



Fort Bend ISD Enrollment Analysis Special Presentation

Presenter:
Dr. Stacey Tepera, President

December 15, 2025



Purpose

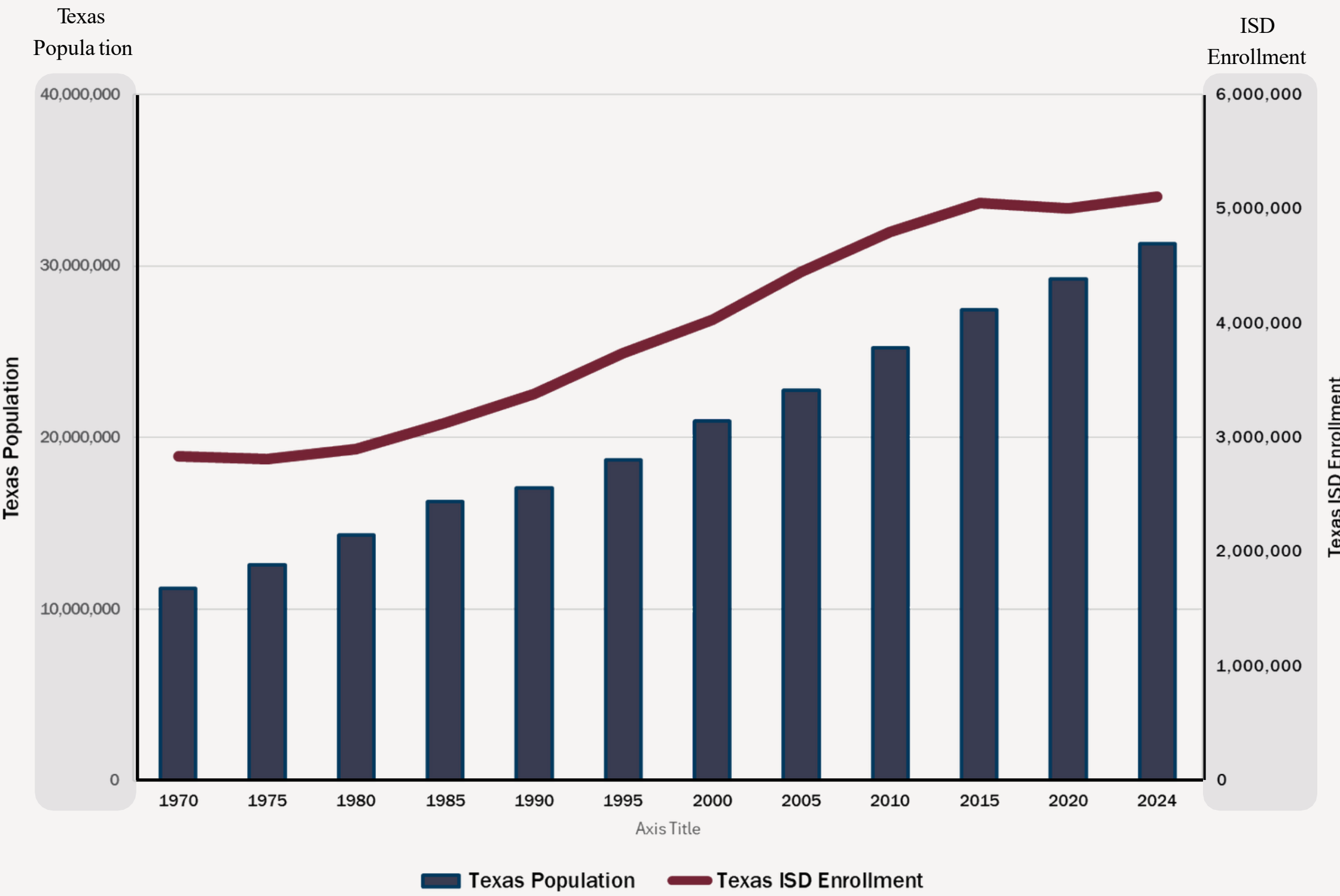
- To assess the 2025–26 Demographic Study projections in comparison with last year's projections
- Help determine whether any shifts in projected enrollment warrant adjustments to the three-year long-range planning initiative

What has changed recently?

- Recent changes in enrollment trends throughout Texas
- Local changes impacting Fort Bend ISD enrollment
- How have the new projections changed?

What does this mean for the current Long -Range Boundary Planning process?

Texas Population vs. ISD Enrollment

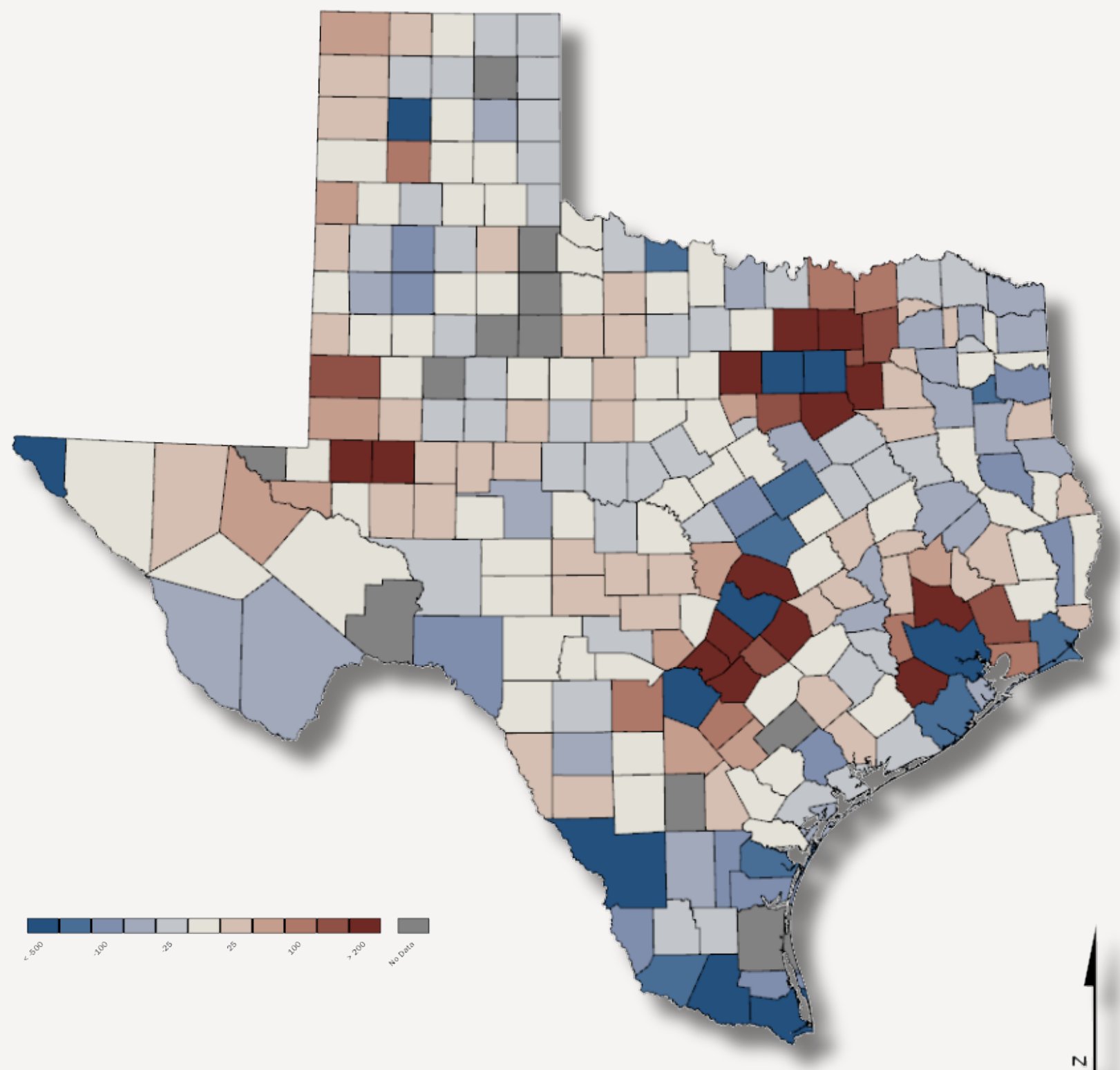


Growth by Decade

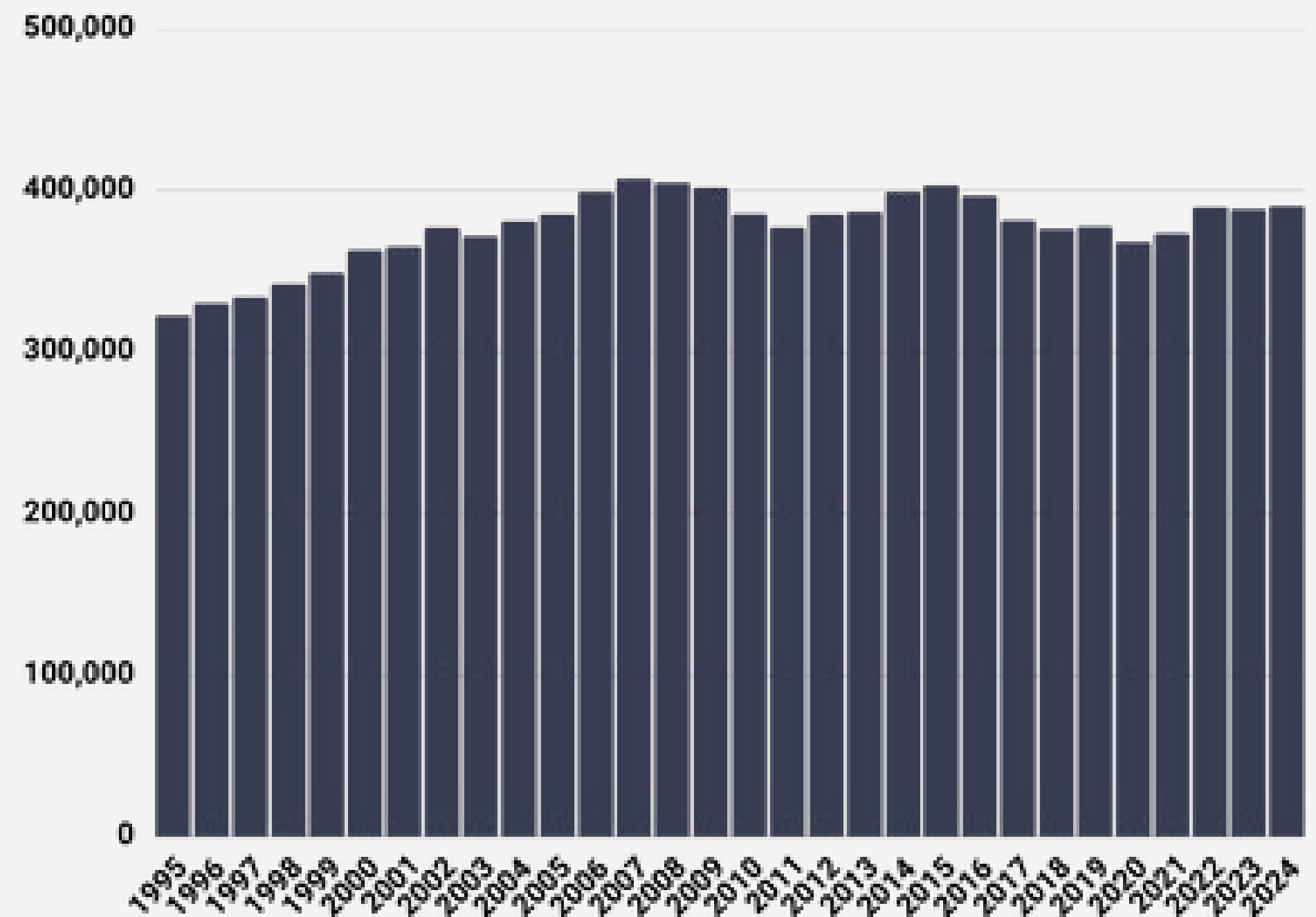
	Texas Population	ISD Enrollment
1980 to 1989	17%	15%
1990 to 1999	18%	18%
2000 to 2009	18%	17%
2010 to 2019	15%	7%
2020 to 2024	7%	2%

Texas' population has continued steady growth across decades, while ISD enrollment has slowed significantly. From 1980 to 2009, enrollment growth kept pace with population increases. However, since 2010, the growth rate in ISD enrollment has only been about half of the growth rate of the total population.

Growth and Decline in Number of Births by County 2010 to 2020



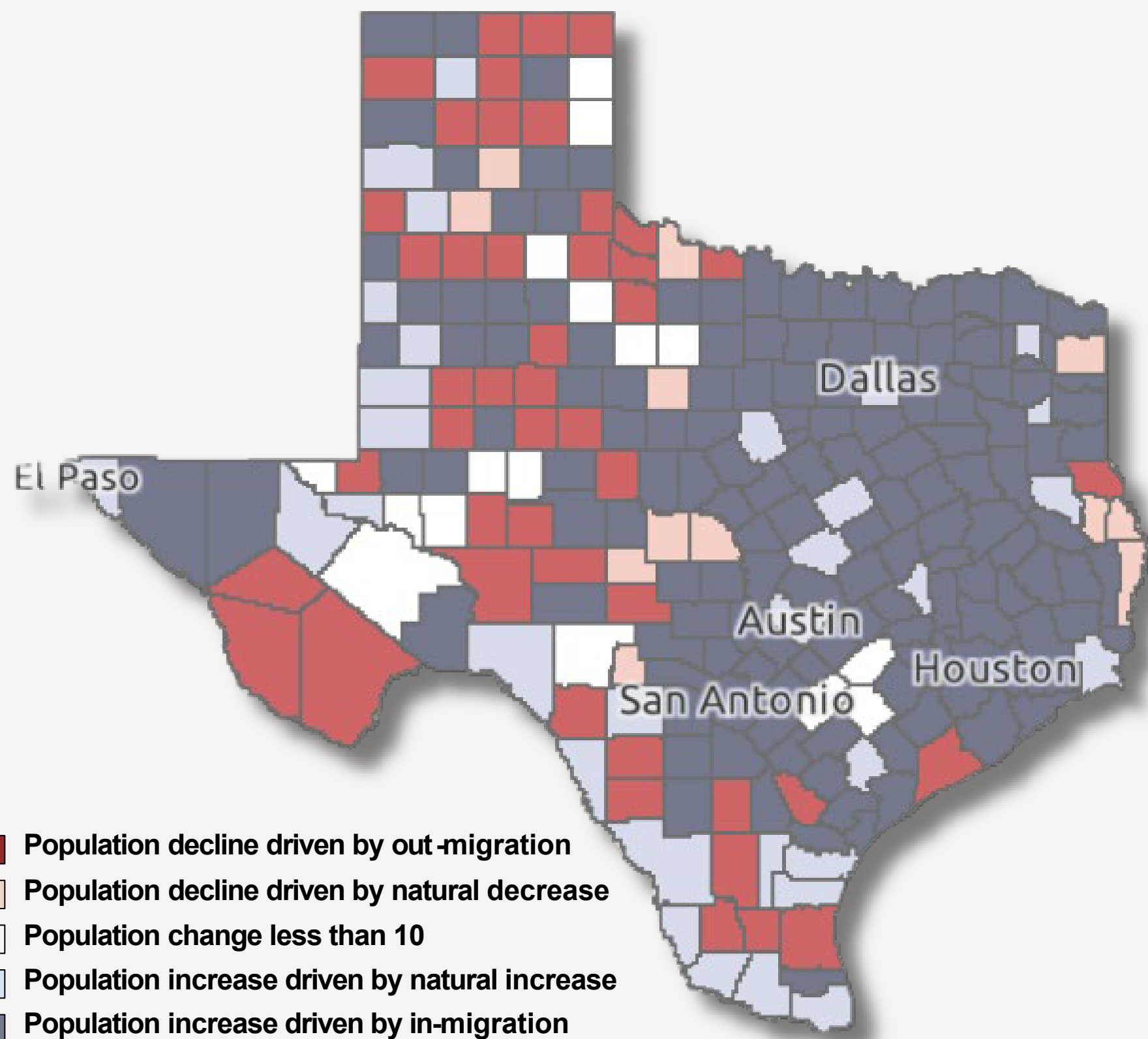
Number of Births in Texas 1995 to 2024



General downward trend in births since 2015

Texas has seen a general decline in births since 2015, reducing the pipeline of future kindergarten enrollments. Suburban counties are experiencing birth growth, while urban and rural areas are seeing declines. As a result, enrollment growth pressures are expected to intensify in fast-growing suburban counties, while urban and rural counties may face stagnation or gradual decline.

Texas Demographics and Migration



Proportion of Migrants by Age

Age	2014	2024
1 to 17	22.5%	20.8%
18 to 24	17.1%	17.6%
25 to 54	49.1%	49.3%
55+	11.4%	12.3%

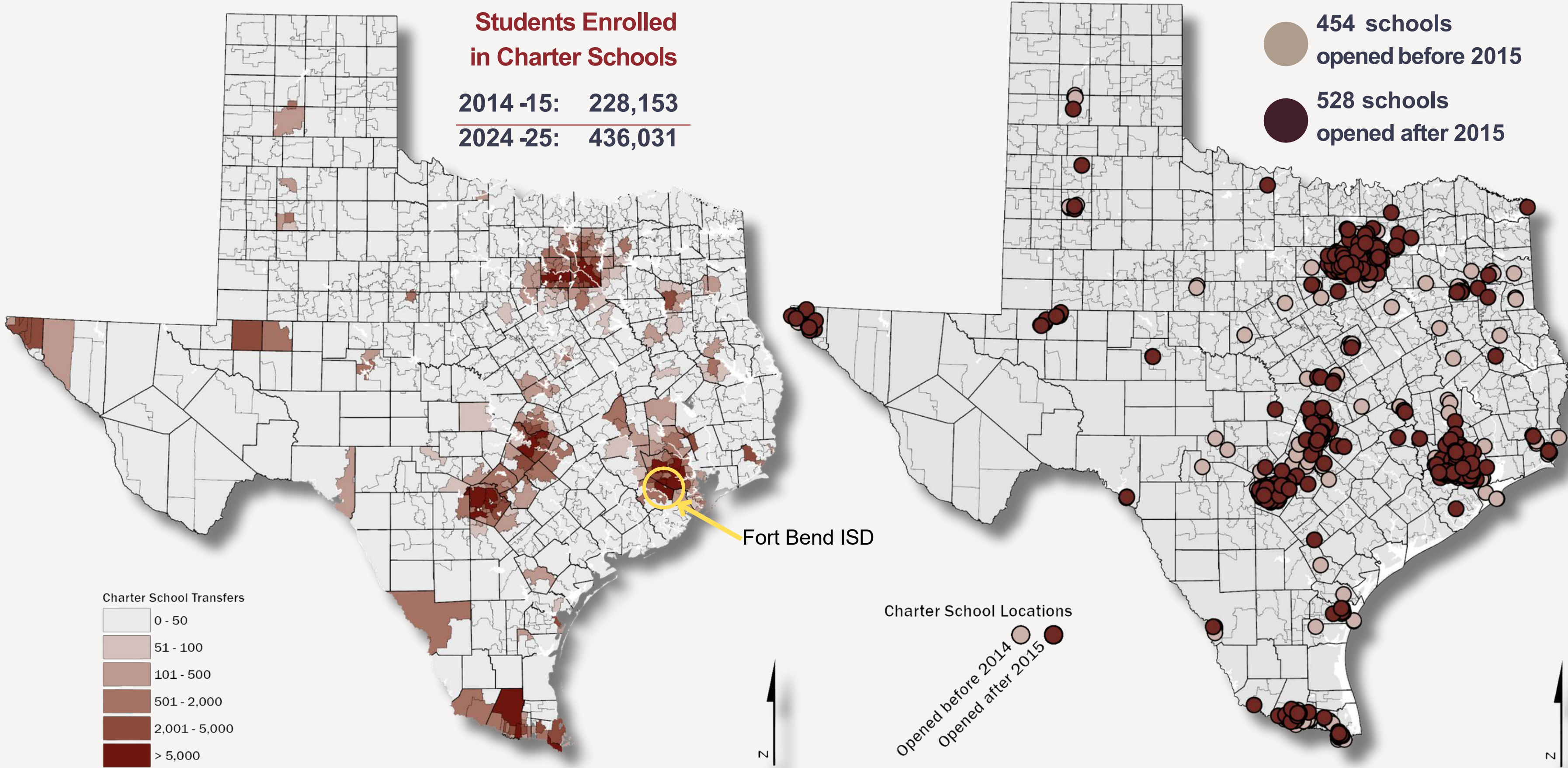
- **Population change is uneven statewide** – Fast-growing counties gain from strong in-migration, while rural and aging areas continue to decline.
- **Regional context drives enrollment** – Local migration patterns matter more than statewide averages.
- **Families cluster in select suburban corridors** – Housing availability and preferences concentrate growth in specific districts.

- **Newcomer households have fewer children**– More migrants are young adults or older adults (55+), delaying enrollment impacts.
- **Migrant origins shape age profiles** – Domestic movers skew older; international migrants more often include younger adults and future parents.

Charter School Expansion in Texas

Growth in Charter Enrollment: 2014 -15 to 2024 -25

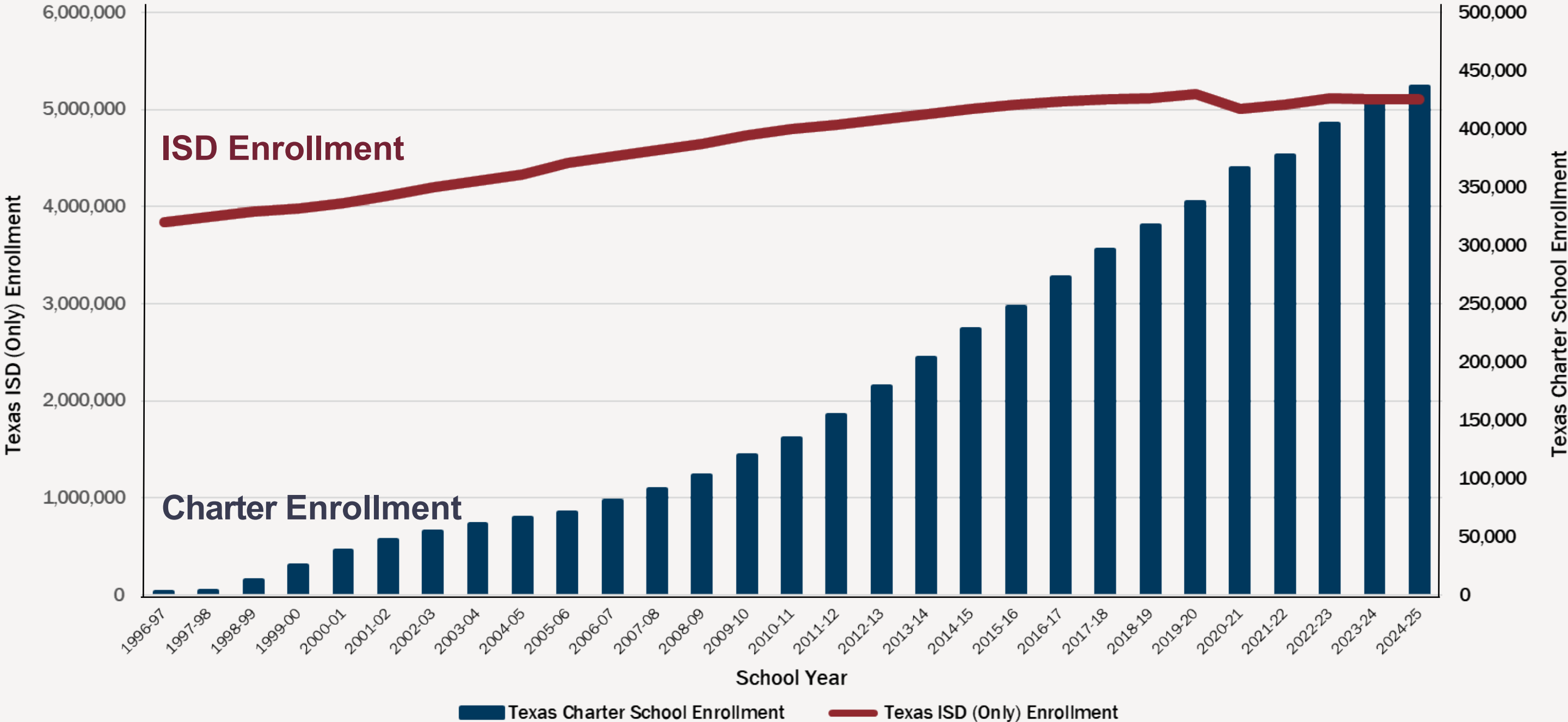
Charter Schools in Texas



Charter school enrollment in Texas has nearly doubled over the past decade, with most of the growth concentrated in metro areas. As seen on the map above (right), over half of all charter schools operating today have opened since 2015, significantly influencing enrollment patterns for nearby districts.

Charter School Expansion in Texas

Charter Enrollment vs. ISD Enrollment



2014 to 2024
Growth

ISD
Enrollment
+2%

Charter
Enrollment
+91%

Texas
Charter
School
Timeline

May 1995
Senate Bill 1
Charter Schools

May 2001
Charter school cap
raised from 20 to
100

May 2013
Texas received a
federal grant,
expanding access in
underserved
communities

May 2015
Senate Bill 2
increased number of
charters to 305

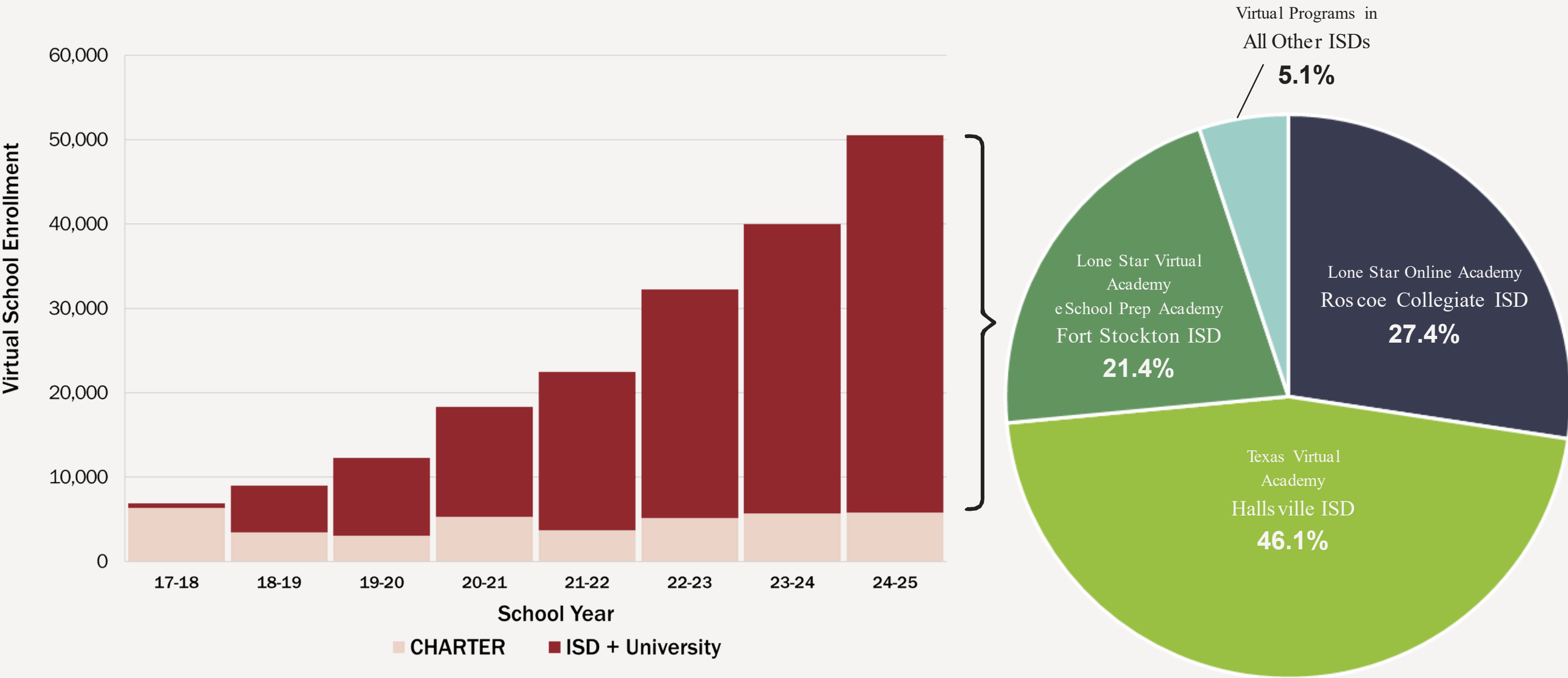
2024-25
Charter School
enrollment exceeds
425,000

From 2014 to 2024, ISD enrollment in Texas grew modestly by 2%, while charter school enrollment surged by 91%, surpassing 425,000 students. This rapid charter growth highlights shifting enrollment dynamics and increasing competition for traditional public schools.

Virtual School Expansion in Texas

Virtual school enrollment has increased **1,200%** in ten years, with nearly **50,525** students enrolled statewide. Prior to 2018-19, virtual school opportunities were primarily offered through charter schools. By 2024-25, virtual programs offered by ISDs dominated the virtual enrollment.

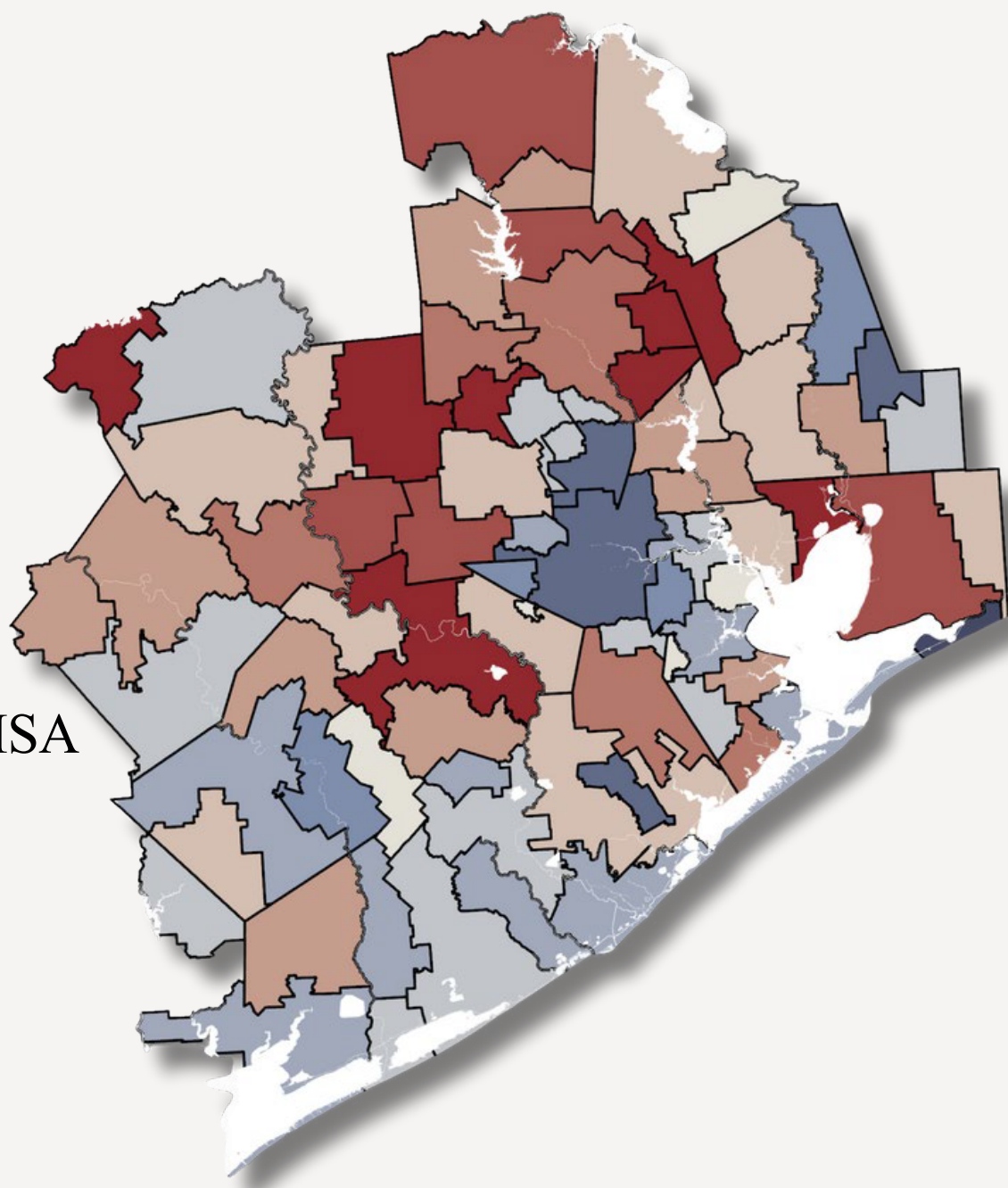
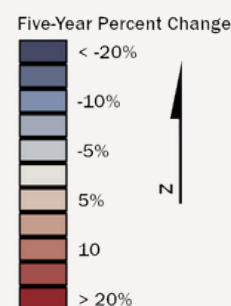
Growth of Texas Virtual School Enrollment



Senate Bill 569, passed in the most recent legislative session, could reshape public school enrollment in Texas by giving districts and charters the authority to operate their own full-time virtual and hybrid campuses. This shift from a state-managed system to local control expands the range of online options available to families and may draw students who would otherwise leave for statewide virtual programs. For traditional ISDs, the bill creates an opportunity to reclaim enrollment by offering flexible models that meet the needs of families seeking alternatives to fully in-person schooling.

Historical Enrollment Trends

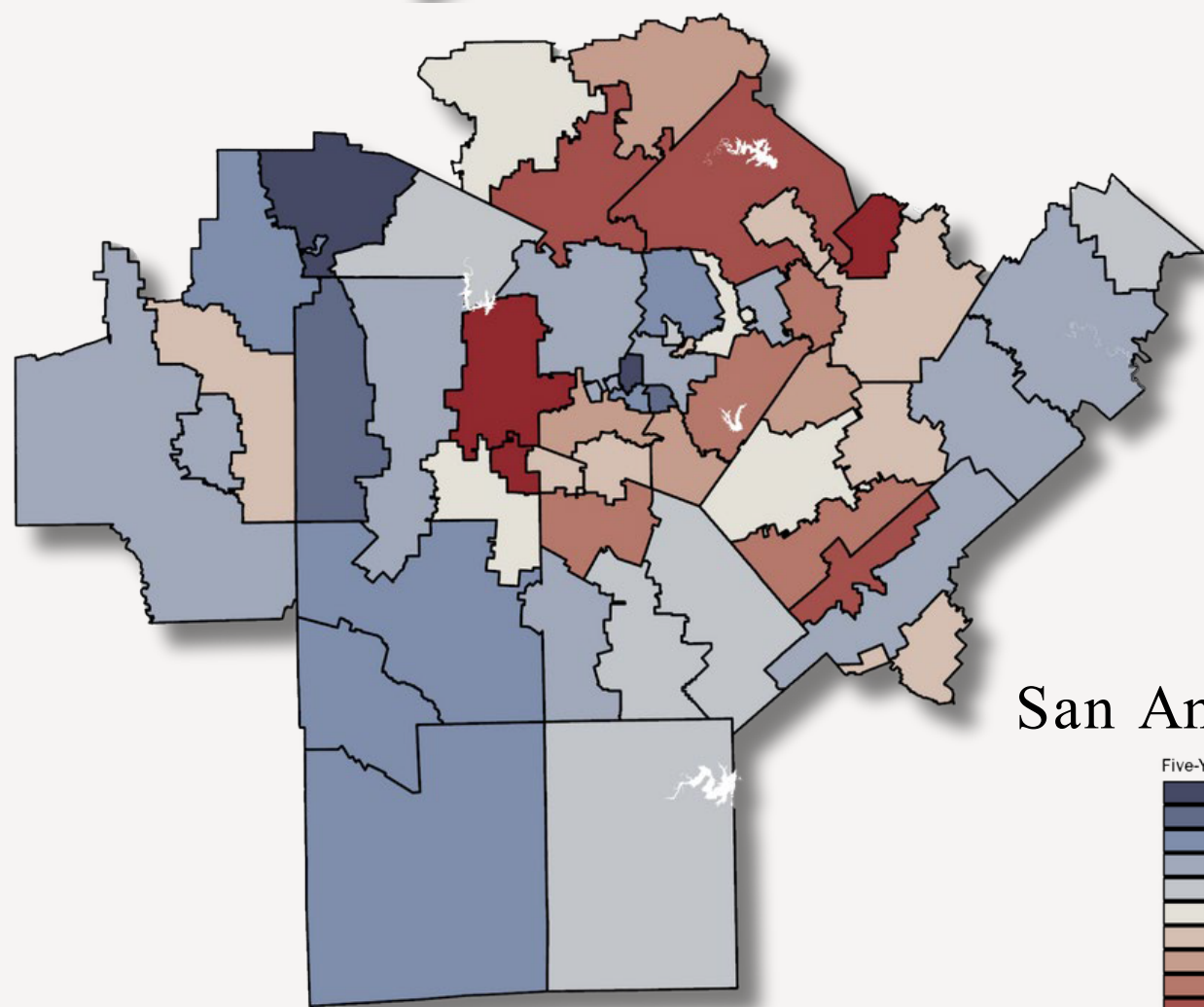
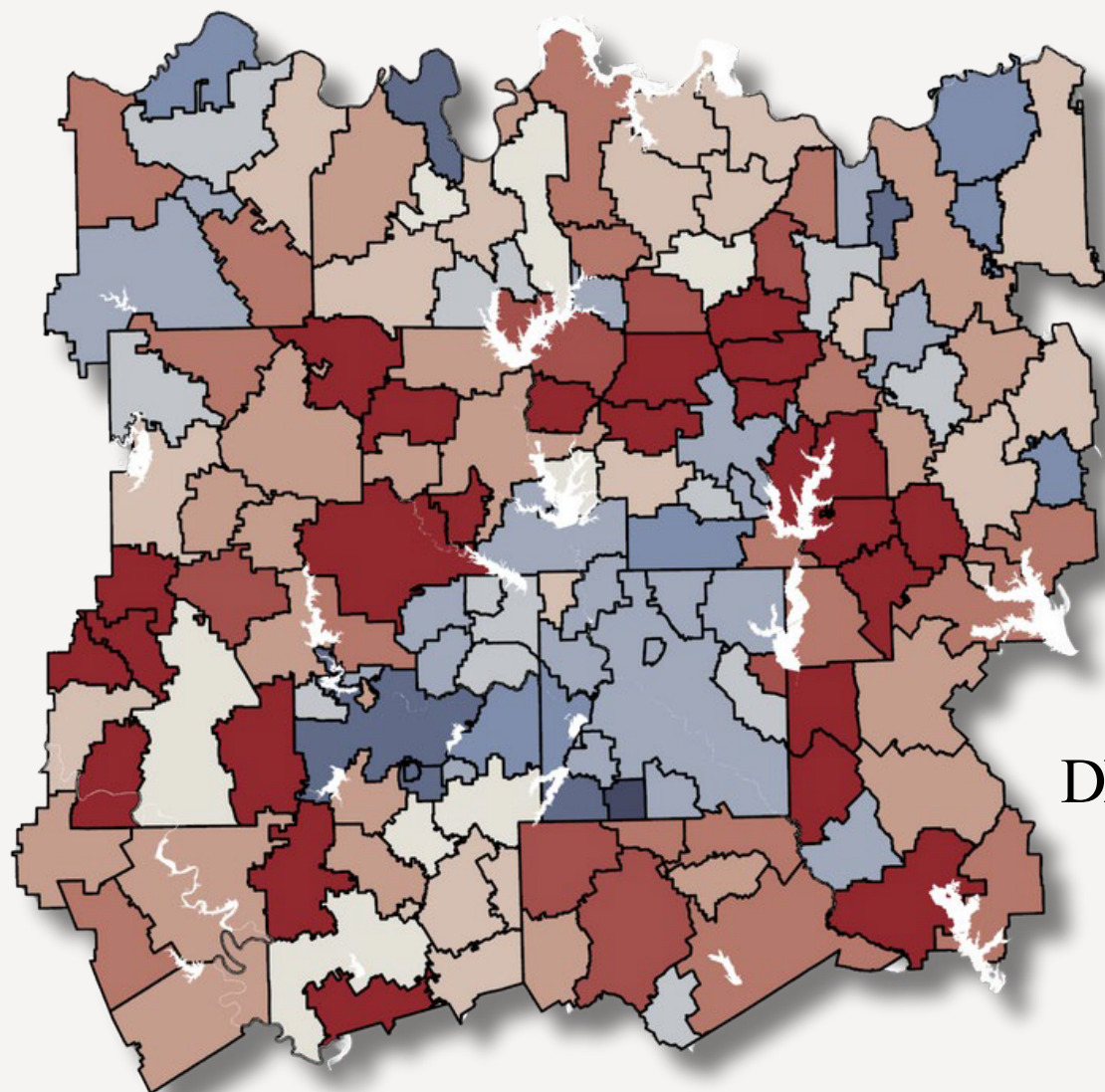
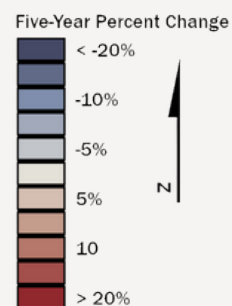
Houston MSA



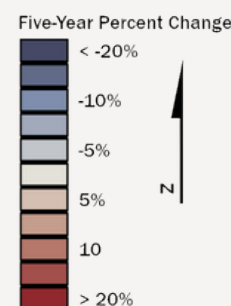
Five-Year Percent Enrollment Change 2019 -20 to 2024 -25

Across Texas' largest metro areas, five-year enrollment change is highly uneven, with rapid growth concentrated in suburban and fringe communities while many urban core and established neighborhoods are experiencing stabilization or decline.

DFW MSA

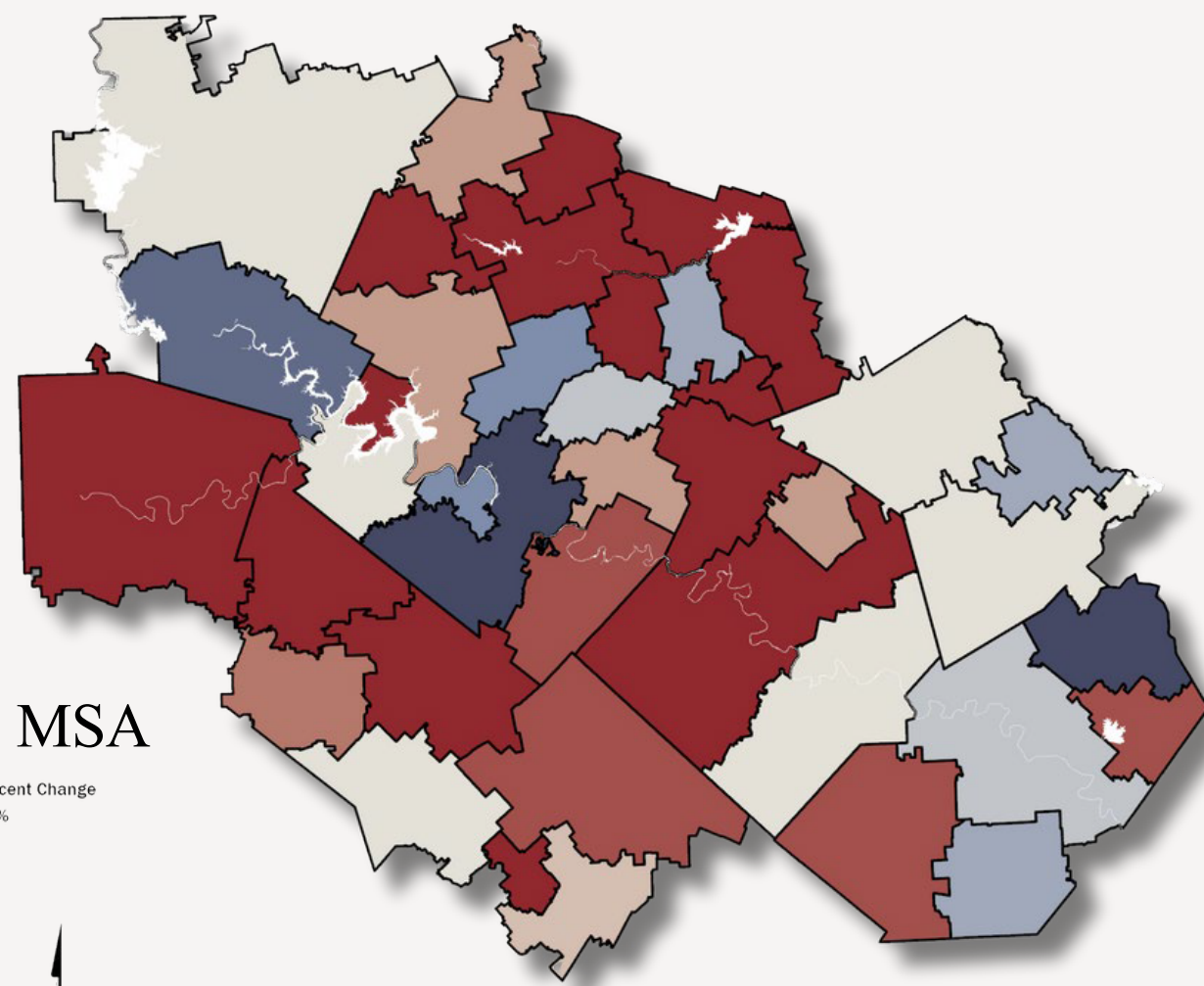
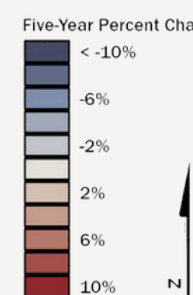


San Antonio MSA

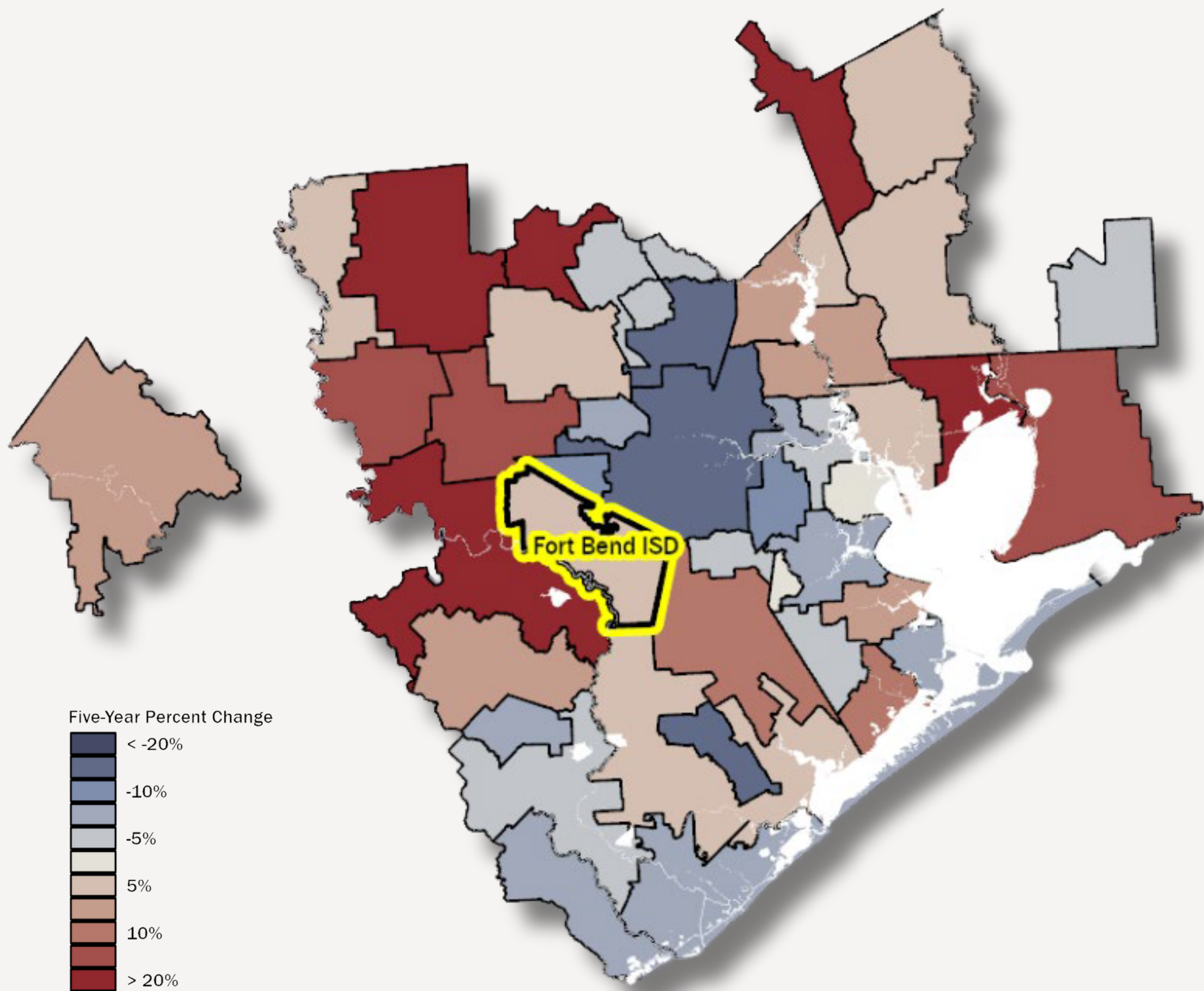


Red = Enrollment Growth
Blue = Enrollment Decline

Austin MSA



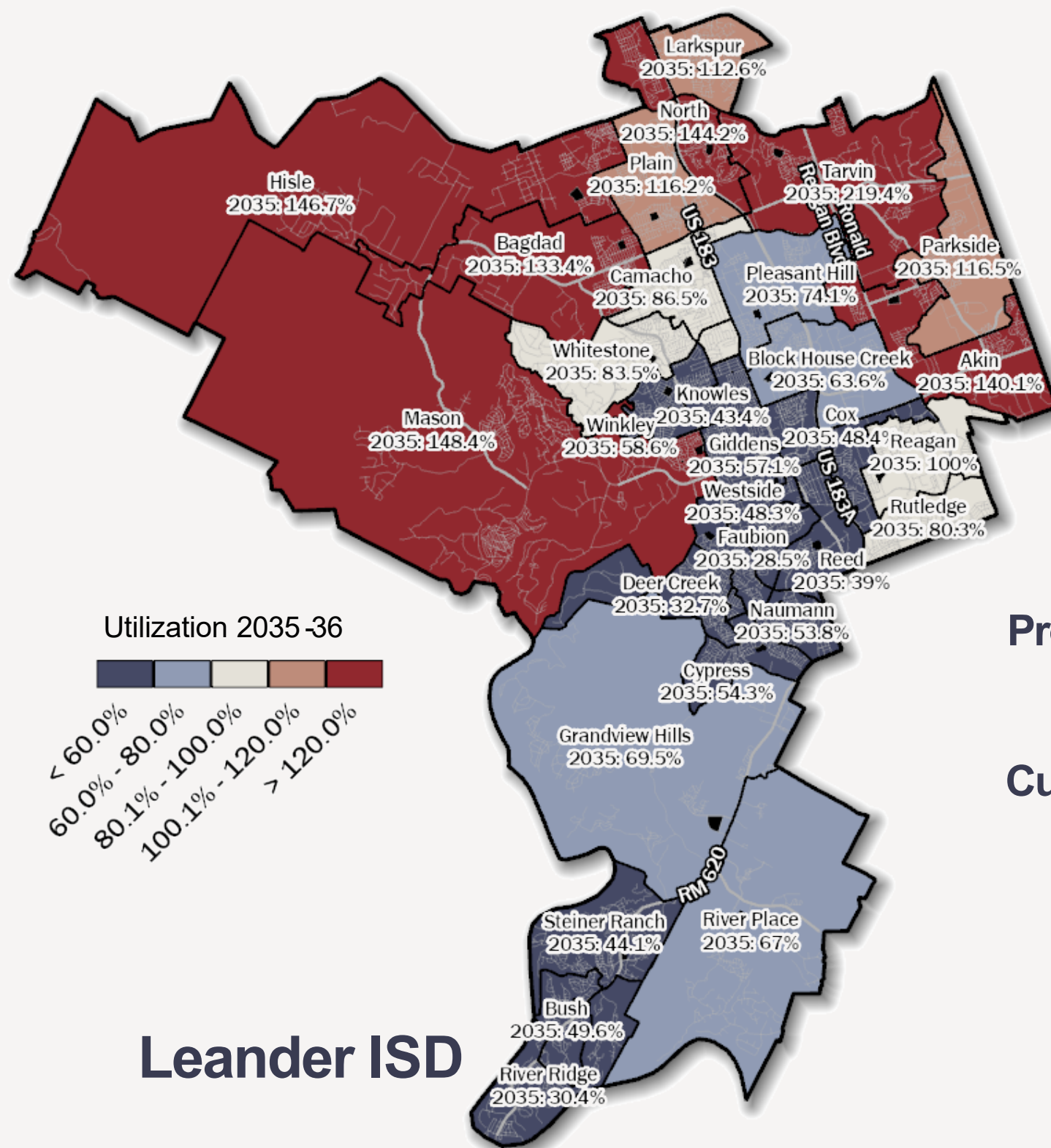
Region 4 - Five-Year Percent Enrollment Change - 2019 to 2024



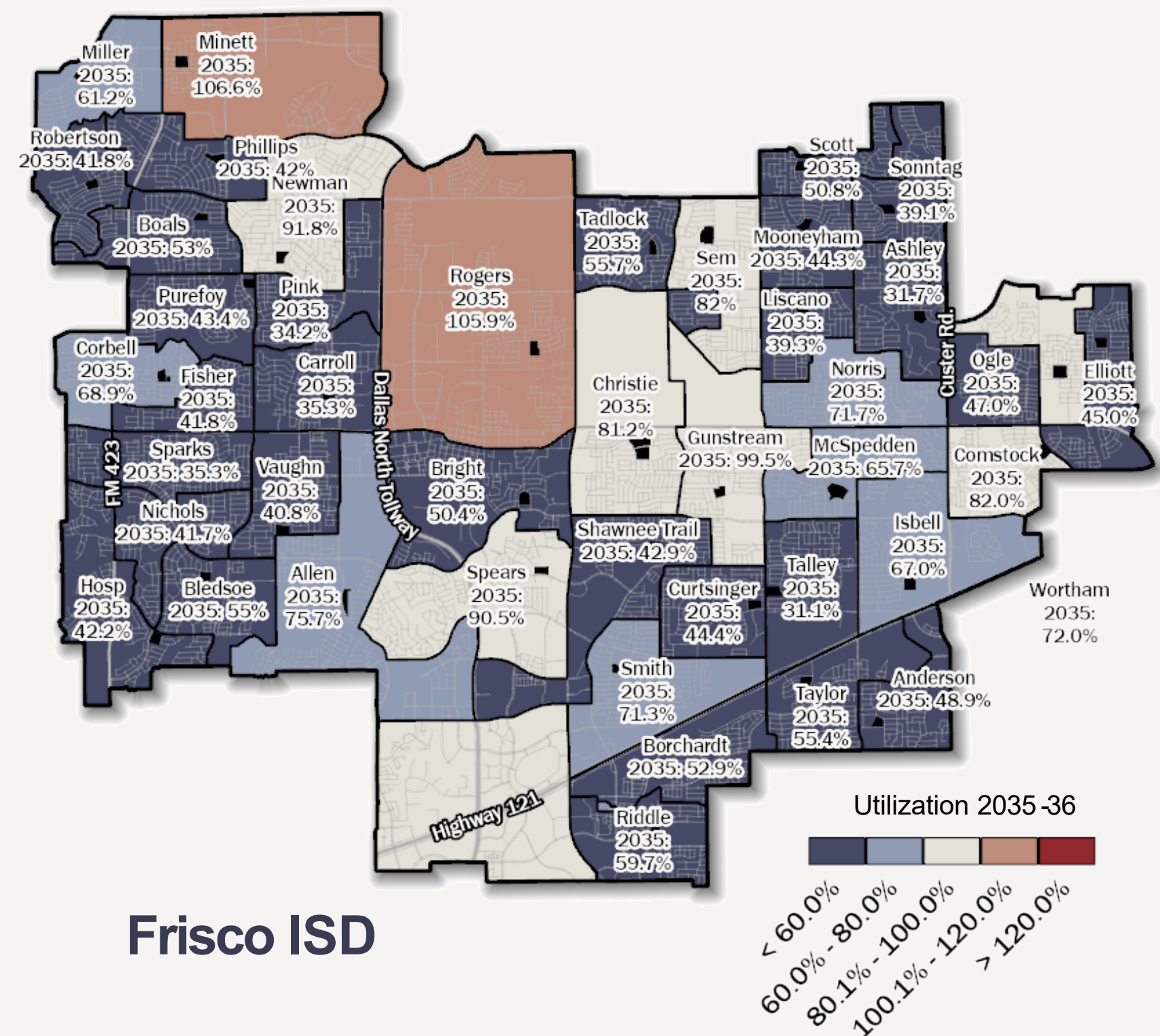
RANKED BY FIVE-YEAR PERCENT CHANGE			
ESC Region 4 Districts	Enrollment 2024-25	Five-Year Change	Rank
		percent	
Cleveland ISD	12,513	64.88%	1
Lamar CISD	46,786	33.08%	2
Waller ISD	9,905	28.15%	3
Barbers Hill ISD	7,875	25.84%	4
Tomball ISD	22,913	25.25%	5
Anahuac ISD	1,552	15.56%	6
Royal ISD	2,884	15.50%	7
Katy ISD	96,111	15.21%	8
Hitchcock ISD	2,012	13.54%	9
Alvin ISD	30,038	11.16%	10
Columbus ISD	1,659	7.51%	16
Angleton ISD	7,105	3.55%	17
Fort Bend ISD	79,663	2.45%	18
Hempstead ISD	1,585	2.19%	19
Dayton ISD	5,675	1.99%	20

Enrollment Shifts: Is this Unique?

Districts with Similar Stories Projected Elementary School Utilization 2034 -35

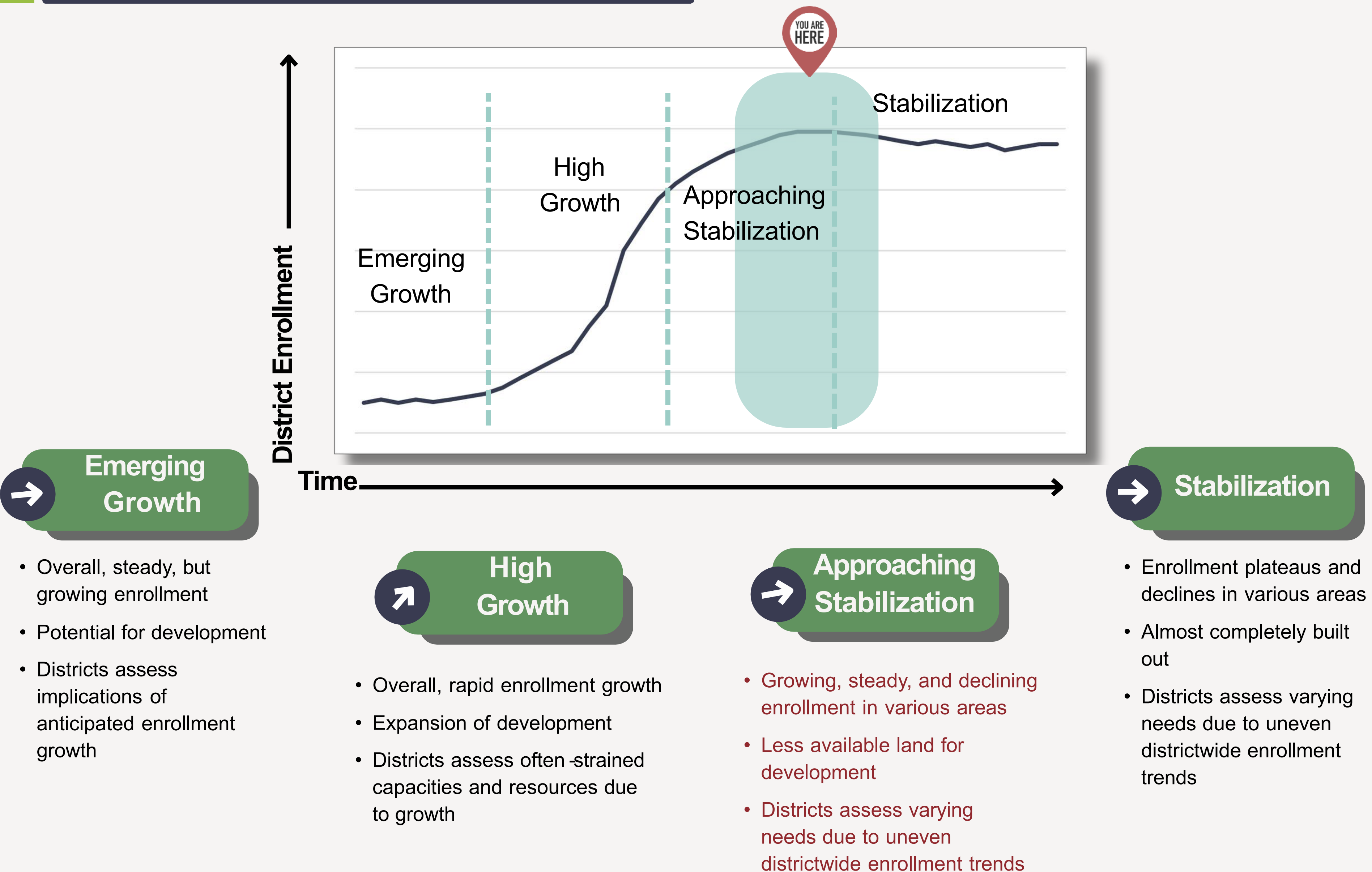


**Projected Resident
Students
vs.
Current Capacities**



Like Fort Bend ISD, the districts above previously experienced rapid growth and are now transitioning into a stabilization phase. Future development is expected to concentrate in the northern portion in Leander ISD, and north and west in Frisco ISD. The central and southern areas in both districts are declining. This pattern is typical of maturing districts approaching build-out, often resulting in uneven campus utilization.

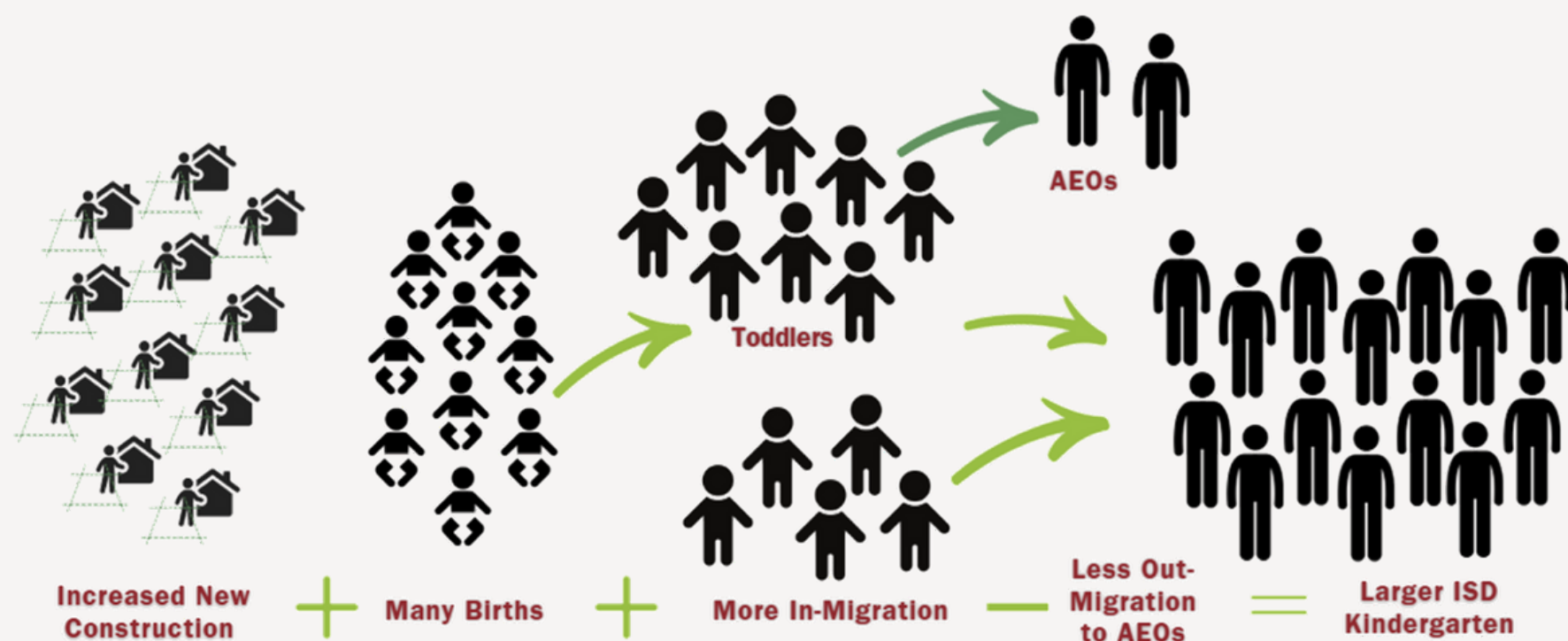
The Demographic Lifecycle*



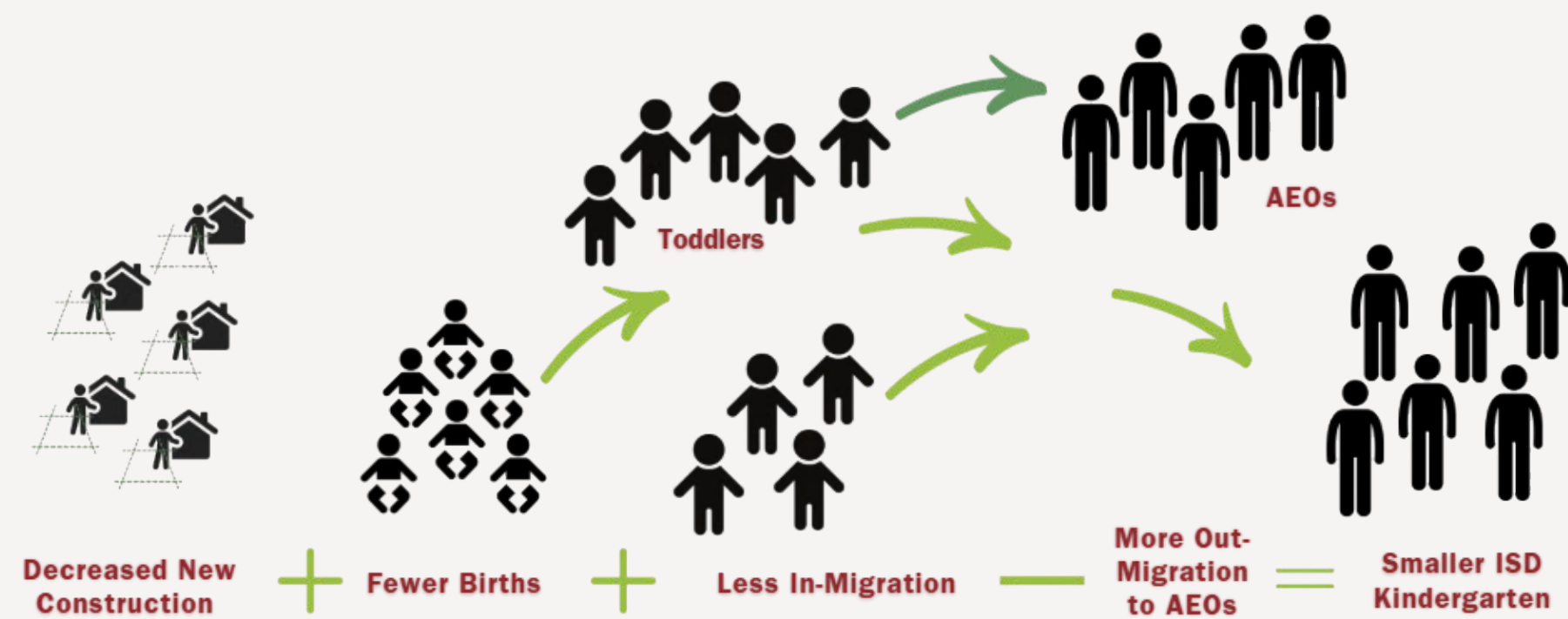
*The Demographic Lifecycle model illustrates typical stages of enrollment change; district experiences may differ due to unique demographic, economic, or geographic factors.

Districts Transitioning from High Growth to Stabilization

Historical Enrollment Trends



Current Enrollment Trends

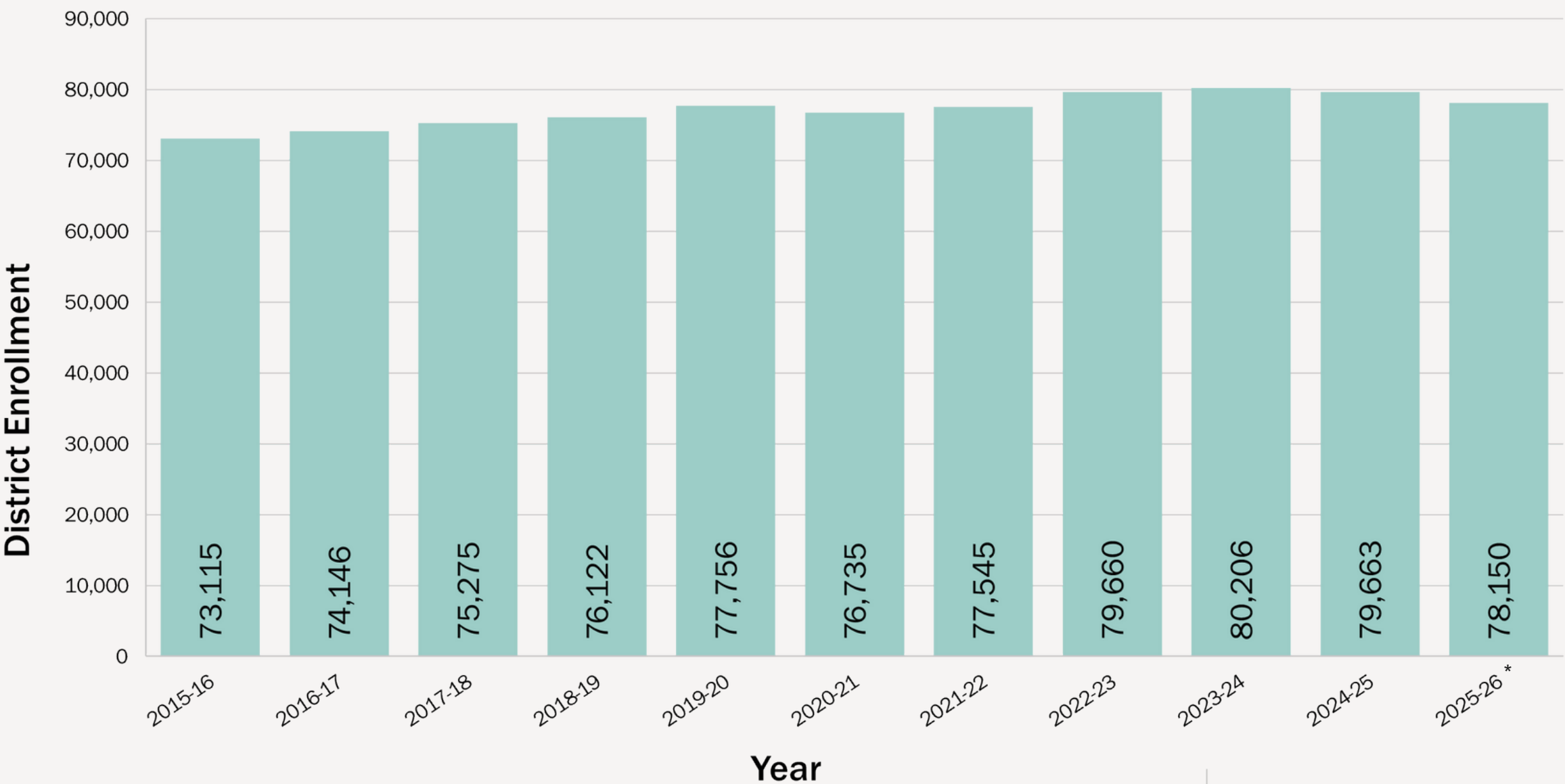


- In districts that were once in their High Growth phase, increased enrollment aligned with periods of high birth rates and strong new housing construction.
- As these larger birth cohorts aged, districts typically saw net in-migration, with more families moving into new developments than leaving for alternative educational opportunities.
- This dynamic produced growing preschool populations and eventually larger kindergarten cohorts, which supported sustained enrollment growth across the elementary grades and beyond.

- Many of these high-growth districts are now nearing build-out, limiting the new housing that previously supported strong in-migration.
- Current enrollment trends now reflect declining birth rates, reducing the number of young children entering ISDs.
- With fewer new homes and more families choosing educational alternatives, in-migration is slowing, and out-migration is rising.
- These factors together are producing smaller kindergarten cohorts, contributing to flatter overall enrollment patterns.

Historical Enrollment Trends in FBISD

Fort Bend ISD Historical Enrollment



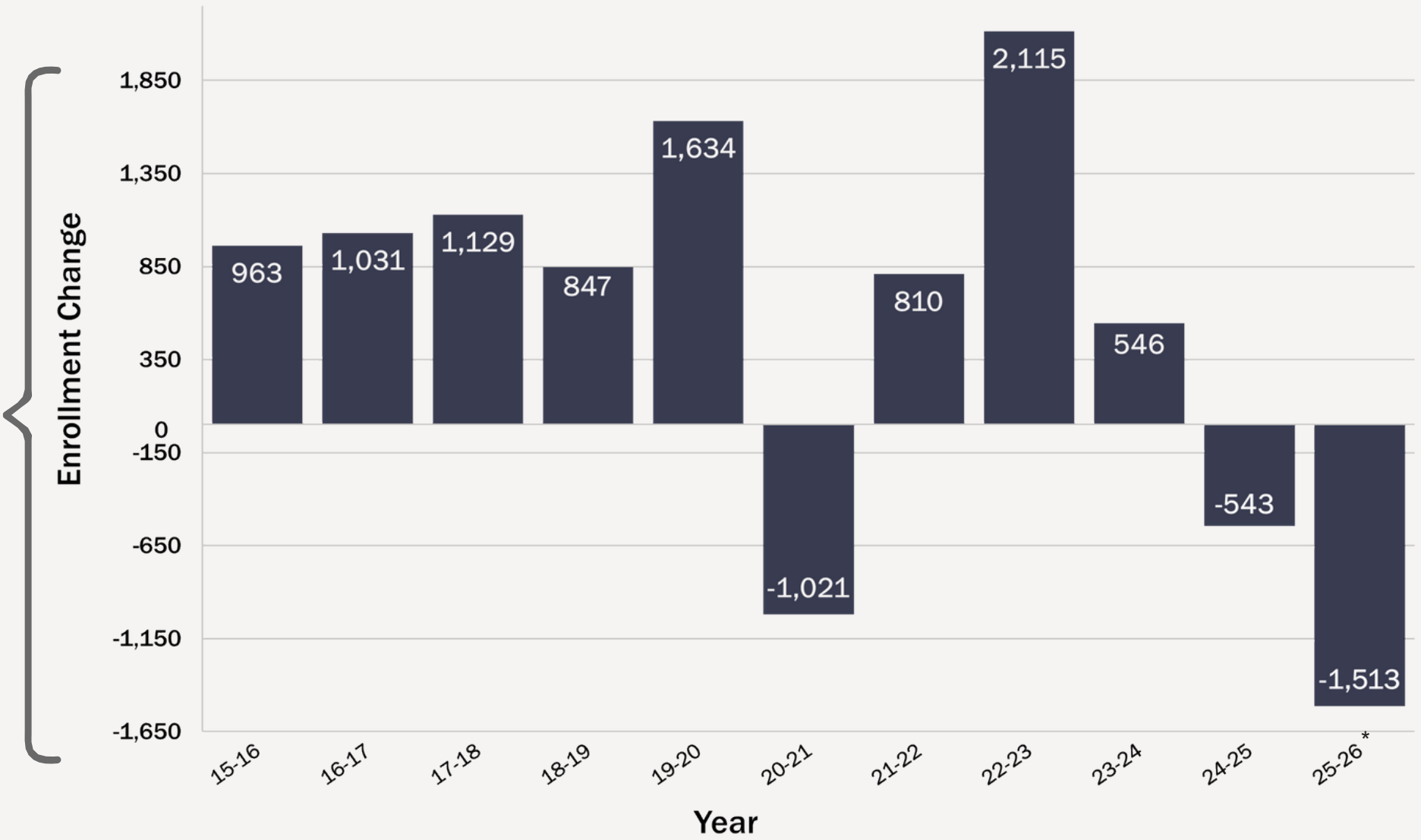
+1,415
Five Year Change
enrollment change
2020 to 2025

+5,035
Ten Year Change
enrollment change
2015 to 2025

Fort Bend ISD Historical Enrollment Change

Largest Increase:
+2,115 students in 2022 –23

Largest Decline:
–1,513 students in 2025 –26



Student Projection Factors

Economic Drivers

Local economic conditions, such as job growth, housing affordability, and major employer activity, drive the majority of enrollment change by influencing family migration patterns and overall student population growth.

New Housing Construction

Primary driver of student enrollment growth, as new neighborhoods and housing expansion bring in the majority of new families and students to the district.

Births

Local birth patterns are a key driver of future student enrollment, as the number of births directly influences the size of incoming kindergarten classes and shapes long-term growth in early grade levels.

Alternative Educational Opportunities (AEOs)

Availability and expansion of charter schools, private schools, virtual academies, and other non-traditional options drive the majority of enrollment change by influencing whether families choose district schools or pursue outside alternatives.

Kindergarten Class Size

Kindergarten enrollment serves as a leading indicator of future student population trends, with the size of each incoming class driving long-term growth patterns across grade levels.

Regeneration of Established Neighborhoods

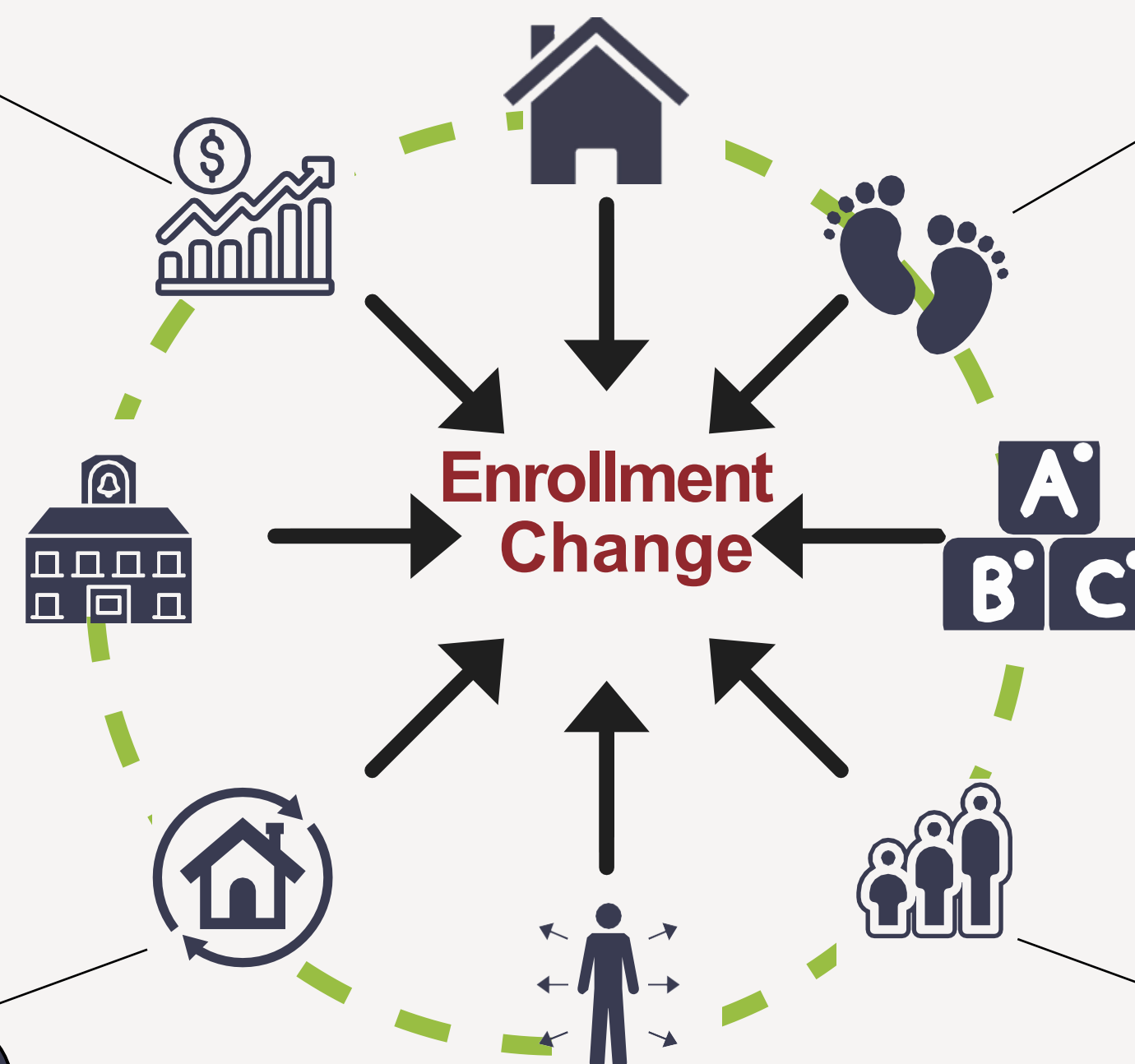
Neighborhood turnover, as older households move out and younger families move in, drives the majority of enrollment change by increasing student populations in previously stable or declining areas.

In & Out Migration

Local patterns of families moving into or out of the district drive enrollment change, as shifts in migration directly impact student population growth or decline across all grade levels.

Aging of the Student Population

The local progression of larger or smaller student cohorts through grade levels drives enrollment change, as graduating classes are replaced by incoming cohorts of different sizes.



Changes in the Last Decade

Assumptions that Informed the 2015–16 Ten-Year Forecast



Unforeseeable External Factors that Emerged, Affecting Enrollment



Growth of new single-family housing (due to a slow increase in oil prices) will accelerate post-2017; ratios of students per home will remain fairly stable, but will increase for many new MPCs;

Kindergarten will grow due to births and new housing construction over the next decade;



The perception of the District remains the same, relative to other surrounding districts;

Charter schools continue to grow at a similar rate as the overall population increases;



Unemployment rates remain at 3.0% to 4.0% in the Fort Bend I.S.D. catchment area over the next five years; and

Interest rates do not increase by more than 2% over current levels for the next five years.



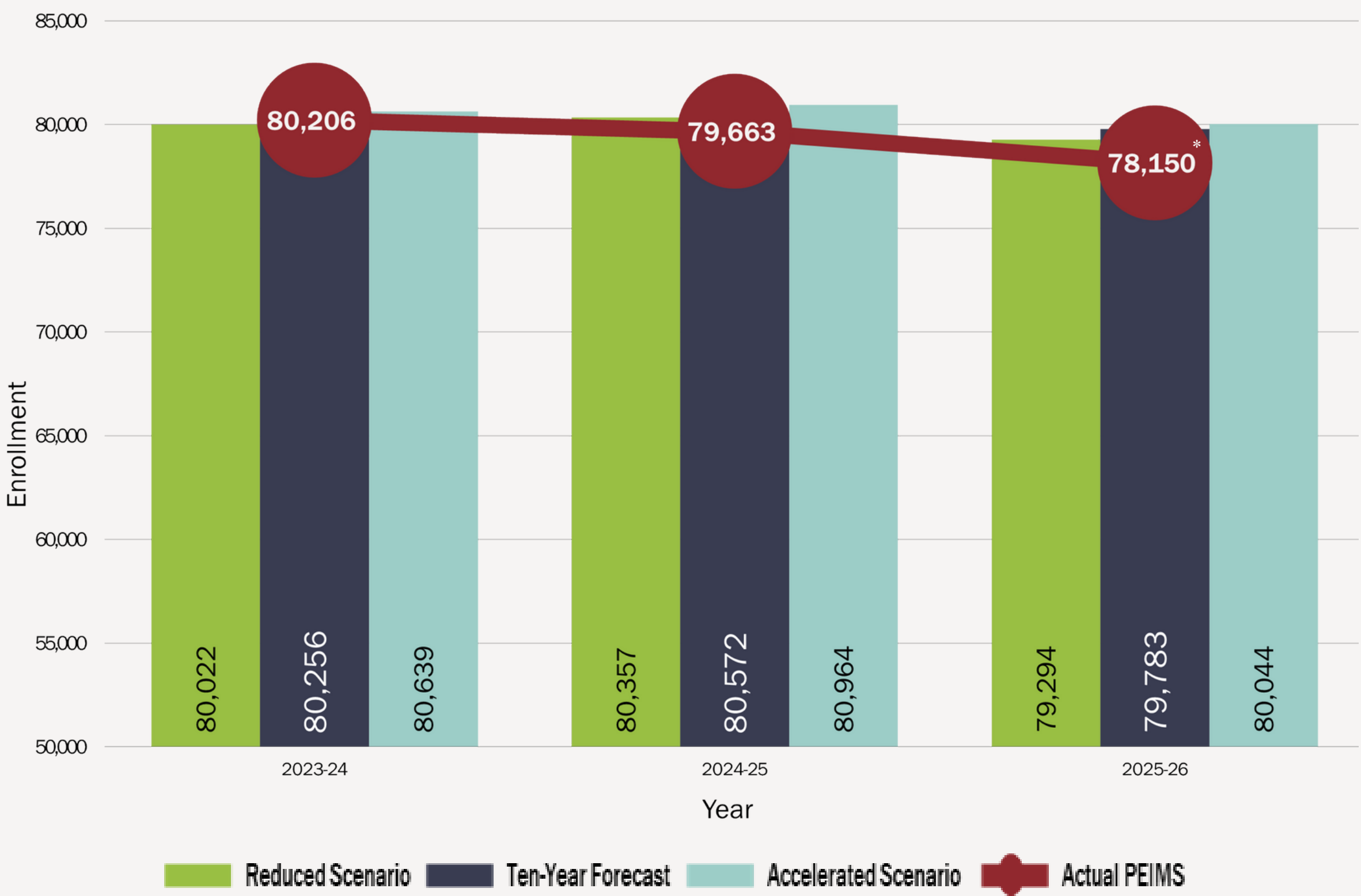
Significant external influences represent variables that could not have been foreseen or reasonably modeled in 2015.

These variables include:

- the COVID-19 pandemic;
- sharpest U.S. inflation spike in 40 years;
- challenges in Texas public school finance;
- the rapid expansion of alternative education models;
- changes in immigration policy; and
- evolving public perceptions of traditional schooling.

Changes Since the Previous Study

Fort Bend ISD Projected Enrollment Scenarios vs. Actual Enrollment



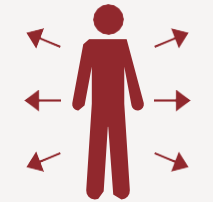
*Based on FBISD enrollment on 10/24/2025



- Slow down in new housing construction
- Fewer FBISD students are moving into the new housing being built



- Fewer babies born, particularly in specific locations in the district

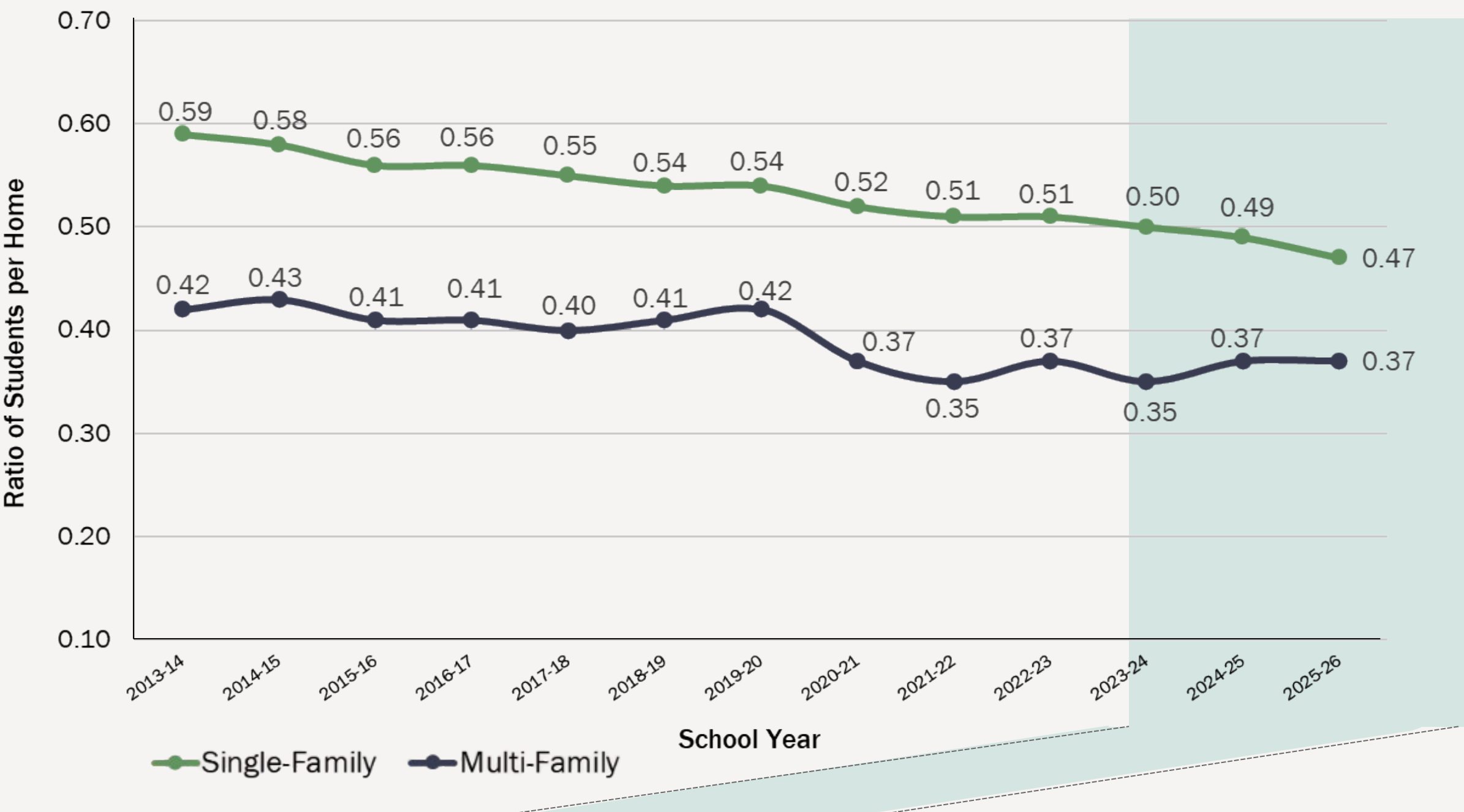


- Shifts in federal immigration policy and enforcement



- Growing competition from Alternative Educational Opportunities

Historical Student Ratios in Housing



Virtually all parts FBISD experienced lower ratios of students per home this year. This was particularly evident in actively building subdivisions. While new houses are still being built, fewer of the new residents have students enrolled in FBISD. These reduced student densities are projected to continue contributing to slower enrollment growth.

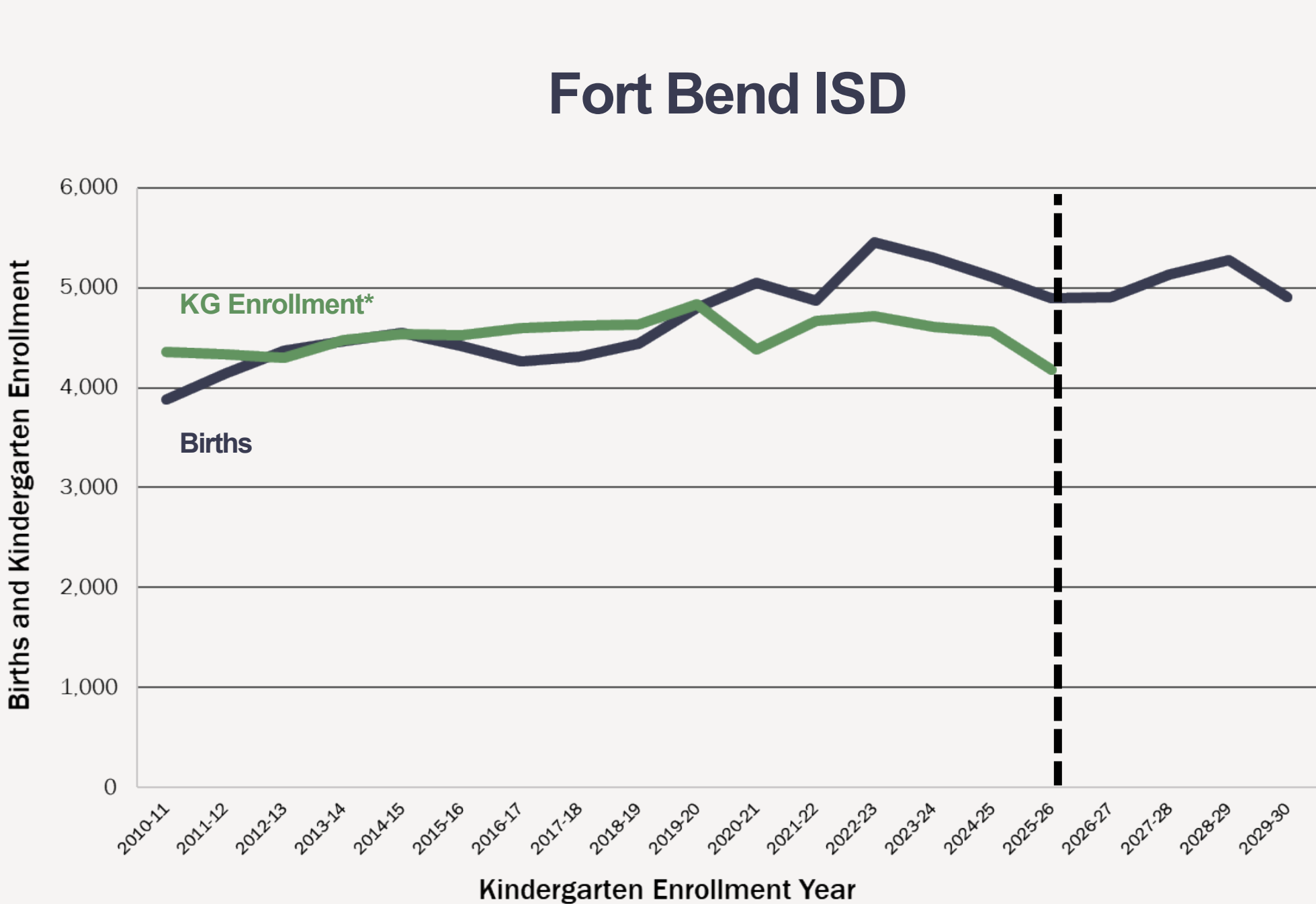
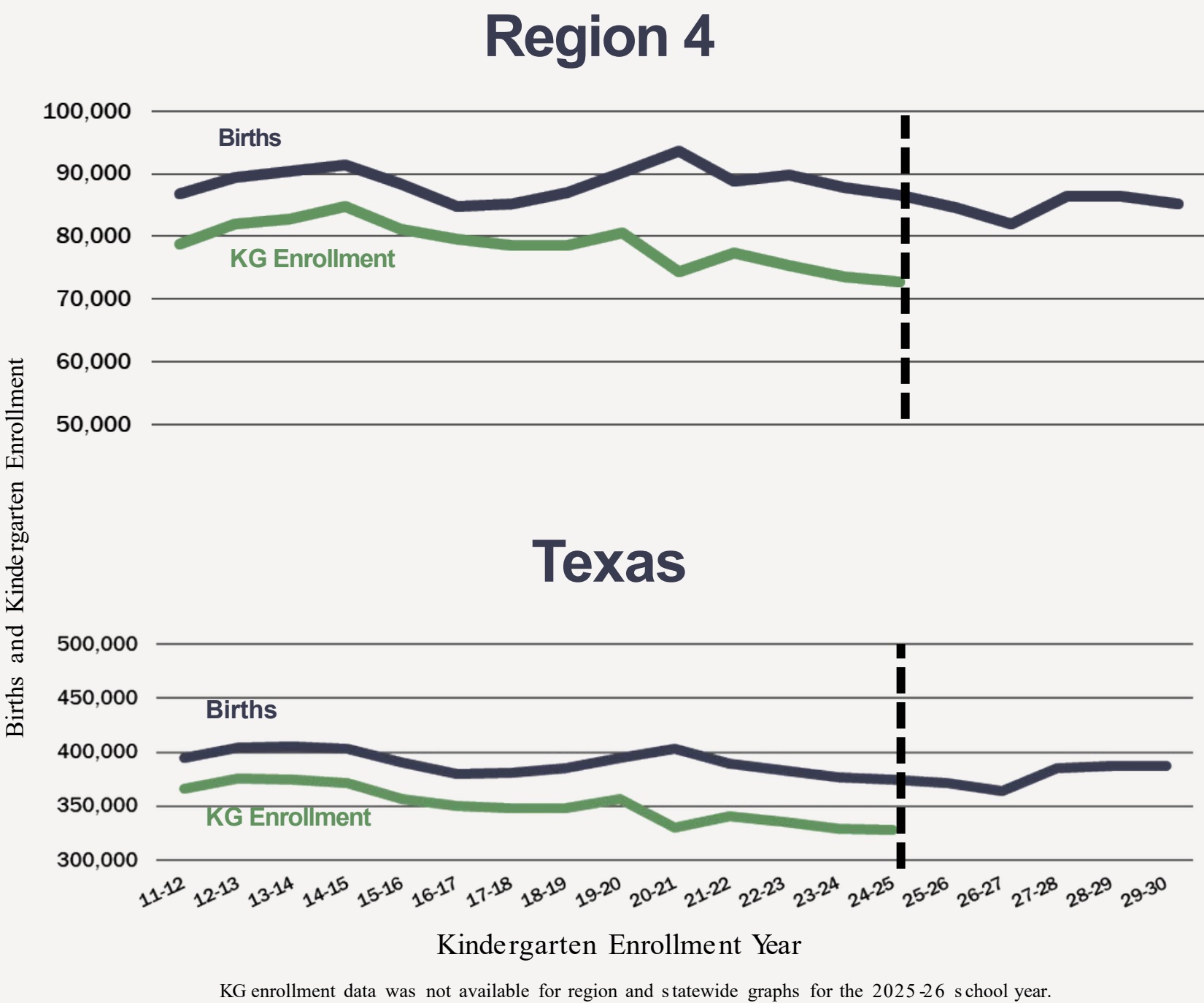
Districtwide Ratios	2023	2024	2025	Change Since 2023	Change Since 2024
Single-Family Subdivisions	0.50	0.49	0.47	-0.01	-0.03
Developing	0.51	0.46	0.44	-0.02	-0.07
Existing	0.50	0.49	0.47	-0.02	-0.03



Reduced Ratios
in New Housing

Master Planned Communities	2023	2024	2025	Change Since 2023	Change Since 2024
Fieldstone	0.93	0.87	0.86	-0.01	-0.07
Harvest Green	0.76	0.72	0.65	-0.07	-0.11
Long Meadow Farms	0.65	0.62	0.61	-0.01	-0.05
Sienna	0.72	0.69	0.67	-0.01	-0.03
Telfair	0.81	0.78	0.73	-0.05	-0.08
Trilium		0.34	0.23		-0.11

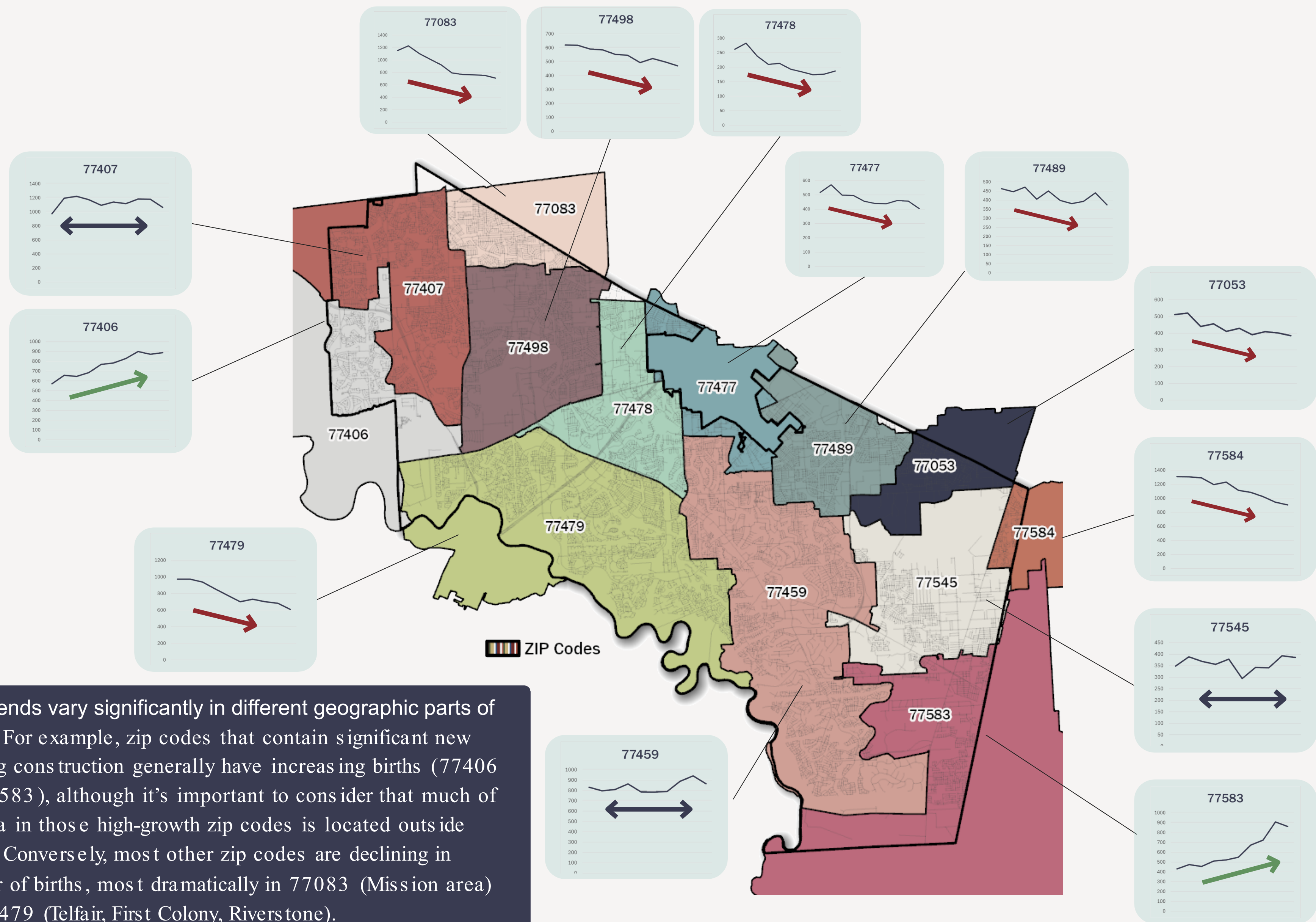
Kindergarten Enrollment & Birth Trends



Over the past decade, Region 4 and statewide trends have moved in parallel, with both births and kindergarten enrollment declining together.

Since the 2022-23 school year, both births and kindergarten enrollment have declined. A smaller share of locally born children are entering kindergarten in FBISD, likely reflecting demographic shifts, growth in alternative education options, and/ or increased mobility out of the District.

Birth Trends by Zip Code



Birth trends vary significantly in different geographic parts of FBISD. For example, zip codes that contain significant new housing construction generally have increasing births (77406 and 77583), although it's important to consider that much of the area in those high-growth zip codes is located outside FBISD. Conversely, most other zip codes are declining in number of births, most dramatically in 77083 (Mission area) and 77479 (Telfair, First Colony, Riverstone).

Charter Schools

- Two new charters expected to open in 2027-28
 - Harmony Science Academy - Missouri City
 - Harmony Science Academy - Pearland
- Four new charter campuses were newly approved this year:
 - Arcadia HS in Alief
 - BASIS (Barrett Engineering Science and Tech) in Sugar Land
 - Two campuses: Houston Classical Academy in Fort Bend County area

Private Schools

- PASA anticipates vouchers will have a moderate impact on FBISD enrollment in 2026-27
 - limited current capacity of private schools for increased enrollment
 - number of vouchers available (50,000-100,000 statewide)
- PASA anticipates that vouchers will have an increasing impact on FBISD in later years
 - State funding is increased
 - Private schools expand their capacities
 - New private schools become accredited

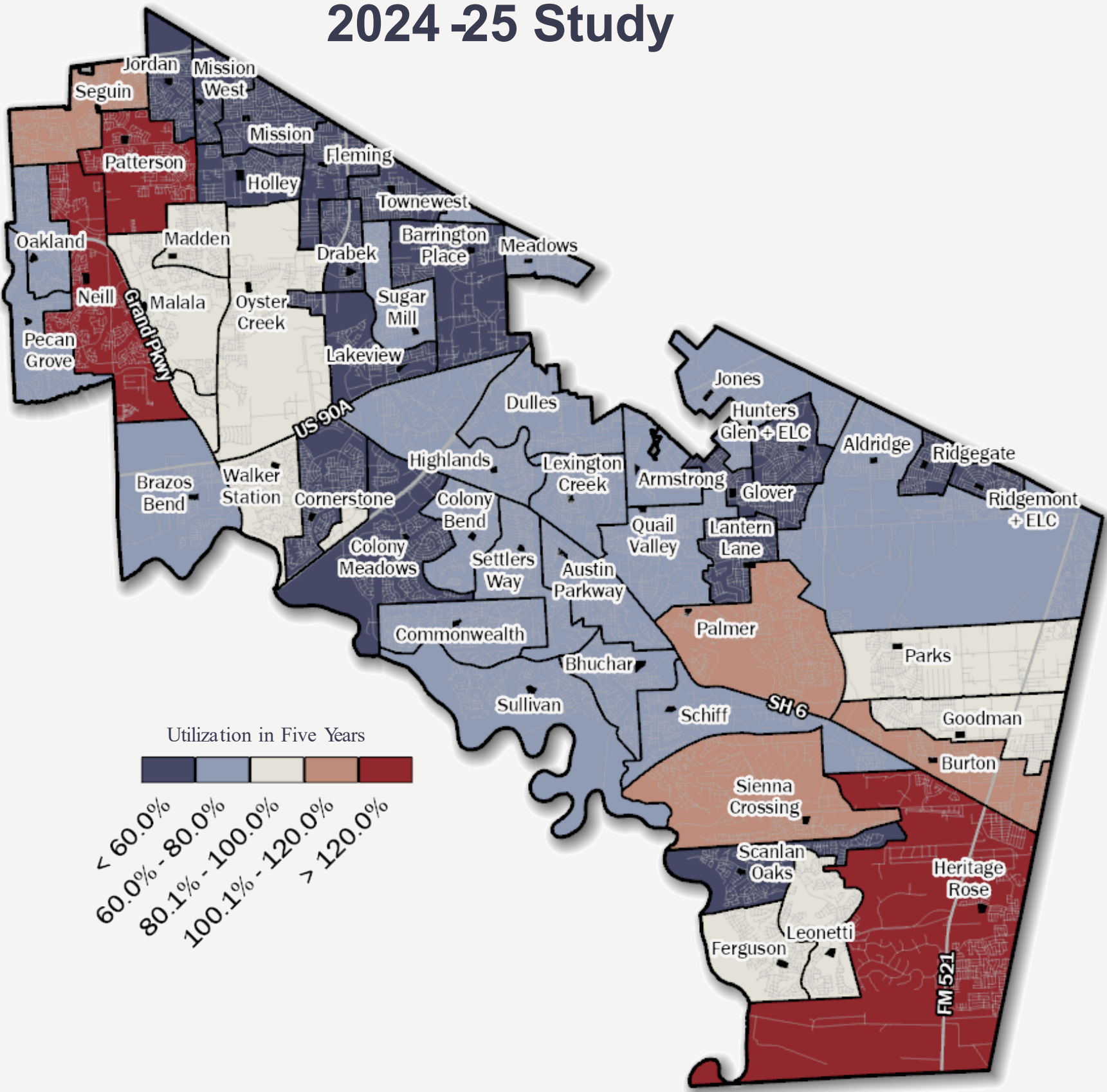
Homeschools

- Homeschooling is a significant but difficult-to-quantify factor in Texas enrollment declines, given the absence of state regulation or reporting.
 - Texas is one of 20 states that do not collect or publish homeschool participation data, limiting visibility into trends.
- Estimates from TEA capture only grades 7–12 and only students who withdraw from public schools and self-report homeschooling, not those who begin homeschooling without ever enrolling in a traditional ISD.
- Recent advances in Geofencing and increased smartphone usage may provide additional avenues for collecting data on homeschooling.

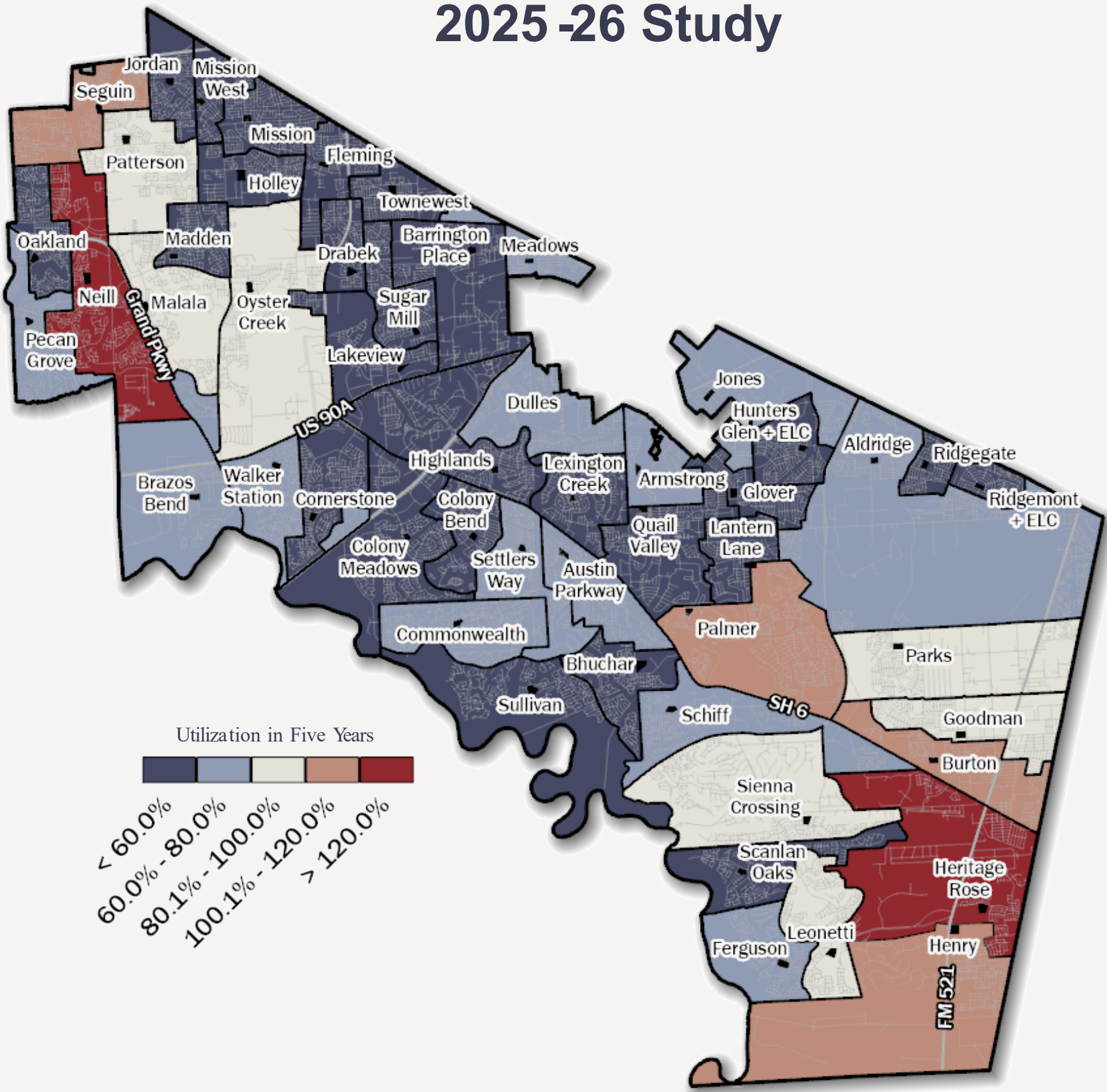
FBISD Elementary School Utilization in Five Years

Projected Resident Students
vs. Current Capacities

Projections from
2024 -25 Study



Projections from
2025 -26 Study



The 2024–25 map shows projected growth concentrated primarily in the southeast and northwest portions of FBISD, while the northern and central bands contain areas of underutilization. In contrast, the 2025–26 projections reveal shifts towards deeper blue shading across much of the District, indicating more widespread projected underutilization. Moderate to critical overutilization in the southeast and northwest remains present in the southeast and northwest, though it is not projected to be as severe as previously projected. Together, the maps illustrate a Districtwide shift toward lower projected utilization throughout the District.

What has changed recently?

- Housing market cooled (fewer new houses built, fewer existing homes sold)
- Fewer FBISD students moved into new housing construction
- Fewer local births
- Changes in federal immigration policy and enforcement
- Four new charter schools approved (plus two more previously approved)
- Educational Savings Accounts - new rules recently published

What does this mean for the current Long -Range Boundary Planning process?

- 2025 -26 projections have been used as a validation check for the committee's recommendations
- Since current enrollment and the new projections are lower than last year's projections, they *support and strengthen* the need for boundary realignment, consolidations, etc.

Other similar large districts across Texas are in the same situation and are finding how important it is to:

- Understand the fluidity of projections
- Continue to make decisions in the absence of a perfectly clear crystal ball

QUESTIONS?



Population and Survey Analysts

www.pasatx.com