



FORT BEND ISD

February 2021

2020-21 Demographic Study



- ▶ **Pandemic's effect on enrollment**
 - ▶ Loss of 1.3% from 19-20
 - ▶ Loss of 3.0% from projection (~2,900 students)
 - ▶ Assumed 75% return in Fall 2021
- ▶ **Charter schools buying more land**
- ▶ **Housing acceleration now and in near-term**
 - ▶ 40% increase in occupancies
 - ▶ Expected acceleration in enrollment to follow

Demographic & Economic Trends

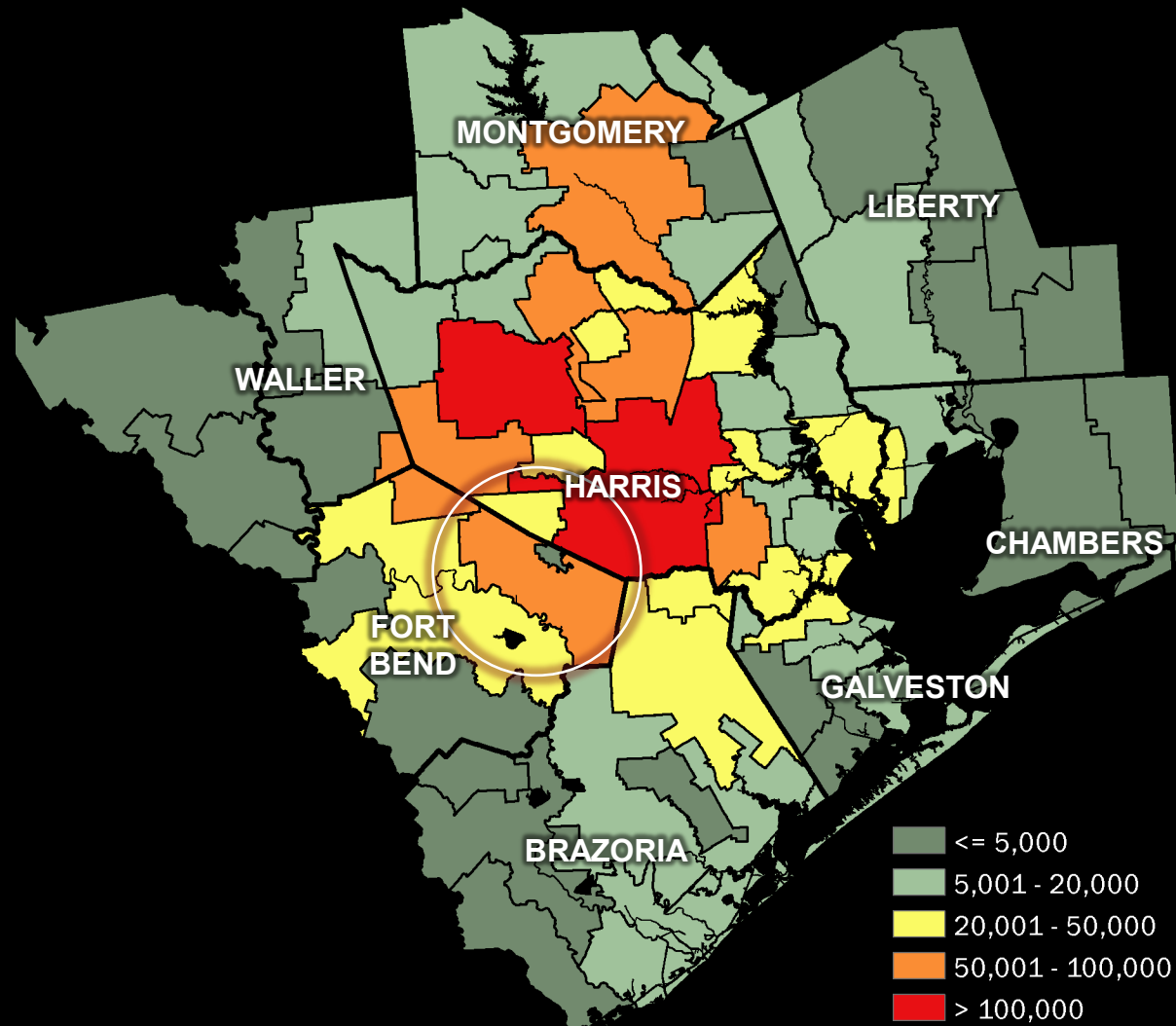


Total School District Enrollment

Fall 2019, Houston Metro



	School District	Enrollment
1	Houston	210,061
2	Cypress-Fairbanks	117,446
3	Katy	83,423
4	Fort Bend	77,756
5	Aldine	67,259
6	Conroe	64,799
7	Klein	54,096
8	Pasadena	52,878
9	Alief	45,300
10	Humble	45,078
11	Clear Creek	42,388
12	Spring	35,336
13	Spring Branch	35,188
14	Lamar	35,156
15	Alvin	27,022

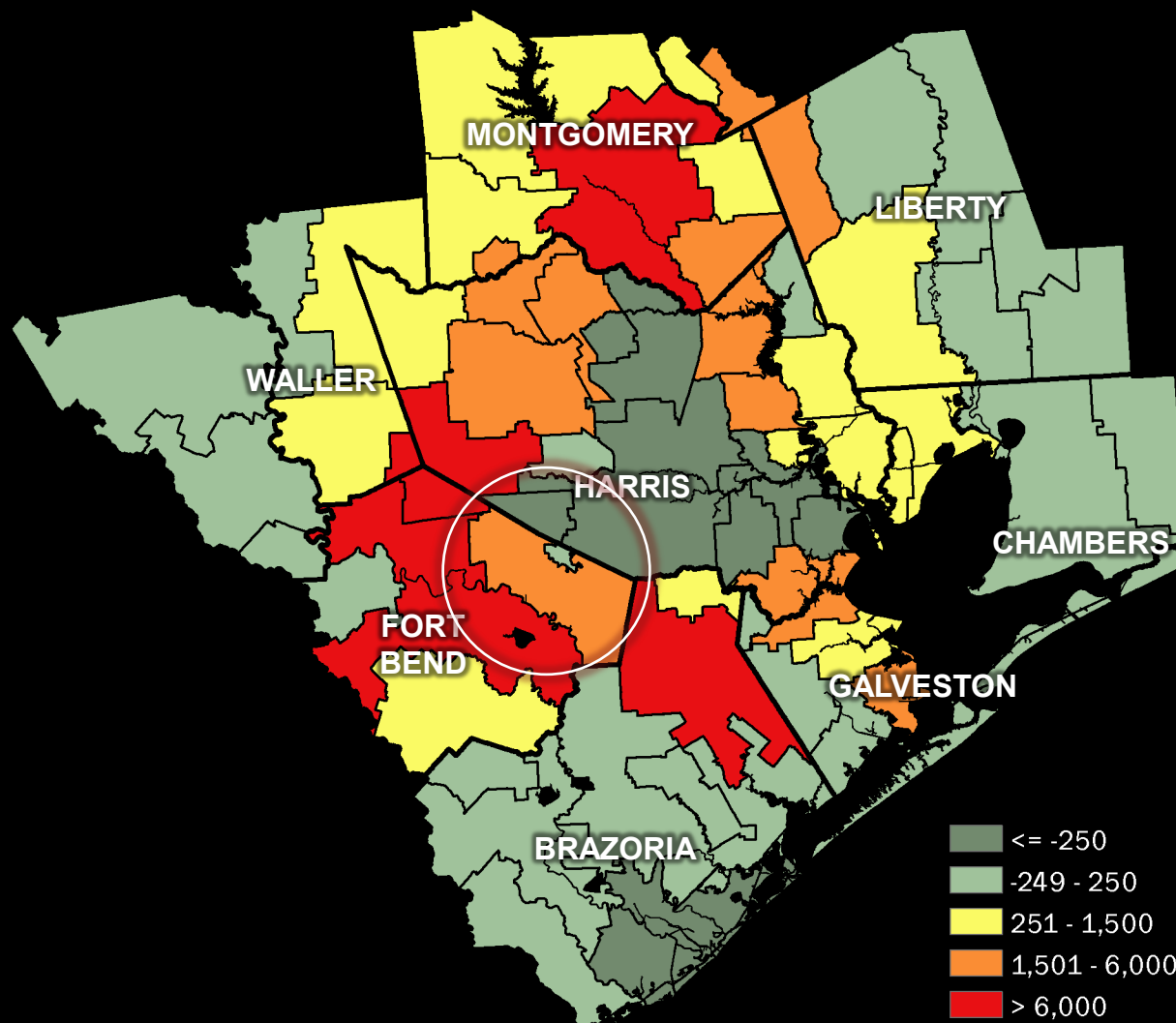


Numeric Change in Enrollment

Fall 2014 to Fall 2019, Houston Metro



	School District	Change
1	Katy	13,093
2	Conroe	8,436
3	Lamar	6,824
4	Alvin	6,156
5	Fort Bend	5,604
6	Humble	5,556
7	Tomball	5,056
8	Klein	4,694
9	Cypress-Fairbanks	4,423
10	Cleveland	3,742
11	New Caney	3,131
12	Sheldon	2,170
13	Texas City	2,104
14	Clear Creek	1,576
15	Waller	1,479



Regional Economy

► Employment in Houston Metro

- 365,200 jobs lost from Mar. to Apr. 2020
 - 50% of jobs recovered through November

► Mortgages & New Home Sales

- Historically low rates hovering around 3%
- Apartment vacancies: 9.8% to 10.8% (1/20 to 1/21)
- 2020 home purchasing ended strong: +40%
- Low inventory: existing homes not being listed due to virus

► Energy job losses focused in north suburbs



Local Jobs

▶ New Amazon fulfillment centers

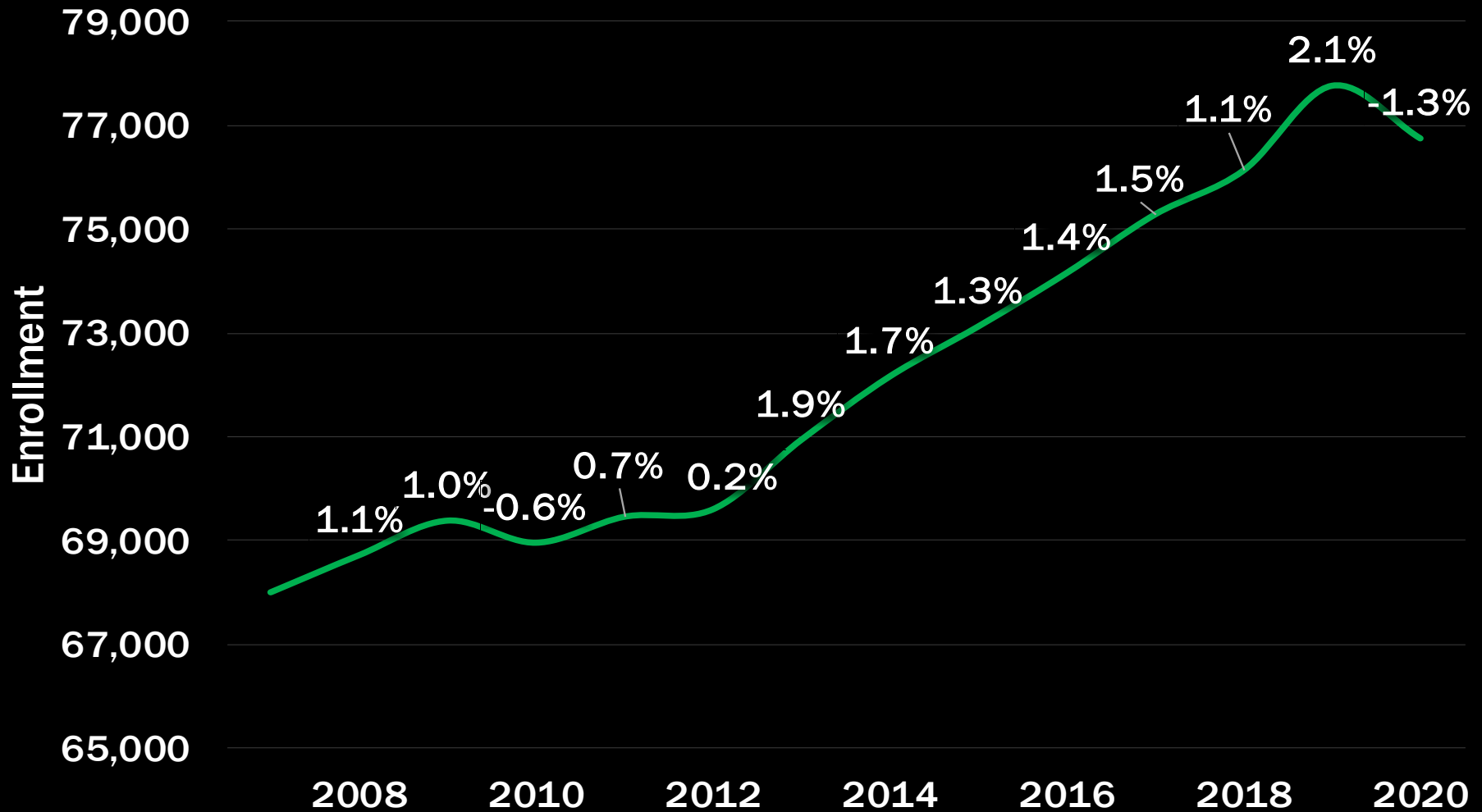
- Harlem Rd. at W. Bellfort
- Hurricane Ln. in Missouri City

▶ Texas Medical Center

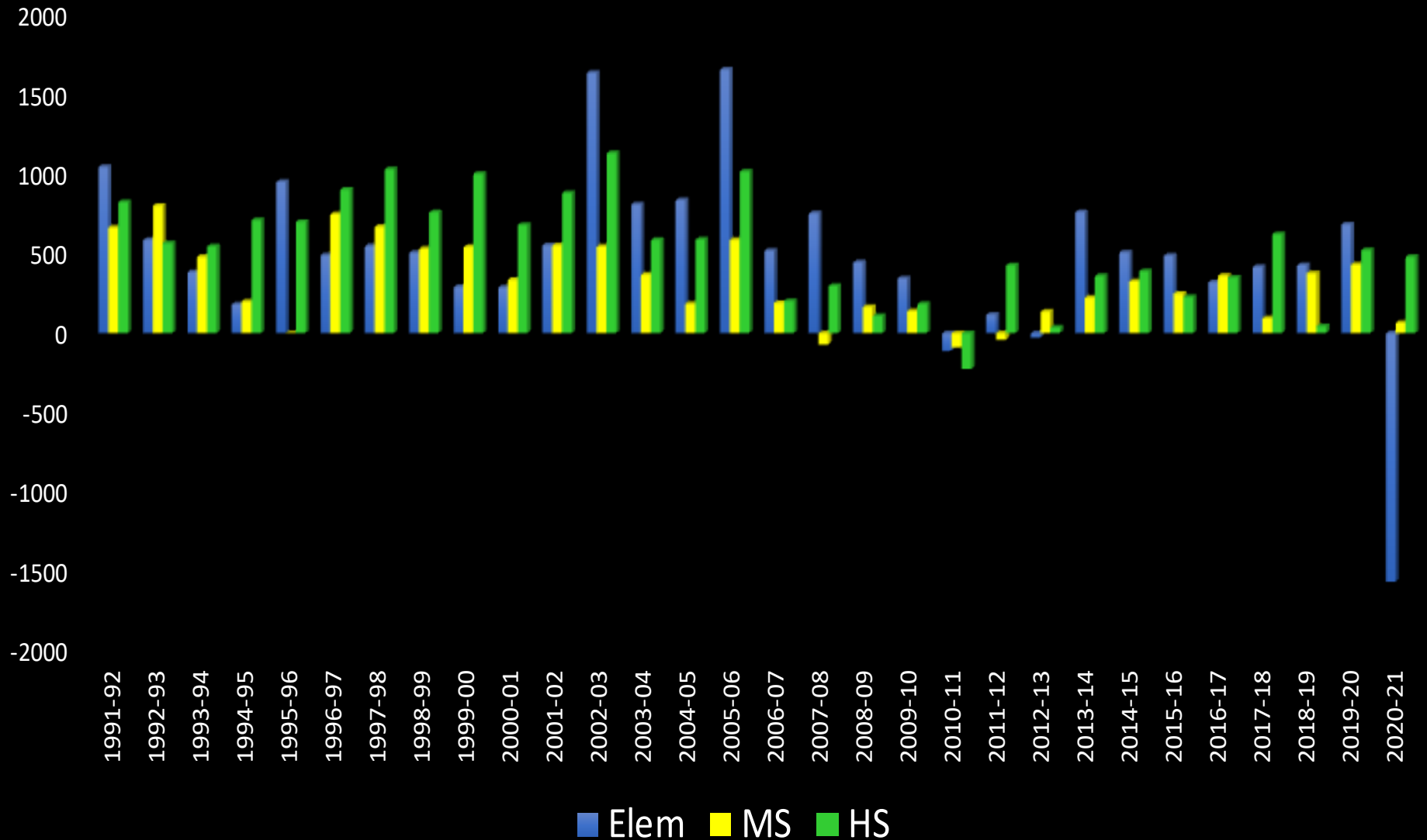
- Texas A&M Innovation Plaza
- TMC³ broke ground in January
- Levit Green



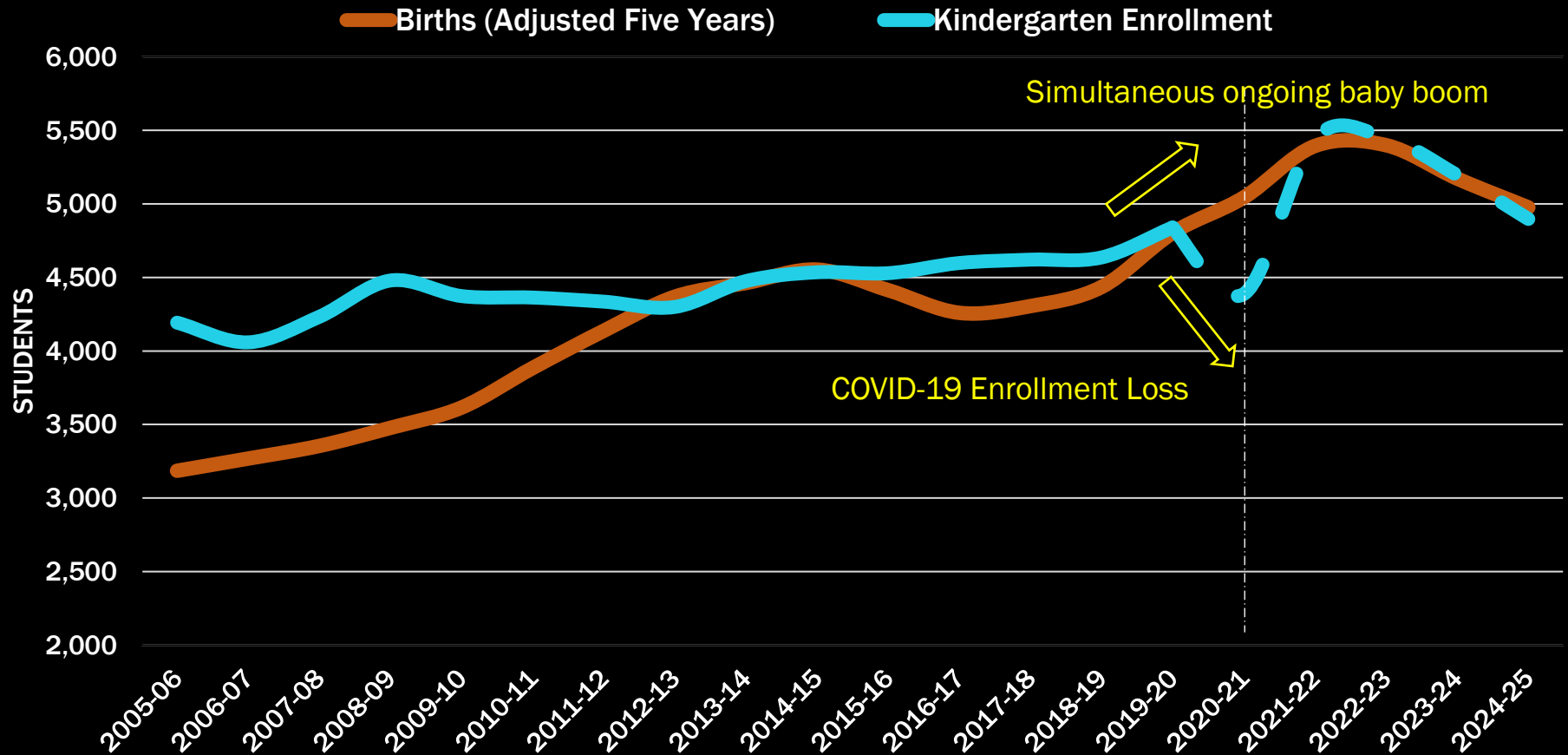
Annual Growth Rates



Added Students by Grade Group



Kindergarten vs. Births

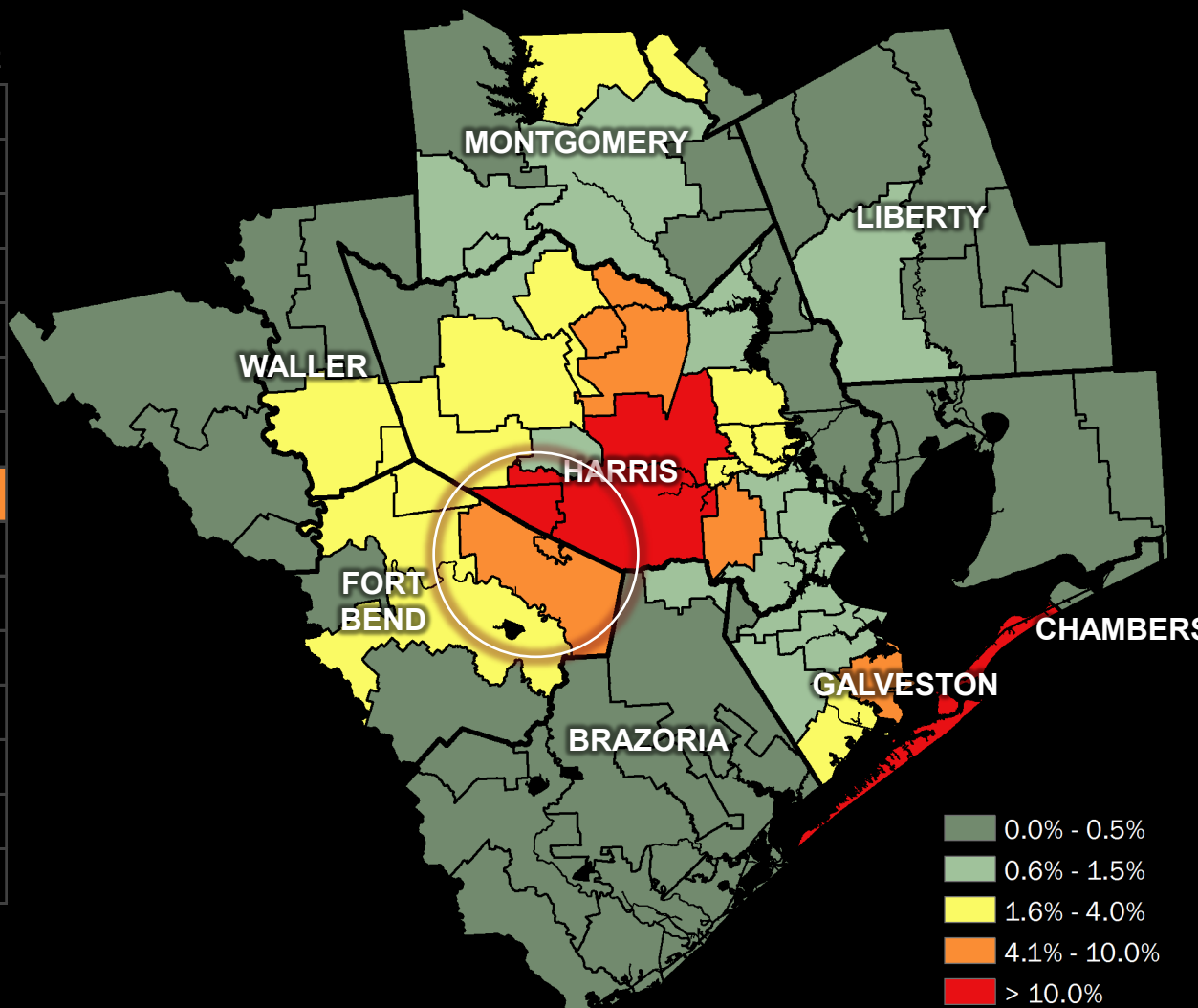


Percent of Students in Charters



Fall 2019, Houston Metro, All Public School Students

	School District	Percent
1	Houston ISD	16.6%
2	Alief ISD	14.9%
3	Galveston ISD	11.4%
4	Texas City ISD	7.5%
5	Spring ISD	6.9%
6	Pasadena ISD	5.7%
7	Aldine ISD	5.4%
8	Fort Bend ISD	5.3%
9	Stafford MSD	4.6%
10	Hitchcock ISD	3.4%
11	Cypress-Fairbanks ISD	3.4%
12	Sheldon ISD	3.2%
13	Katy ISD	2.9%
14	Royal ISD	2.6%
15	Klein ISD	2.1%



EE-12 Enrollment Share



Fort Bend ISD Residents

Resident Students:	90,156
Attending FBISD	76,742
<i>Presumed temporary student loss (COVID)</i>	2,924
<i>Transfers into the District ¹</i>	452
Attending and Residing in FBISD	79,214 (87.9%)
Attending Charter Schools ¹	4,855 (5.4%)
Attending Private Schools ²	4,283 (4.8%)
Attending Nearby Districts ¹	1,804 (2%)

¹ Sources: Texas Education Agency, Transfer Reports 2019-20; PASA surveys

² Source: PASA interviews (excludes PK enrollment)

Charter School Expansions

FBISD Feeders Impacted

▶ IDEA Public Schools

First 4 campuses all in northeast suburbs but more planned

▶ Yes Prep expansion (+10,000 elementary)

Minor to no impact in FBISD

▶ School of Science & Tech. SL opened in 2018

857 students now: 70-75% FBISD residents

Austin, Bush,
Kempner, Travis

▶ Harmony land purchase

Kempner, Dulles

▶ Houston Classical: 6403 Addicks Clodine Rd.

Bush

▶ KIPP campus expansions

- KIPP Journey on Florence Road

Kempner

- KIPP Mosaic at 90A/Hillcroft

Marshall, Willowridge

- New site at 15022 Old Richmond Road

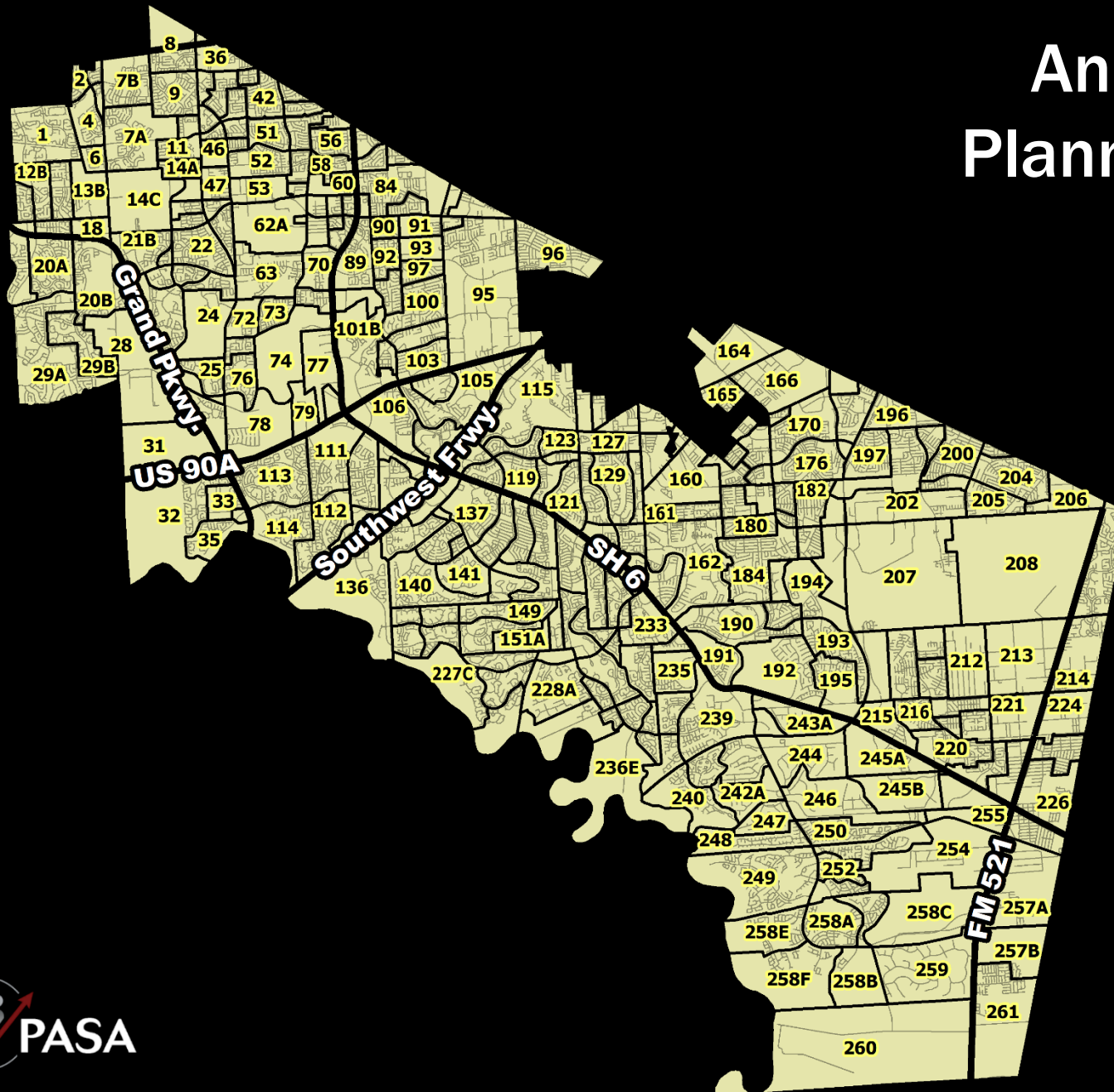
Austin, Bush, Kempner

Housing Trends

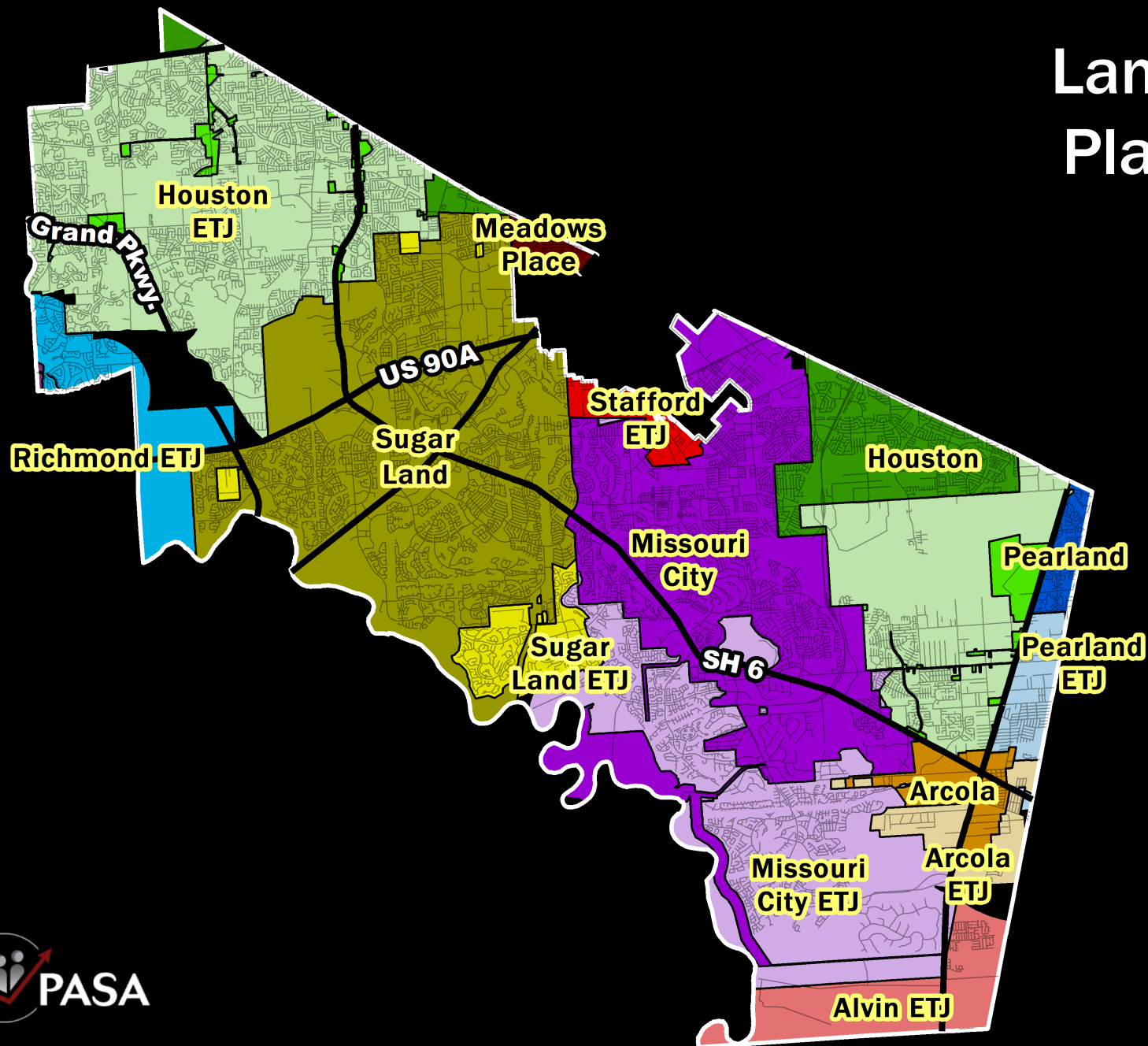
- ▶ Development Maps
- ▶ 10-Year Occupancy Projections



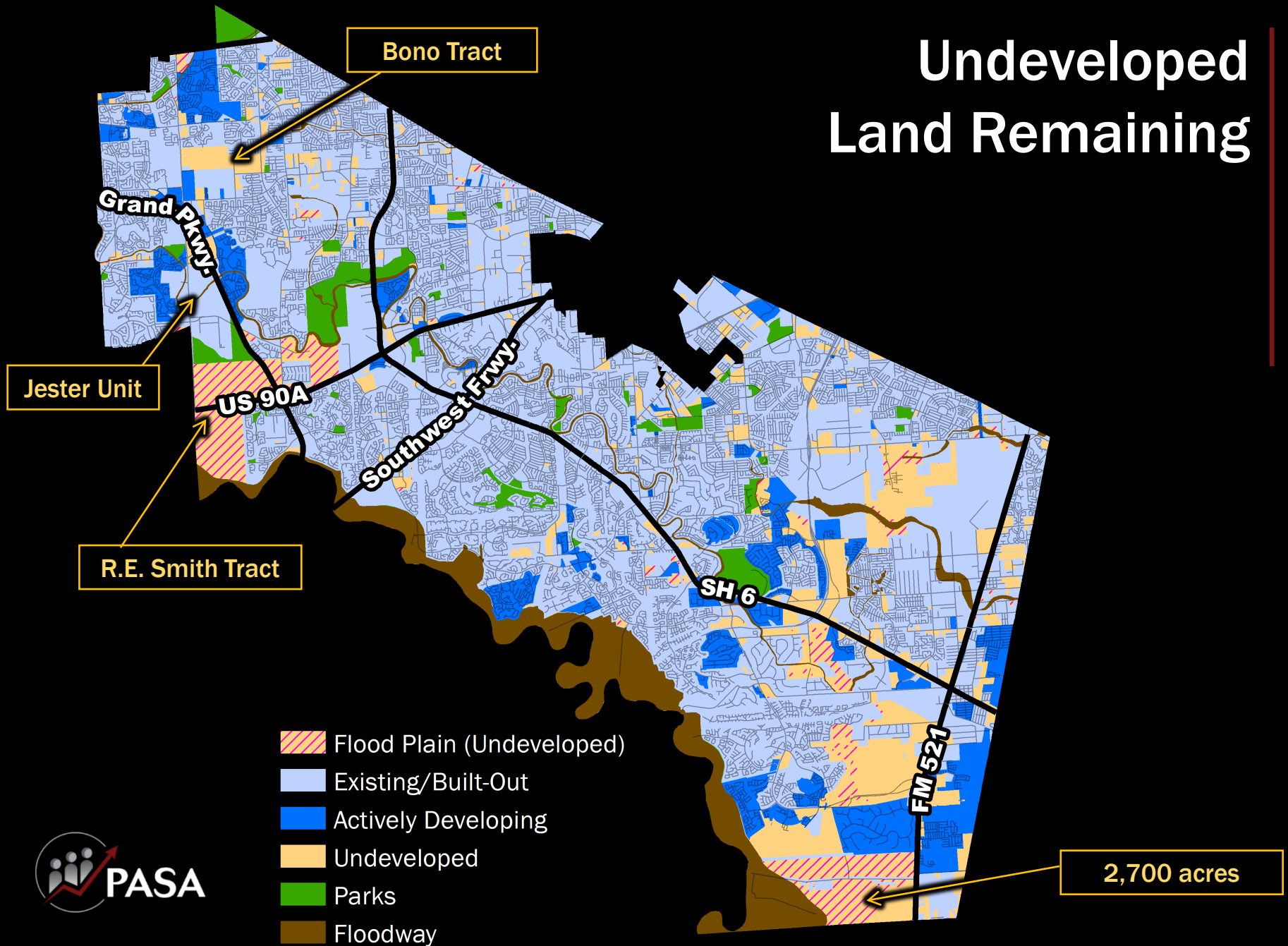
Analysis by Planning Unit



Land Use Planning

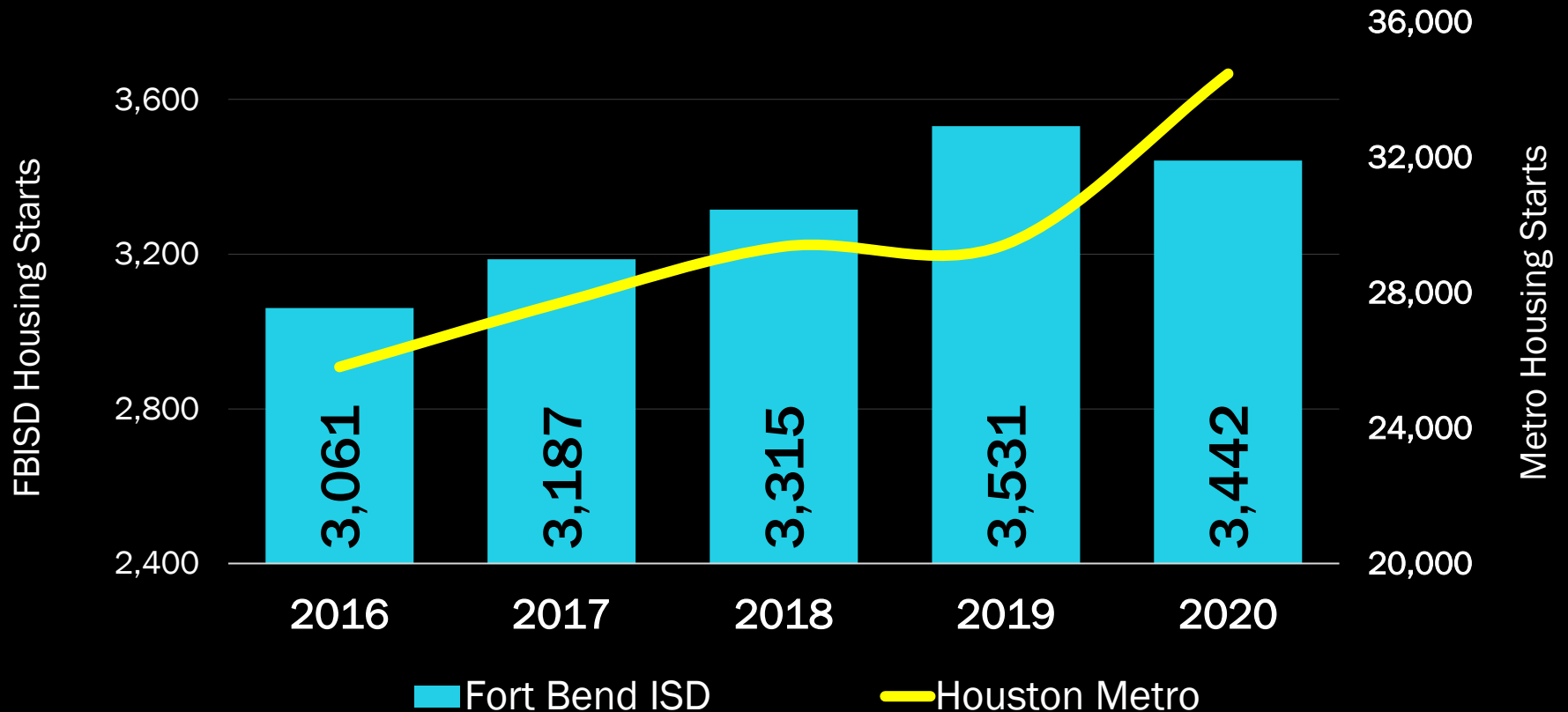


Undeveloped Land Remaining



Annual Housing Starts

Single-Family, October to September



Source: Metrostudy

New Home Occupancies (SF)



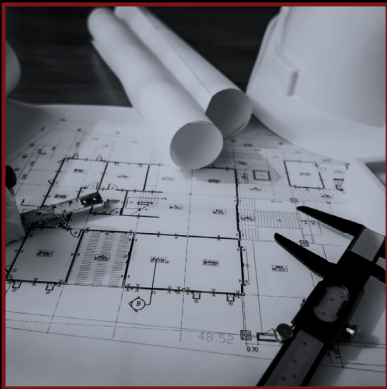
		Actual	Projected				
		2020	2021	2022	2023	2024	2025
NORTH	Harvest Green	431	326	78	1	0	0
	Aliana	405	279	161	13	7	6
	Lakeview Retreat	285	264	201	29	0	0
	Grand Vista	174	217	146	139	34	0
	Grand Mission Estates	163	128	155	103	97	45
	Camellia	149	0	0	0	0	0
	Fieldstone	65	0	0	0	0	0
		1,672	1,214	741	285	138	51
CENTRAL	Riverstone	275	116	82	95	95	39
	Parks Edge	184	194	209	217	100	0
	Olympia Estates	91	31	0	0	0	0
	Dry Creek Village	88	142	129	7	0	0
	Mustang Trails	84	87	38	0	0	0
	Liberty Ridge	82	0	0	0	0	0
	Clements Crossing	82	49	3	0	0	0
	Imperial	75	51	47	31	26	23
	Miramonte Village Duplexes	60	0	0	0	0	0
	Lake Shore Harbour	49	26	3	0	0	0
	Winfield Lakes	45	48	58	55	38	0
	Shadow Grove	43	0	0	0	0	0
	Cartwright Townhomes	28	12	0	0	0	0
	Olympia Falls	0	21	48	65	77	85
	Shipmans Cove	0	73	92	87	22	0
	Future SF (500 ac.)	0	0	0	20	40	55
		1,186	850	709	577	398	202
SOUTH	Sienna	693	740	759	642	605	605
	Southern Colony	301	296	285	267	242	213
	Glendale Lakes	121	147	176	185	193	190
	Enclave at Lakeshore Harbour	61	45	1	0	0	0
	Huntington Place	54	50	61	70	75	80
	Compass Development	0	17	44	56	68	75
		1,230	1,295	1,326	1,220	1,183	1,163



Single-Family Housing

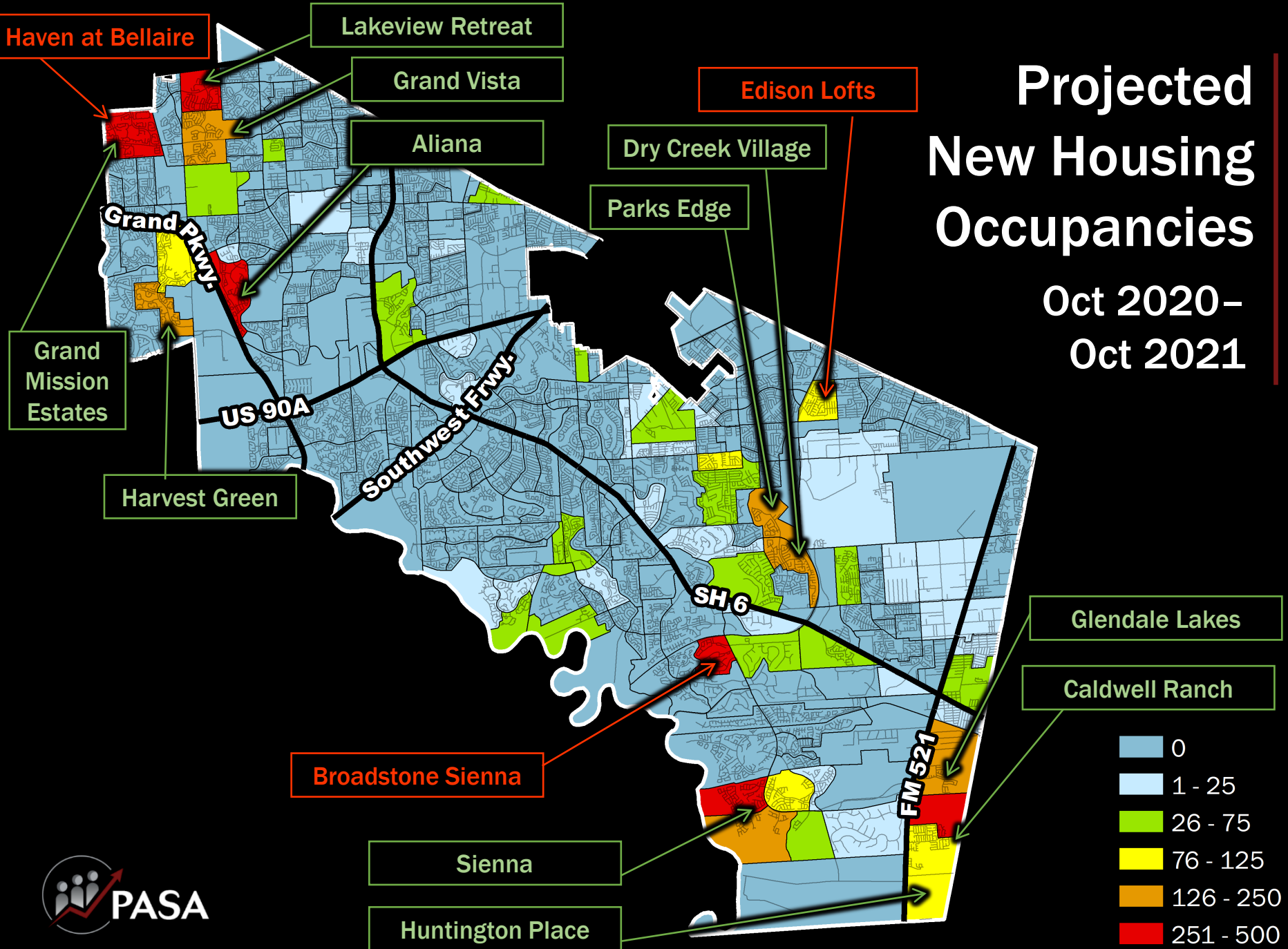


- ▶ FBISD ranks 2nd in TX for new home starts
 - ▶ Lamar CISD overtook FBISD after 5 years as #1
 - ▶ Of 21,000+ new SF homes projected through 2030, 50.6% are in Sienna/FM 521 Corridor
- ▶ Sienna developers no longer anticipate age-restricted single-family
- ▶ Fort Bend Parkway Corridor
 - ▶ Olympia Falls now in development: 450 lots
 - ▶ 500 ac. along future Chimney Rock: 1,500-2,000 lots



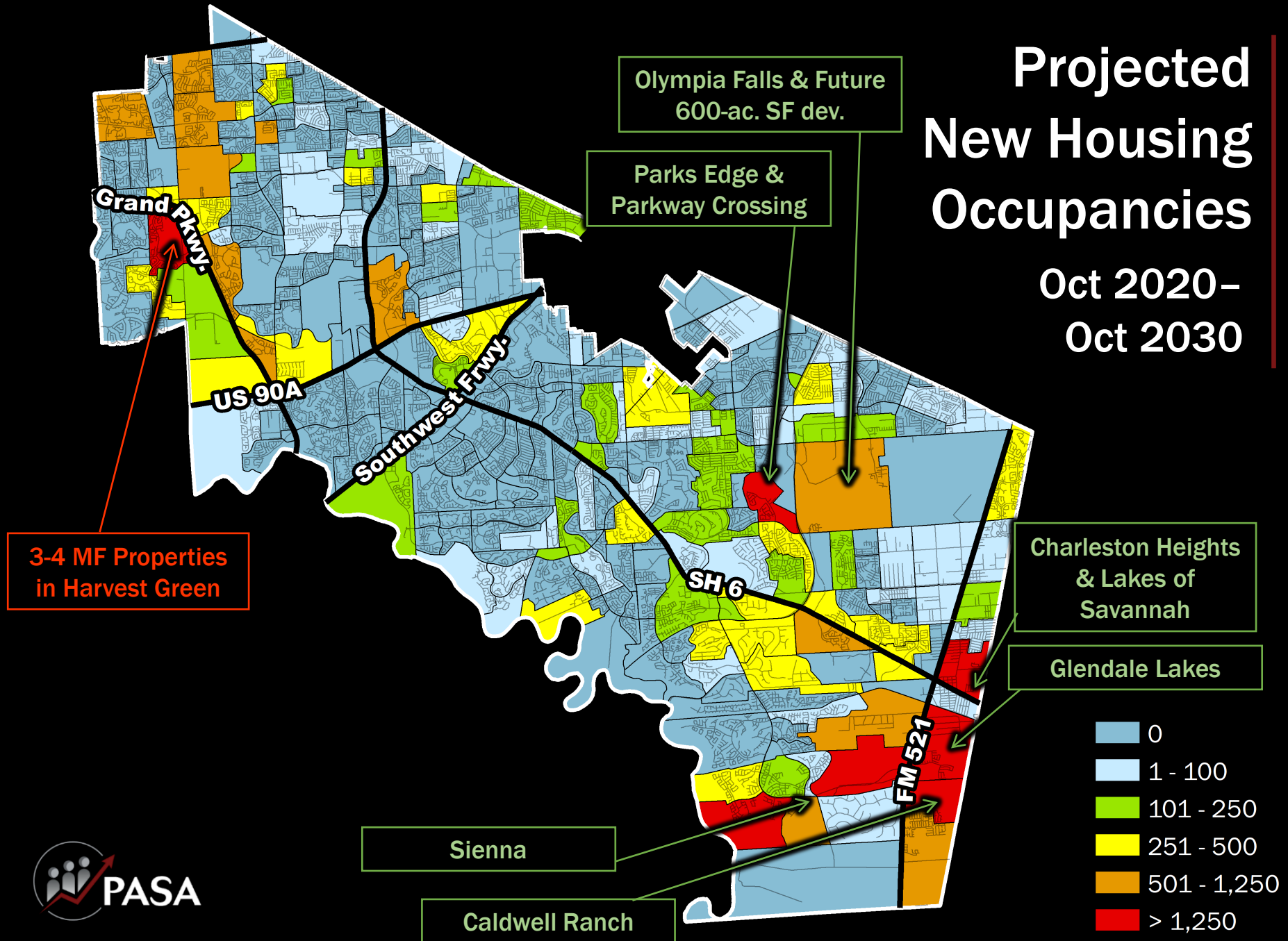
Projected New Housing Occupancies

Oct 2020–
Oct 2021



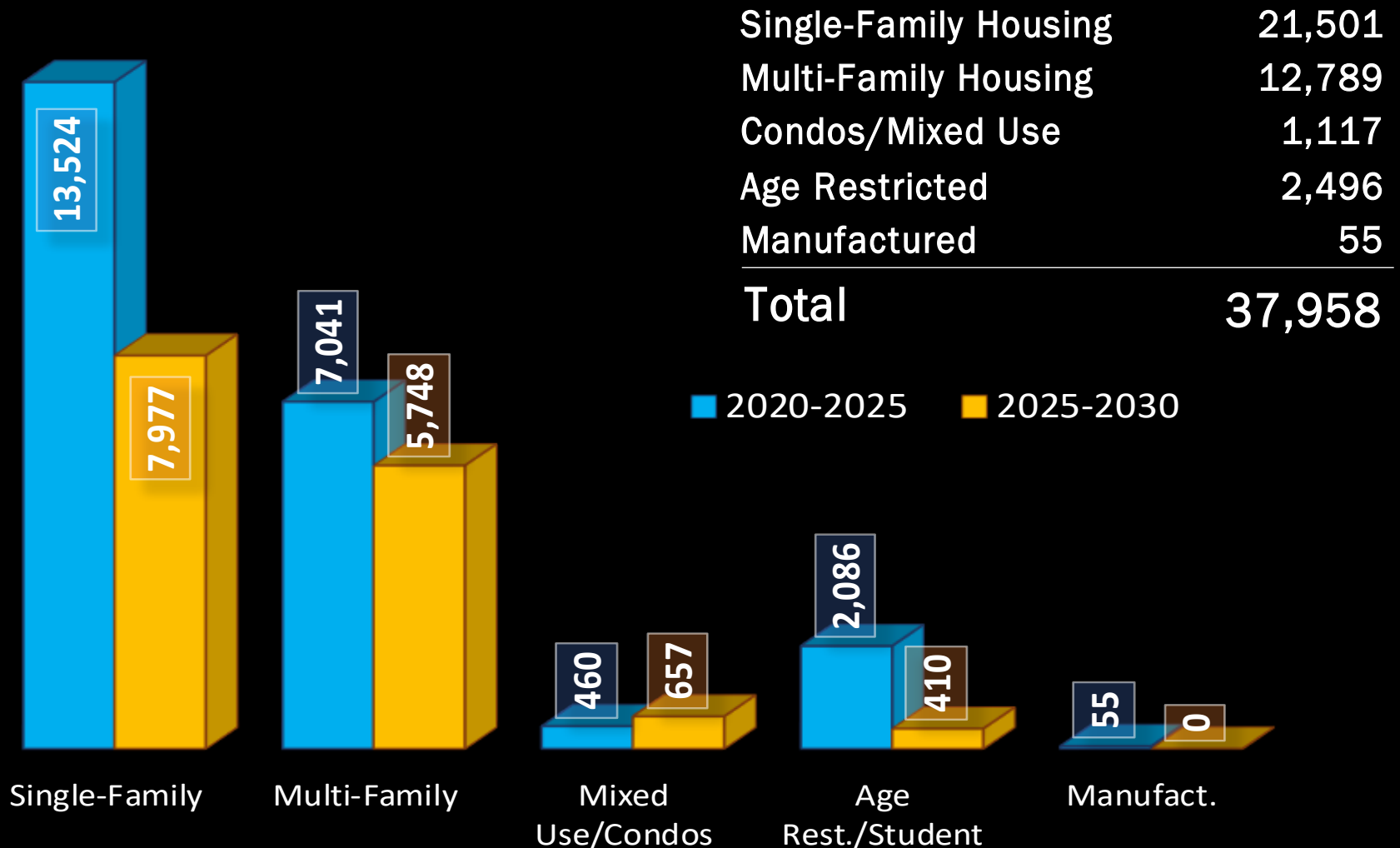
Projected New Housing Occupancies

Oct 2020–
Oct 2030



Projected New Housing Occupancies

2020-2030



Current Students



Students per Occupied Home

Districtwide



0.52



Single-Family

0.37



Multi-Family

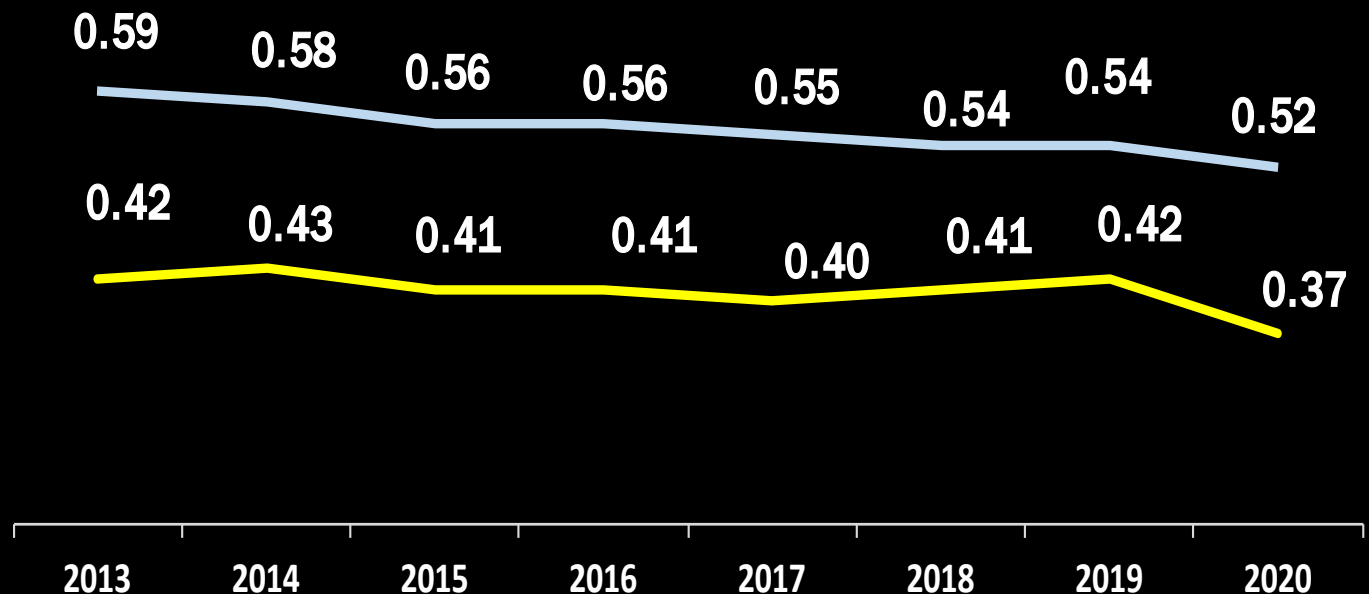
Students per Home



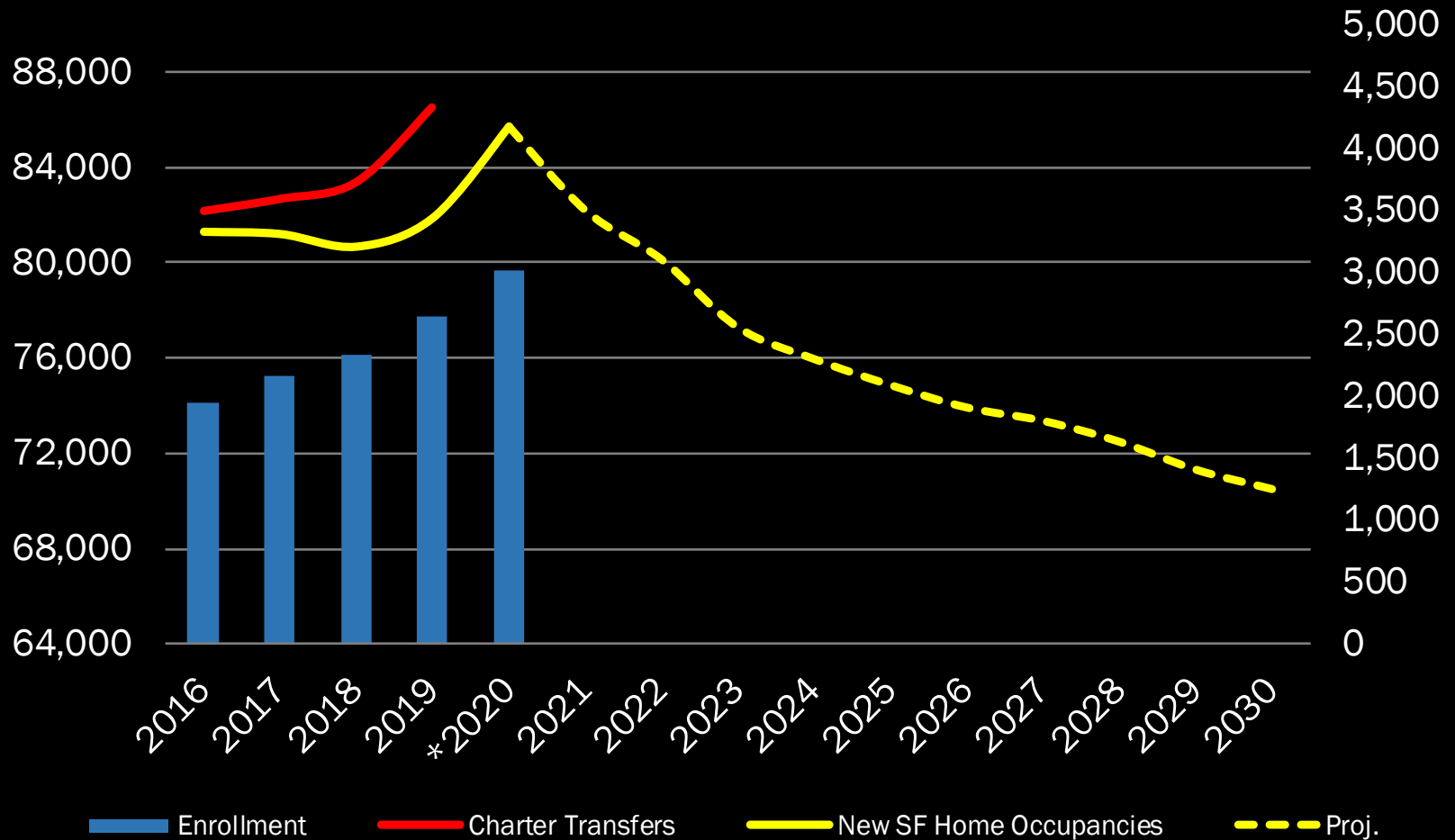
Single-Family



Multi-Family



Recent Annual Growth Trends with Annual Single-Family Housing Projections



Sources: Texas Education Agency and PASA

*Students presumed not enrolled due to pandemic included in enrollment total for 2020

Student Projections



- ▶ Enrollment Projected for TEA Snapshot
- ▶ Moderate Growth Scenario used for all planning documents in report

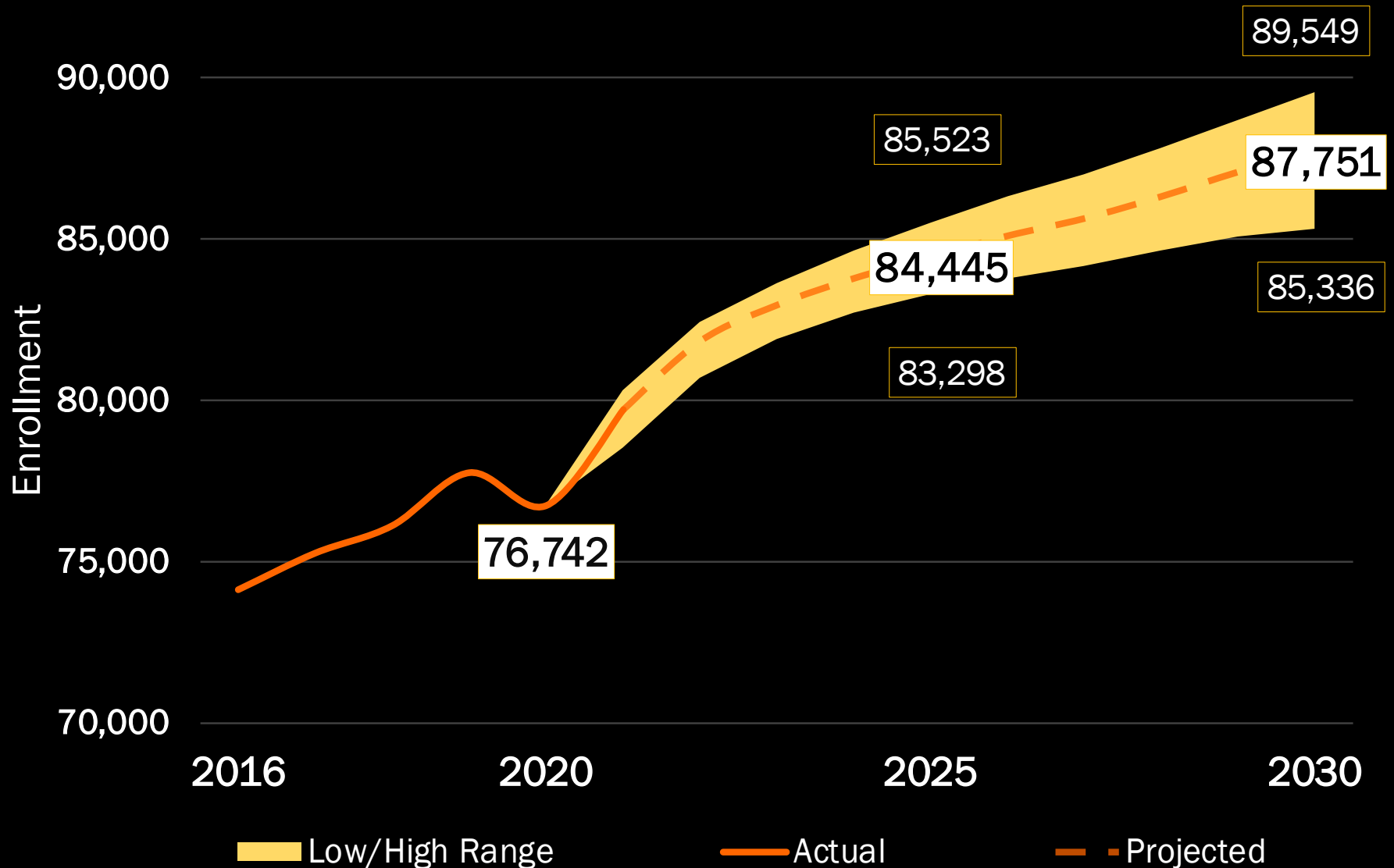
Moderate Growth Scenario



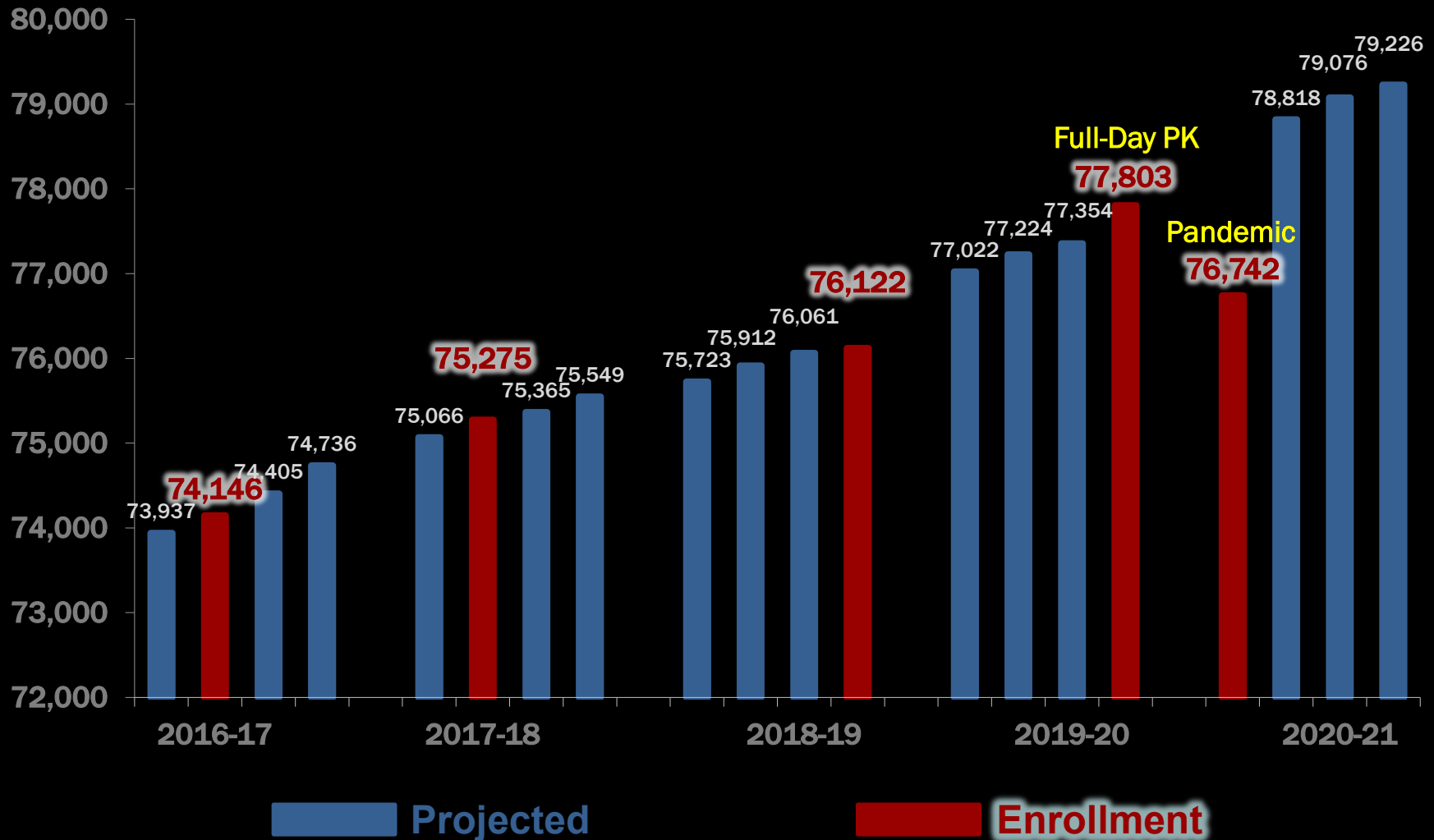
Projected Enrollment at PEIMS Snapshot Date

	2021	2022	2023	2024	2025
Enrollment	79,701	81,827	82,949	83,777	84,445
% Growth	3.86%	2.67%	1.37%	1.00%	0.80%
Growth	2,959	2,126	1,122	828	668
	2026	2027	2028	2029	2030
Enrollment	85,098	85,639	86,321	87,084	87,751
% Growth	0.77%	0.64%	0.80%	0.88%	0.77%
Growth	653	541	682	763	667

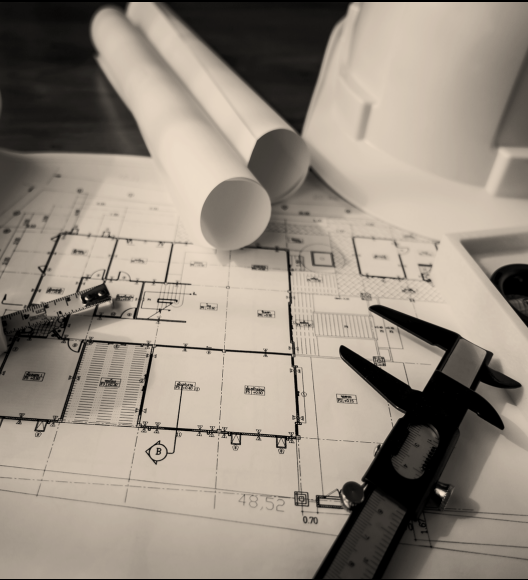
Three Scenarios of Growth



Historical Projections vs. Enrollment

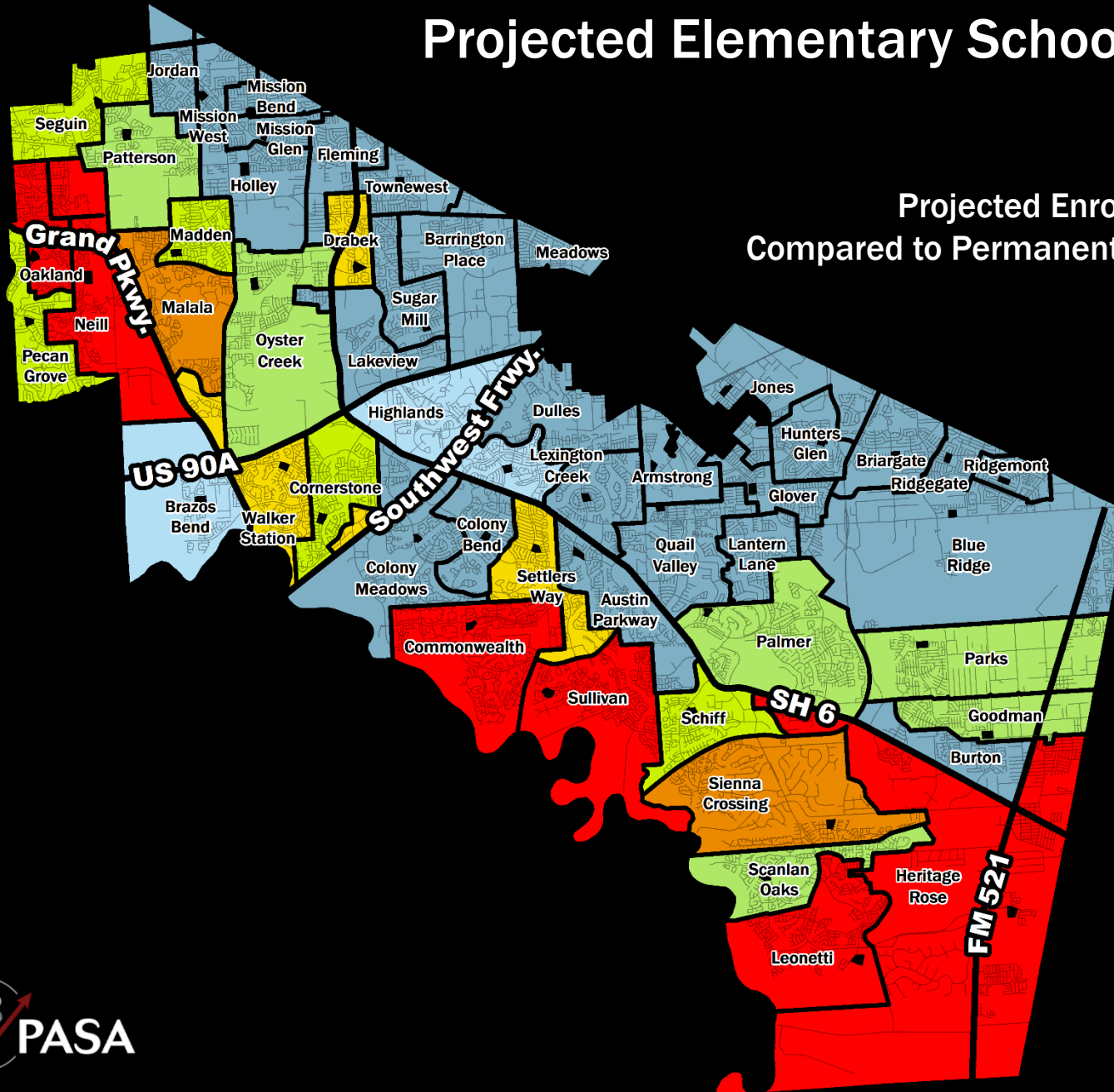


Short-Term Planning

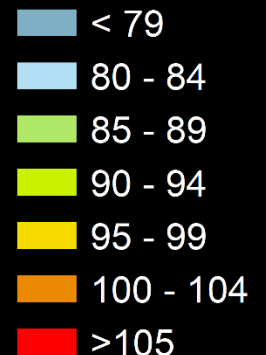


Projected Elementary School Utilization 2021-22

Projected Enrollment in 2021-22
Compared to Permanent Planned Capacity



Percent Utilization
2021-22



Projected Elementary Enrollment 2021-22

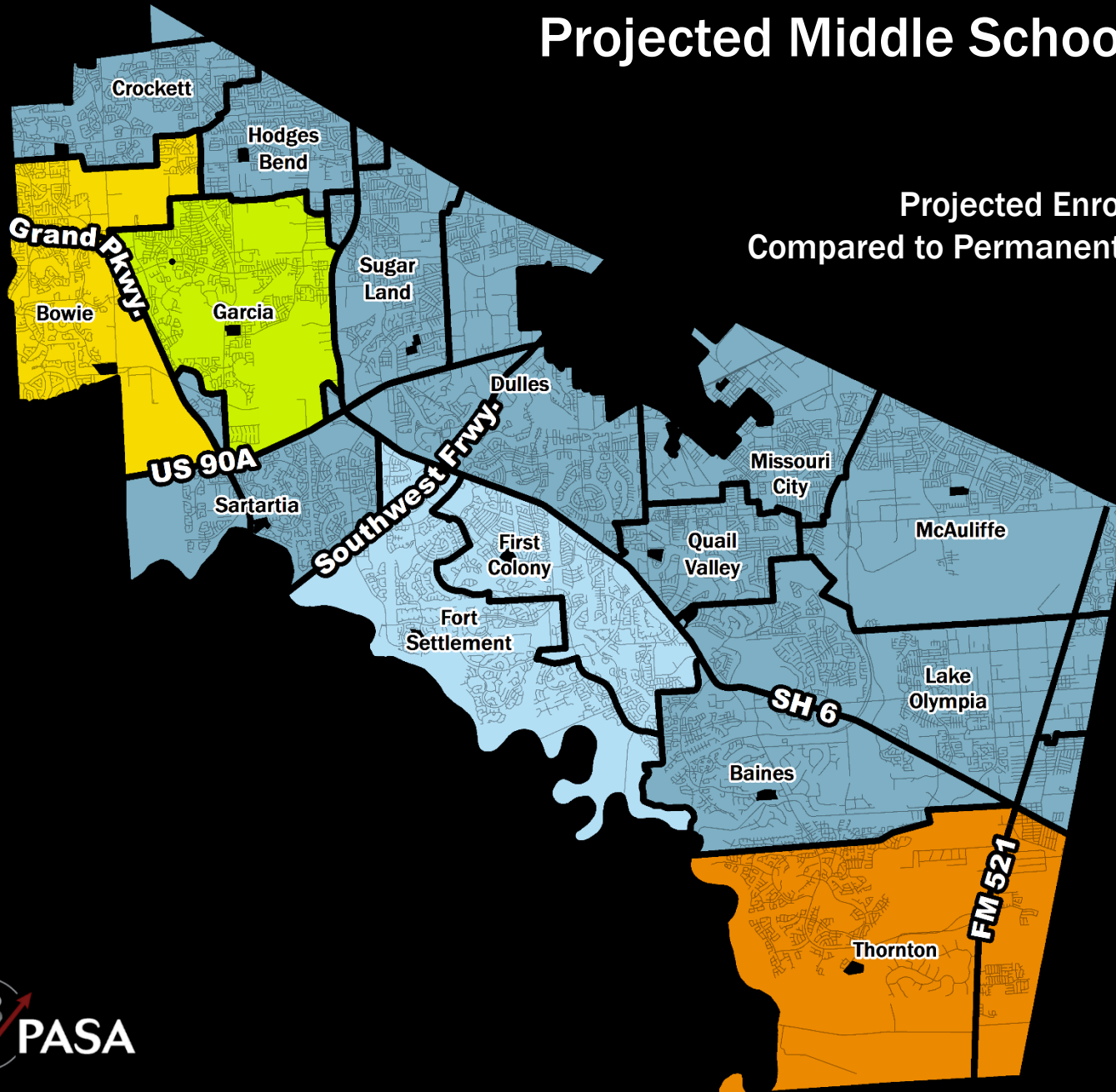


	Permanent Capacity	2020-21		2021-22	
		Current Enrollment	Current Utilization	Projected Enrollment	Projected Utilization
Armstrong	840	460	55%	461	55%
Austin Parkway	862	654	76%	664	77%
Barrington Place	862	535	62%	548	64%
Blue Ridge	691	253	37%	244	35%
Brazos Bend	813	681	84%	660	81%
Briargate	860	360	42%	377	44%
Burton	767	393	51%	392	51%
Colony Bend	785	500	64%	510	65%
Colony Meadows	866	685	79%	660	76%
Commonwealth	815	1,013	124%	1,042	128%
Cornerstone	999	981	98%	926	93%
Drabek	757	719	95%	730	96%
Dulles	855	646	76%	624	73%
Fleming	813	538	66%	517	64%
Glover	868	391	45%	345	40%
Goodman	812	690	85%	703	87%
Heritage Rose	1,136	1,130	99%	1,325	117%
Highlands	815	574	70%	649	80%
Holley	940	643	68%	655	70%
Hunters Glen + ELC	794	364	46%	615	77%
Jones	842	527	63%	458	54%
Jordan	757	510	67%	510	67%
Lakeview	432	278	64%	304	70%
Lantern Lane	833	417	50%	489	59%
Leonetti	971	866	89%	1,144	118%
Lexington Creek	868	540	62%	579	67%

	Permanent Capacity	2020-21		2021-22	
		Current Enrollment	Current Utilization	Projected Enrollment	Projected Utilization
Madden	928	814	88%	863	93%
Malala	1,003	833	83%	1,004	100%
Meadows	509	385	76%	358	70%
Mission Bend	842	387	46%	421	50%
Mission Glen	821	394	48%	440	54%
Mission West	863	579	67%	582	67%
Neill	1,013	978	97%	1,139	112%
Oakland	796	875	110%	888	112%
Oyster Creek	1,020	853	84%	880	86%
Palmer	812	607	75%	722	89%
Parks	784	603	77%	681	87%
Patterson	963	757	79%	842	87%
Pecan Grove	823	657	80%	751	91%
Quail Valley	800	480	60%	520	65%
Ridgegate	814	464	57%	455	56%
Ridgemont + ELC	1,094	804	73%	844	77%
Scanlan Oaks	977	792	81%	870	89%
Schiff	974	881	90%	903	93%
Seguin	839	642	77%	788	94%
Settlers Way	927	803	87%	896	97%
Sienna Crossing	1,020	977	96%	1,025	100%
Sugar Mill	825	555	67%	534	65%
Sullivan	1,119	1,253	112%	1,214	108%
Townewest	796	567	71%	543	68%
Walker Station	862	809	94%	826	96%
Totals:		33,097		35,120	

Projected Middle School Utilization 2021-22

Projected Enrollment in 2021-22
Compared to Permanent Planned Capacity



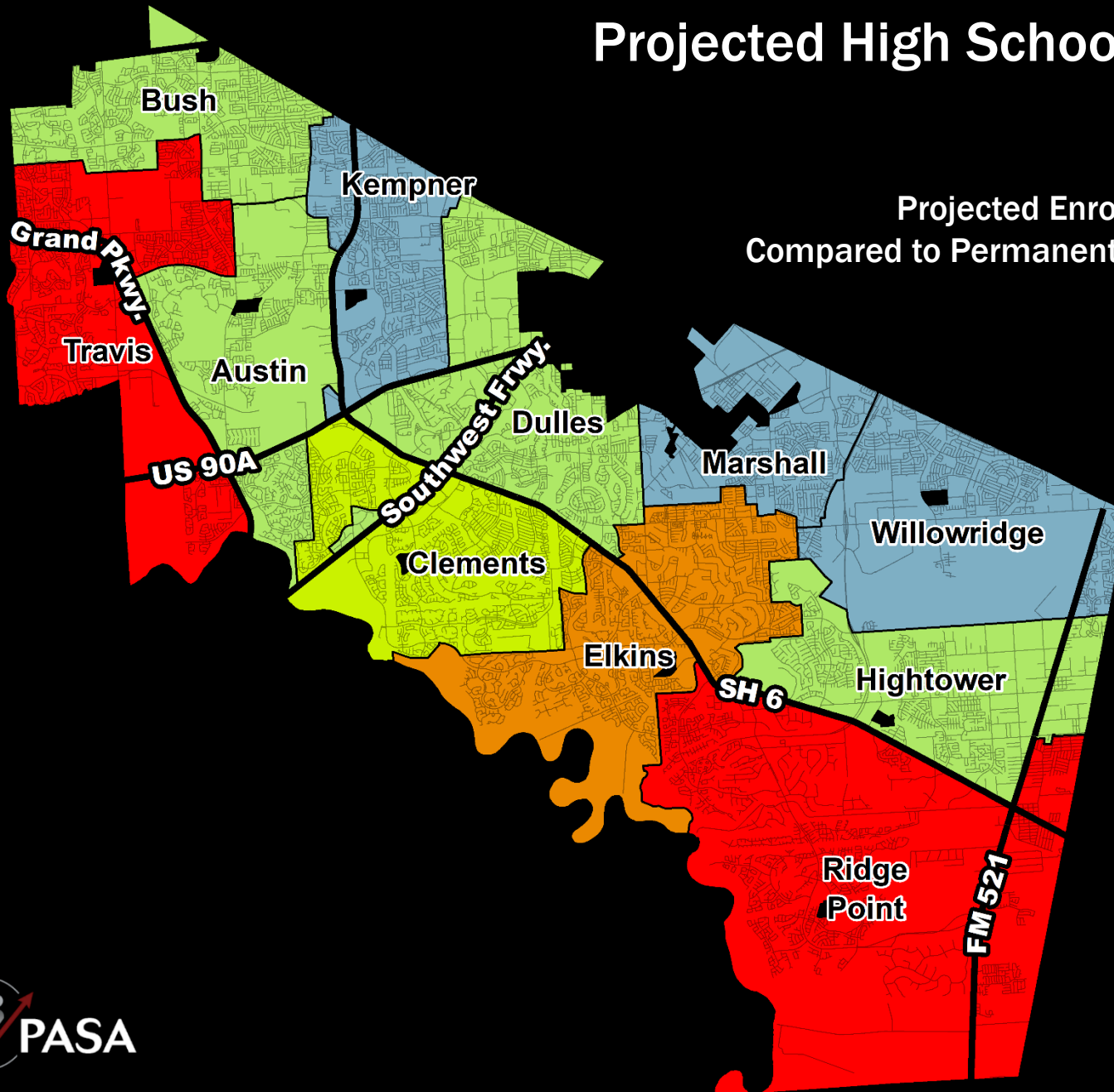
Projected Middle School Enrollment 2021-22



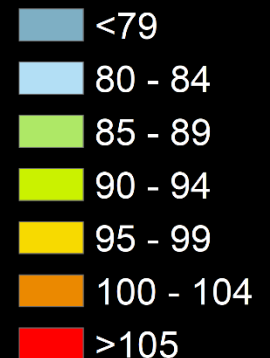
	Permanent Capacity	2020-21		2021-22	
		Current Enrollment	Current Utilization	Projected Enrollment	Projected Utilization
Baines	1,723	1,256	73%	1,315	76%
Bowie	1,657	1,485	90%	1,581	95%
Crockett	1,603	1,064	66%	1,159	72%
Dulles	1,880	1,418	75%	1,446	77%
First Colony	1,515	1,270	84%	1,275	84%
Fort Settlement	1,723	1,360	79%	1,443	84%
Garcia	1,631	1,411	87%	1,481	91%
Hodges Bend	1,526	1,036	68%	956	63%
Lake Olympia	1,513	1,224	81%	1,184	78%
McAuliffe	1,488	908	61%	910	61%
Missouri City	1,678	1,000	60%	978	58%
Quail Valley	1,639	1,067	65%	1,079	66%
Sartartia	1,723	1,324	77%	1,355	79%
Sugar Land	1,495	1,148	77%	1,124	75%
Thornton	1,494	1,342	90%	1,545	103%
Totals:		18,313		18,831	

Projected High School Utilization 2021-22

Projected Enrollment in 2021-22
Compared to Permanent Planned Capacity



Percent Utilization
2021-22

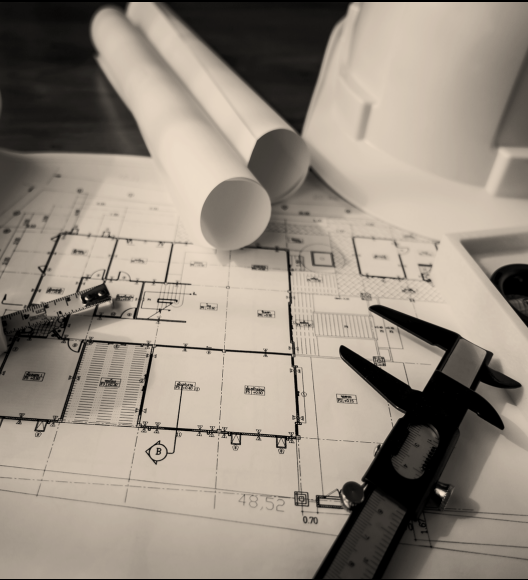


Projected High School Enrollment 2021-22

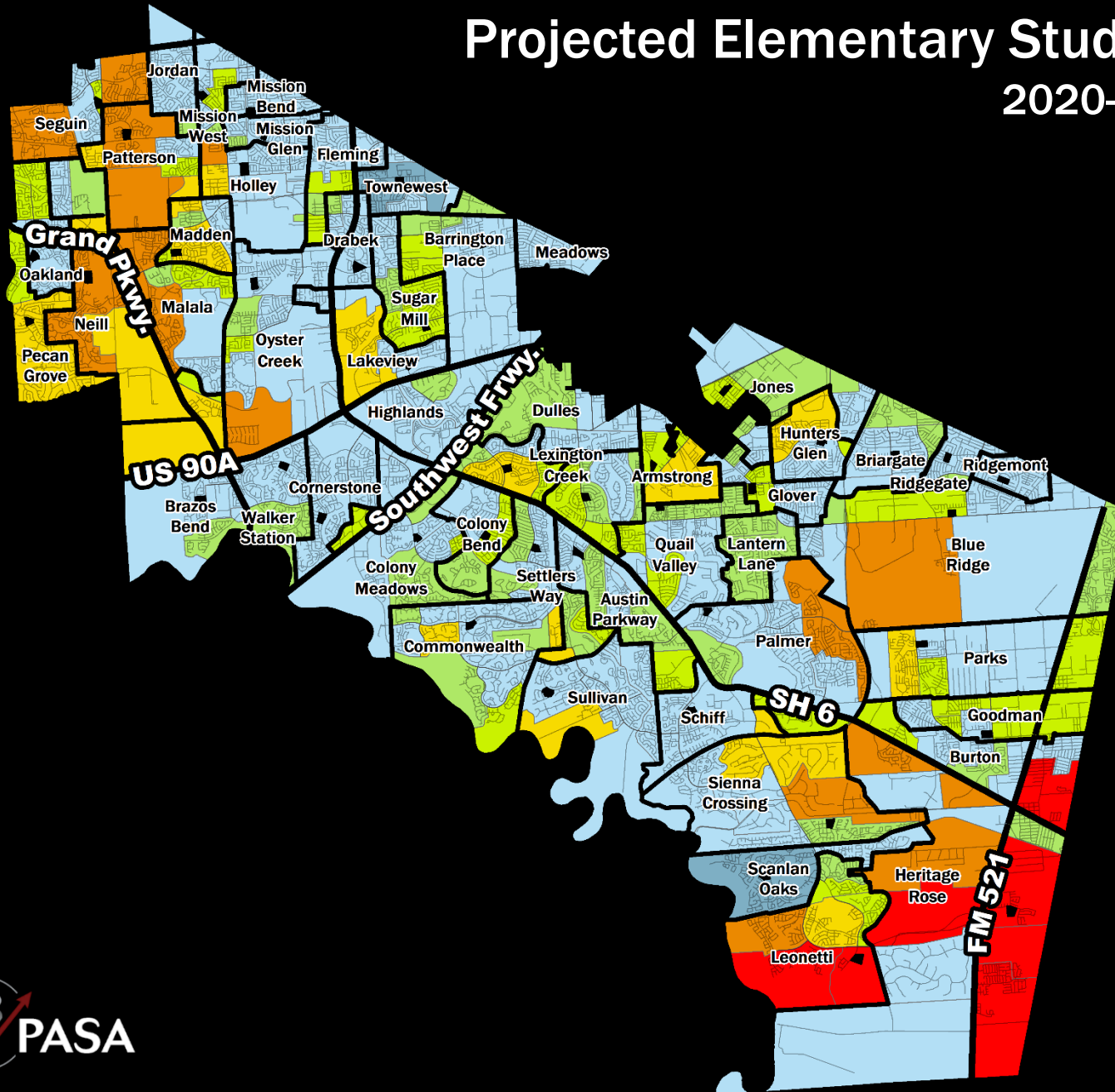


	Permanent Capacity	2020-21		2021-22	
		Current Enrollment	Current Utilization	Projected Enrollment	Projected Utilization
Austin	2,552	2,249	88%	2,267	89%
Bush	2,893	2,521	87%	2,578	89%
Clements	2,658	2,496	94%	2,499	94%
Dulles	2,875	2,548	89%	2,534	88%
Elkins	2,559	2,565	100%	2,579	101%
Hightower	2,746	2,159	79%	2,455	89%
Kempner	2,659	2,070	78%	2,005	75%
Marshall	2,570	1,392	54%	1,433	56%
Ridge Point	2,587	3,028	117%	3,011	116%
Travis	2,922	3,013	103%	3,112	107%
Willowridge	2,553	1,291	51%	1,277	50%
Totals:		25,332		25,750	

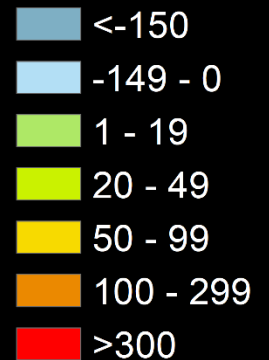
Long-Range Planning



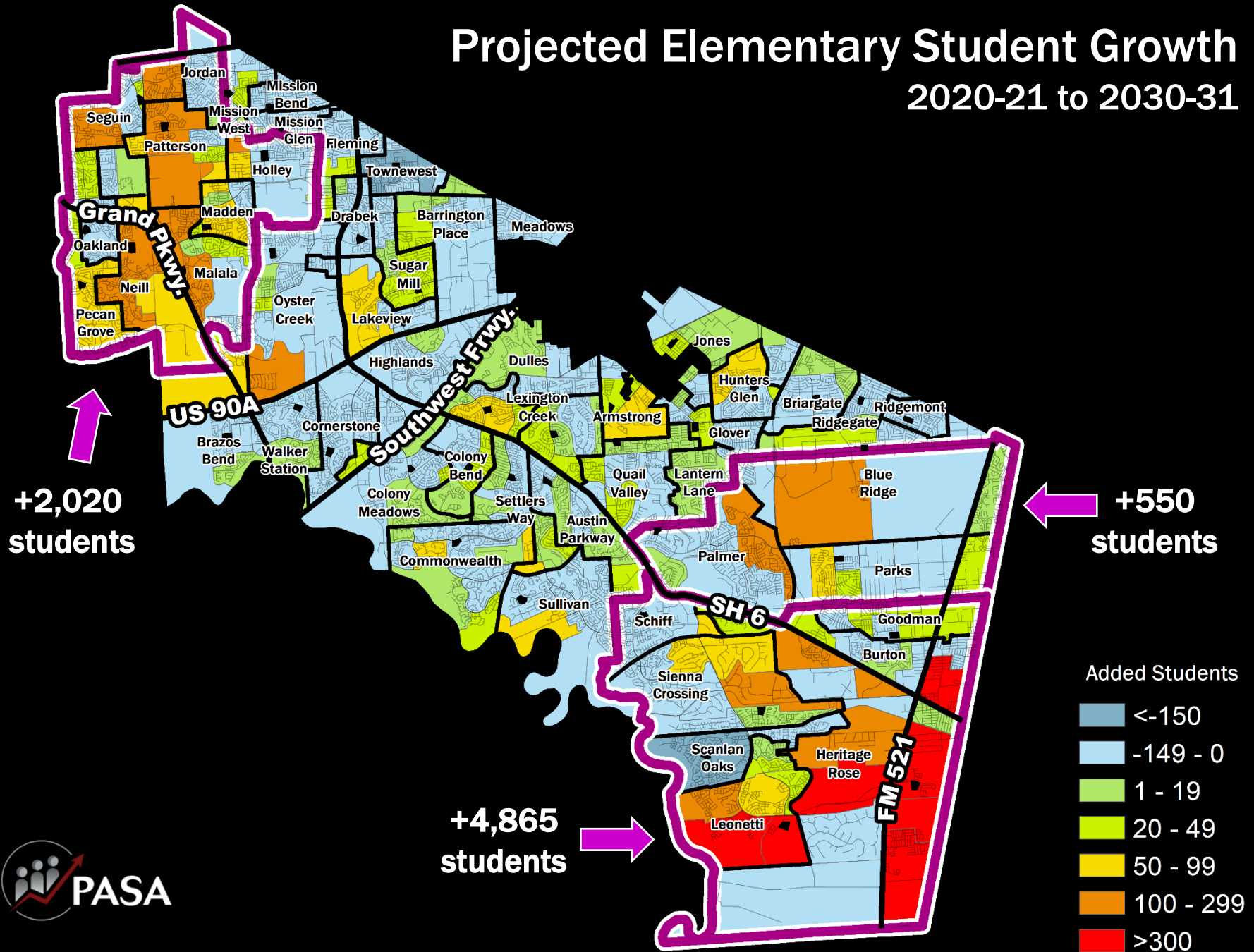
Projected Elementary Student Growth 2020-21 to 2030-31



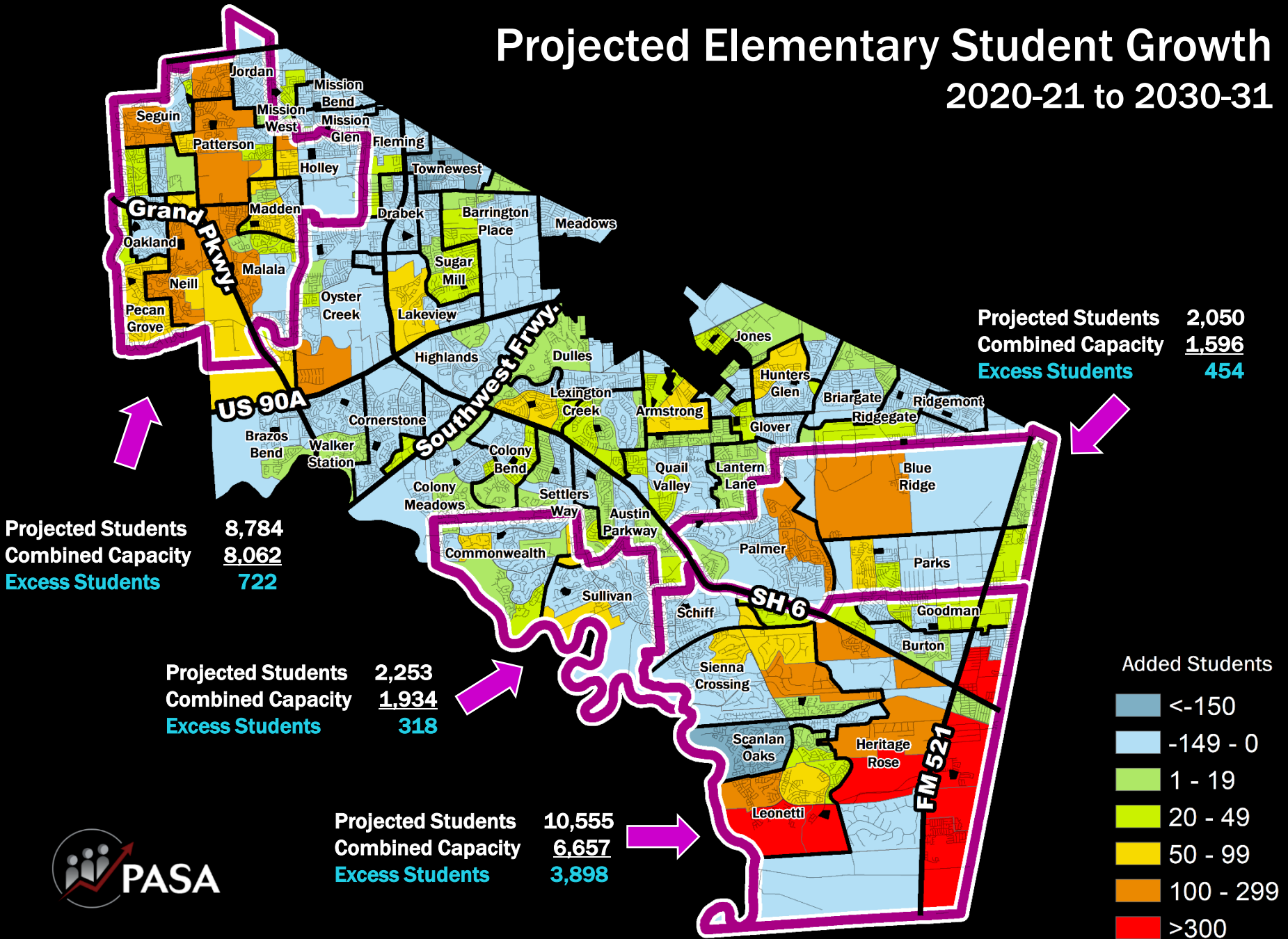
Added Students



Projected Elementary Student Growth 2020-21 to 2030-31

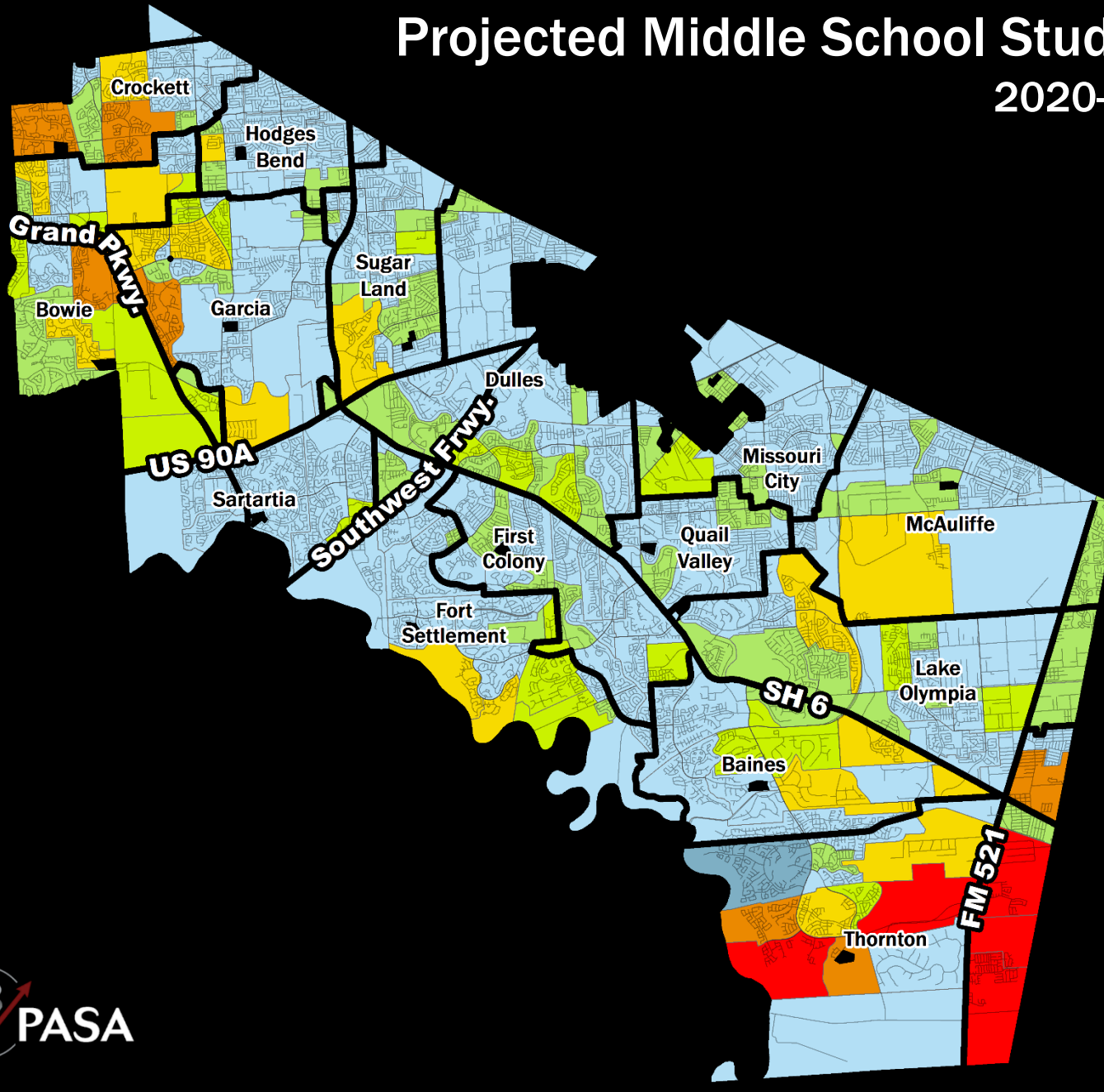


Projected Elementary Student Growth 2020-21 to 2030-31

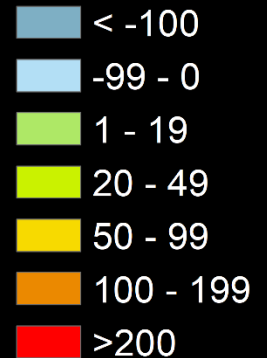


Projected Middle School Student Growth

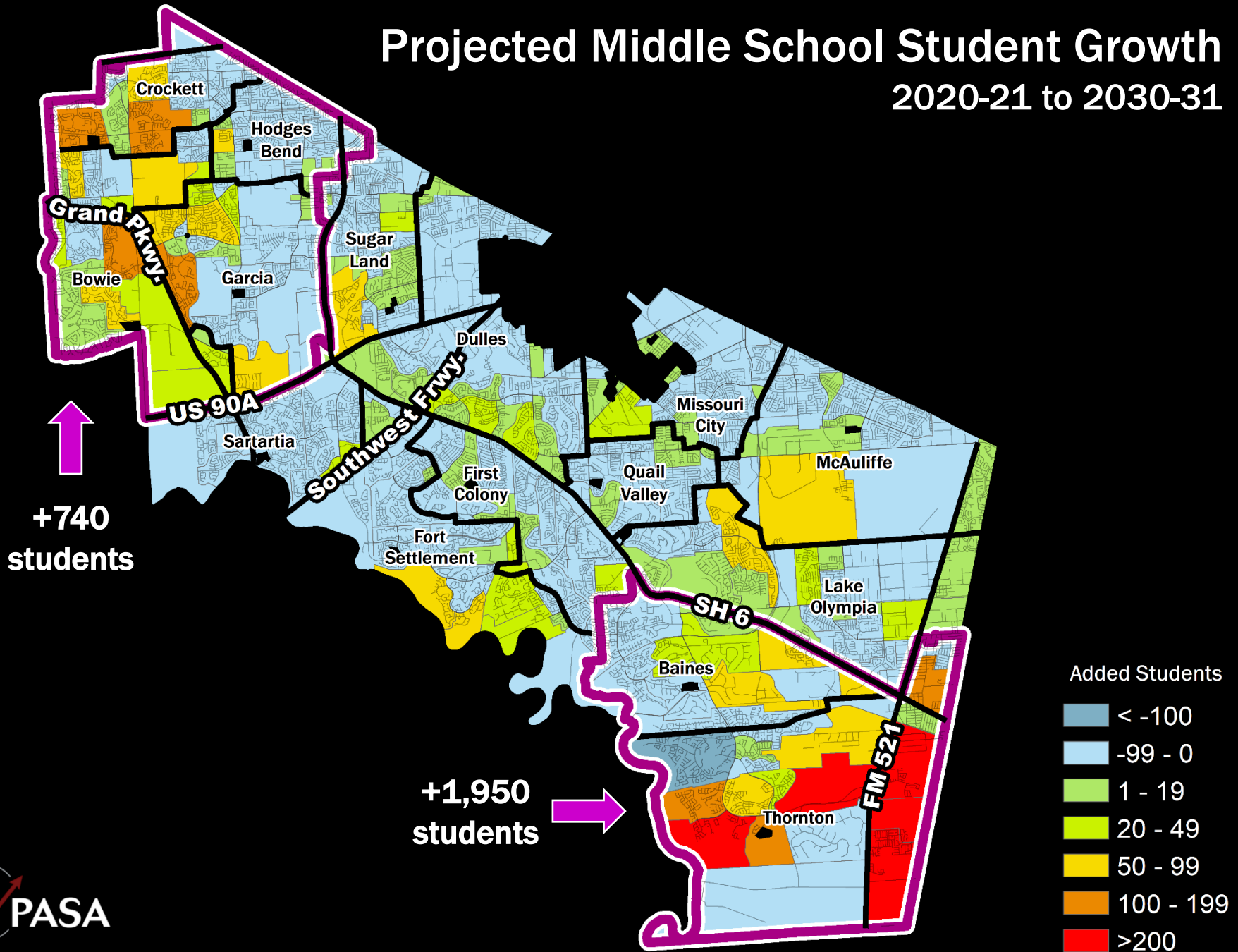
2020-21 to 2030-31



Added Students

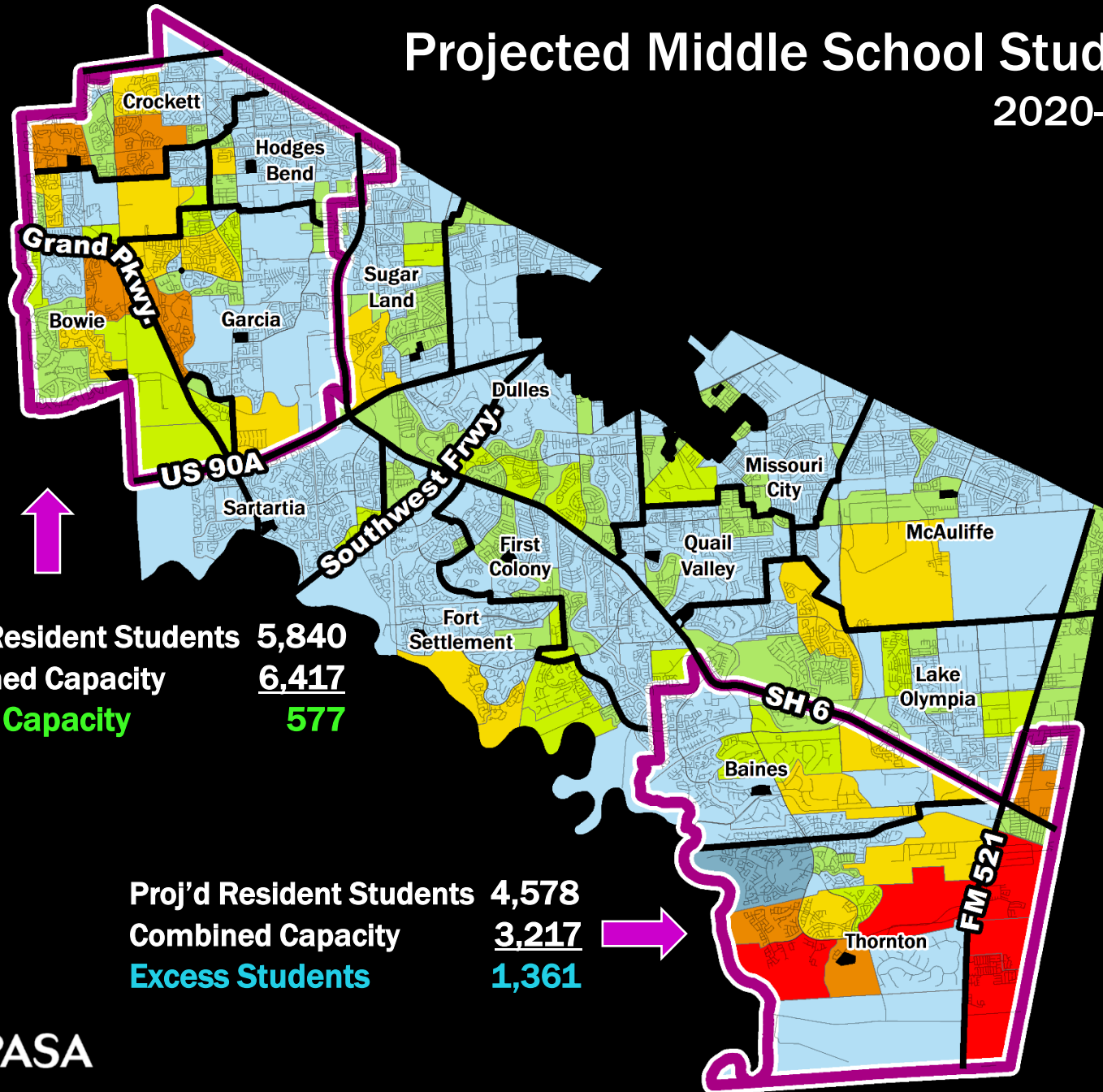


Projected Middle School Student Growth 2020-21 to 2030-31

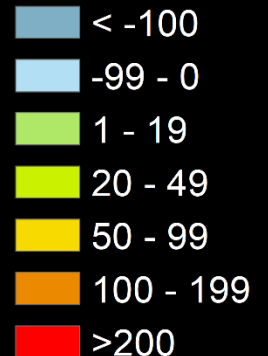


Projected Middle School Student Growth

2020-21 to 2030-31



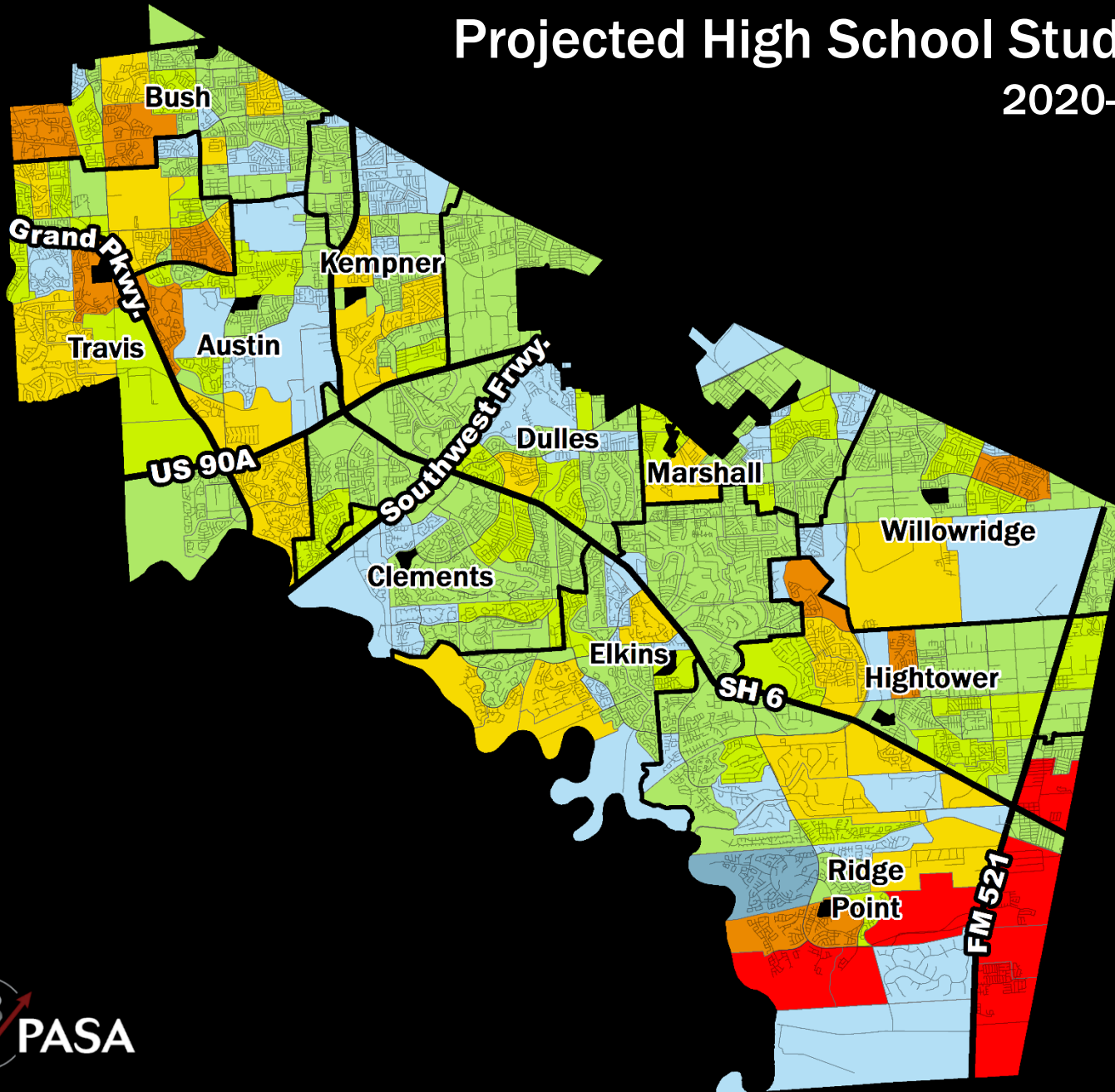
Added Students



Moderate Growth Scenario

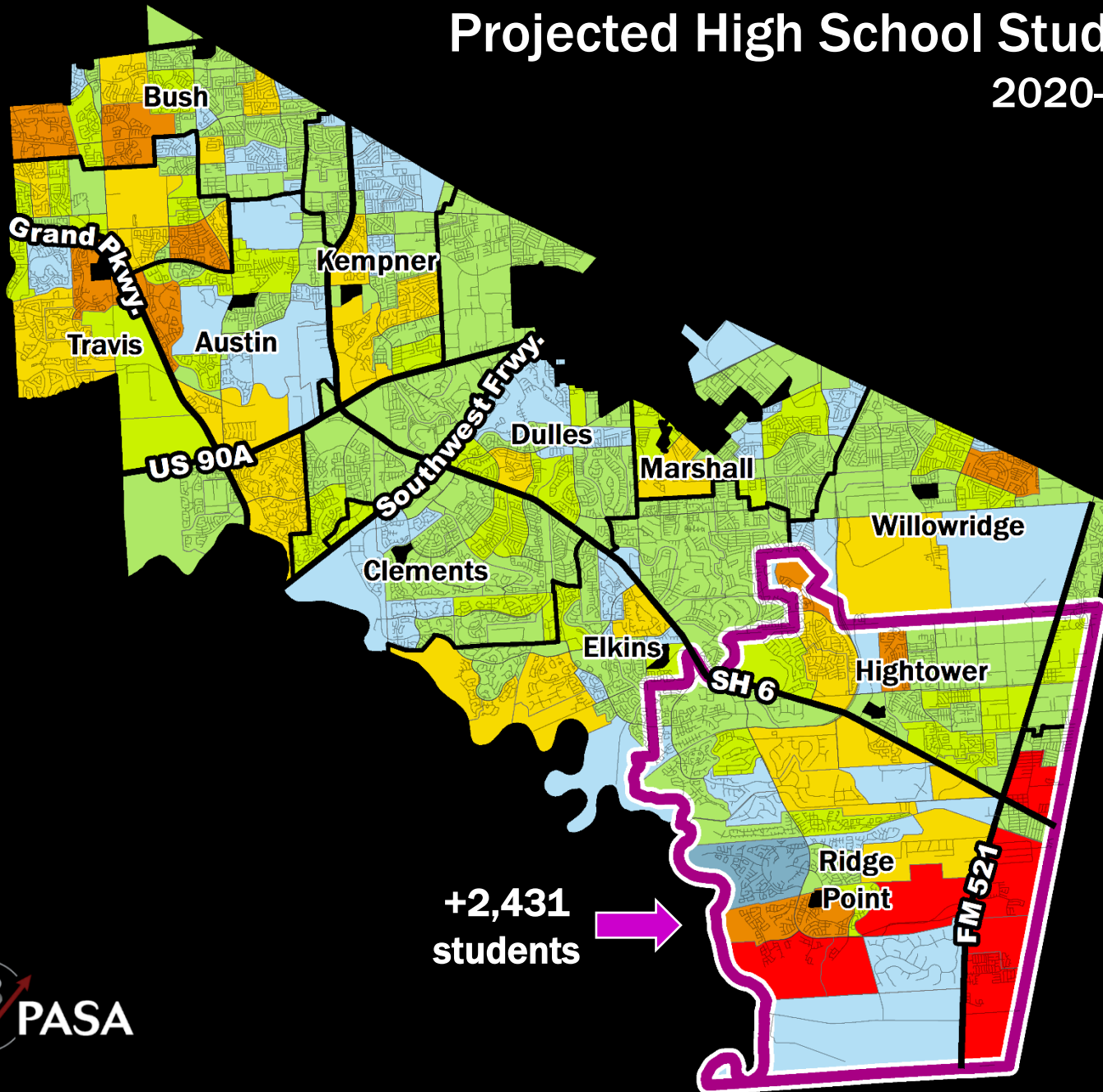
Projected High School Student Growth

2020-21 to 2030-31

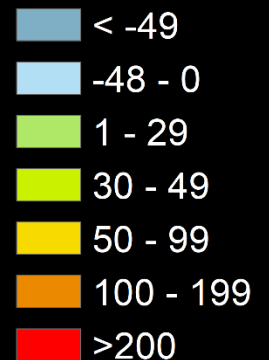


Projected High School Student Growth

2020-21 to 2030-31



Added Students



Long-Range Plan Summary

In the Next Ten Years

- ▶ **New Elementary Schools**
 - ▶ New Elementary in Riverstone
 - ▶ Four Elementary Schools in southeast
 - ▶ New Elementary in Parks Edge
 - ▶ New Elementary in northwest
- ▶ **New Middle School in southeast**
- ▶ **High School #12 in southeast**





QUESTIONS?



FORT BEND ISD

February 2021