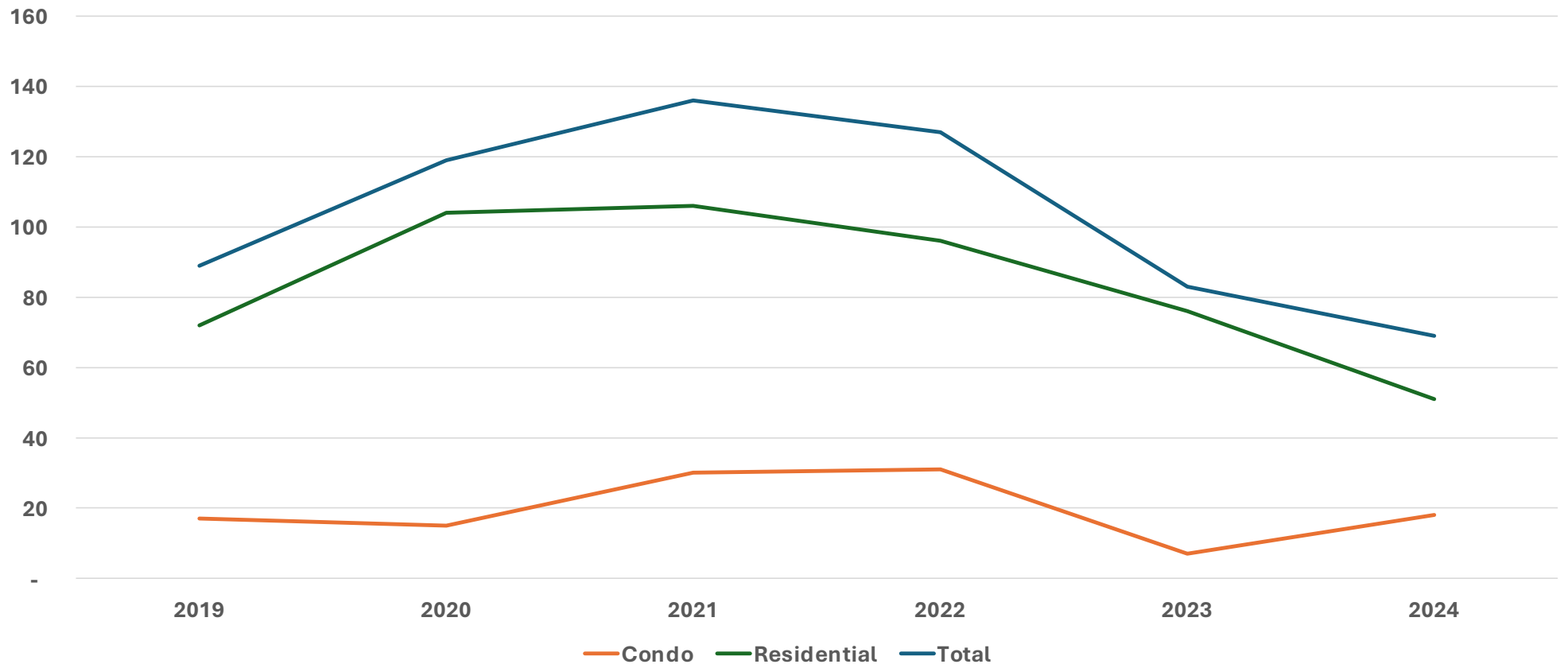
Subdivision and Site Plan Approvals



Residential and Condo Growth

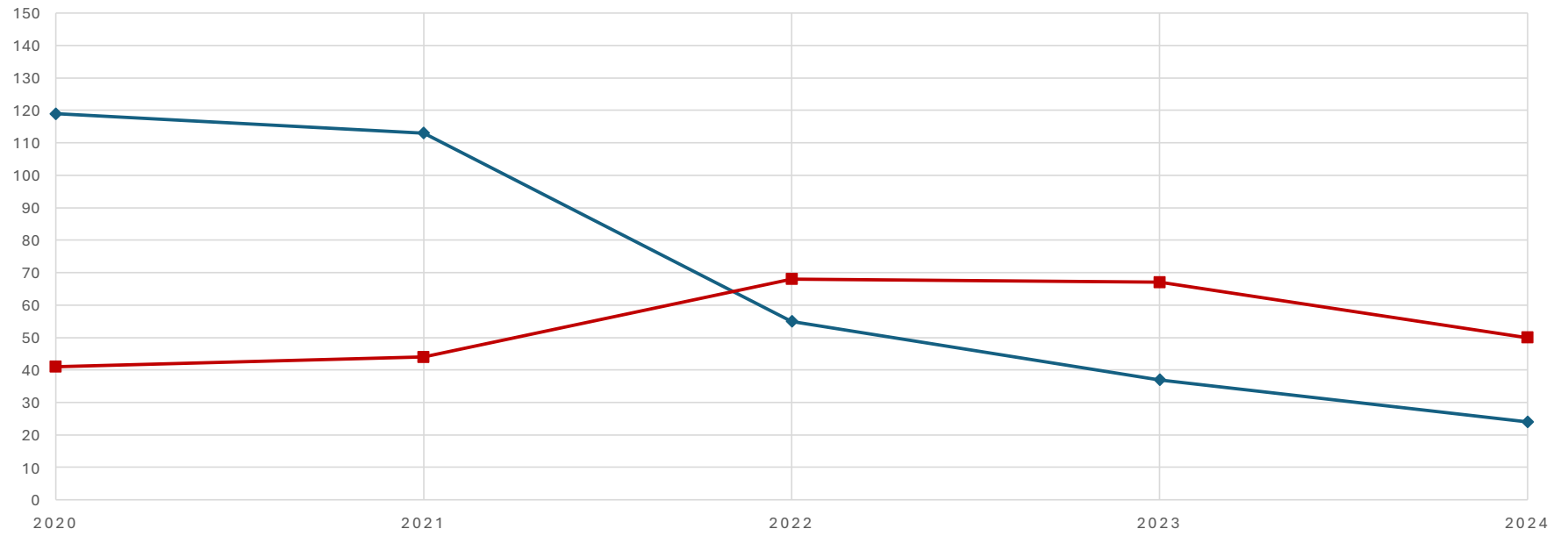


Residential and Condo Growth

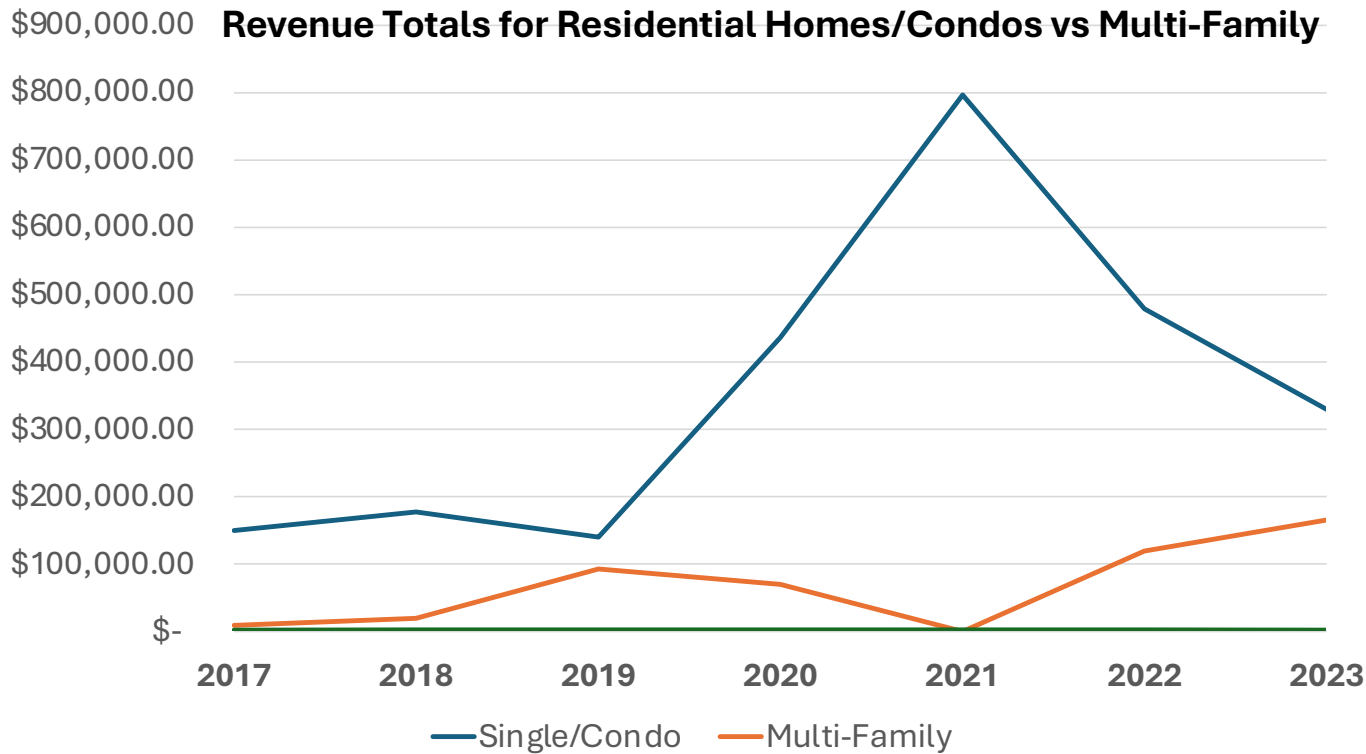


SINGLE FAMILY VS. MULTI-FAMILY UNITS

◆ Single Family ■ Two & Multi- Family



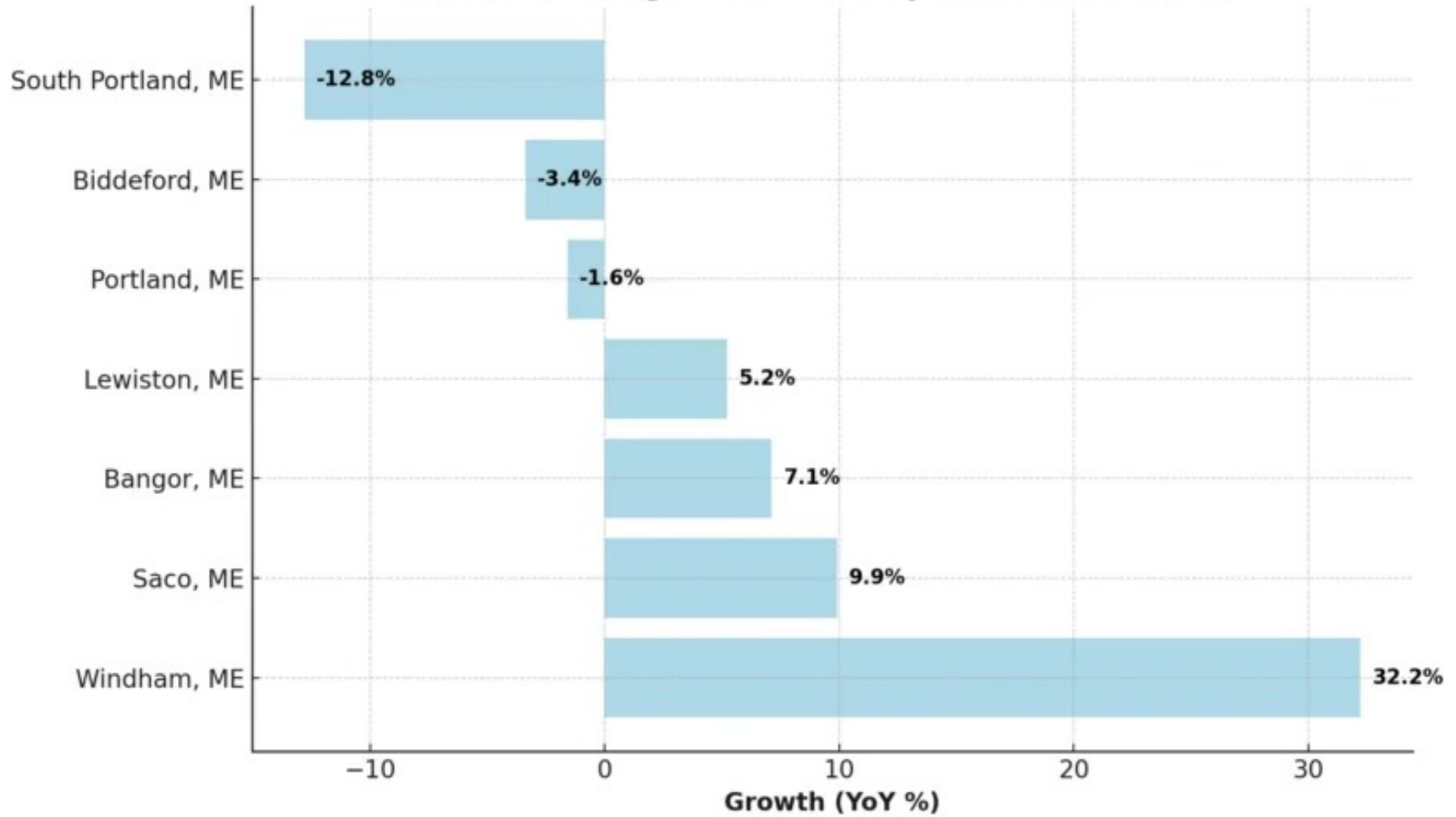
Permit and Fee Tracking, 2017-23

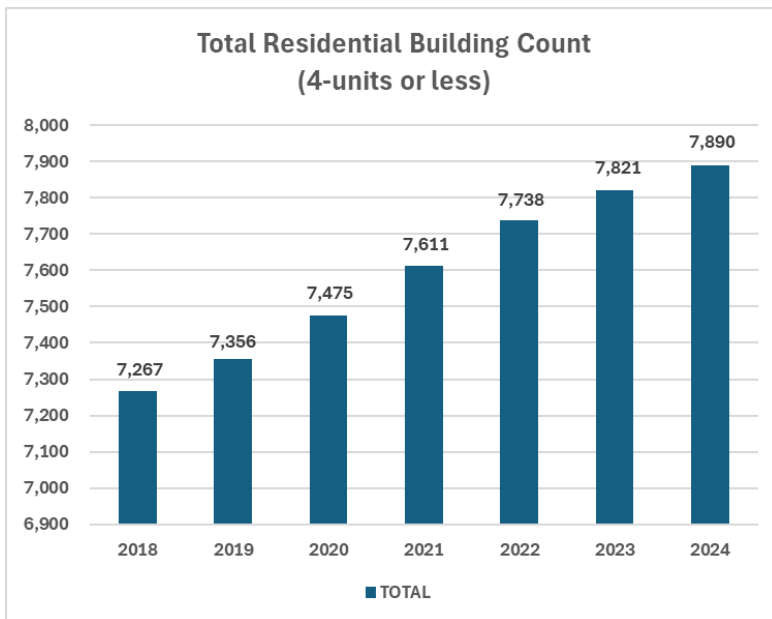


Housing Permit Revenues	Single / Condo	Multi-Family
2017	\$ 149,448.75	\$ 9,369.20
2018	\$ 177,378.71	\$ 19,670.25
2019	\$ 140,125.43	\$ 93,074.66
2020	\$ 436,231.30	\$ 69,669.09
2021	\$ 796,728.82	\$ -
2022	\$ 479,136.58	\$ 119,815.10
2023	\$ 329,844.48	\$ 165,574.50

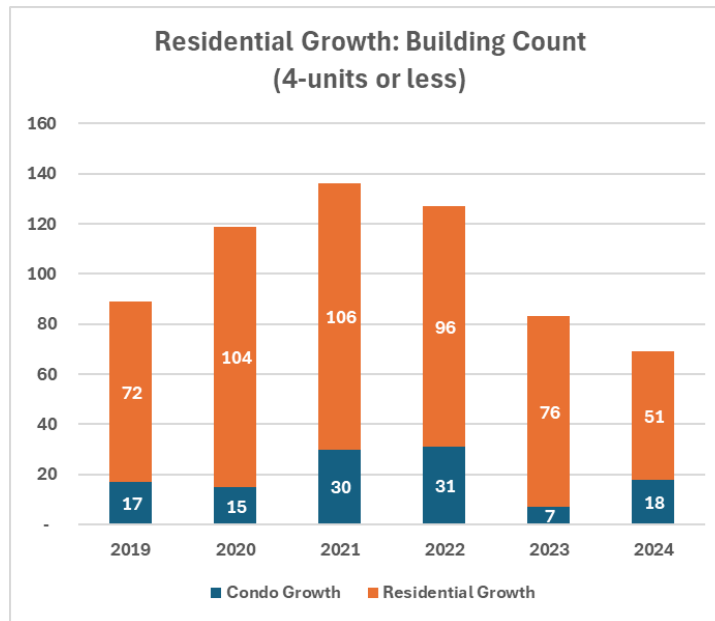
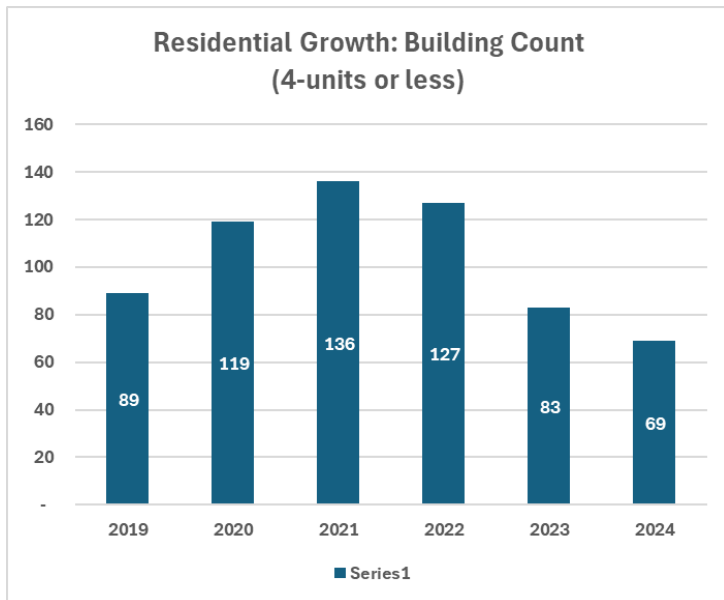
Town has averaged 107 permits since 1980 and 122 over last 10 years,
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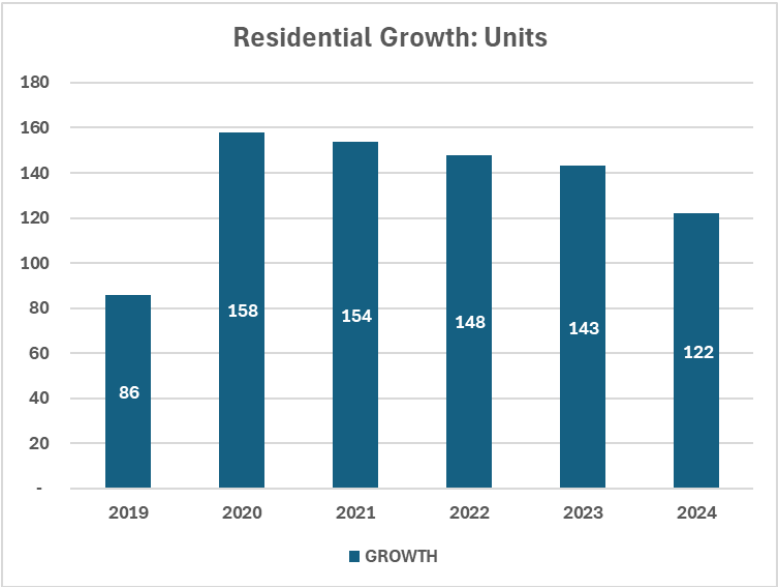
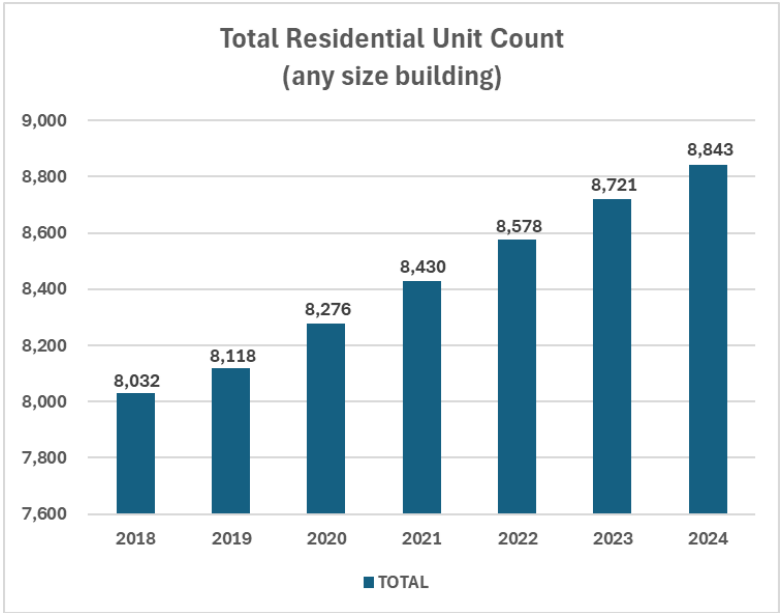
Fastest Growing Home Prices by Metro Area in Maine





Bldgs 4-Unit or Less	2018	2019	2020	2021	2022	2023	2024
Condo	403	420	435	465	496	503	521
Residential	6,864	6,936	7,040	7,146	7,242	7,318	7,369
TOTAL	7,267	7,356	7,475	7,611	7,738	7,821	7,890
Condo Growth		17	15	30	31	7	18
Residential Growth		72	104	106	96	76	51
TOTAL GROWTH		89	119	136	127	83	69
Occupancy	2018	2019	2020	2021	2022	2023	2024
4-Unit or Less	7,792	7,878	8,036	8,190	8,338	8,439	8,518
5-Unit or More	240	240	240	240	240	282	325
TOTAL	8,032	8,118	8,276	8,430	8,578	8,721	8,843
In 4-Units or Less		86	158	154	148	101	79
In 5-Units or More		-	-	-	-	42	43
GROWTH		86	158	154	148	143	122

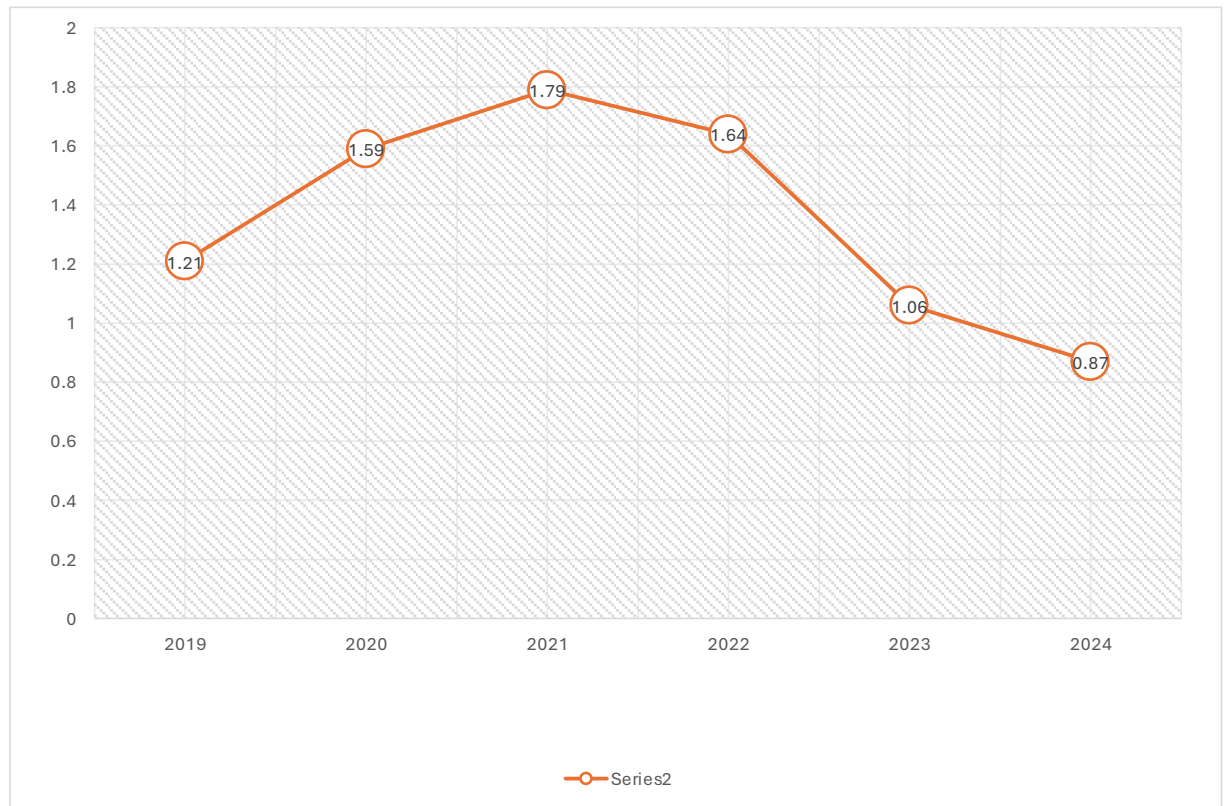




Windham Village Apartments Estimated AV		
The hypothetical building and land AV is calculated on Diane Way (PID 10204) in Vision's Sales Analysis mode (bldg 3, land line 172 BL)		
Category	AP5 Land BL	Notes
BLDG	26,159,000	69x63 bldg (BAS/FUS/FUS), Avg+10. \$1,868,500 per bldg x 14 bldgs. Note that bldg 10 will be slightly larger, which will add some more value.
LAND	6,054,400	AP5 land special calc, which is Average
TOTAL	32,213,400	
	32,563,400	Estimated Cost to Build per application
	36,611,000	Estimated Cost per Financial Capacity Bank Letter
	172	Units
	187,287	AV per unit
	2,000	Hypothetical monthly rent per unit
	344,000	Hypothetical monthly gross rent income
	4,128,000	Hypothetical annual gross rent income
	3,000,000	Hypothetical NOI
	9.3%	Hypothetical Cap Rate

Other Apartment Buildings for Comparison						
Address/Name	Un	AV	AV/unit	Eff Sq	Sqft/un	Notes
Windham Village	172	32,213,400	187,287	182,574	1,061	Avg+10
Stockyard	31	6,275,200	202,426	37,542	1,211	Avg+10
Badger Run	30	6,586,600	219,553	40,927	1,364	Avg
Diane Way	24	5,723,100	238,463	33,773	1,407	Avg+10

2018	7267			
2019	7356	89	0.01209897	1.21
2020	7475	119	0.01591973	1.59
2021	7611	136	0.01786887	1.79
2022	7738	127	0.01641251	1.64
2023	7821	83	0.01061245	1.06
2024	7890	69	0.00874525	0.87
				1.36
Average growth is 1.36% per year on total households				



Subdivision Unit Approvals

Year	Single	Duplex	Multi	Total
2018	0	52	0	52
2019	49	42	0	91
2020				
2021	0	42	24	66
2022	2	0	30	32
2023	3	2	50	55
2024	18	0	179	197 (no senior)
2025	17	66	154	237 (no sewer)
			7 years =96 unit	675 (no sewer/senior)
			7 years =96 units	682 w sewer & senior
			7 years= 194	1357

In Short, What does this all mean!

- **Traffic**

- 26,000 (traffic count at Boody's) X 365 (days) visits per year = 9.5 million visits in a year
- \$30,000,000 in road system improvements (Of which \$25 million grant) expected 35% efficiency gains in road system, \$0 to General Fund Taxpayers

- **Sewer System**

- Investment of \$61,000,000– State of the Art Sewer System \$0 cost to General Fund Taxpayers--cleaning the environment & protecting public health

- **Housing Additions**

- 150 Multi Family units Constructed (recent additions in 2022-23)
- 750 Multi Family units Planned (2025-2031)
- 48 Affordable Senior Housing Units North Windham
- 18 Affordable Senior Housing Units South Windham

- **Added Valuation and Additional Dollars in local economy**

- \$250,000,000 added valuation in TIF
- Approx. \$20,500,000 local economy dollars. This supports our local businesses

- **Windham Outdoors**

- 700 acres preserved
- 10 miles of trails marked