



Fort Bend ISD

Demographic Study

Population and Survey Analysts

Fall 2024

Presenters:

Dr. Stacey Tepera, President
Susan Cates, Demographer



Demographic Study Process

- **Collect Background Data**
- **Study Economic and Housing Data**
- **Study Past and Current Student Population**
- **Generate Projections**
- **Analyze Long-Range Planning Implications**

Demographic Study Components

Demographic Trends

Past & Current Students

Economy and Housing

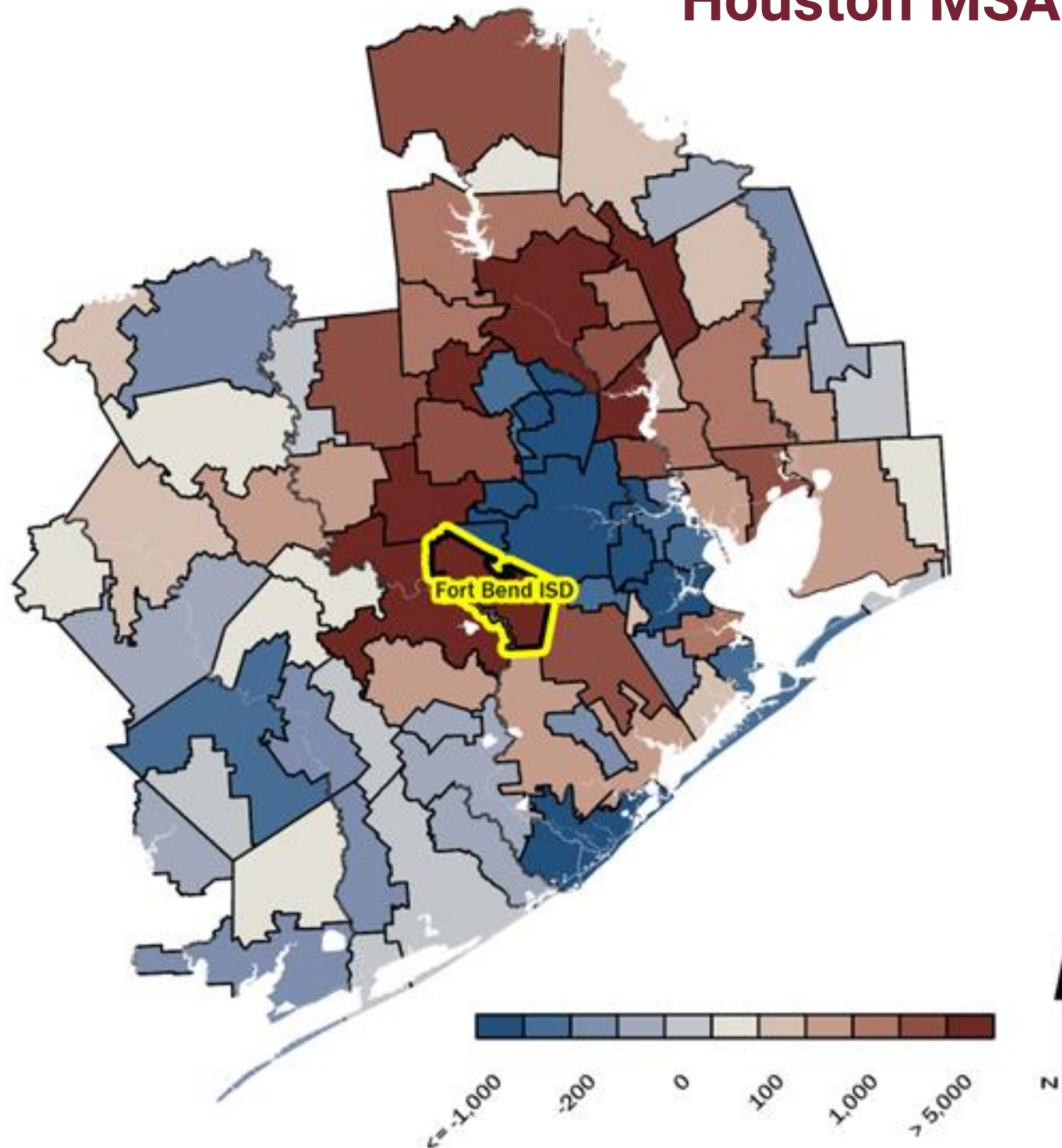
Student Projections



Five-Year Numerical Change in Enrollment

Fall 2019 - Fall 2023

Houston MSA

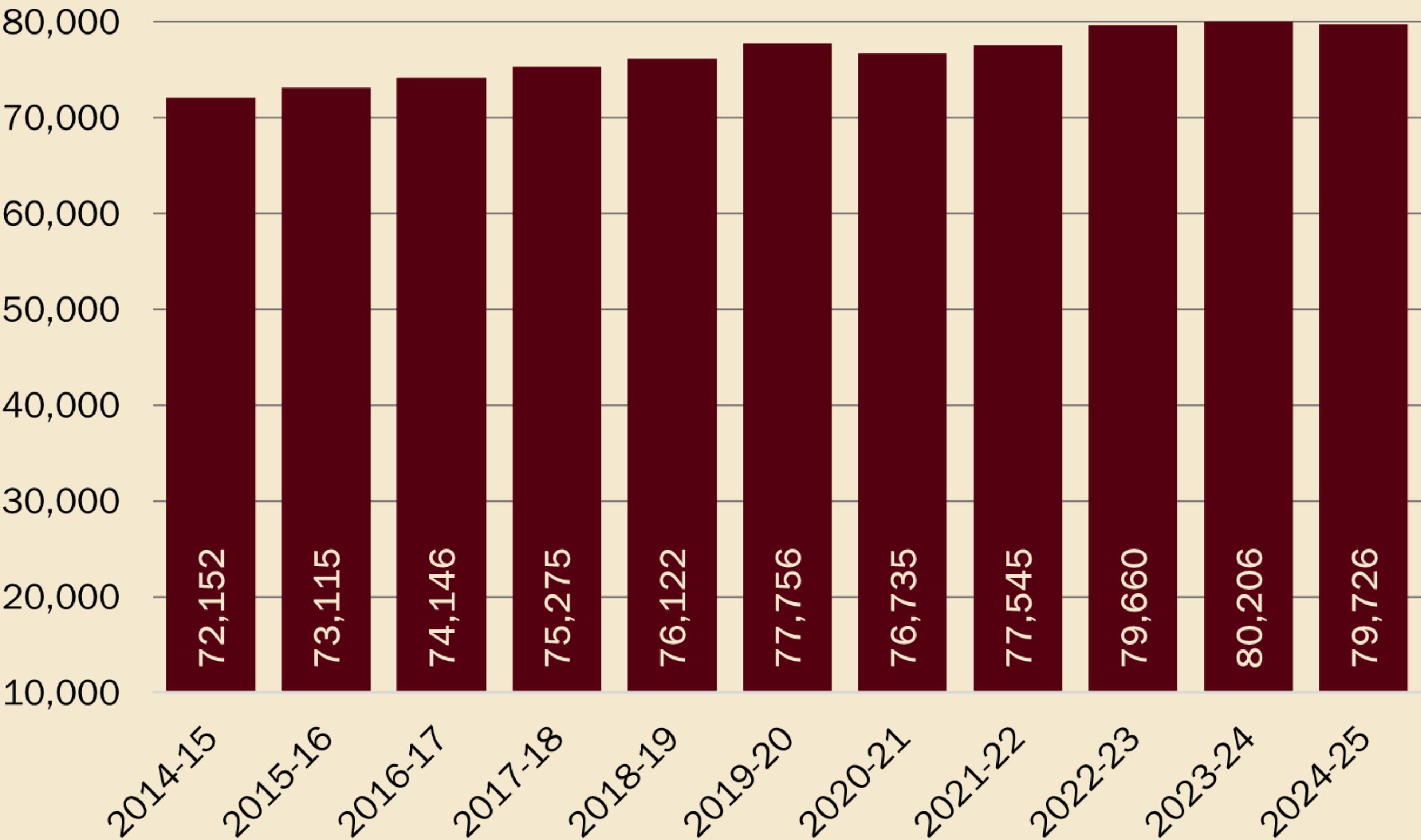


District	Enrollment 2023-24	5-Year Change		
		Numeric	Rank	Percent
Katy ISD	94,785	14,872	1	18.6
Lamar CISD	44,512	11,068	2	33.1
Conroe ISD	72,352	9,515	3	15.1
Cleveland ISD	11,970	5,386	4	81.8
Tomball ISD	22,273	5,311	5	31.3
Humble ISD	48,552	4,999	6	11.5
Fort Bend ISD	80,206	4,084	7	5.4
Alvin ISD	29,740	3,795	8	14.6
New Caney ISD	18,987	3,606	9	23.4
Huntsville ISD	11,318	2,390	10	26.8
Barbers Hill ISD	7,723	1,991	11	34.7
Cypress-Fairbanks ISD	118,470	1,958	12	1.7
Waller ISD	9,283	1,880	13	25.4
Sheldon ISD	11,028	1,627	14	17.3
Willis ISD	8,974	1,481	15	19.8

7th in the region for total student growth
5.4% increase over five years
4,084 student increase over five years

Past Enrollment Change

FBISD Ten-Year Historical Enrollment

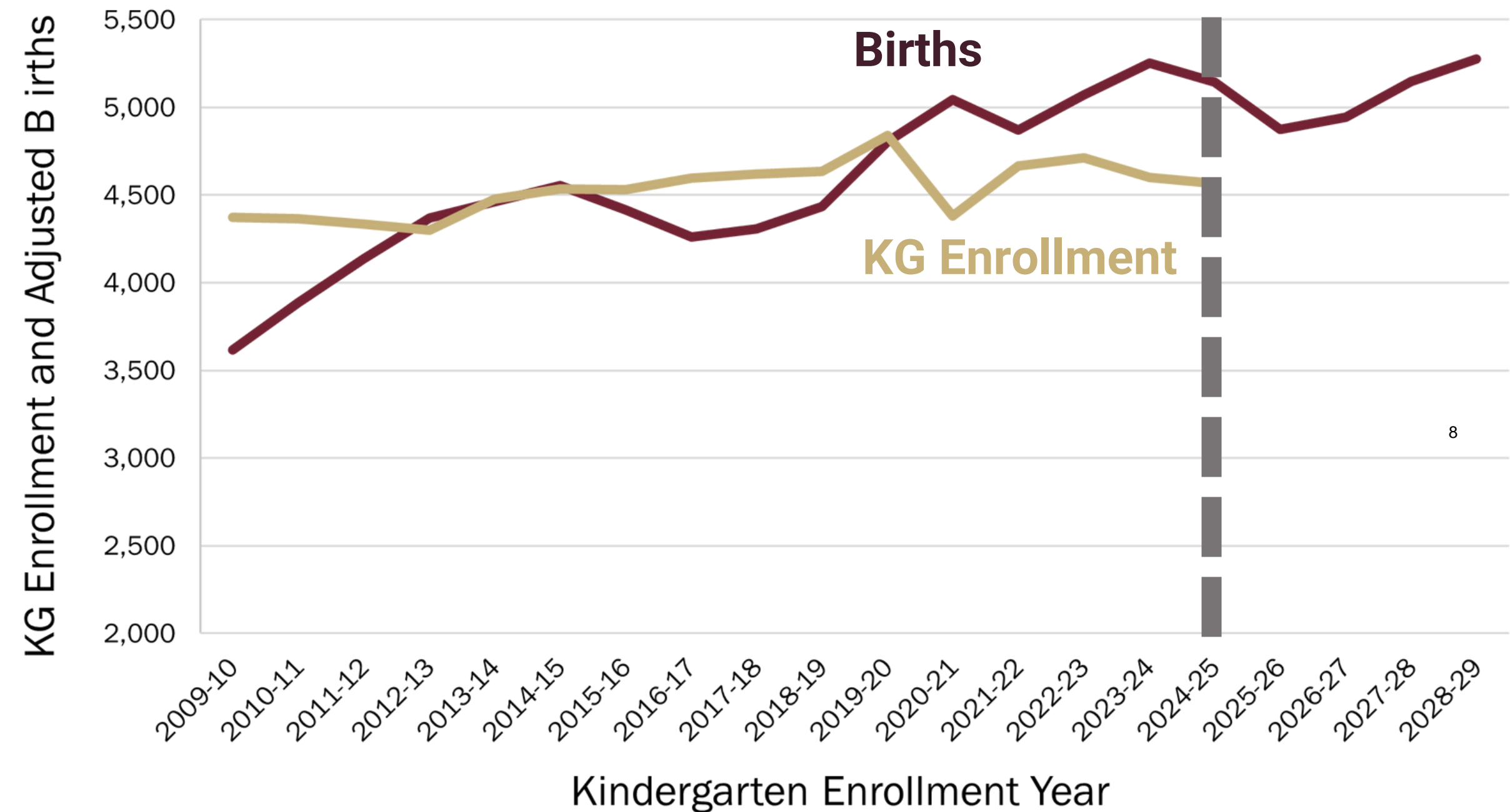


79,726₇

**2024-25
FBISD Enrollment
10/25/2024**

Sources: Texas Education Agency (TEA); FBISD Enrollment - October 25, 2024

KG Enrollment vs. Births



Difference Between Two Lines Shows Immigration of Young Children After Birth

Births Adjusted Five Years to Align with KG Enrollment

Births by Zip Code of Birth Mother

Sources: Texas Department of Health and Human Services, Vital Statistics; Texas Education Agency (TEA)

Demographic Study Components

Demographic Trends



Past & Current Students



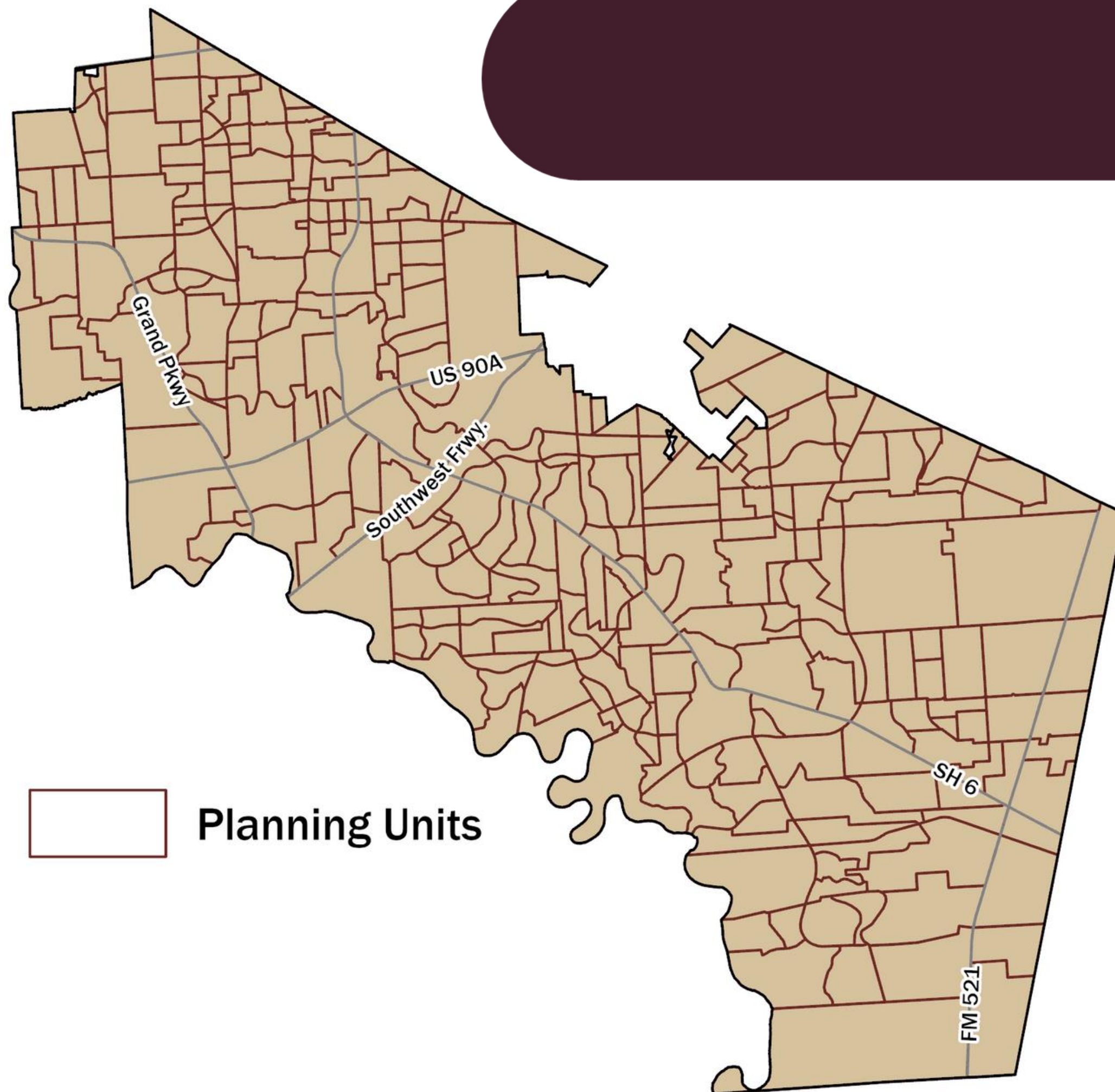
Economy and Housing



Student Projections



Planning Units

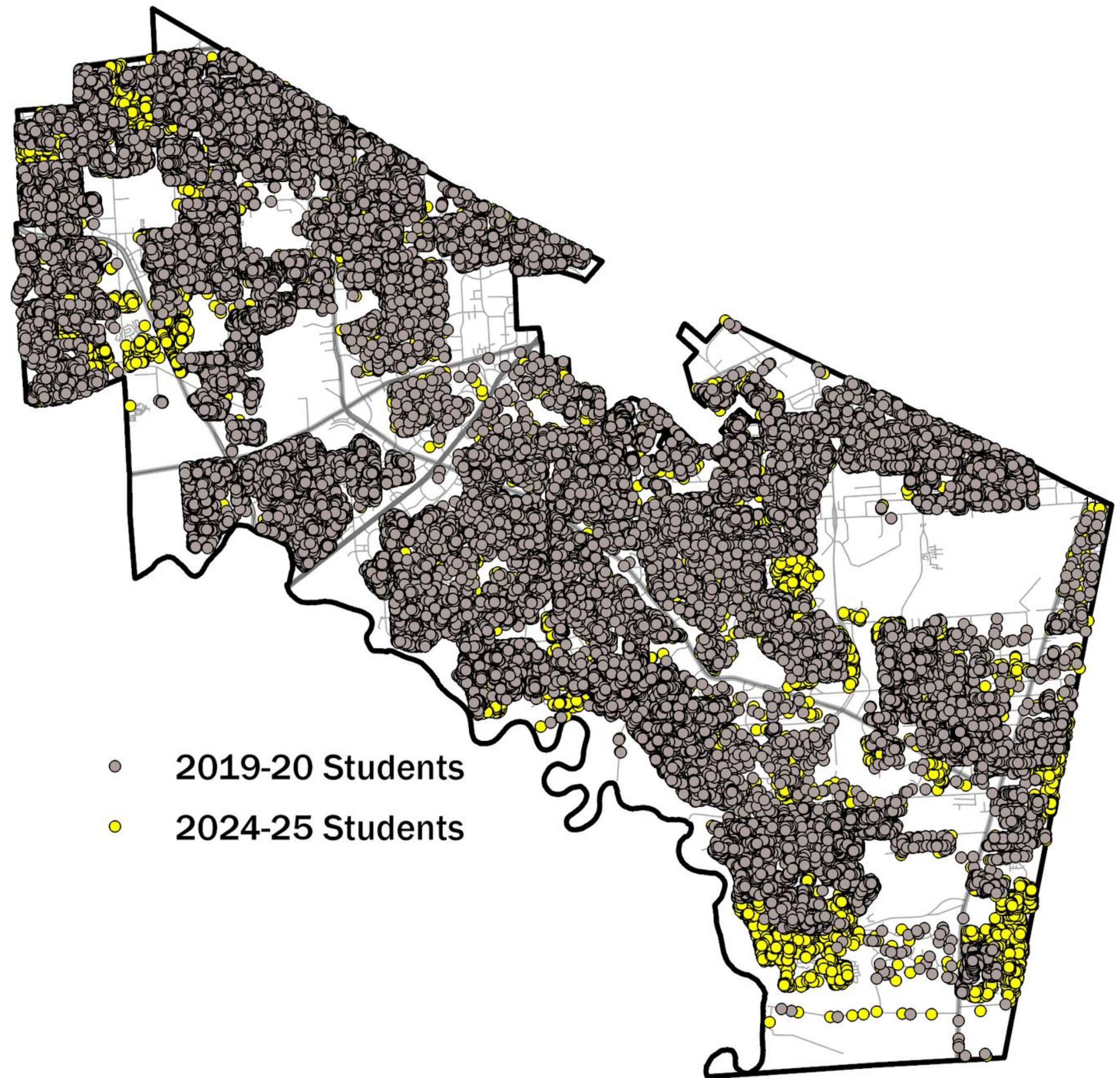


- PASA's organizational scheme
- Small divisions of the district containing one or more housing developments or parcels of land
- Created by PASA using major roadways, current attendance zones, parcel ownership, etc.

Student Geocode

- Place each student on the map
- 99% accuracy
- Starting point for projections

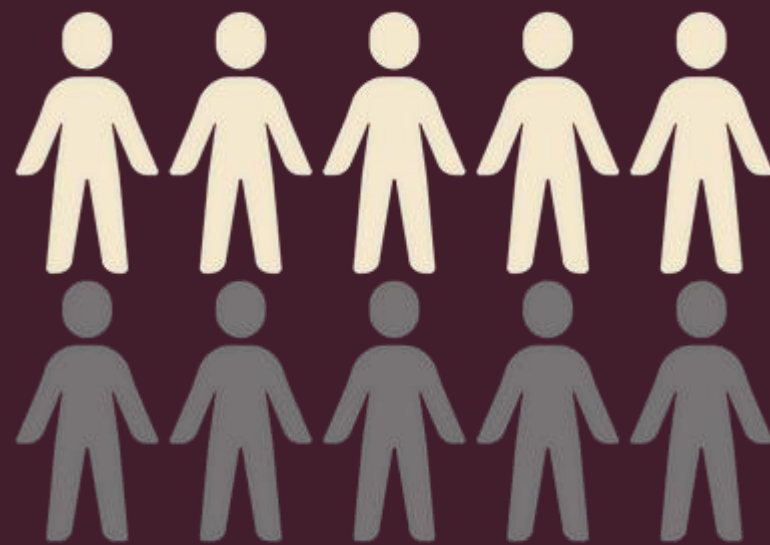
Yellow areas highlight where students live now, showing the growth across the District.



Students Per Home

0.49

Single-Family

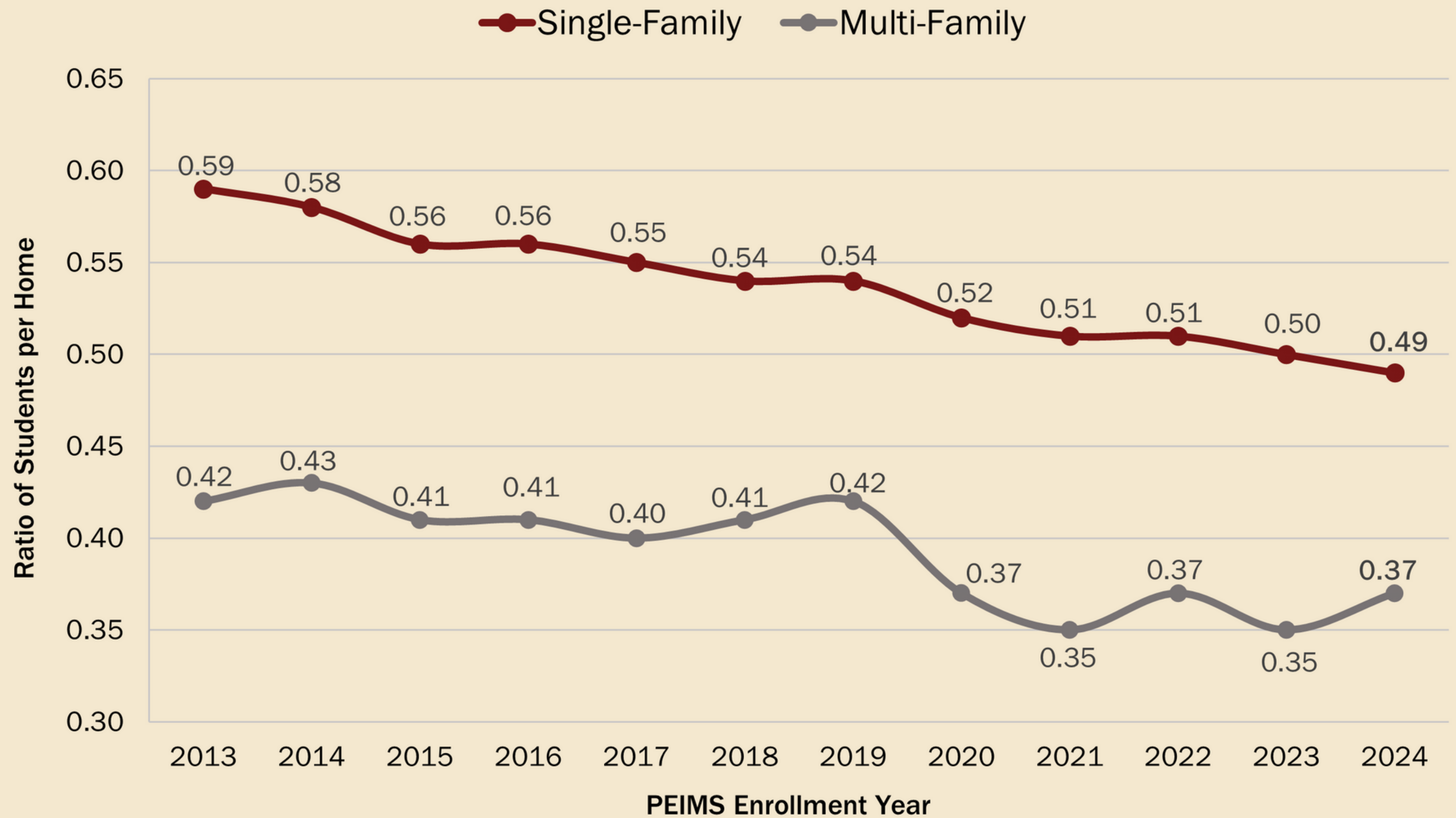


0.37

Multi-Family

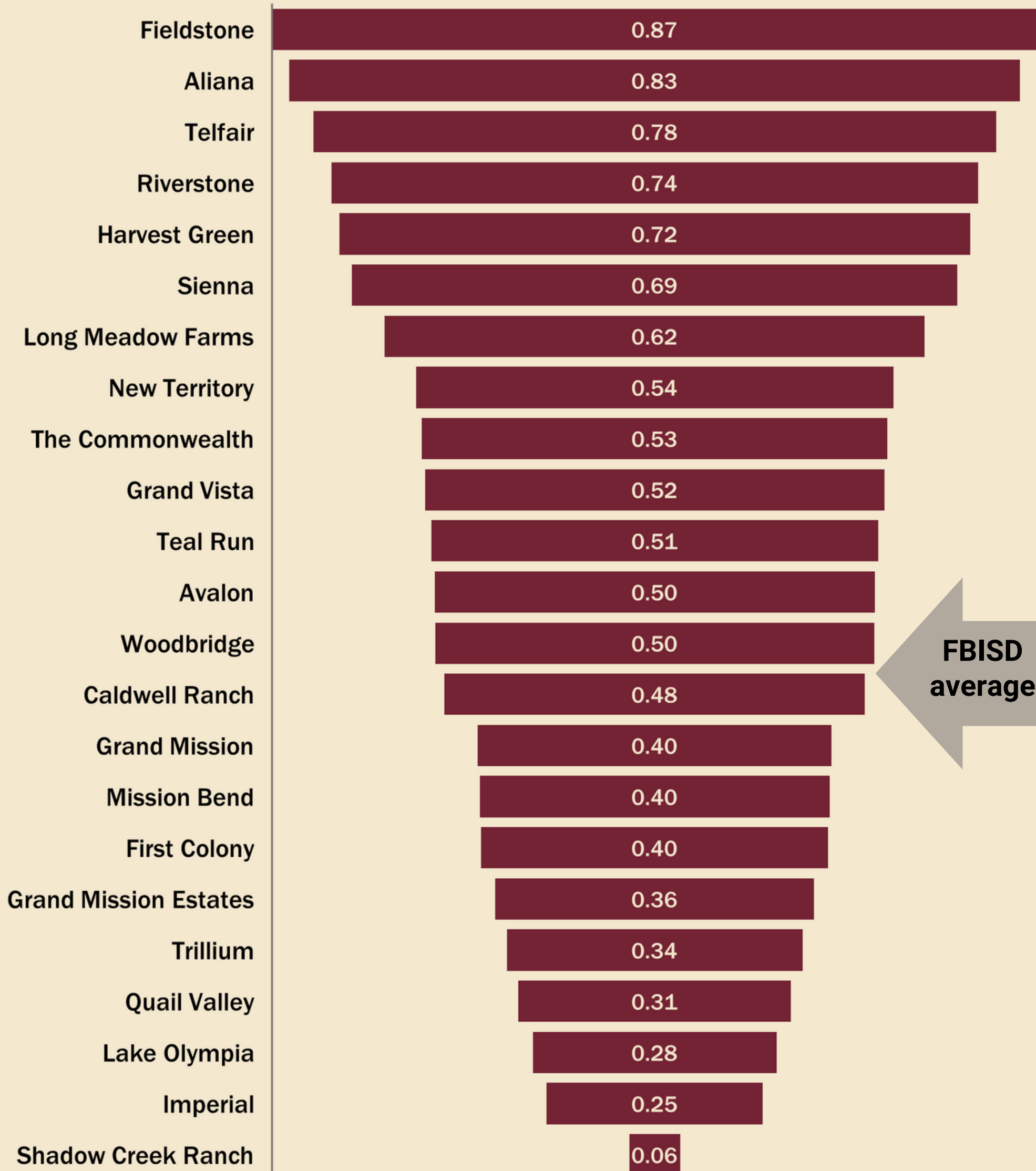


Historical Students Per Home



Variations of Student Density per Community

Master-Planned Communities



Single-Family MPC	Students per Home	# Of Occupied Homes
Fieldstone	0.87	1,444
Aliana	0.83	4,319
Telfair	0.78	2,839
Riverstone	0.74	6,395
Harvest Green	0.72	2,324
Sienna	0.69	11,593
Long Meadow Farms	0.62	380
New Territory	0.54	4,601
The Commonwealth	0.53	1,134 ¹⁴
Grand Vista	0.52	1,661
Teal Run	0.51	2,537
Avalon	0.50	1,042
Woodbridge	0.50	1,250
Caldwell Ranch	0.48	1,746
Grand Mission	0.40	1,261
Mission Bend	0.40	2,761
First Colony	0.40	13,981
Grand Mission Estates	0.36	1,687
Trillium	0.34	77
Quail Valley	0.31	5,387
Lake Olympia	0.28	1,828
Imperial	0.25	567
Shadow Creek Ranch	0.06	1,674

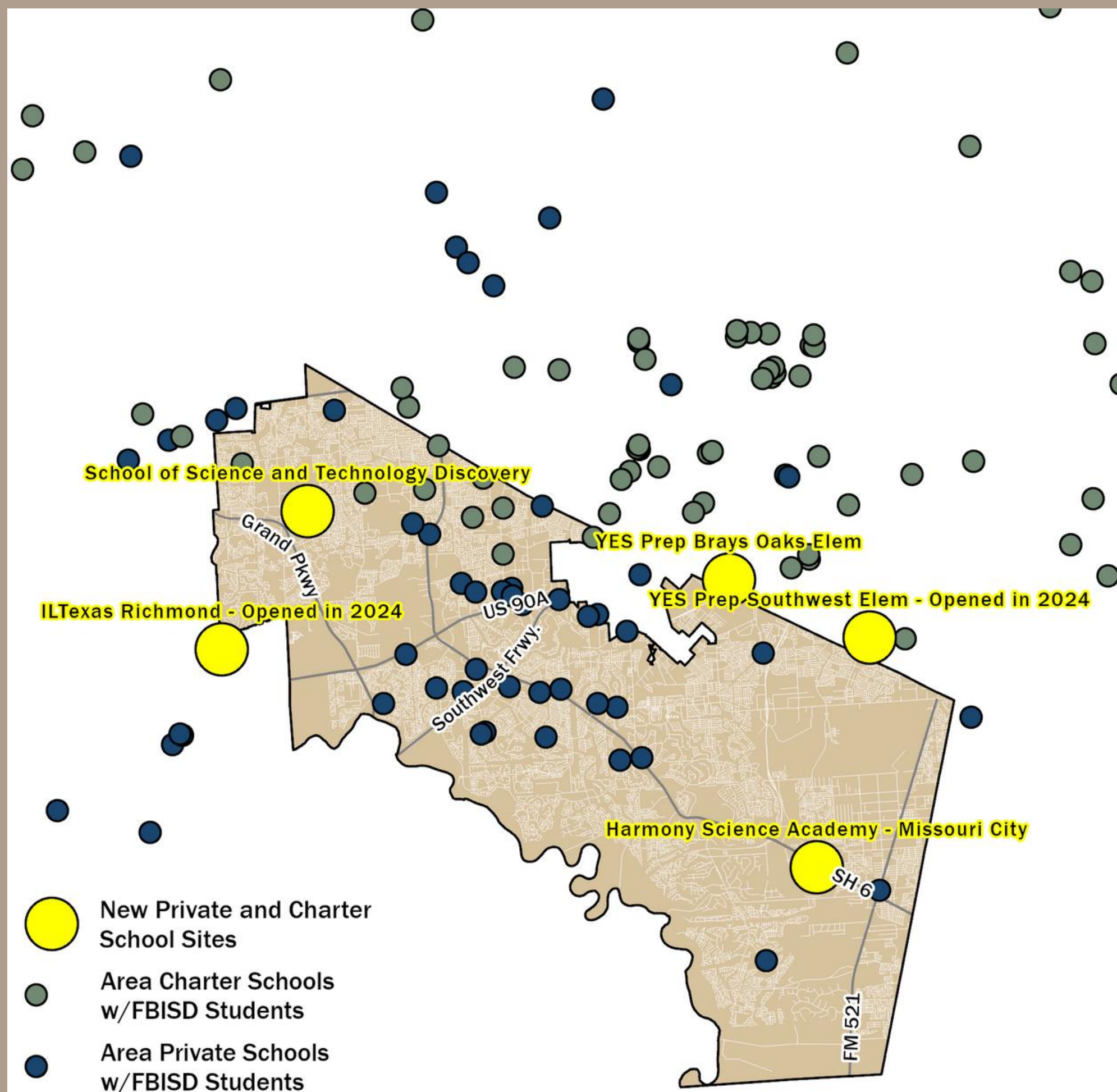
Alternative Educational Opportunities

New Charter Impacts

Future charter campuses include:

- **Harmony Science Academy** - Highway 6 and Westenfeldt
- **School of Science and Technology Discovery** - Richmond
- **YES Prep** - Brays Oaks Elementary
- **ILTexas** - Richmond (opened Aug 2024)
- **YES Prep** - Southwest Elementary (opened Aug 2024)

15



~652

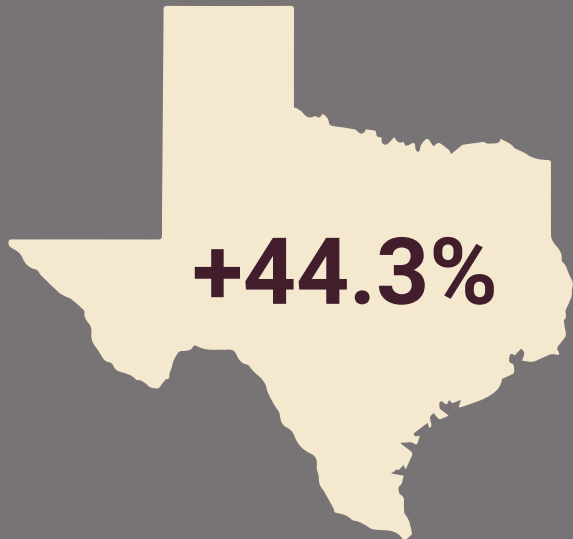
more students could
leave for charters over
five years

Alternative Educational Opportunities

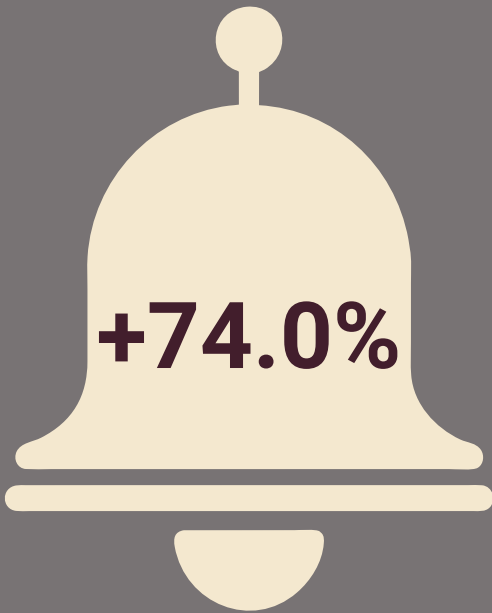
Fort Bend ISD 2023-24 Summary of Enrollment

Resident Students	93,074	
Attending Charter Schools	-6,191	(6.7%)
Attending Private Schools	-4,961	(5.3%)
Attending Other ISDs	-1,675	(1.8%)
Attending Virtual Academies	-642	(0.7%)
Attending and Residing in District	=79,605	(85.5%)
Transfers into District	+601	
Attending District	=80,206	

Since Fall 2017:



Statewide
increase in
charter school
enrollment



FBISD increase
in students
transferring to
charter schools

Sources: TEA Transfer Reports, PASA
Interviews with Schools

85.5% of FBISD Resident
Students Attend FBISD

Demographic Study Components

Demographic Trends



Past & Current Students



Economy and Housing

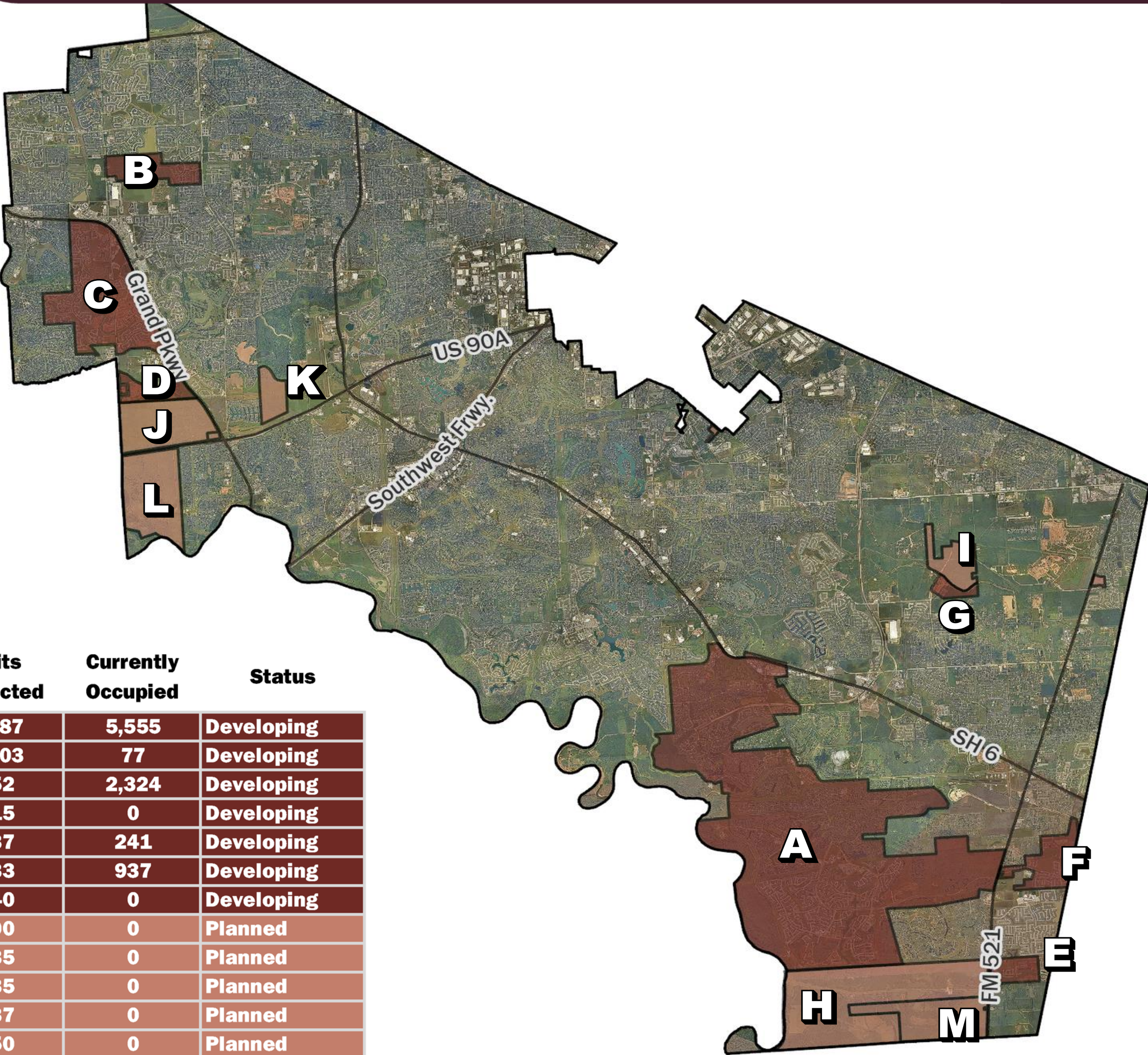


Student Projections



Impactful Single-Family Developments

Ten-Year Projected New Occupancies



Development		Units Projected	Currently Occupied	Status
A	Sienna	3,887	5,555	Developing
B	Trillium	1,203	77	Developing
C	Harvest Green	952	2,324	Developing
D	Indigo	815	0	Developing
E	Huntington Place	637	241	Developing
F	Glendale Lakes	633	937	Developing
G	Olympia Fields	440	0	Developing
H	Potential Residential	900	0	Planned
I	Future Single-Family	835	0	Planned
J	RES/VLS Real Est LTD Tracts	735	0	Planned
K	Abbey Lakes	637	0	Planned
L	Lone Goat Tract	450	0	Planned
M	Potential Residential	400	0	Planned

Largest Single-Family Subdivisions

Ten-Year Projected New Occupancies

**3,887
units**

Sienna

Johnson Development continues its progress, with over 700+ acres yet to be developed. The last lots are projected to be completed in 2030, which would see this development reach build-out within the current projection period.

**1,203
units**

Trillium

Taylor Morrison is developing this community that crosses PU 14B and 14C. This subdivision is just gearing up with only 77 units occupied at the time of the study. All units are projected occupied in this ten-year projection period.

**952
units**

Harvest Green

Johnson Development is advancing its work in Harvest Green, with infrastructure underway on the additional 190 acres across Harlem Road. The build-out of single-family residential units is expected within this projection period.

**815
units**

Indigo

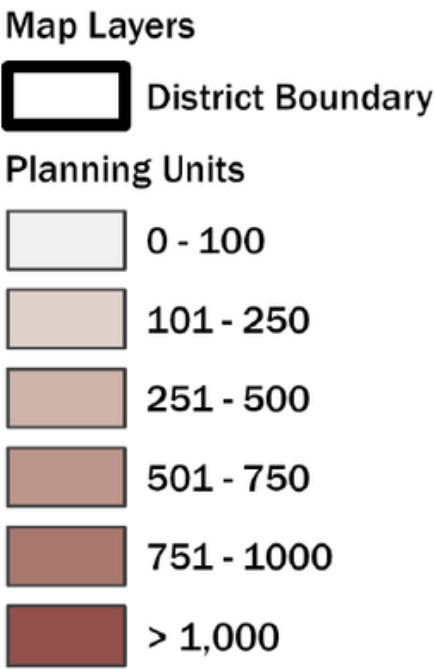
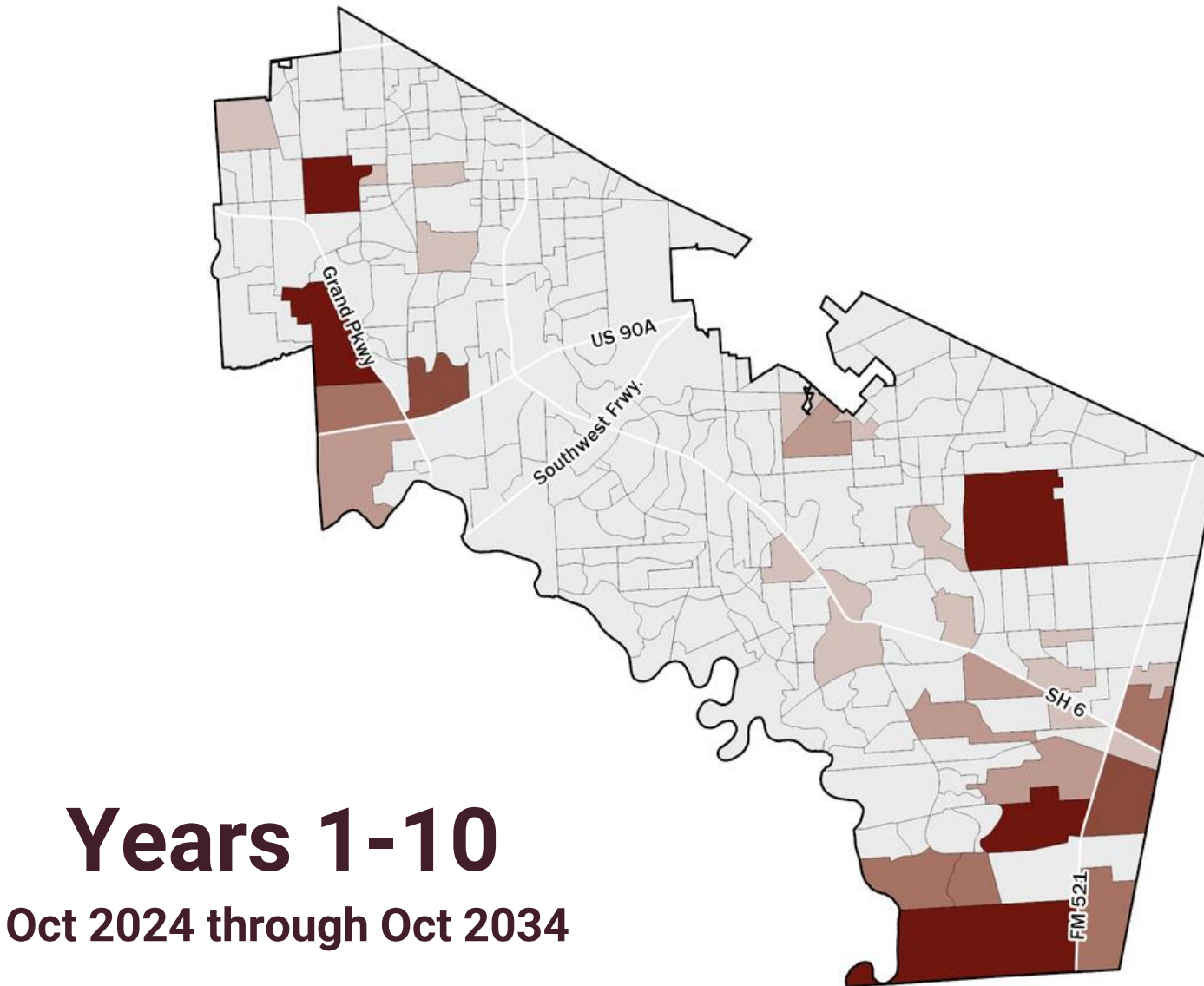
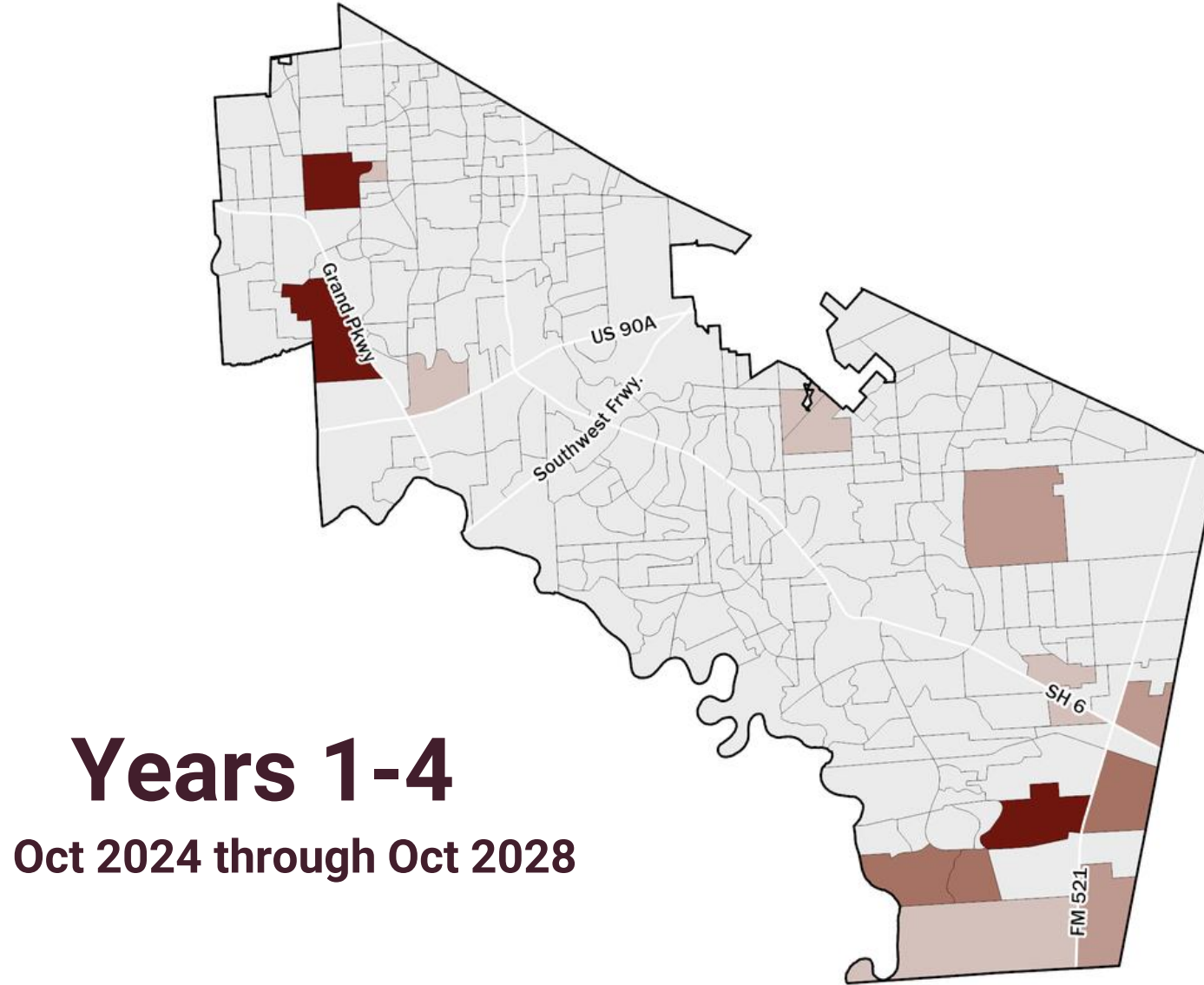
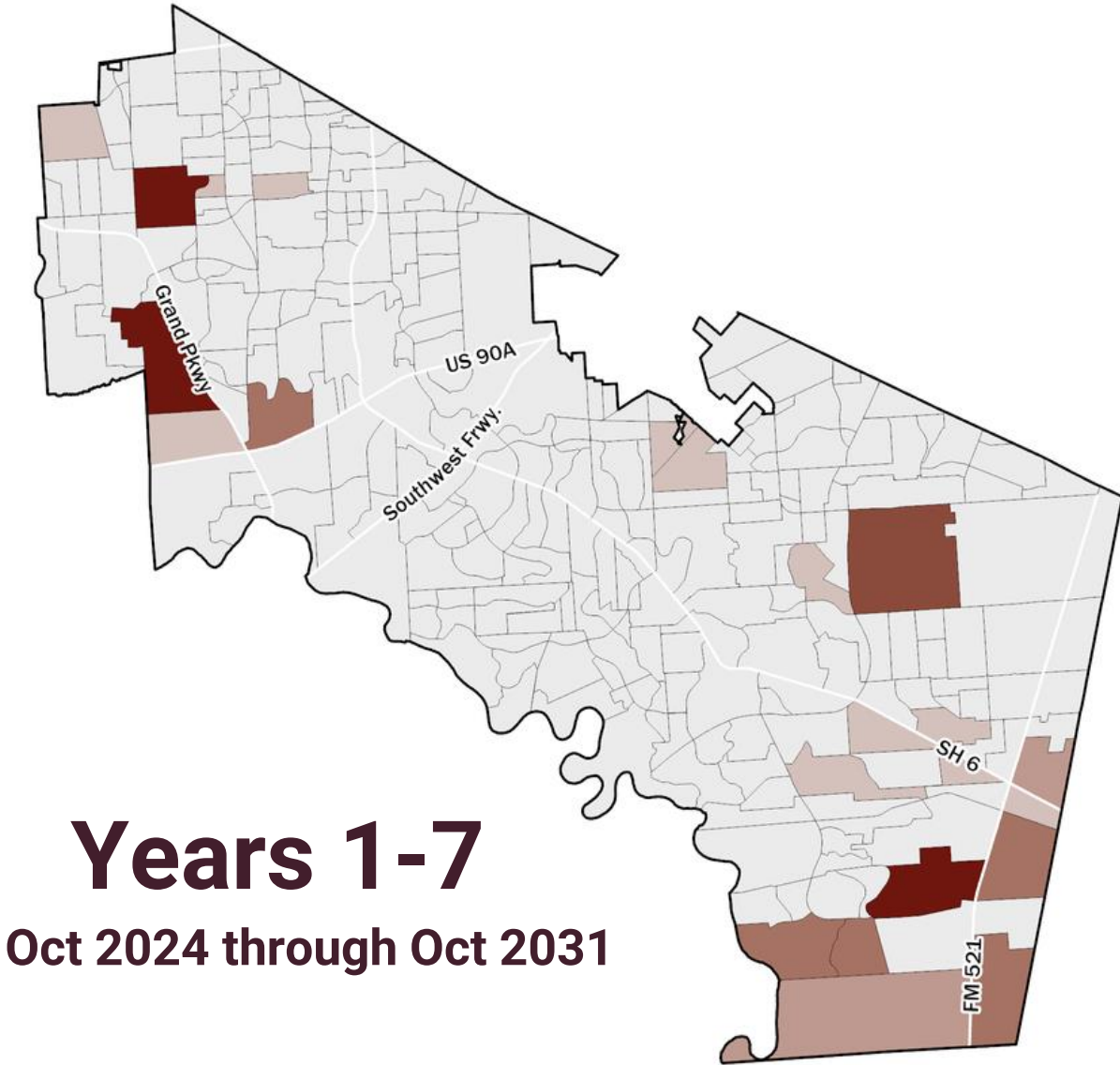
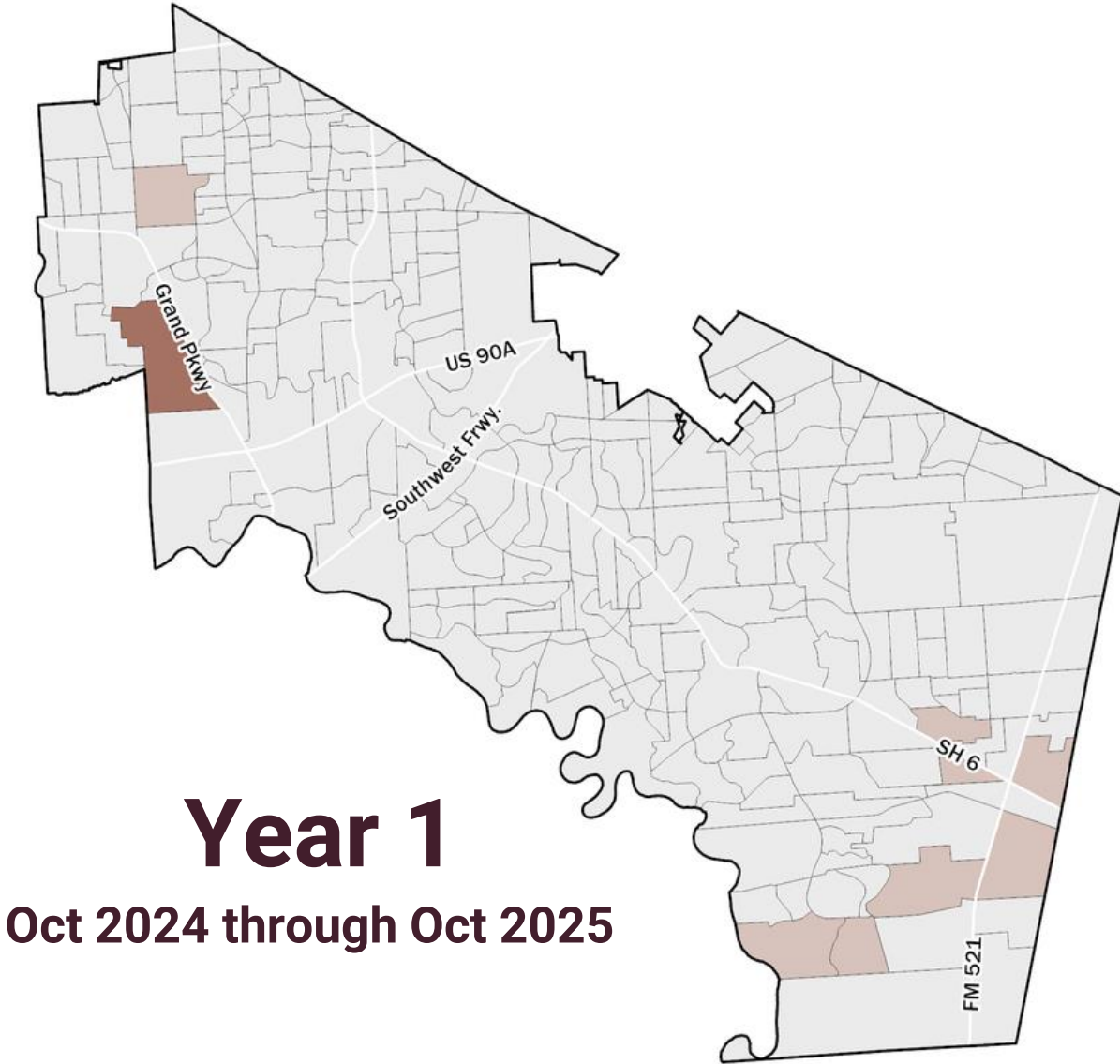
Meristem is developing this unique concept which includes single-family, townhomes, cottages, and cluster homes. Construction is underway with all units projected to be occupied within the ten-year period.

**637
units**

Huntington Place

Woodmere continues to develop with Lake Ridge Builders & Pride Homes. Although not a fast-growing development, the steady number of units added each year will lead to full build out within the current projection period.

Projected New Single-Family Occupancies by Planning Unit



Multi-Family & Rental Projections

Multi-Family Projects in Development

PU	COMPLEX
30	Landmark at NinetyNine
46	Haven Mission Trace
124	Pramukh Sadan
20C	Silos at Harvest Green
54	Wildwood Lake Residency

10,160

Multi-Family
Occupancies

+346

Build-to-Rent
single-family
homes

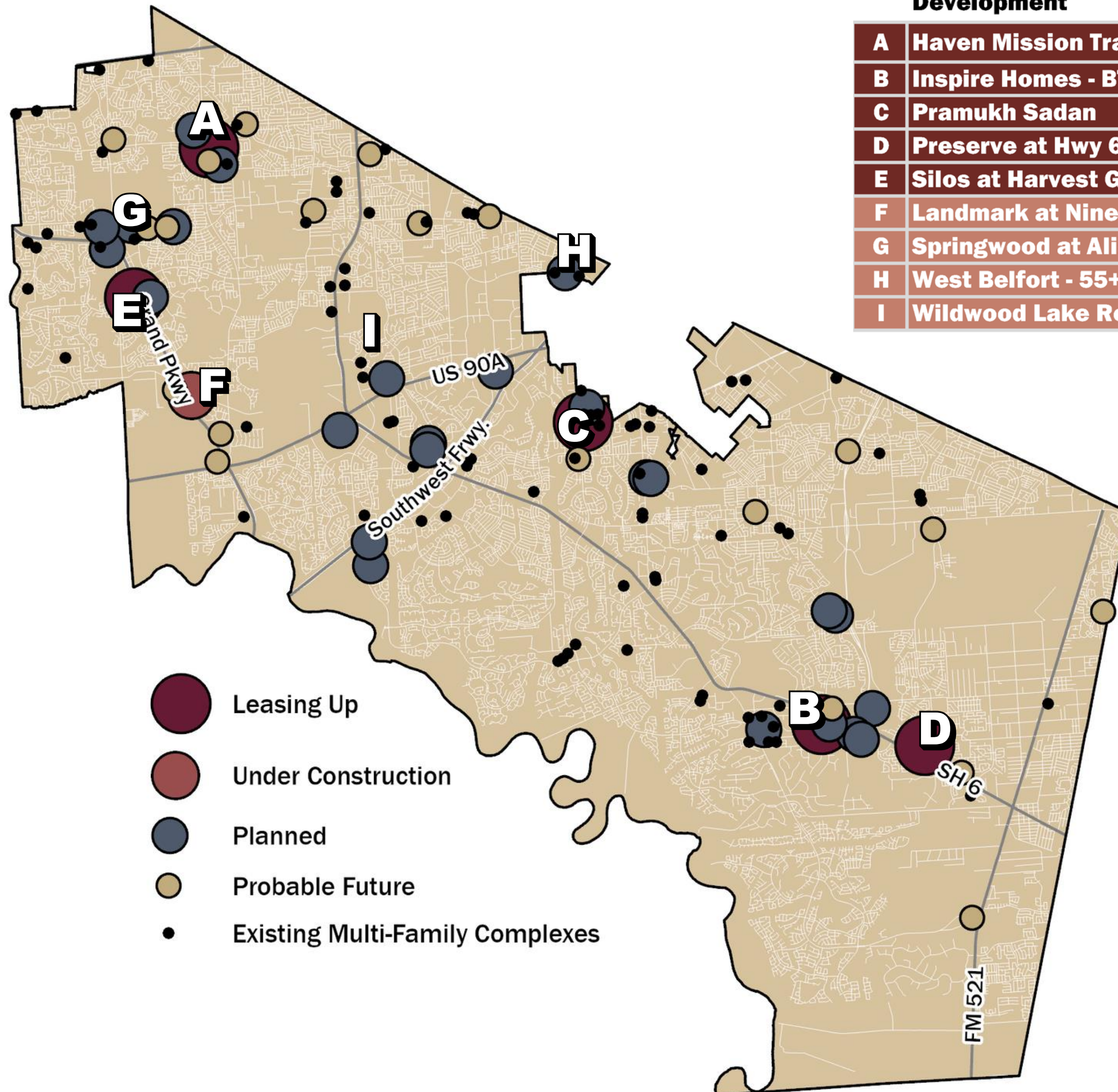
33.6%

of total projected
new housing

25

additional
developments
in planning

Projected New Rental Development



Development		Status	Units
A	Haven Mission Trace	Leasing Up	264
B	Inspire Homes - BTR	Leasing Up	176
C	Pramukh Sadan	Leasing Up	60
D	Preserve at Hwy 6 - BTR	Leasing Up	320
E	Silos at Harvest Green	Leasing Up	378
F	Landmark at NinetyNine	Developing	408
G	Springwood at Aliana - 55+	Developing	136
H	West Belfort - 55+	Developing	152
I	Wildwood Lake Residency	Developing	120

What to Watch



Mixed-Use Development



Infrastructure Development



Additional Large Tracts of Land Sold

Ten-Year Total Projected New Occupancies

19,171

61.4% of Total
SINGLE-FAMILY

10,160

32.5% of Total
MULTI-FAMILY

1,223

3.9% of Total
MANUFACTURED

31,248

TOTAL PROJECTED NEW HOUSING OCCUPANCIES

Demographic Study Components

Demographic Trends

Past & Current Students

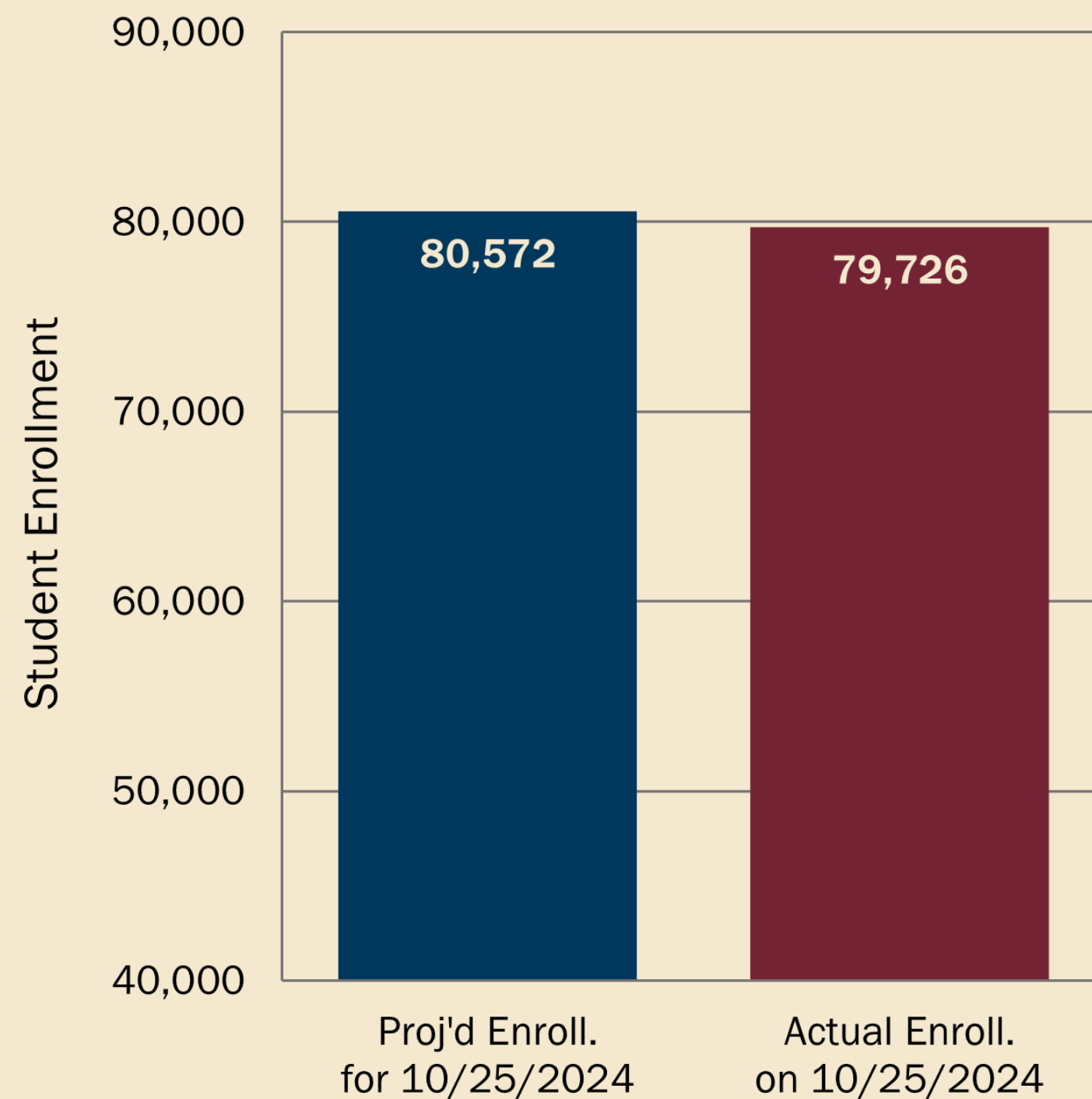
Economy and Housing

Student Projections



What Has Changed Since Last Study?

Projected Enrollment compared to Actual Enrollment



Sources: PASA 2023-24 Demographic Study; FBISD Enrollment – 10/25/2024



New Housing

- New housing was built as projected
- Fewer students per home in new construction
- Fewer young students as a proportion of total students in new construction
- MLS housing sales dropped 15% this year



Small KG classes

- Past two years, KG smaller than previous year
- Cumulative effect on future enrollment

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Alternative Educational Opportunities

- Two new charter schools opened near FBISD
- More students transfer out of FBISD than transfer into FBISD



Intangible Trends

- Anti-traditional schooling sentiment
- Anecdotal suggestions of increasing trends in homeschools and micro-schools
- Increased likelihood of voucher legislation this spring

Student Projection Factors

Birth Rates

Births have been declining in recent years but have increased in the last two years.

New Housing Construction

Drives majority of growth, adding 900-1,400 students per year.

Incoming KG Class Size

Class sizes have not reached pre-Covid size and have declined for past two years. Could see small increases in 2027-28 and beyond with increased recent births.

Factors Impacting Future Enrollment

Cohort Size

Normal variation in grade levels can cause fluctuations in projections - both by grade and by grade group.

Regeneration

Many established neighborhoods have declining enrollment as empty nesters remain in the same homes after children graduate.

Alternative Educational Opportunities

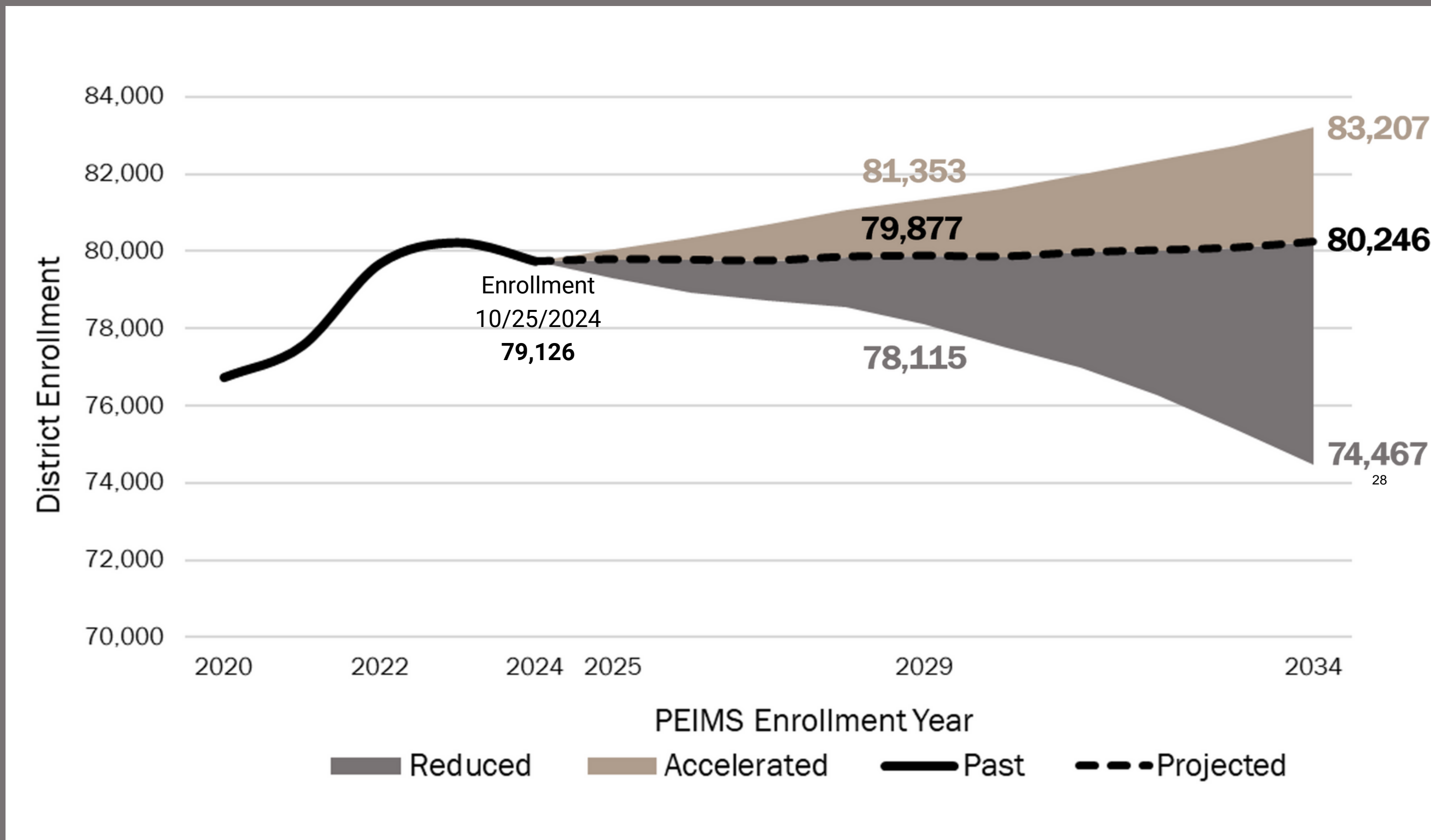
At least three new charter campuses near FBISD are expected to pull significant number of students from the District.

Enrollment Forecast

Every year starts with a clean slate -- not impacted by the previous year's accuracy

The Enrollment Forecast represents the most likely scenario based on the best information available at the time

Reduced and Accelerated Scenarios are also feasible, assuming changing circumstances

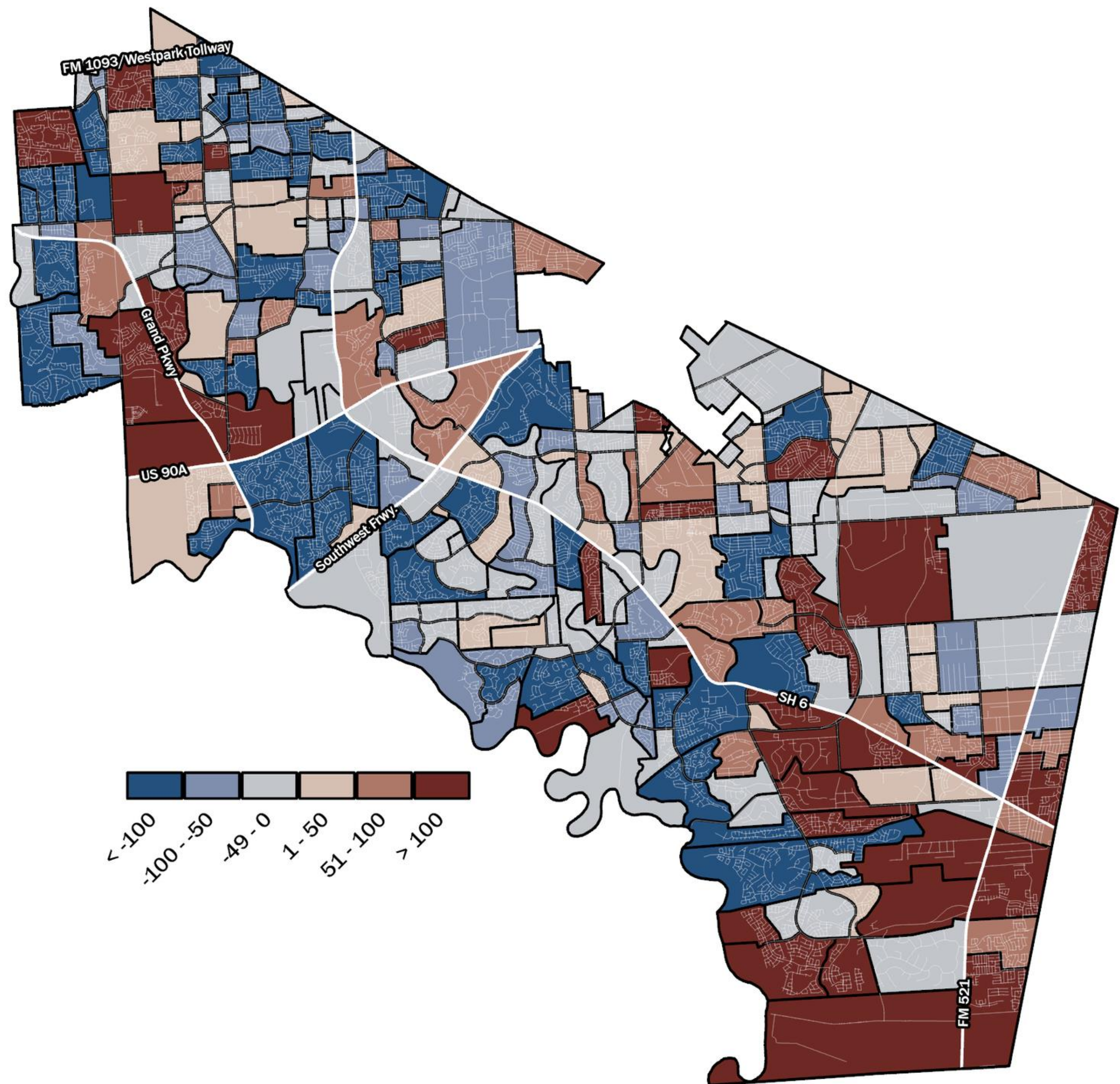


The Accelerated and Reduced Enrollment Scenarios account for potential changes in factors affecting enrollment, such as fluctuations in mortgage rates, housing construction, new charter school plans, birth rates, kindergarten class sizes, and specifics of pending voucher legislation.

Projected EE-12th Resident Students

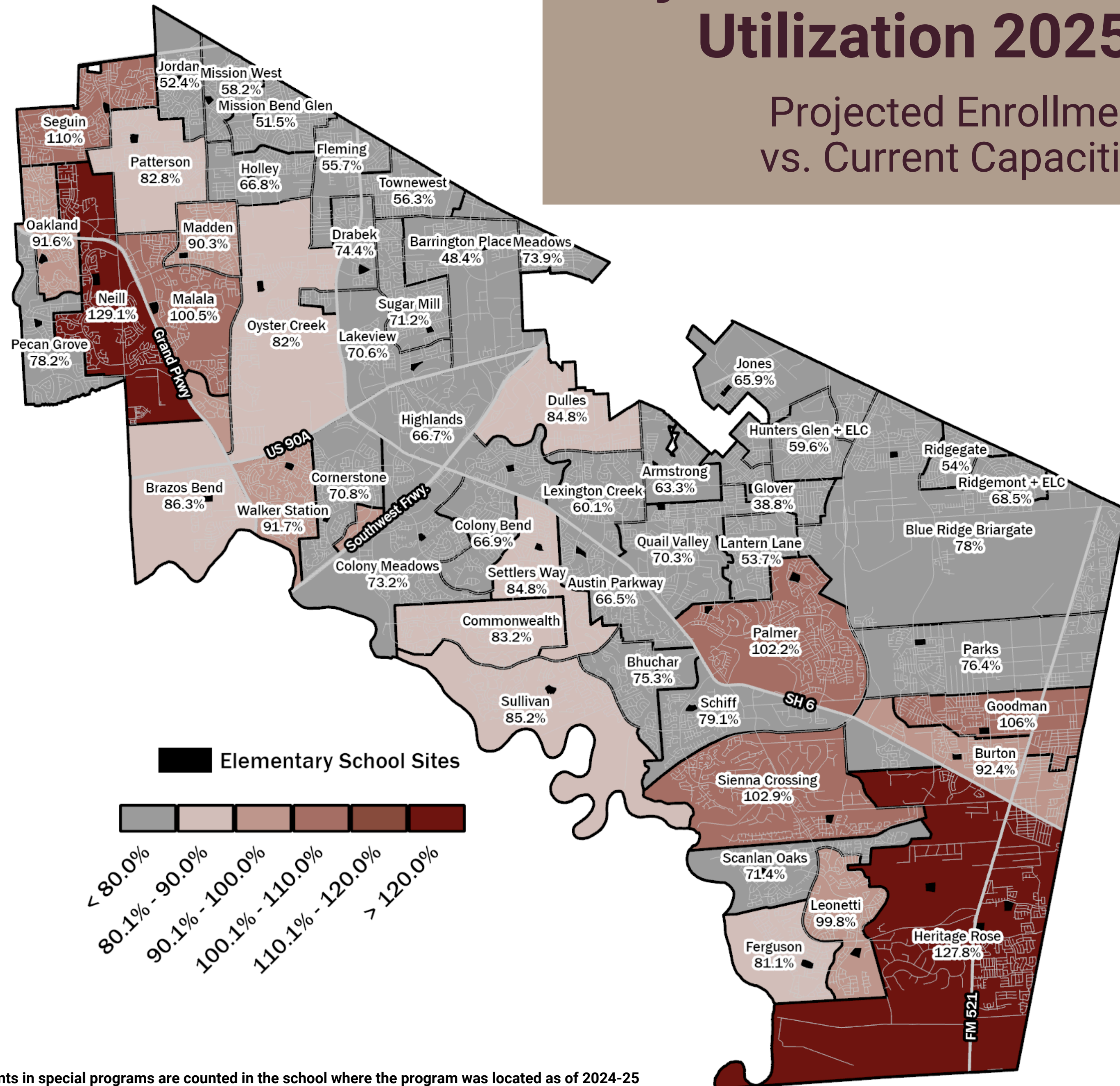
Fall 2024 - Fall 2034

by Planning Unit



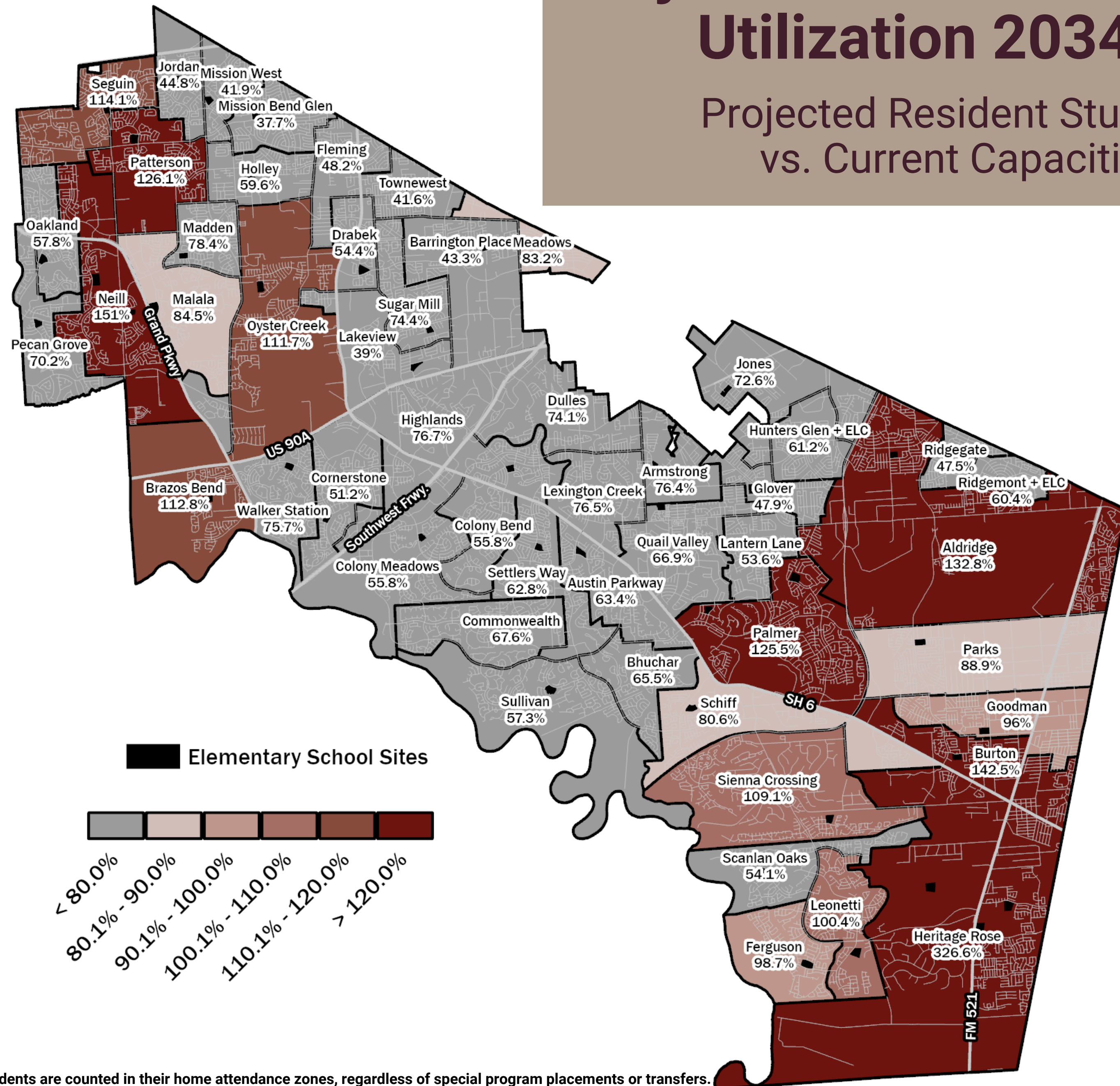
Projected Elementary School Utilization 2025-26

Projected Enrollment
vs. Current Capacities



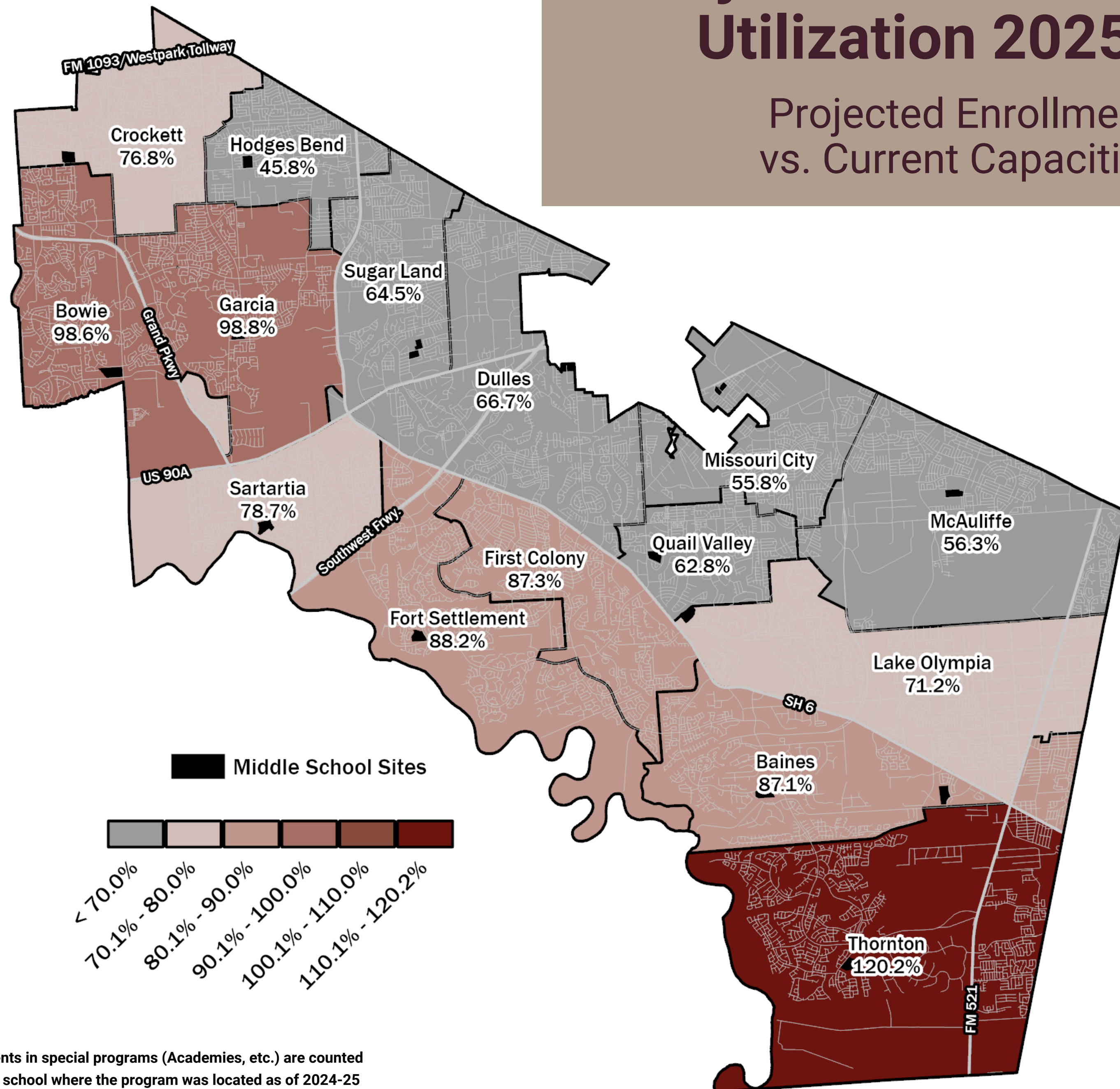
Projected Elementary School Utilization 2034-35

Projected Resident Students
vs. Current Capacities



Projected Middle School Utilization 2025-26

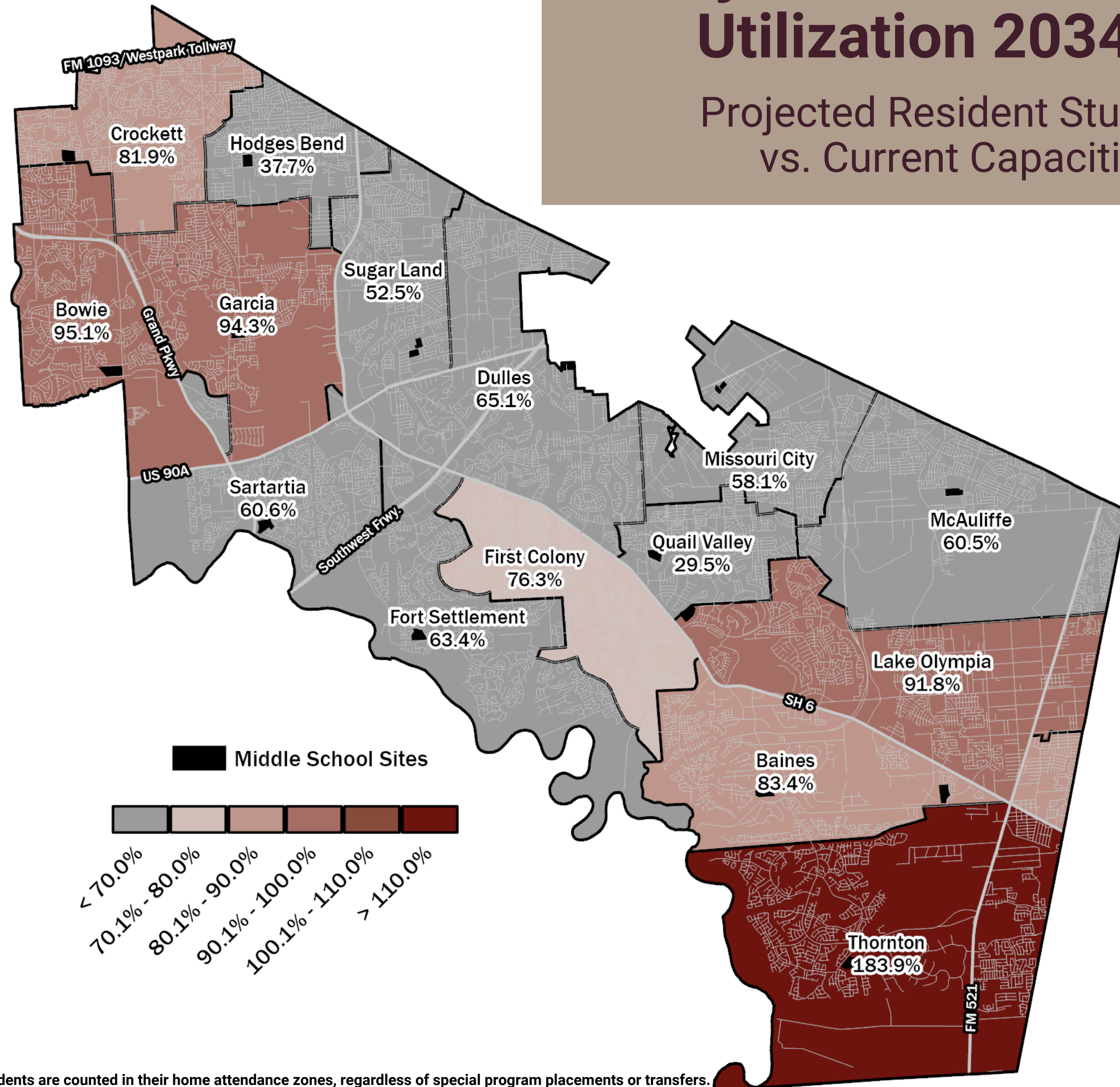
Projected Enrollment
vs. Current Capacities



Students in special programs (Academies, etc.) are counted in the school where the program was located as of 2024-25

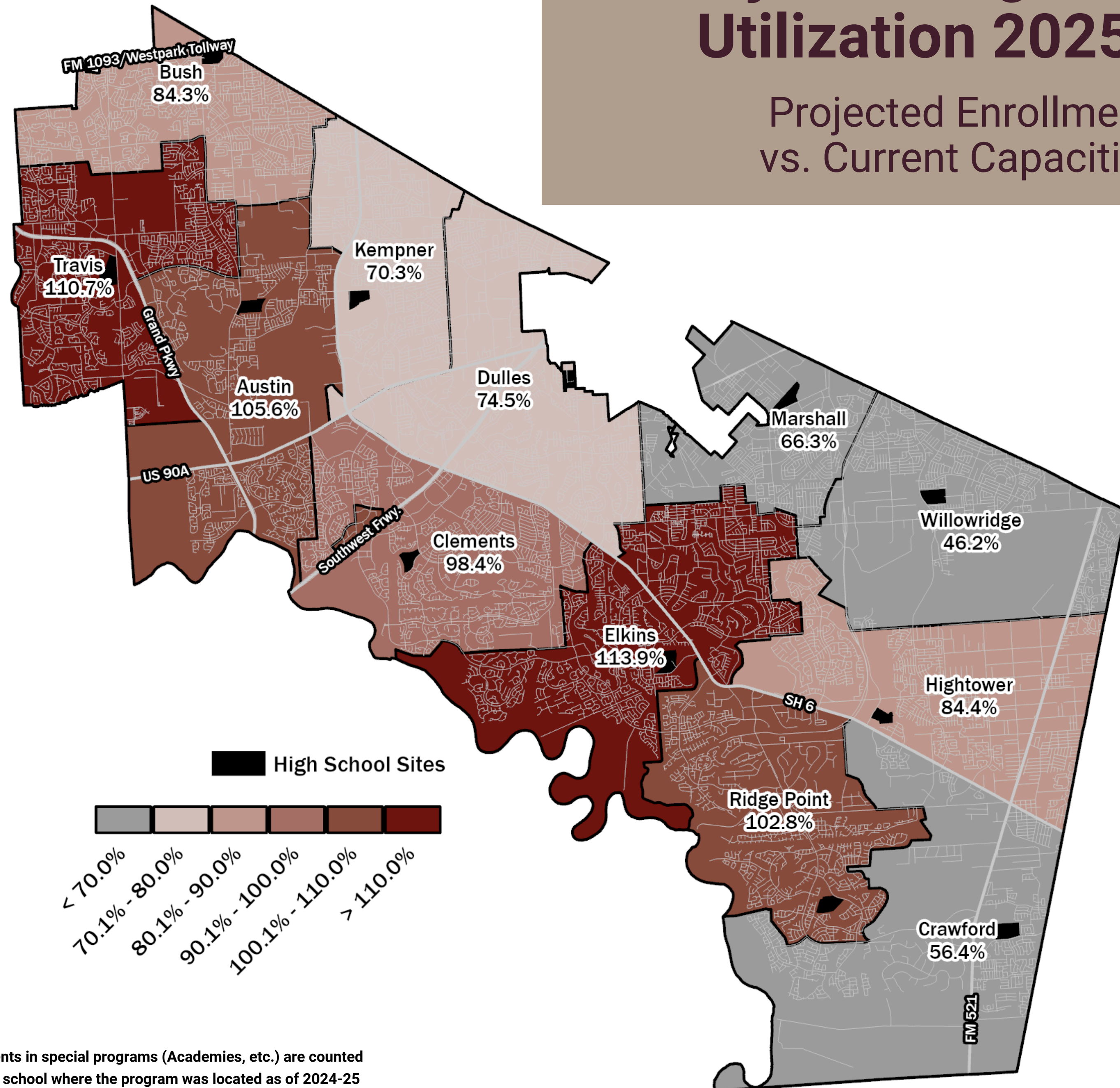
Projected Middle School Utilization 2034-35

Projected Resident Students
vs. Current Capacities



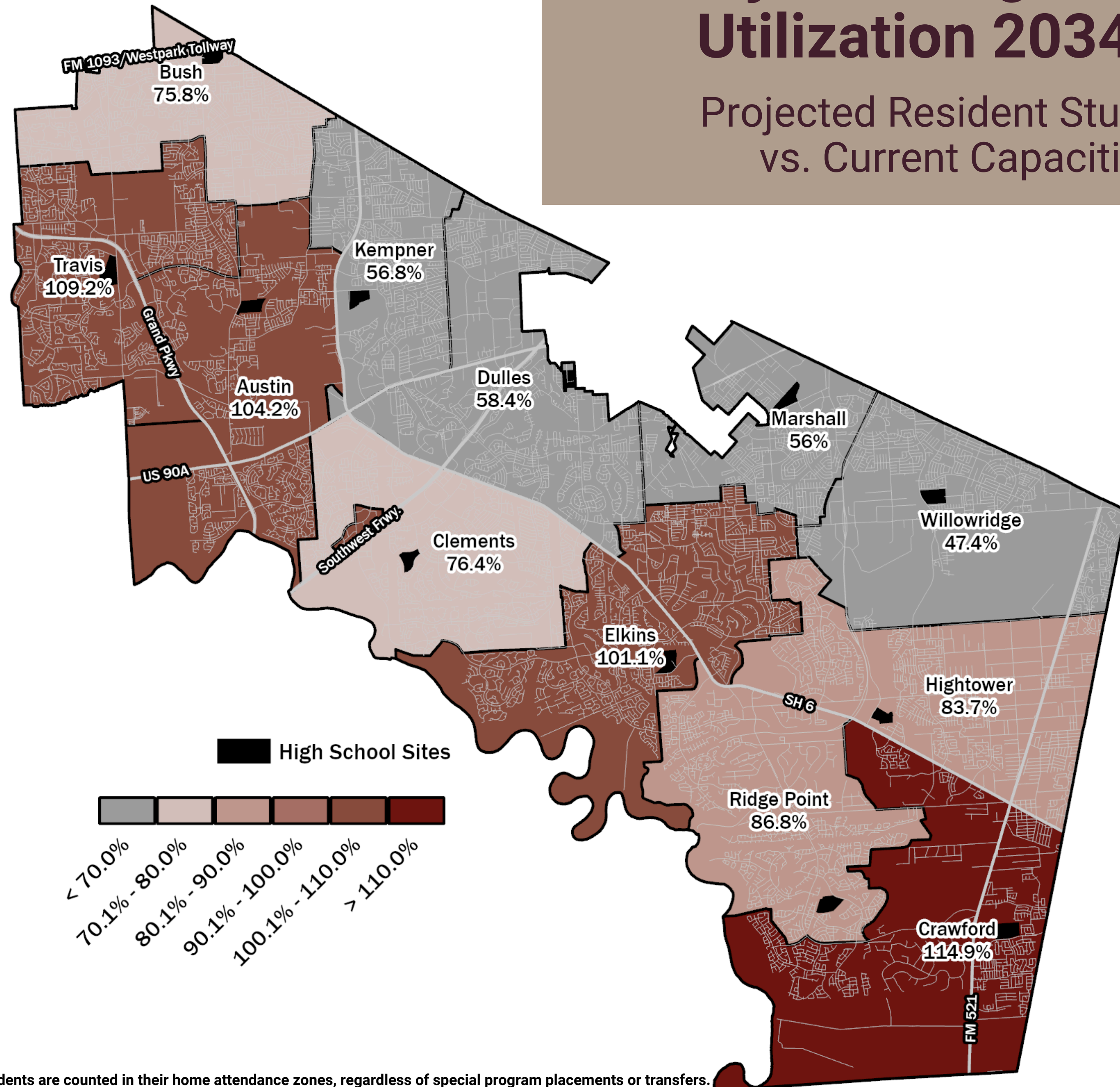
Projected High School Utilization 2025-26

Projected Enrollment
vs. Current Capacities



Projected High School Utilization 2034-35

Projected Resident Students
vs. Current Capacities



Demographic Study Take Away Points



- Fort Bend ISD demographic life cycle
 - Most of the District is built out.
 - New housing growth continues in pockets.
 - Regeneration in built out areas will not yield growth like new construction.
- East and west parts of the District are growing, while much of the central part of the District continues to decline in student population.
- General anti-traditional school sentiment is gaining traction across the State.
- New charter schools continue to pull students from FBISD.
- Specifics of pending voucher legislation will determine the magnitude of impact on FBISD enrollment.

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It is common in large districts to have some growing areas and some areas declining in enrollment as part of the natural demographic life cycle of each neighborhood.

QUESTIONS?

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Population and Survey Analysts

www.pasatx.com