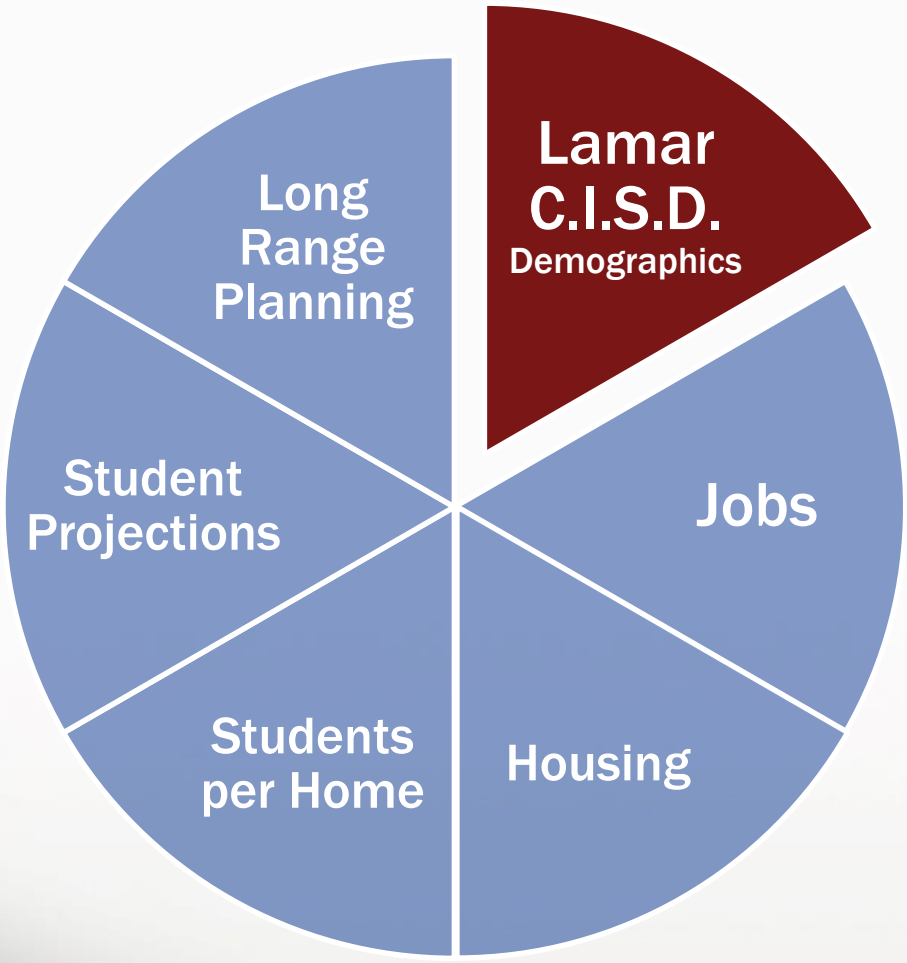
Lamar C.I.S.D.

Demographic Update

February 15, 2018

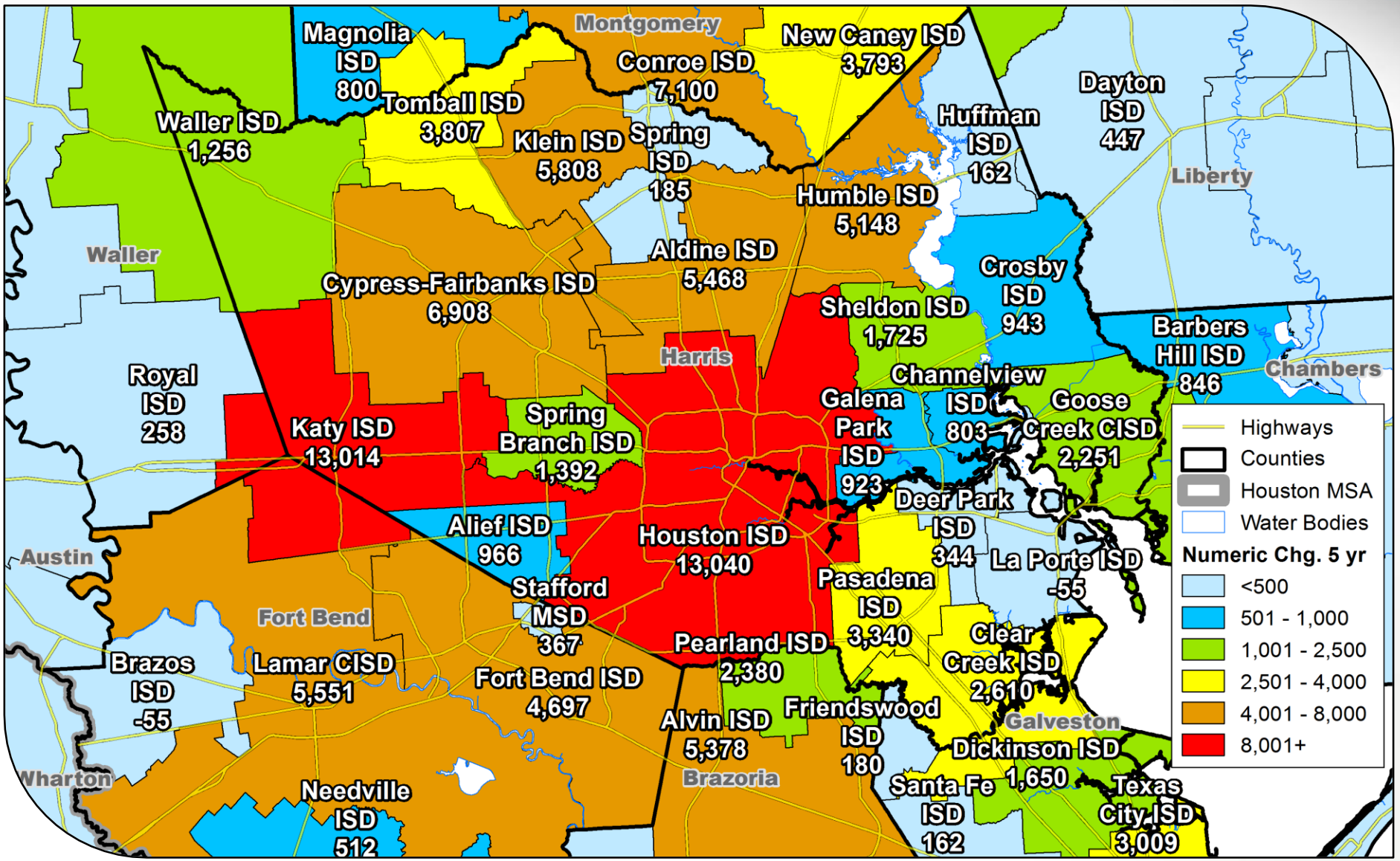
PASA



2017-18 Demographic Update

5-Year Enrollment Change

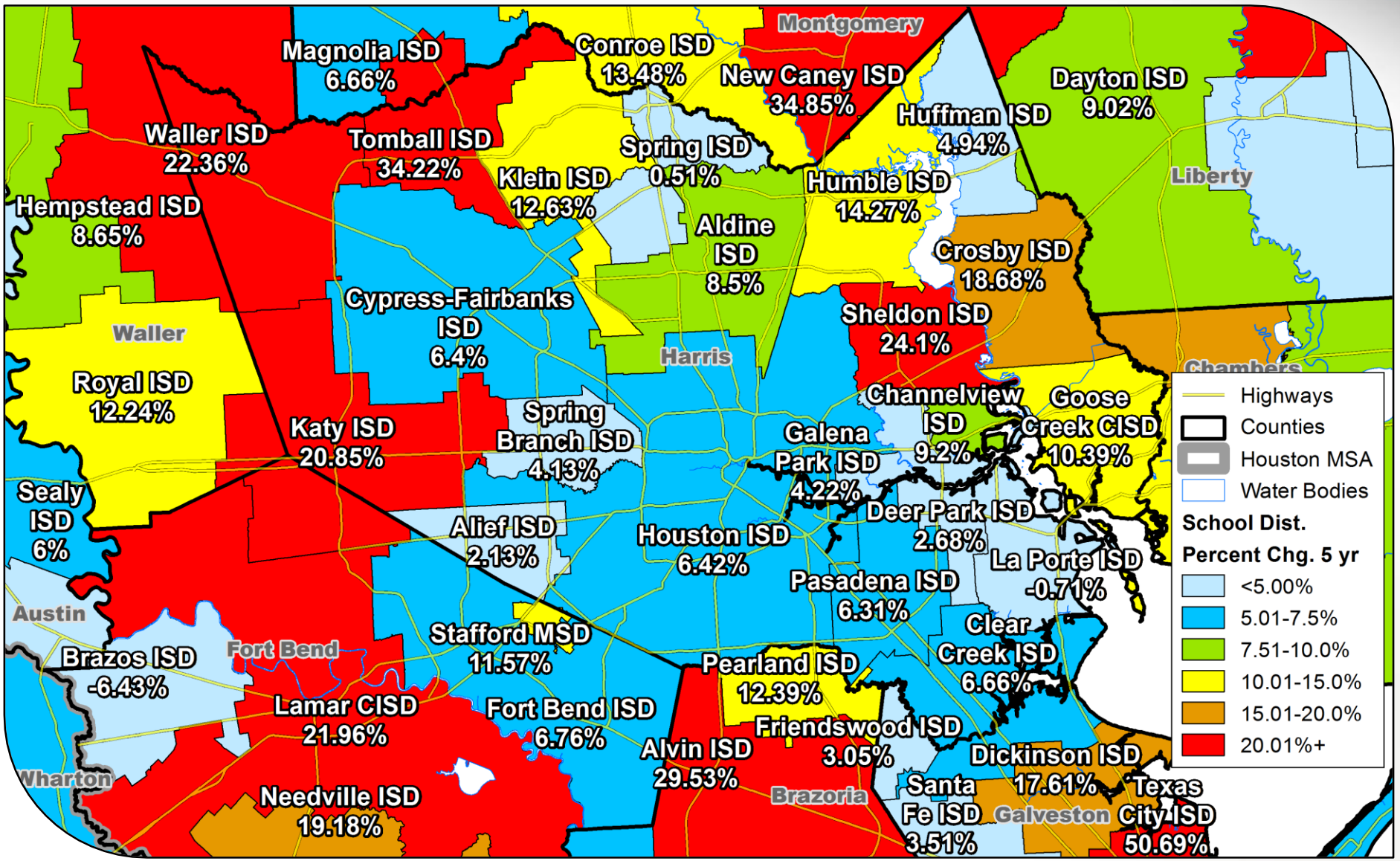
2011-12 to 2016-17, Numeric Change



Source: Texas Education Agency, Public Education Information Management System Division

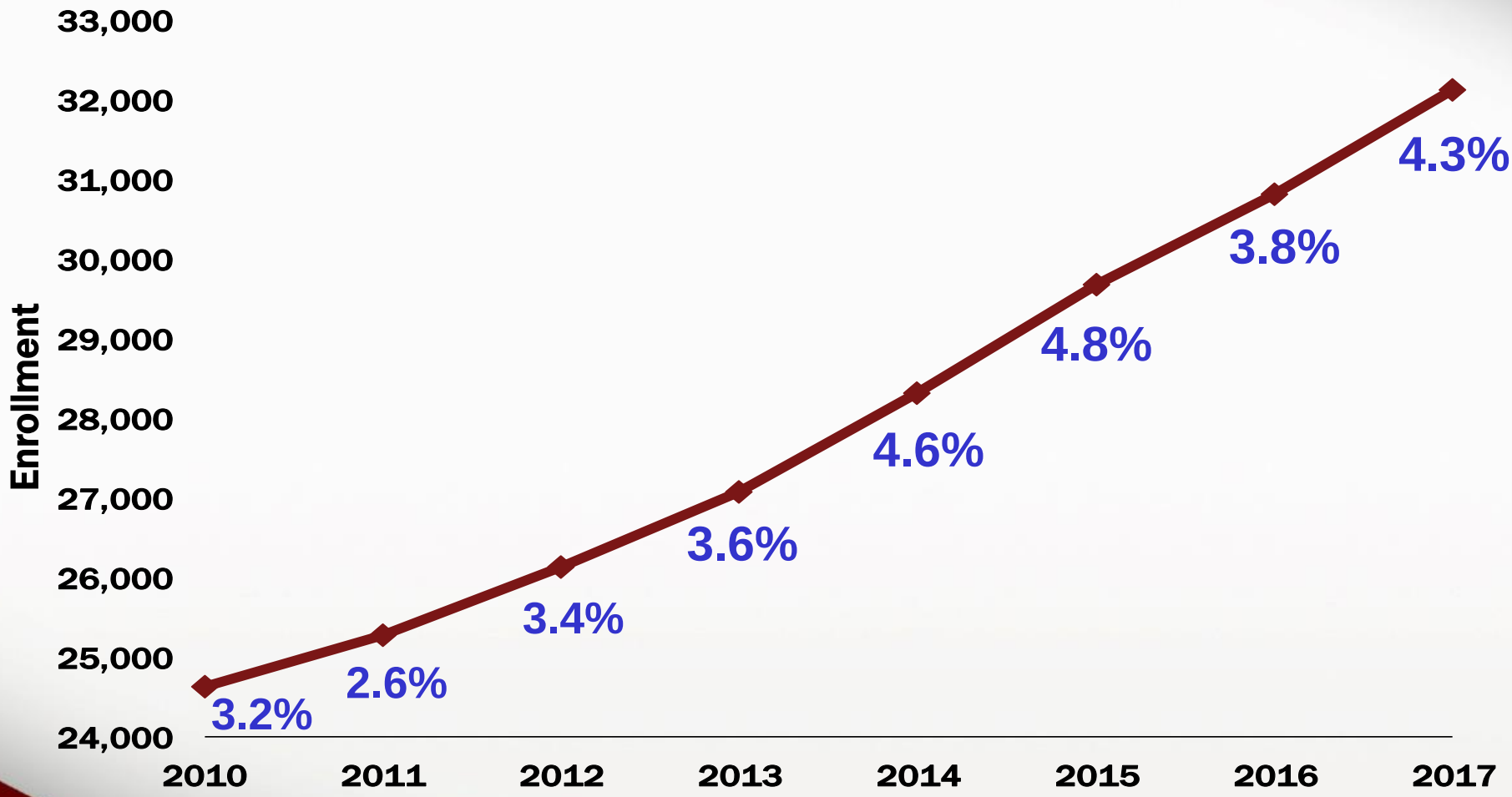
5-Year Enrollment Change

2011-12 to 2016-17, Percent Change



Source: Texas Education Agency, Public Education Information Management System Division

Past Growth Rates



Fastest Growth Districts

2016 PEIMS, Based on Numeric Gain in Students

Rank	District Name	Enrollment 2015-16	Enrollment 2016-17	Growth Numeric	Growth Percent
1	FRISCO ISD	53,300	55,923	2,623	4.9%
2	KATY ISD	72,952	75,428	2,476	3.4%
3	PROSPER ISD	8,296	9,998	1,702	20.5%
4	CONROE ISD	58,239	59,764	1,525	2.6%
5	ALVIN ISD	22,183	23,587	1,404	6.3%
6	KLEIN ISD	50,594	51,810	1,216	2.4%
7	LAMAR CISD	29,692	30,829	1,137	3.8%
8	COMAL ISD	21,163	22,240	1,077	5.1%
9	DENTON ISD	27,559	28,628	1,069	3.9%
10	NORTHWEST ISD	20,976	22,044	1,068	5.1%
11	LEANDER ISD	37,158	38,226	1,068	2.9%
12	NORTHSIDE ISD	105,110	106,145	1,035	1.0%
13	FORT BEND ISD	73,115	74,146	1,031	1.4%
14	CYPRESS-FAIRBANKS ISD	113,936	114,868	932	0.8%
15	NEW CANEY ISD	13,816	14,677	861	6.2%

Source: Texas Education Agency, Public Education Information Management System Division

Demographic Characteristics

Lamar C.I.S.D.

Median Age **36.2**

Houston Metro 34.2

Economically Disadvantaged Student Population

42.16% State of Texas 58.95%

Population Ages 5–17

21%

Houston Metro 19%

Median Household Income

$85,982

Houston Metro $61,708

Mean Travel Time to Work **32.8**

Houston Metro 30.0 minutes

STAAR Passage Rate **80.21%**

Texas – 71.31%

Bachelor's Degree **38%**

Houston Metro - 32%

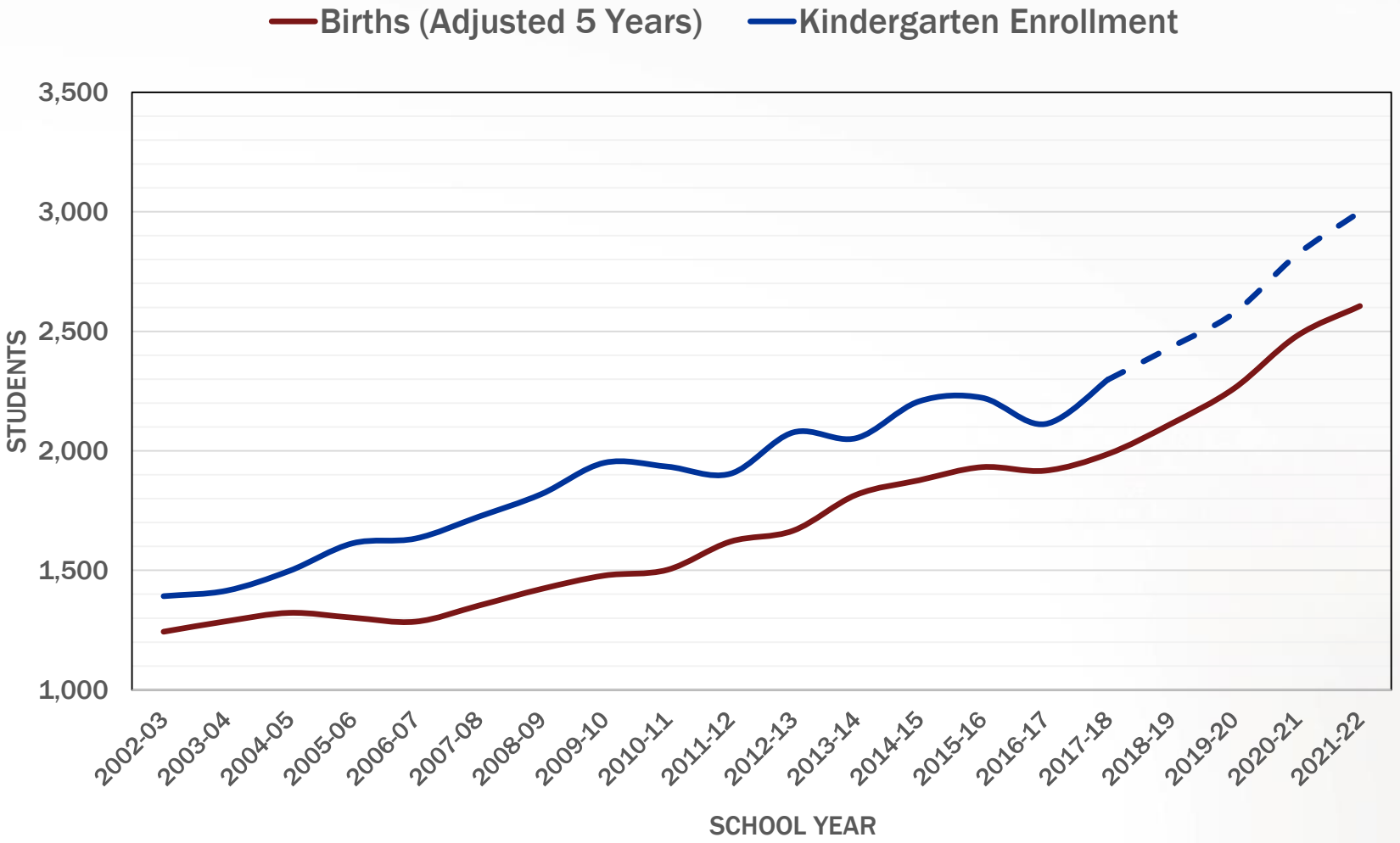
Source: Texas Education Agency; U.S. Census Bureau (ACS 2016 5-Year Estimate)

2015-16 STAAR Results 3rd-8th Grade

(Districts w/>20,000 Students)

Rank	School District	2016-17 Enrollment	STAAR Passage Rate 2016-17 Level II	2015-16 Level II	2014-15 Level II	2013-14 Level II
1	ALLEN ISD	20,939	**90.70%**	91.91%	90.25%	92.04%
2	FRISCO ISD	55,923	**89.80%**	90.62%	90.69%	91.90%
3	KATY ISD	75,428	**86.00%**	87.56%	87.36%	87.21%
4	PEARLAND ISD	21,585	**85.90%**	89.69%	88.91%	85.83%
5	ROUND ROCK ISD	48,321	**83.70%**	86.95%	85.79%	83.96%
6	LEANDER ISD	38,226	**83.30%**	84.44%	82.98%	83.32%
7	KELLER ISD	34,660	**83.20%**	83.42%	81.54%	84.30%
8	COMAL ISD	22,240	**83.10%**	84.29%	83.20%	82.27%
9	PLANO ISD	54,176	**81.90%**	87.80%	86.97%	86.15%
10	CONROE ISD	59,764	**81.70%**	84.48%	83.73%	84.12%
11	NORTHWEST ISD	22,044	**81.50%**	82.83%	83.94%	83.87%
12	MANSFIELD ISD	34,309	**81.30%**	81.91%	79.71%	80.70%
13	MCKINNEY ISD	24,851	**80.80%**	84.46%	84.39%	84.75%
14	HURST-EULESS-BEDFORD ISD	23,120	**80.70%**	82.04%	84.01%	83.27%
15	CLEAR CREEK ISD	41,819	**80.70%**	82.94%	82.31%	83.60%
16	**LAMAR CISD**	**30,829**	**80.20%**	**82.59%**	**79.17%**	**80.90%**

Kindergarten Enrollment vs. Births



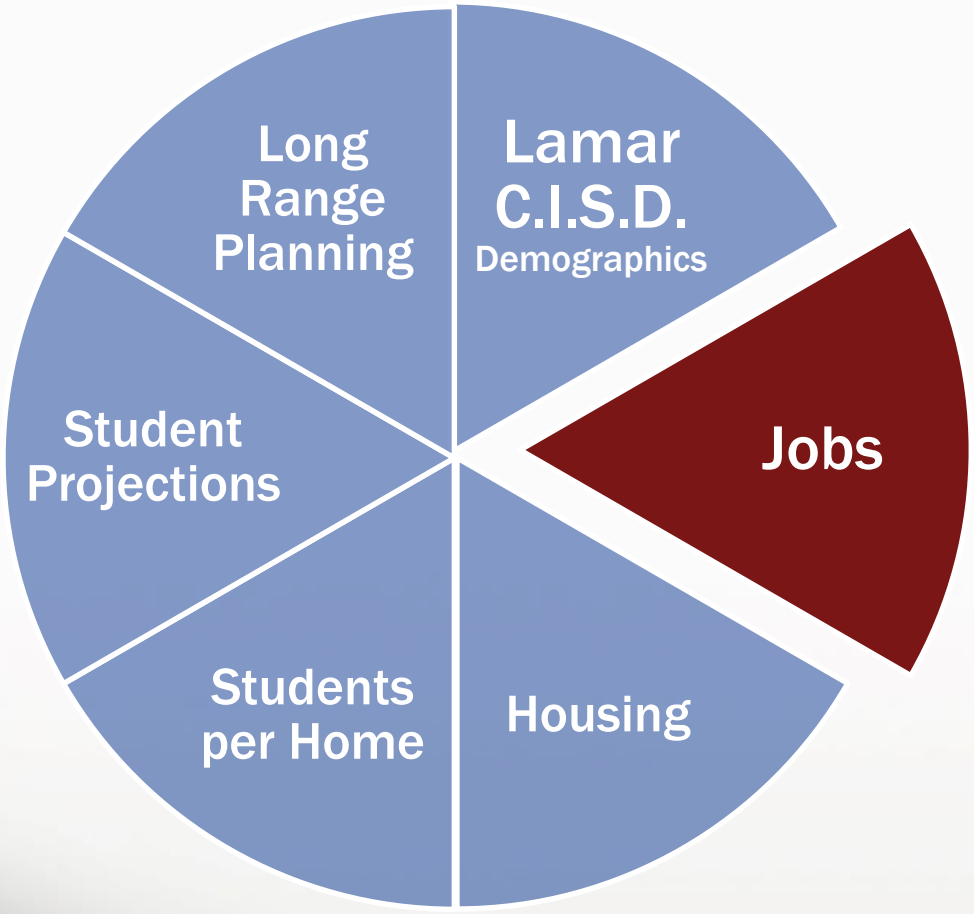
Charter and Private School Enrollment Trends

	2015-16	2016-17	2017-18
Residents (KN-12th):	29,986	31,102	32,333
Attending L.C.I.S.D.[1]	28,414 (94.8%)	29,458 (94.7%)	30,649 (94.8%)
Attending Private Schools[2]	732 (2.4%)	696 (2.2%)	661 (2%)
Attending Charter Schools[3]	405 (1.4%)	513 (1.7%)	588 (1.8%)
Attending Nearby Districts[3]	435 (1.5%)	435 (1.4%)	435 (1.3%)

[1] Actual KN-12th district enrollment minus transfer students from other school districts

[2] Private school enrollment data collected by Population and Survey Analysts

[3] Texas Education Agency, PEIMS 2015-16 through 2016-17 (2017-18 based on interviews and estimates)



2017-18 Demographic Update

Annual Employment Trends

	December 2016	June 2017	December 2017	6-Month Pct. Change	Annual Pct. Change
City of Houston					
Employment	1,096,556	1,104,115	1,117,463	1.21%	1.91%
Unemployment Rate	5.0	5.1	4.1		
Missouri City					
Employment	37,402	37,662	38,104	1.17%	1.88%
Unemployment Rate	5.1	5.3	4.4		
Rosenberg City					
Employment	16,175	16,287	16,478	1.17%	1.87%
Unemployment Rate	4.8	5.0	4.2		
Sugar Land					
Employment	43,706	44,009	44,525	1.17%	1.87%
Unemployment Rate	4.7	4.6	3.5		
Fort Bend County					
Employment	342,572	344,945	348,991	1.17%	1.87%
Unemployment Rate	5.0	5.0	4.0		
Harris County					
Employment	2143274	2158045	2184152	1.21%	1.91%
Unemployment Rate	5.3	5.3	4.4		

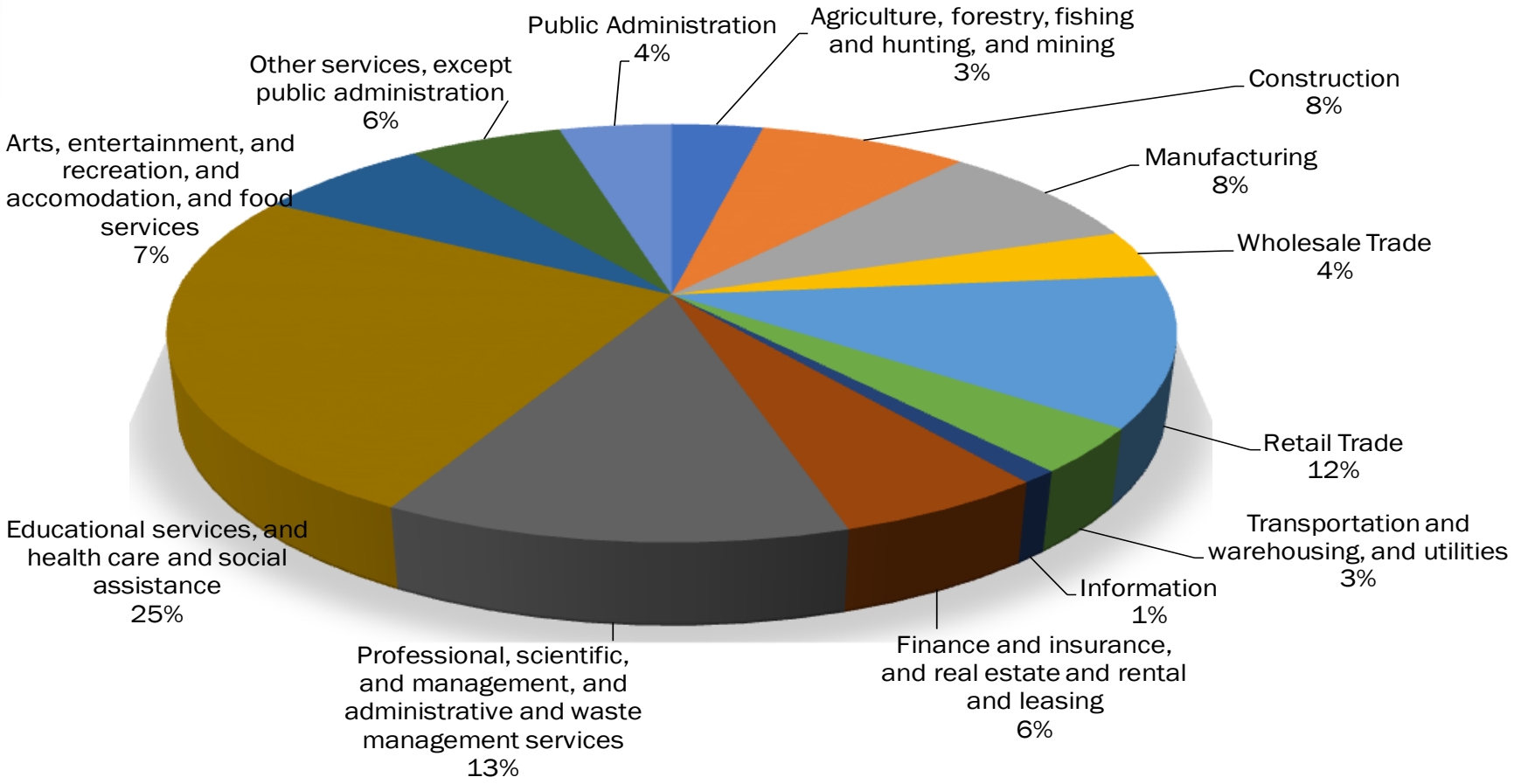
Lamar CISD Job Outlook

- **Texas Medical Center Growth**
  - 4,500 – 6,000 new jobs from $3 billion in investment

- **Oil (WTI) price is hovering at $64/barrel**
- **Manufacturing and Logistics moving to Suburbs**
  - Amazon, Goya Foods, Point West Business Park

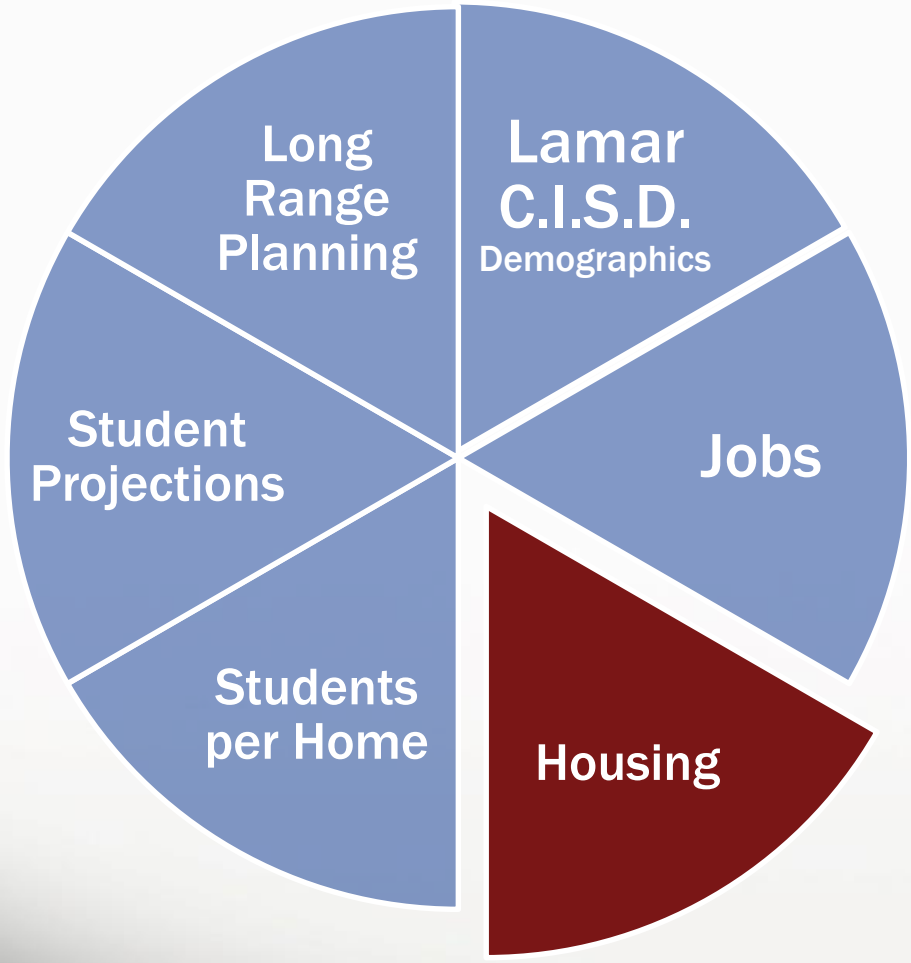
- **Port of Freeport Traffic**
  - Freeport to Rosenberg Rail: study funded in Jan. 2018
  - Robertson County rail hub

Employment by Sector



Emploment by Sector, Lamar C.I.S.D.

U.S. Census Bureau: 2016 American Community Survey



2017-18 Demographic Update

Transportation Improvements

- November 2017 - $218 million bond approved by Fort Bend Co. voters
  - Peek Road
  - Twinwood Ranch Road

- Southwest Freeway
- Westpark Tollway

Lamar CISD Housing Trends

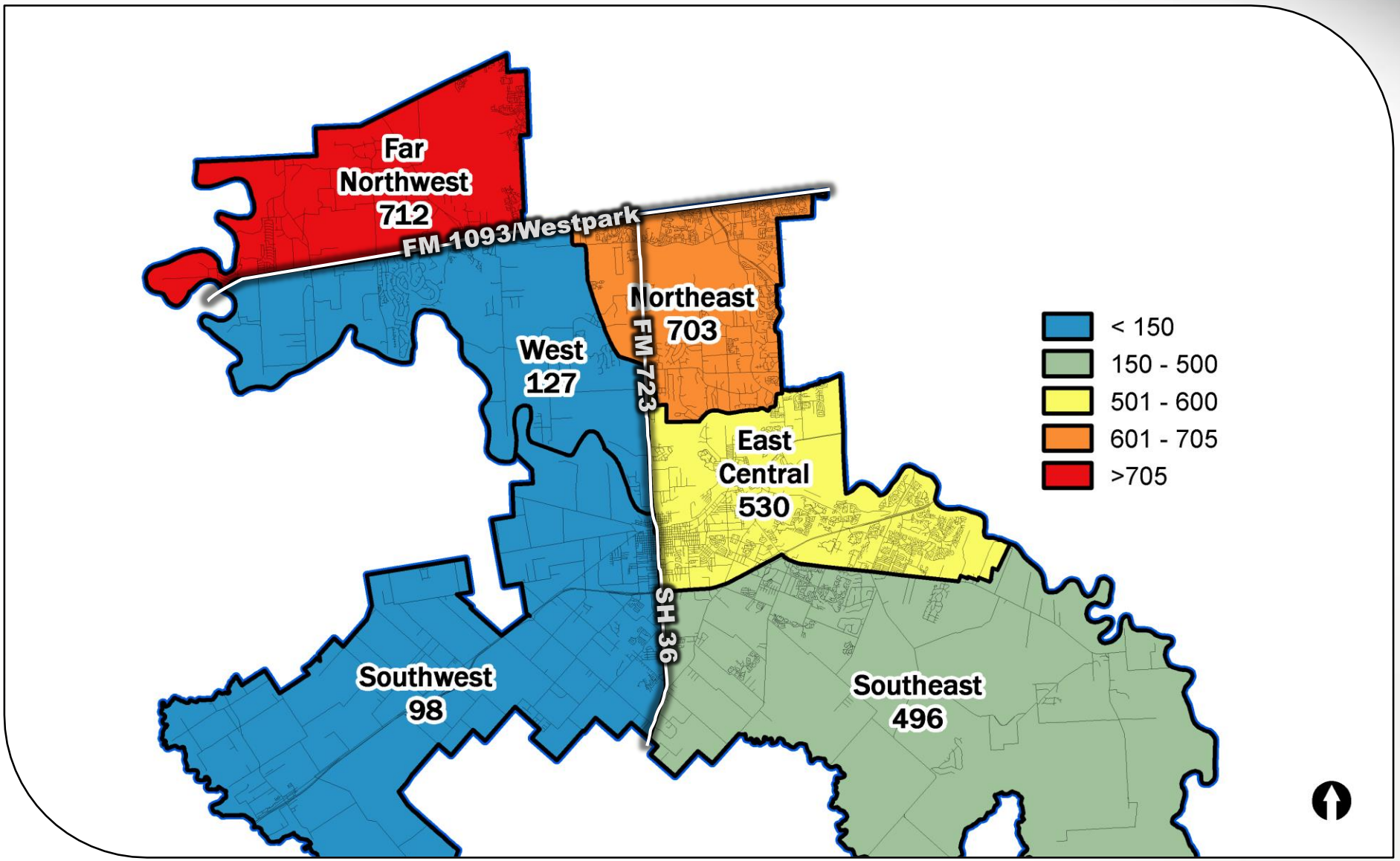
- Ranks 3rd out of 61 Houston Metro Area school districts for most housing starts in 4Q 2017

- Housing Starts Increasing
  - 2,501 new home starts in 2017
  - 2,437 new home starts in 2016

- Housing Occupancies are now greatest in the Far Northwest region of the District

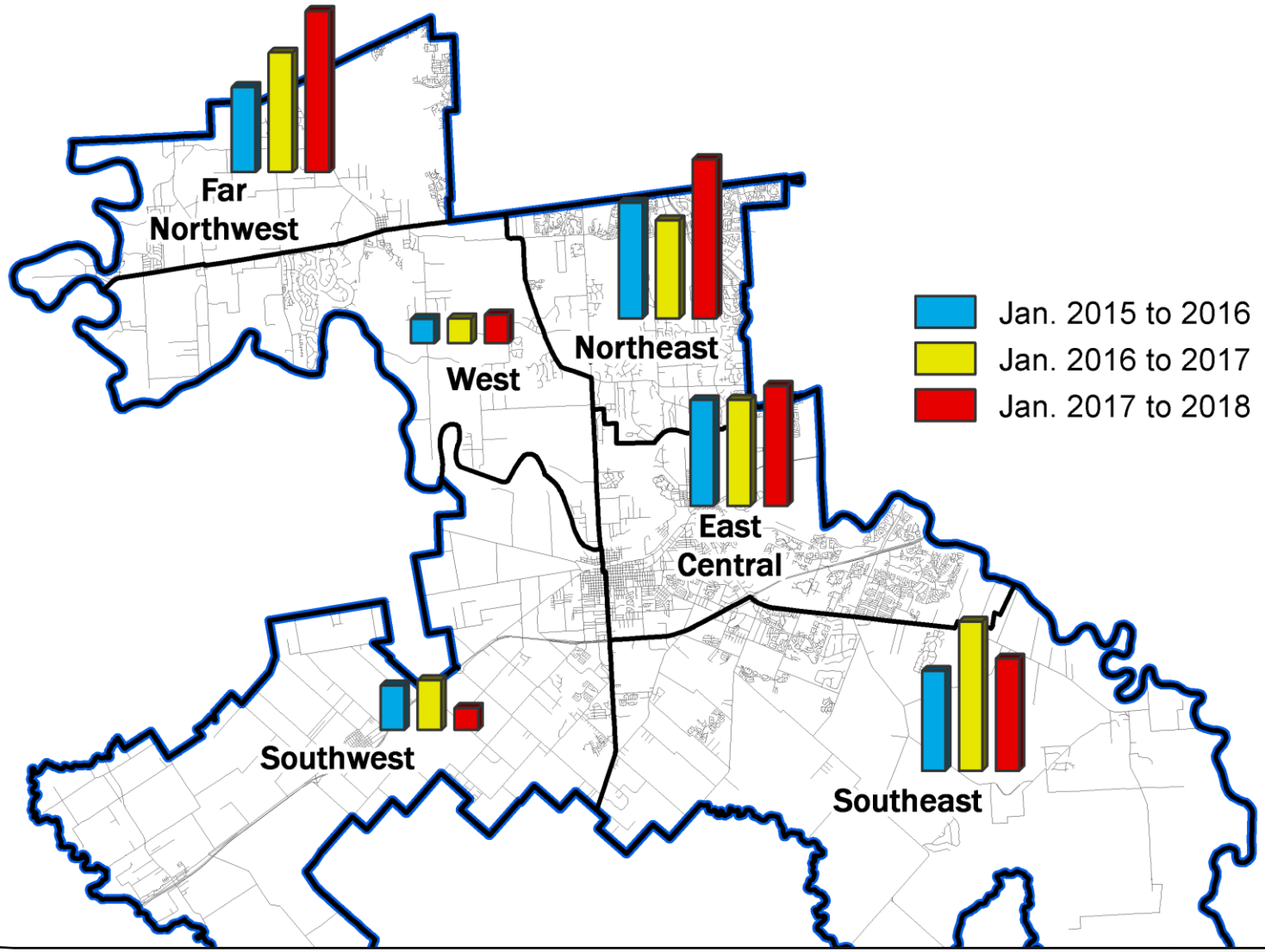
Actual Housing Occupancies

Jan. 2017 to Jan. 2018



Actual Housing Occupancies

Annual Change: Jan. 2015 to Jan. 2018



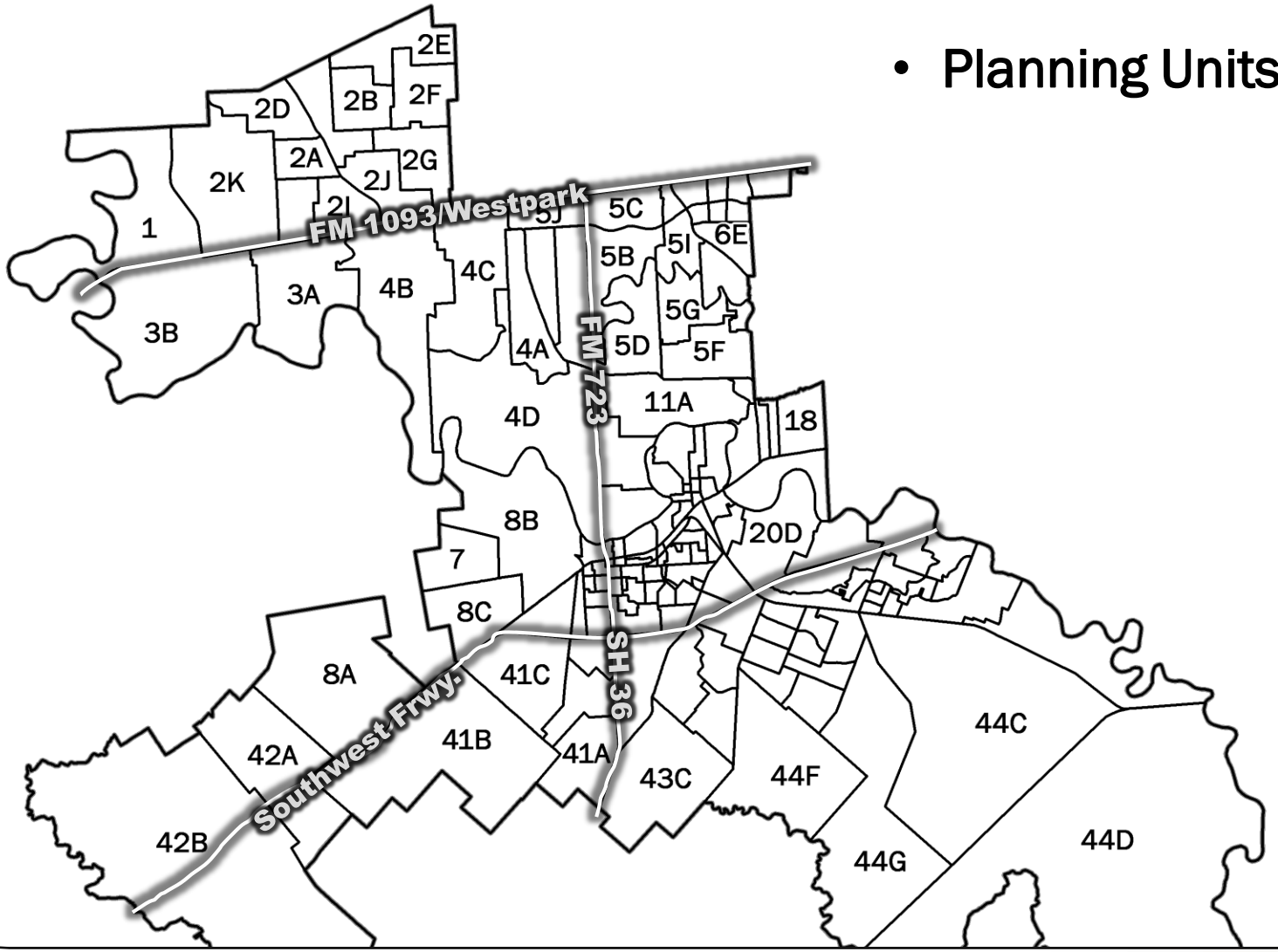
Actual Housing Occupancies

Annual Change: Jan. 2015 to Jan. 2018

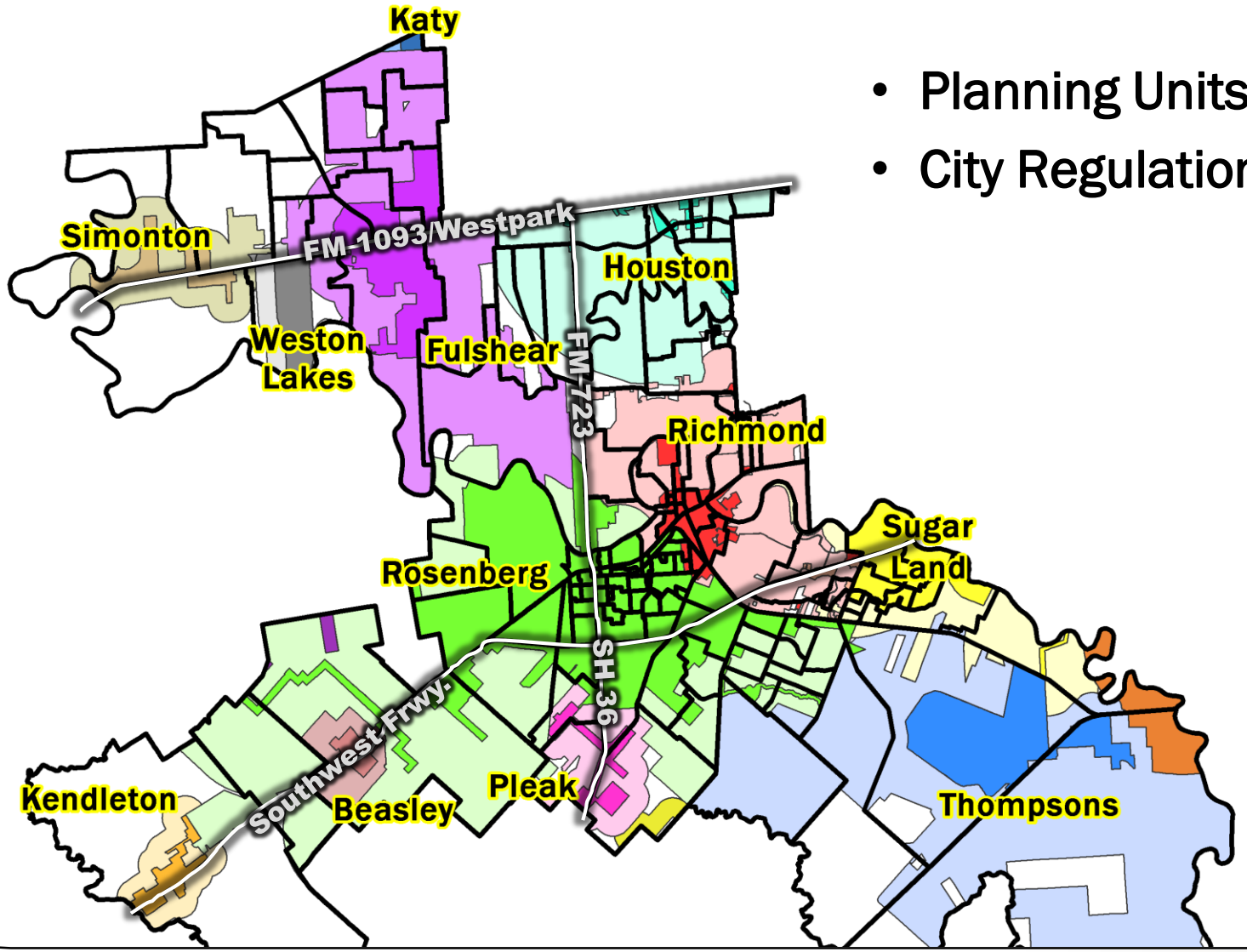
Region	Jan. 2015 to Jan. 2016	Jan. 2016 to Jan. 2017	Jan. 2017 to Jan. 2018	Change, 1-Year	Change, 2-Year
East Central	467	468	530	13%	13%
Far Northwest	375	528	712	35%	90%
Northeast	511	432	703	63%	38%
Southeast	441	658	496	-25%	12%
Southwest	197	221	98	-56%	-50%
West	108	110	127	15%	18%

Housing Projections Crash Course

- Planning Units

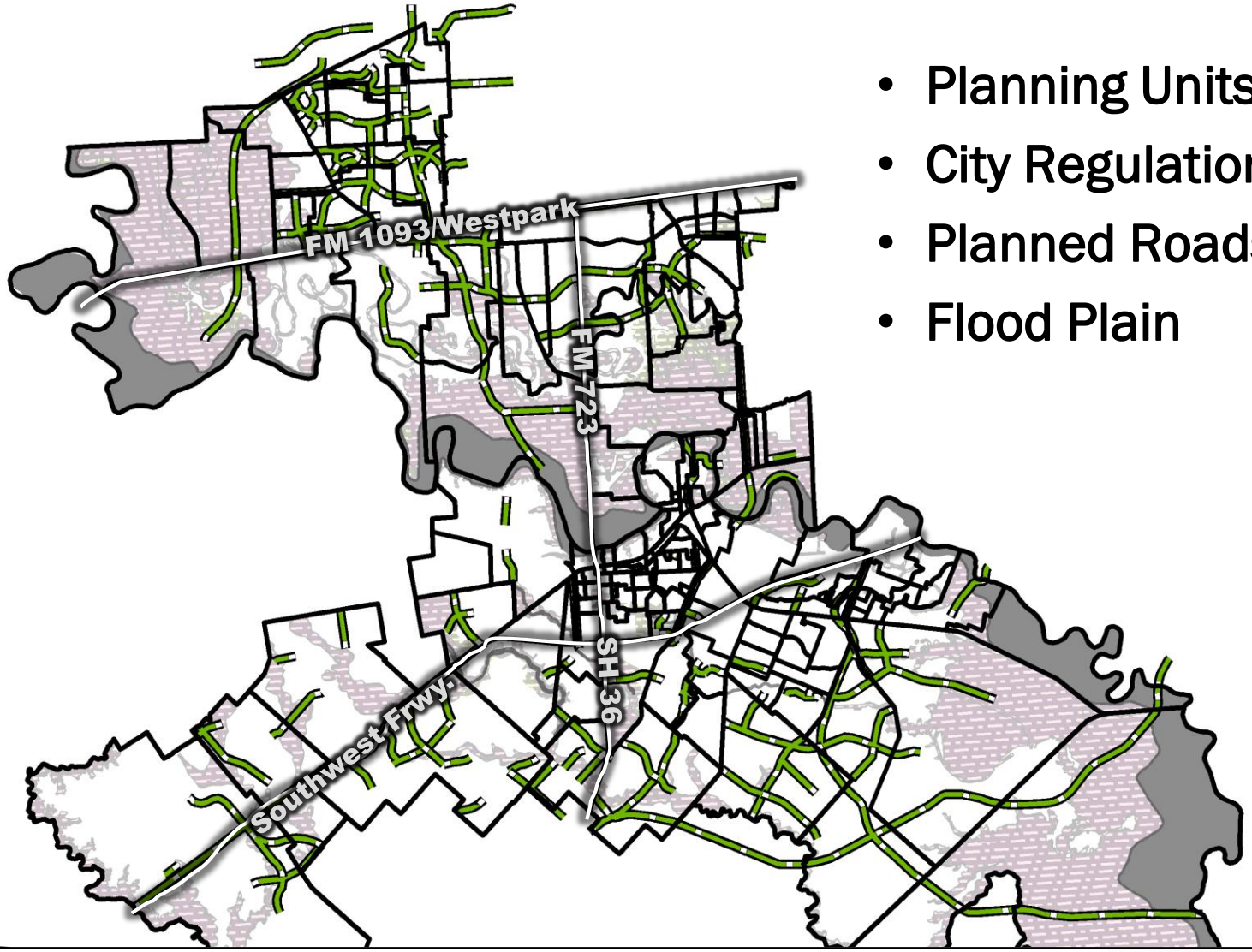


Housing Projections Crash Course



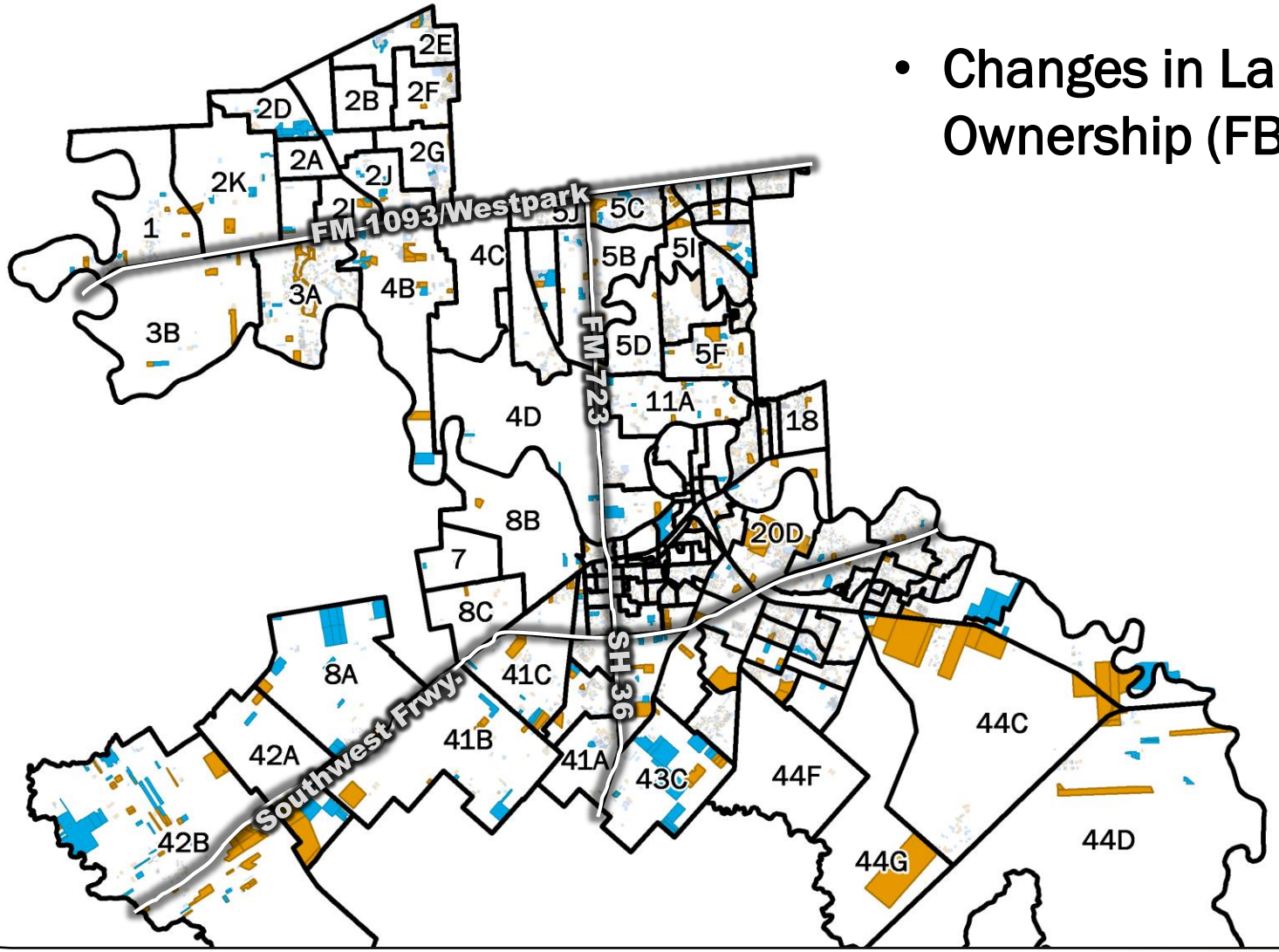
- Planning Units
- City Regulations

Housing Projections Crash Course



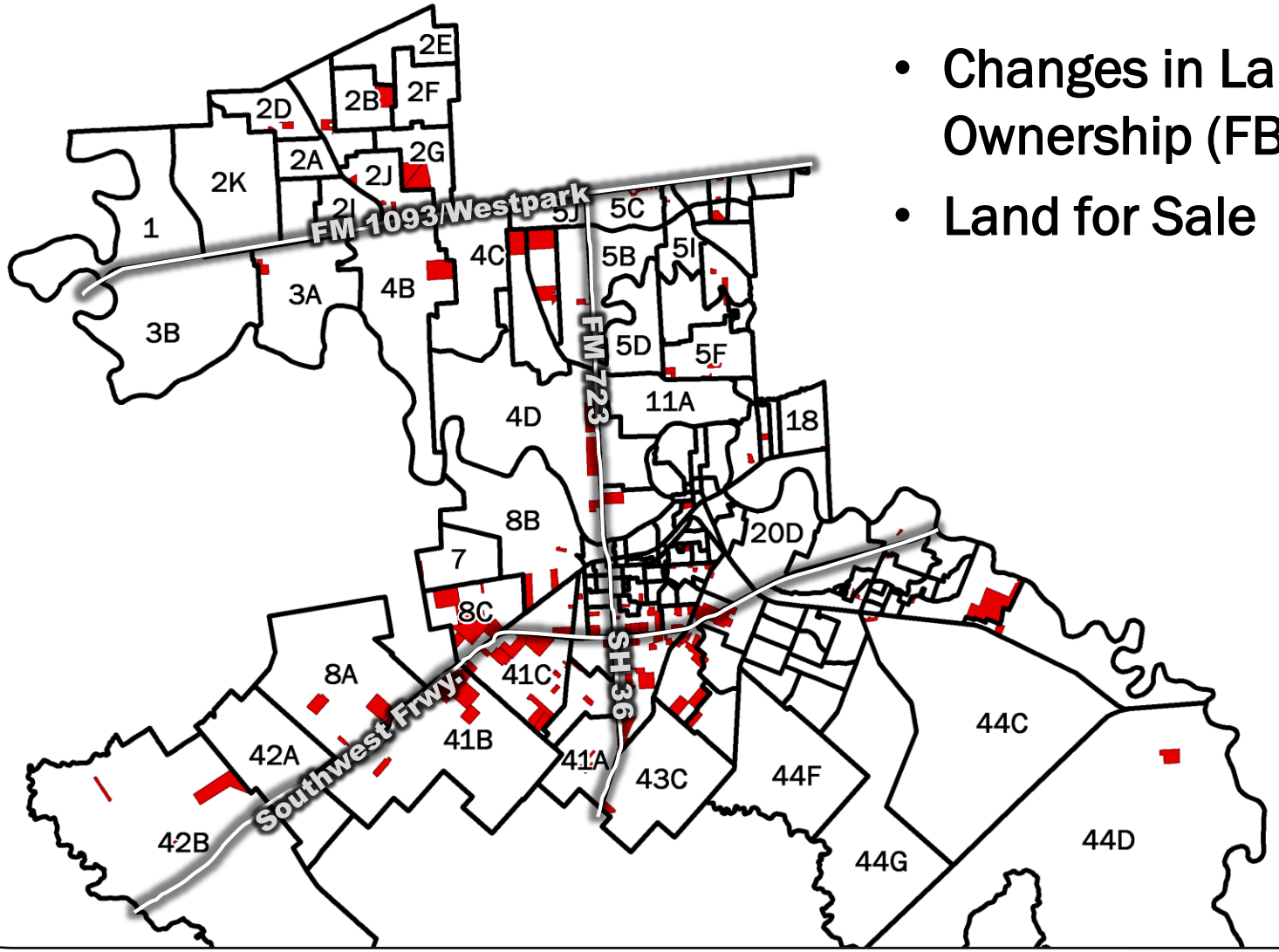
- Planning Units
- City Regulations
- Planned Roads
- Flood Plain

Housing Projections Crash Course



- Changes in Land Ownership (FBCAD)

Housing Projections Crash Course



- Changes in Land Ownership (FBCAD)
- Land for Sale

Lamar CISD Housing Trends

- Fulshear Area Projects Ramping Up
  - Polo Ranch
  - Vanbrooke
  - Cross Creek Ranch

- Veranda

- Developers are actively searching for land in south Rosenberg and Pleak
  - Rosenberg's 60-ft. lot restriction

Largest Growth Single-Family Developments

Subdivision Names or Owner(s) Names	Projected New Housing Units 2018-2022	2022-2027	2018-2027
Tamarron	1,465	1,443	2,908
Jordan Ranch	1,056	1,369	2,425
Veranda	1,125	713	1,838
Cross Creek	788	611	1,399
Fulshear Farms	235	1,080	1,315
Briarwood Crossing	517	575	1,092
Total (Above-Listed Subdivisions):	5,186	5,791	10,977
Total Single-Family Housing Projected:	17,283	24,447	41,730

Largest Multi-Family Developments

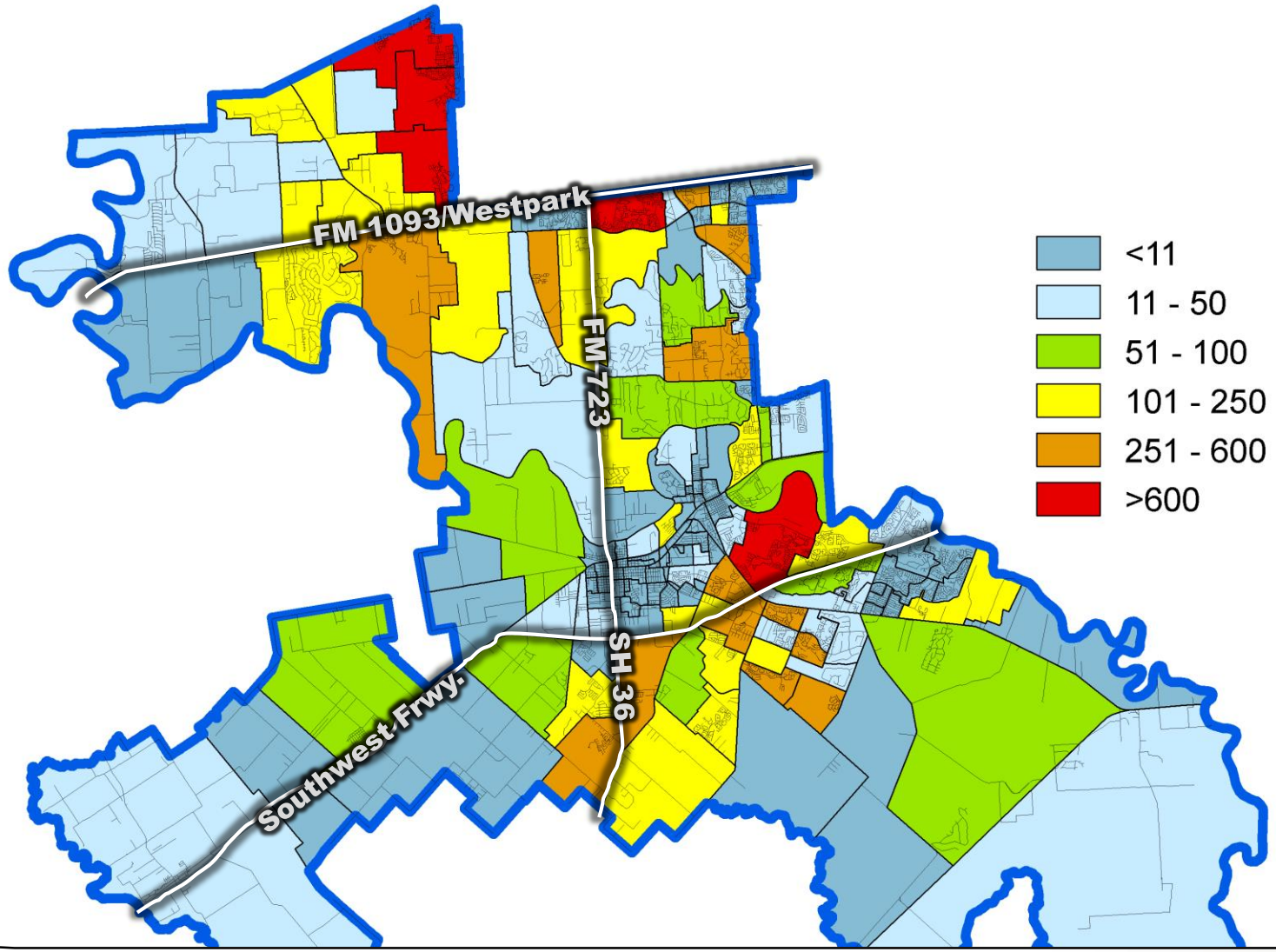
Planning Unit	Complex Names or Owner(s) Names	2018-2022	2022-2027	2018-2027
28B	Village Crossing	175	460	635
2G	Cross Creek Ranch MF	175	450	625
20D	Veranda	115	325	440
6E	Davis Development	300	130	430
44A	Summer Park	215	205	420
20D	Mixed Use	35	375	410
2E	Jordan Ranch MF	25	360	385
Total Multi-Family Housing Projected:		2,453	5,505	7,958

Projected New Housing Occupancies 2018– 2028

	Single-Family	Multi-Family	Mixed Use	Age-Restricted	Manu-factured	RVs	Grand Total
Jan 2018–Oct 2022	17,283	2,453	205	1,042	34	120	18,870
Oct 2022–Oct 2027	24,447	5,505	1,510	630	14	20	32,126
Jan 2018–Oct 2027	41,730	7,958	1,715	1,672	48	140	50,996

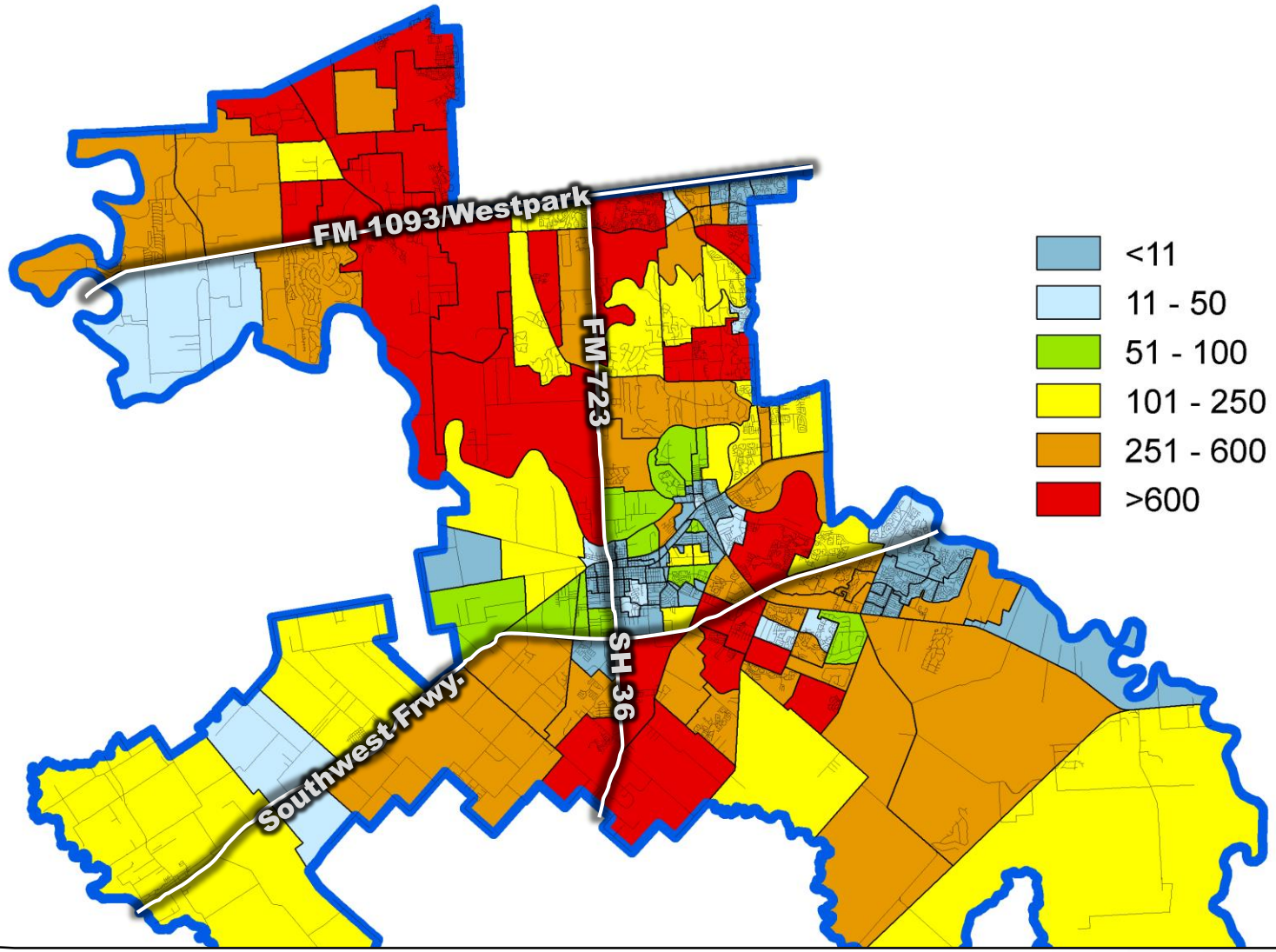
New Housing Occupancies

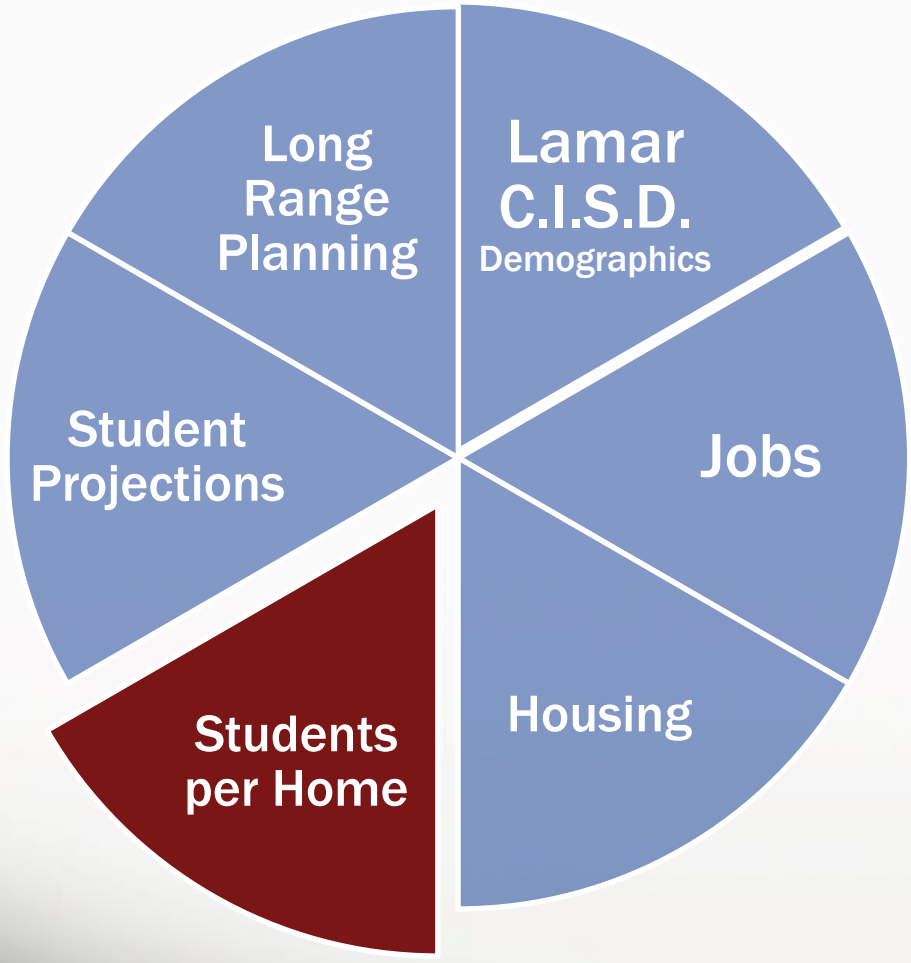
Projected: Jan. 2018 to Oct. 2022



New Housing Occupancies

Projected: Jan. 2018 to Oct. 2027





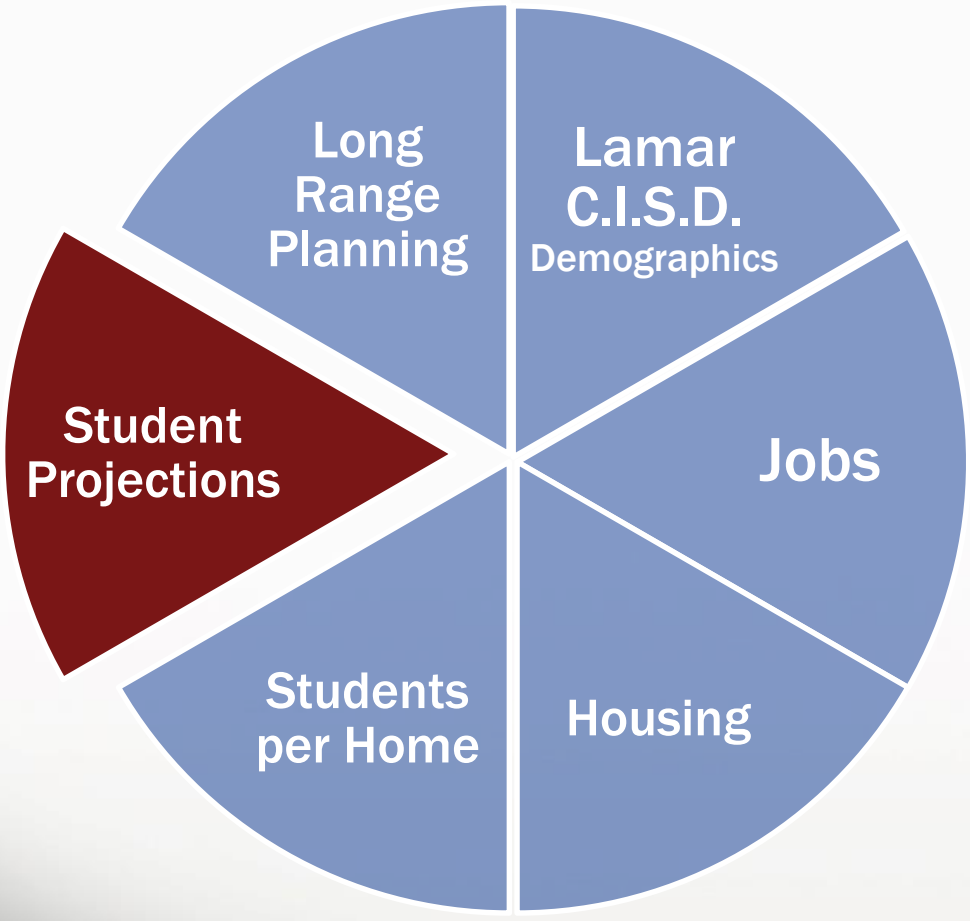
2017-18 Demographic Update

Students per Household

	2013-14	2014-15	2015-16	2016-17	2017-18
Single-Family Homes	0.58	0.61	0.57	0.58	0.58
Multi-Family Homes	0.40	0.33	0.38	0.38	0.38

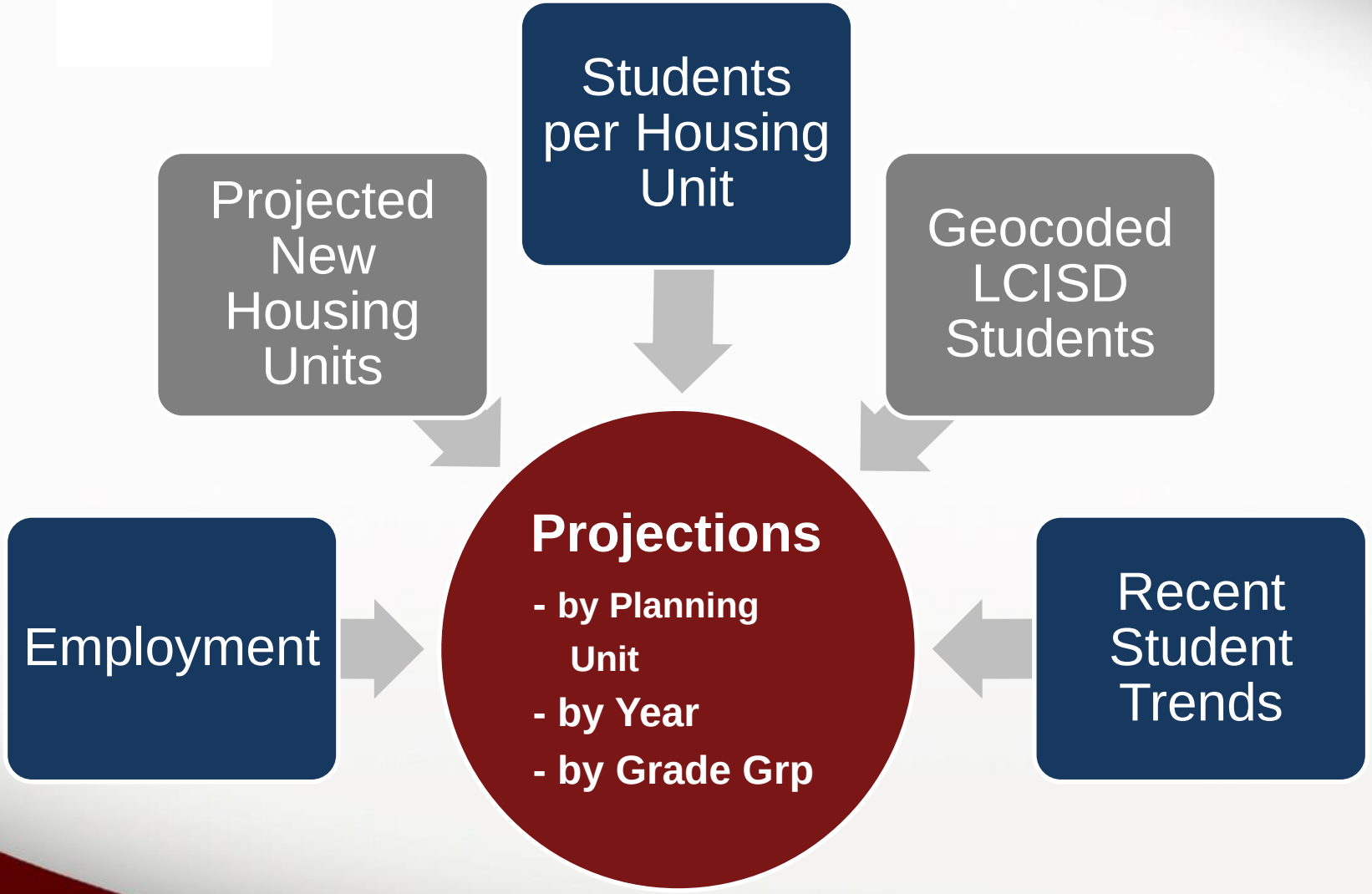
Ratios of Students per Household by Master Planned Community

Master-Planned Community	Weighted Average Students per Housing Unit			
	2014-15	2015-16	2016-17	2017-18
Brazos Town Center	---	0.33	0.32	0.39
Briarwood Crossing	---	---	0.52	0.52
Canyon Gate at the Brazos	0.77	0.77	0.80	0.78
Cross Creek Ranch	0.04	0.06	0.10	0.16
Firethorne West	0.21	0.26	0.27	0.37
Greatwood	0.63	0.63	0.62	0.61
Jordan Ranch	---	---	---	0.45
Lakemont	0.61	0.61	0.62	0.65
Lakes of Bella Terra	0.55	0.44	0.47	0.50
Long Meadow Farms	0.75	0.66	0.66	0.63
Parkway Lakes	0.76	0.76	0.73	0.72
River Park	0.42	0.42	0.40	0.38
River Park West	0.46	0.44	0.43	0.44
River's Edge	0.49	0.43	0.40	0.40
Tamarron	---	0.34	0.46	0.48
Westheimer Lakes	0.59	0.57	0.58	0.60

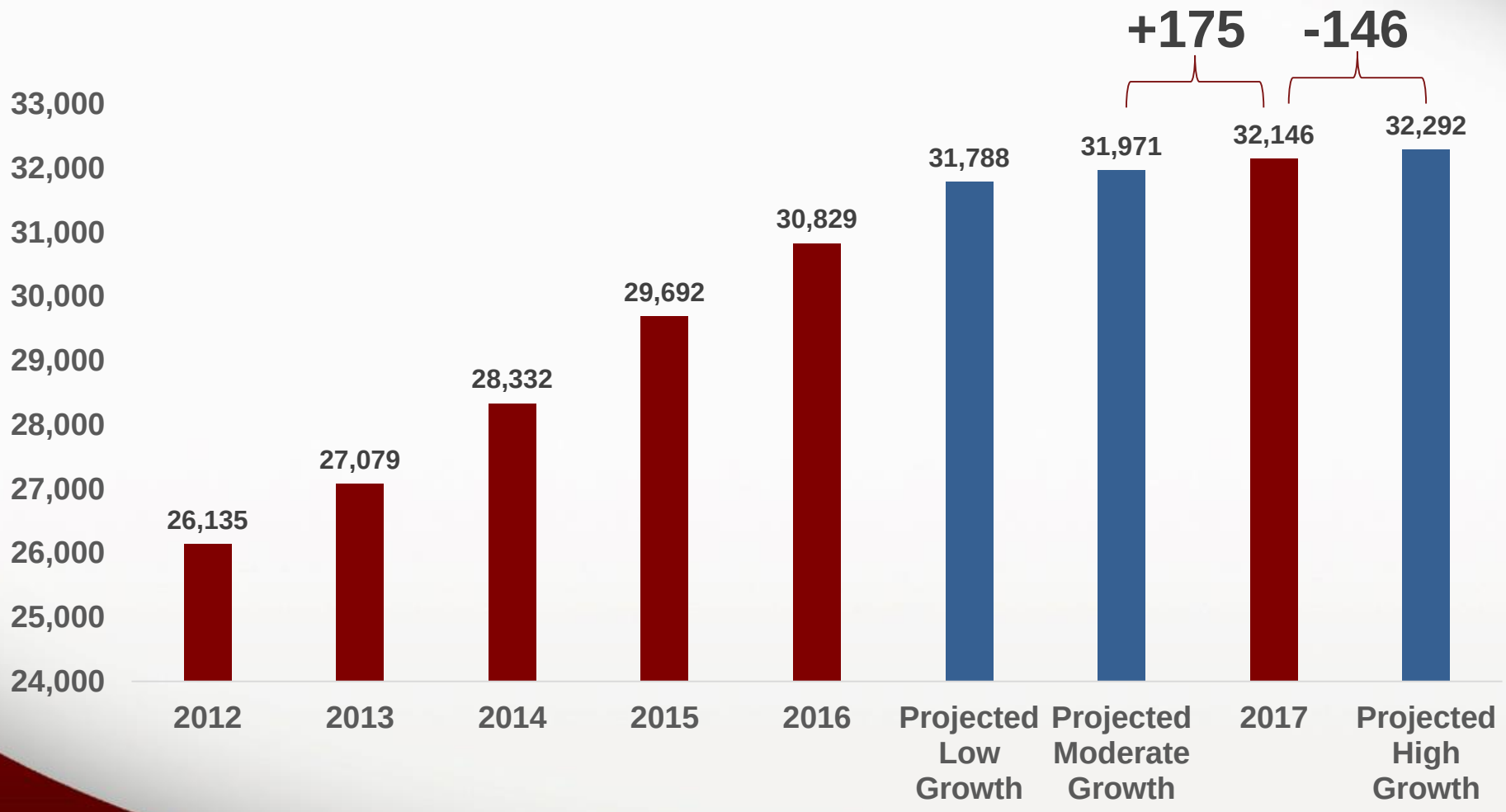


2017-18 Demographic Update

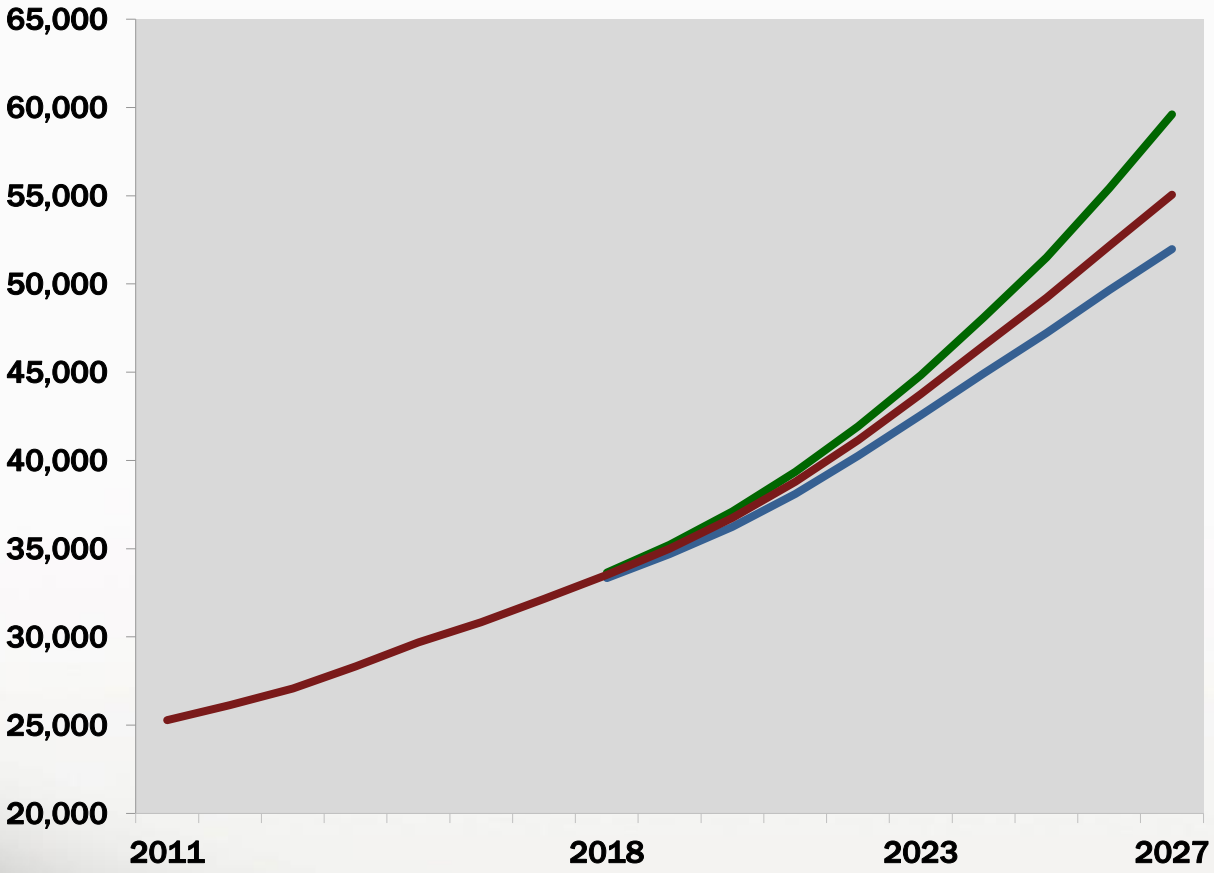
Process for Generating Student Projections



Past Projections vs. Enrollment



Three Scenarios of Growth



High Growth
2022 – 41,931
2027 – 59,613

Moderate Growth
2022 – 41,155
2027 – 55,062

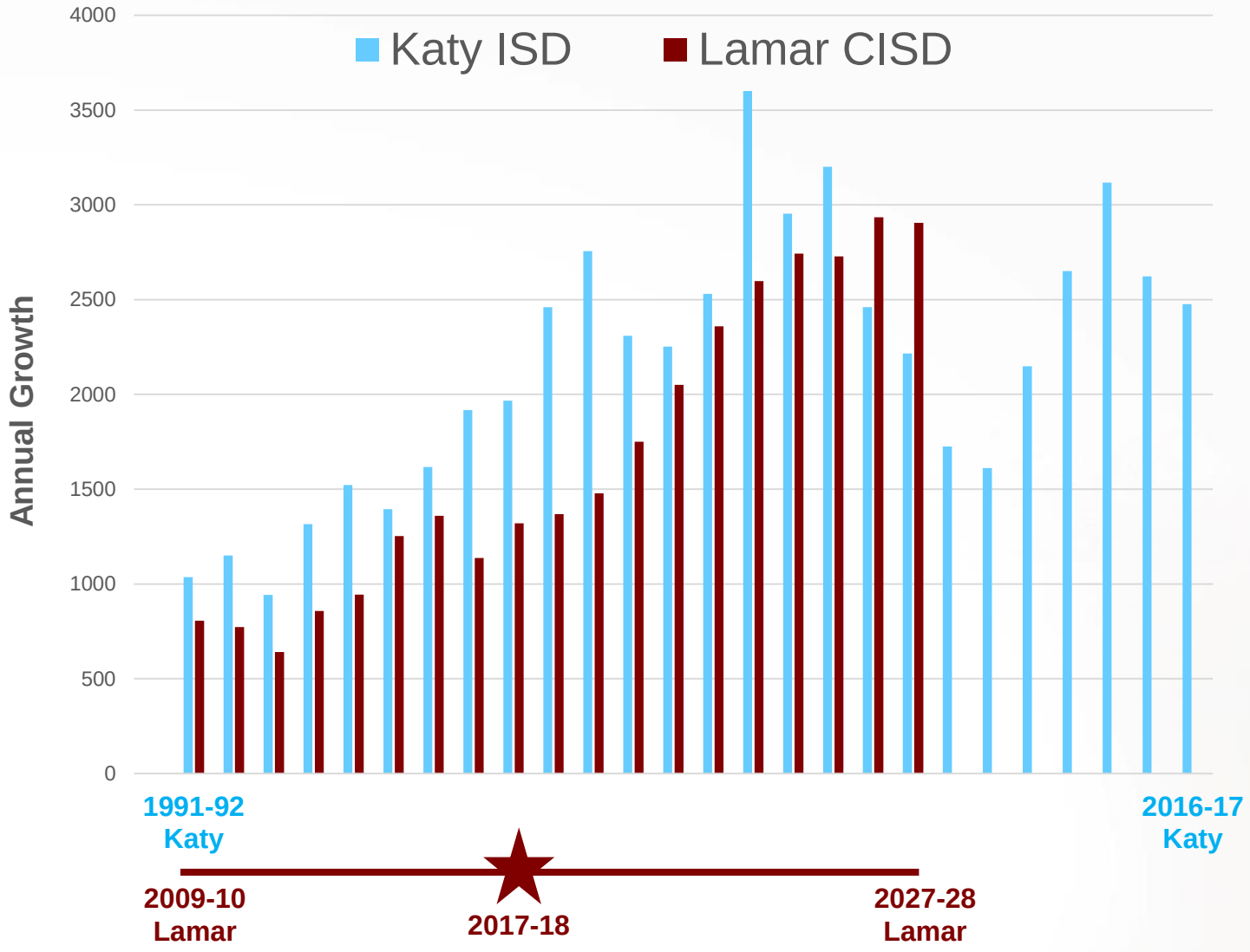
Low Growth
2022 – 40,267
2027– 51,972

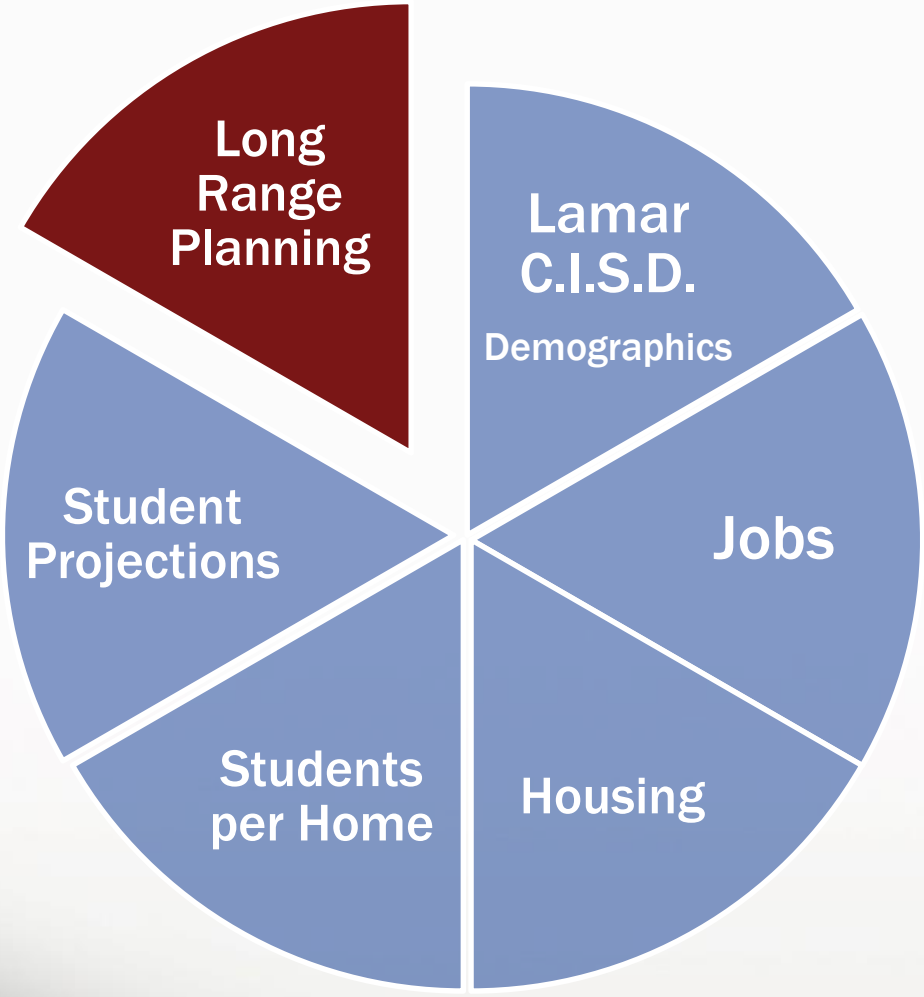
Moderate Growth Scenario

	Projected Enrollment at PEIMS Snapshot Date				
	2018	2019	2020	2121	2022
Enrollment	**33,517**	**34,995**	**36,745**	**38,795**	**41,155**
% Growth	4.27%	4.41%	5.00%	5.58%	6.08%
Growth	1,371	1,477	1,751	2,050	2,360

	Projected Enrollment at PEIMS Snapshot Date				
	2023	2024	2025	2026	2027
Enrollment	**43,753**	**46,496**	**49,224**	**52,157**	**55,062**
% Growth	6.31%	6.27%	5.87%	5.96%	5.57%
Growth	2,598	2,743	2,728	2,934	2,904

Projected LCISD Growth Compared to Historical Katy ISD Growth (adjusted)

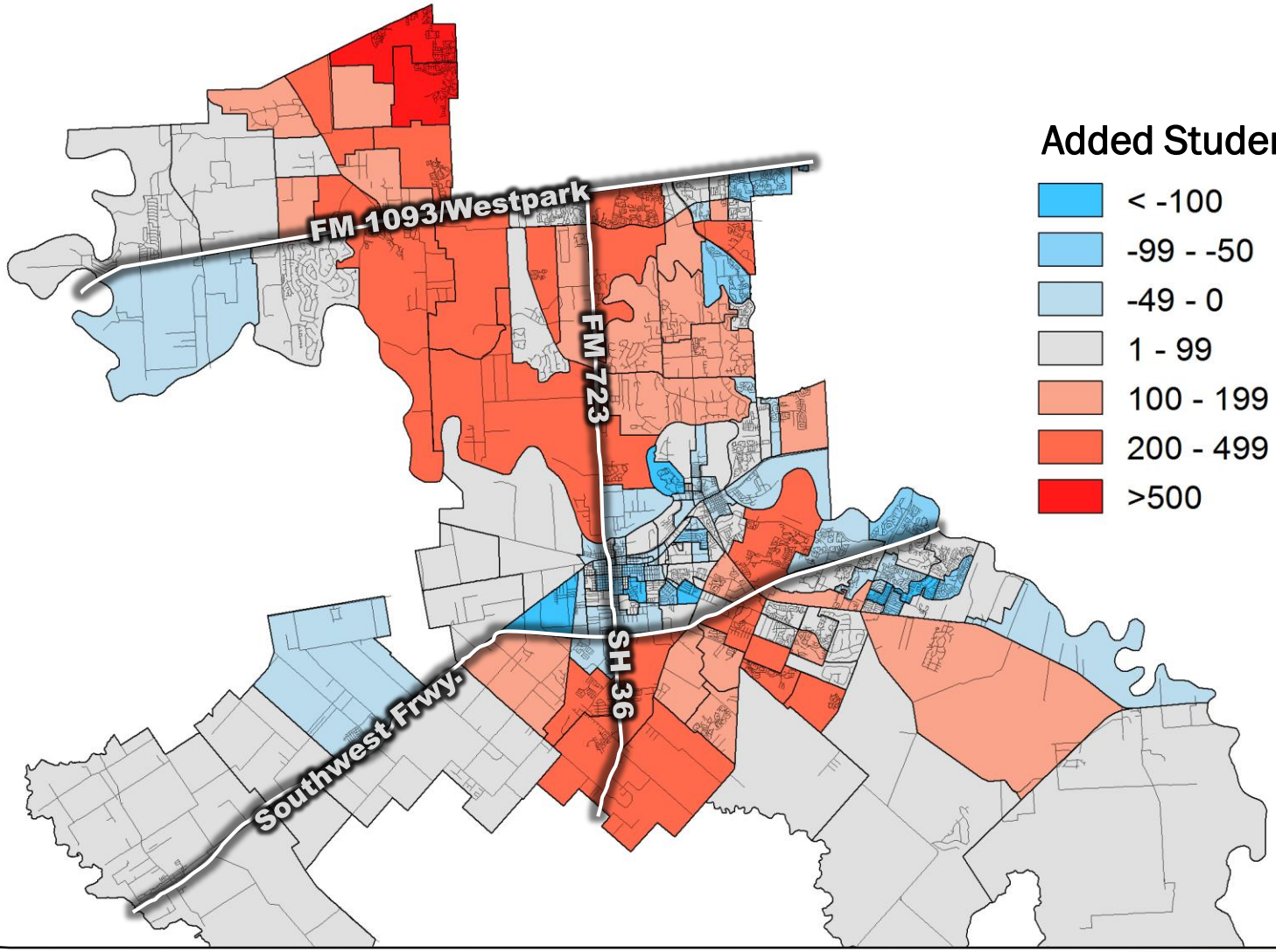




2017-18 Demographic Update

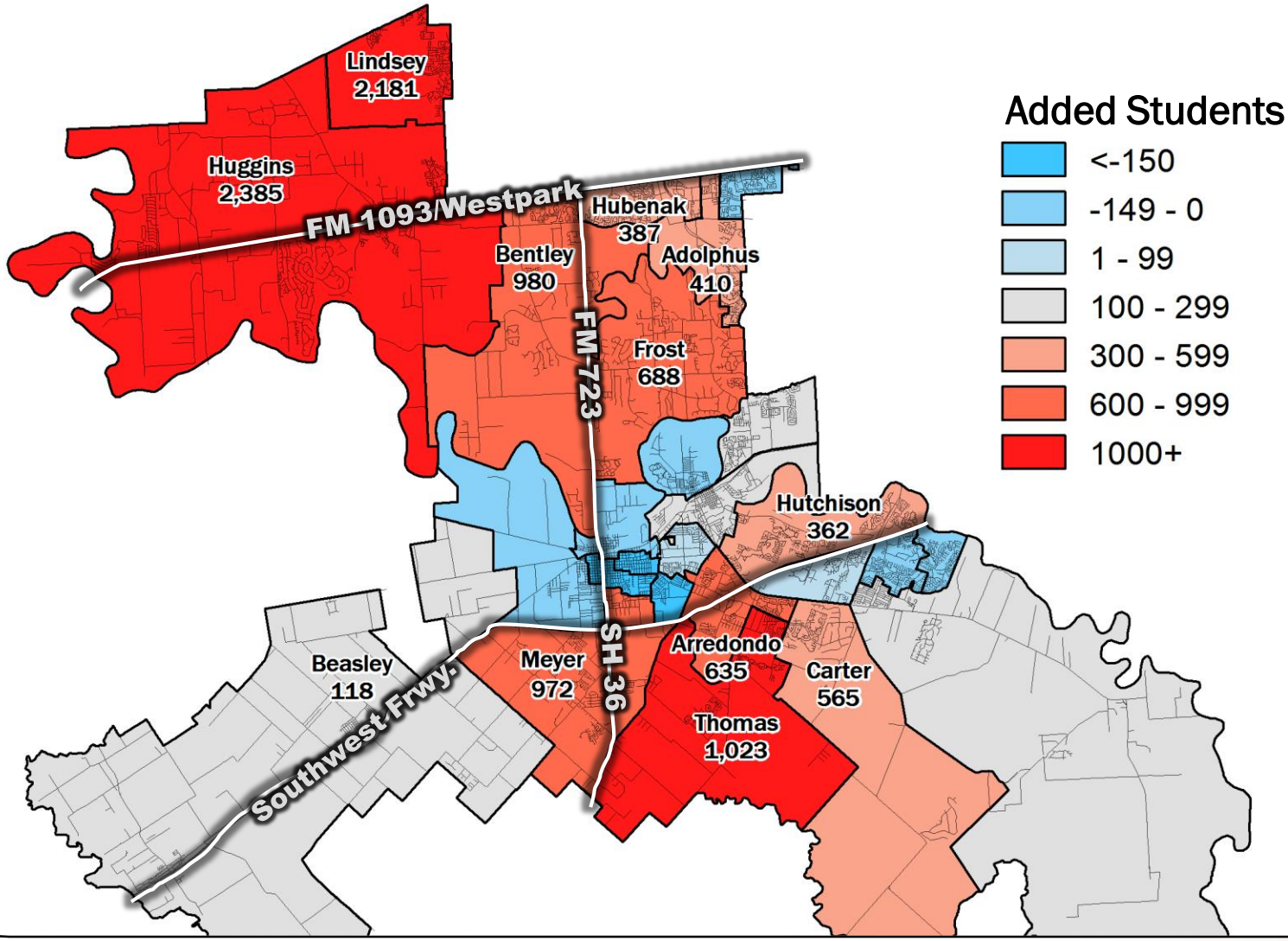
New Elementary Student Growth

Projected: 2017-18 to 2027-28



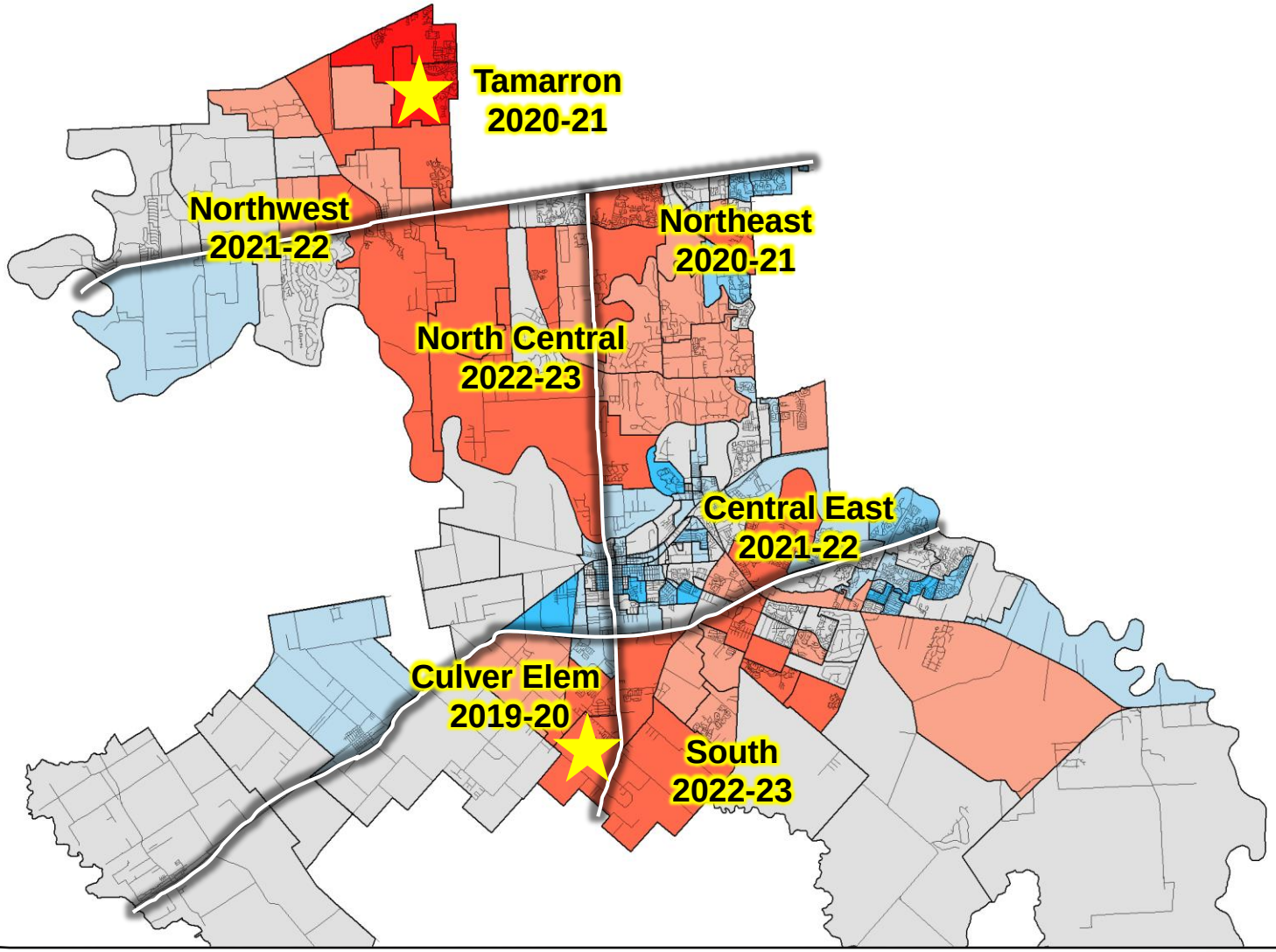
New Elementary Student Growth

Projected: 2017-18 to 2027-28



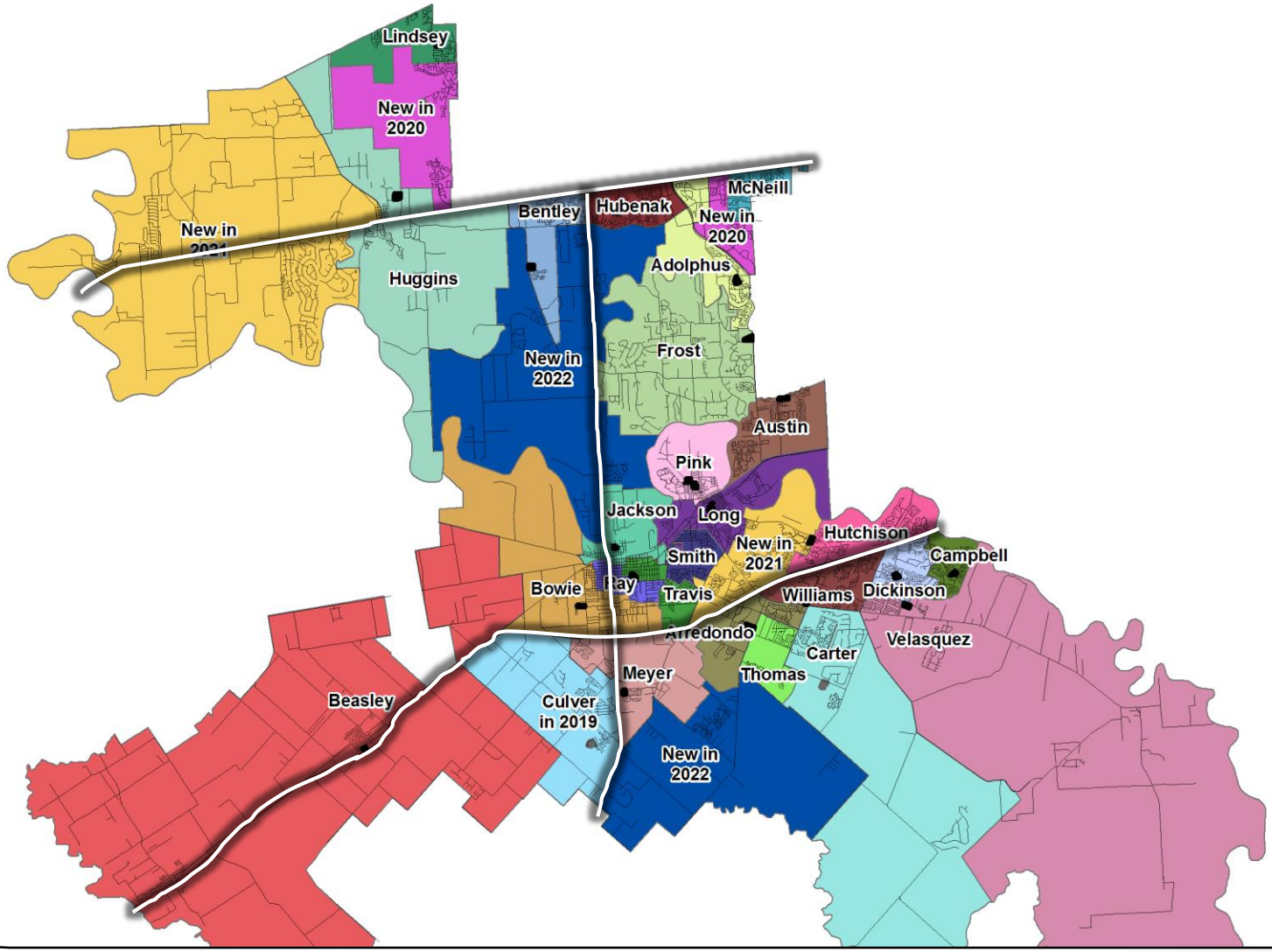
Elementary Long Range Plan

New Elementary Schools Needed 2019-20 through 2022-23



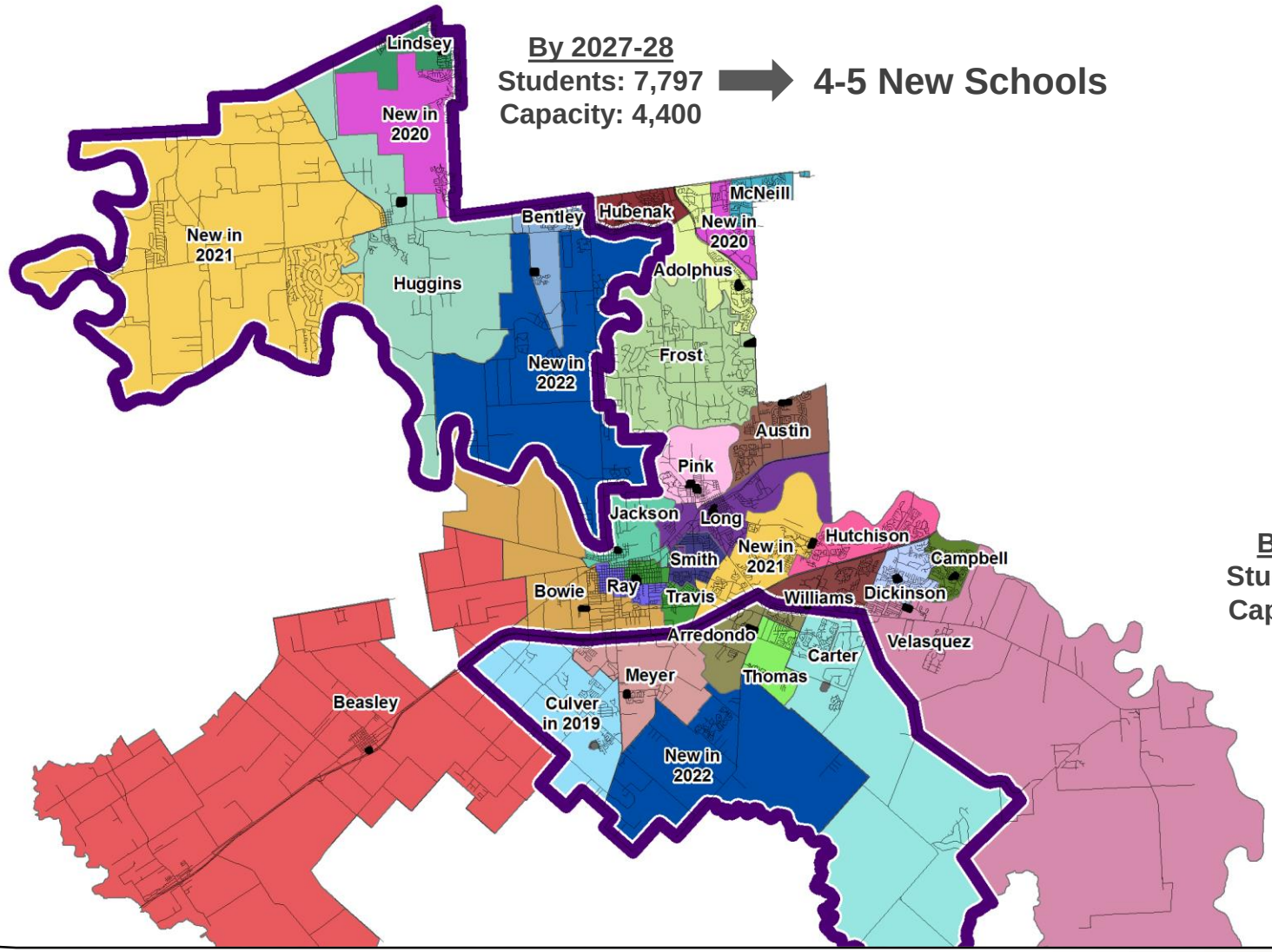
Elementary Long Range Plan

New Elementary Schools Needed 2019-20 through 2022-23



Elementary Long Range Plan

New Elementary Schools Needed 2023-24 through 2027-28



By 2027-28
Students: 7,797
Capacity: 4,400

→ 4-5 New Schools

By 2027-28
Students: 5,753
Capacity: 4,500

↓

1 New School

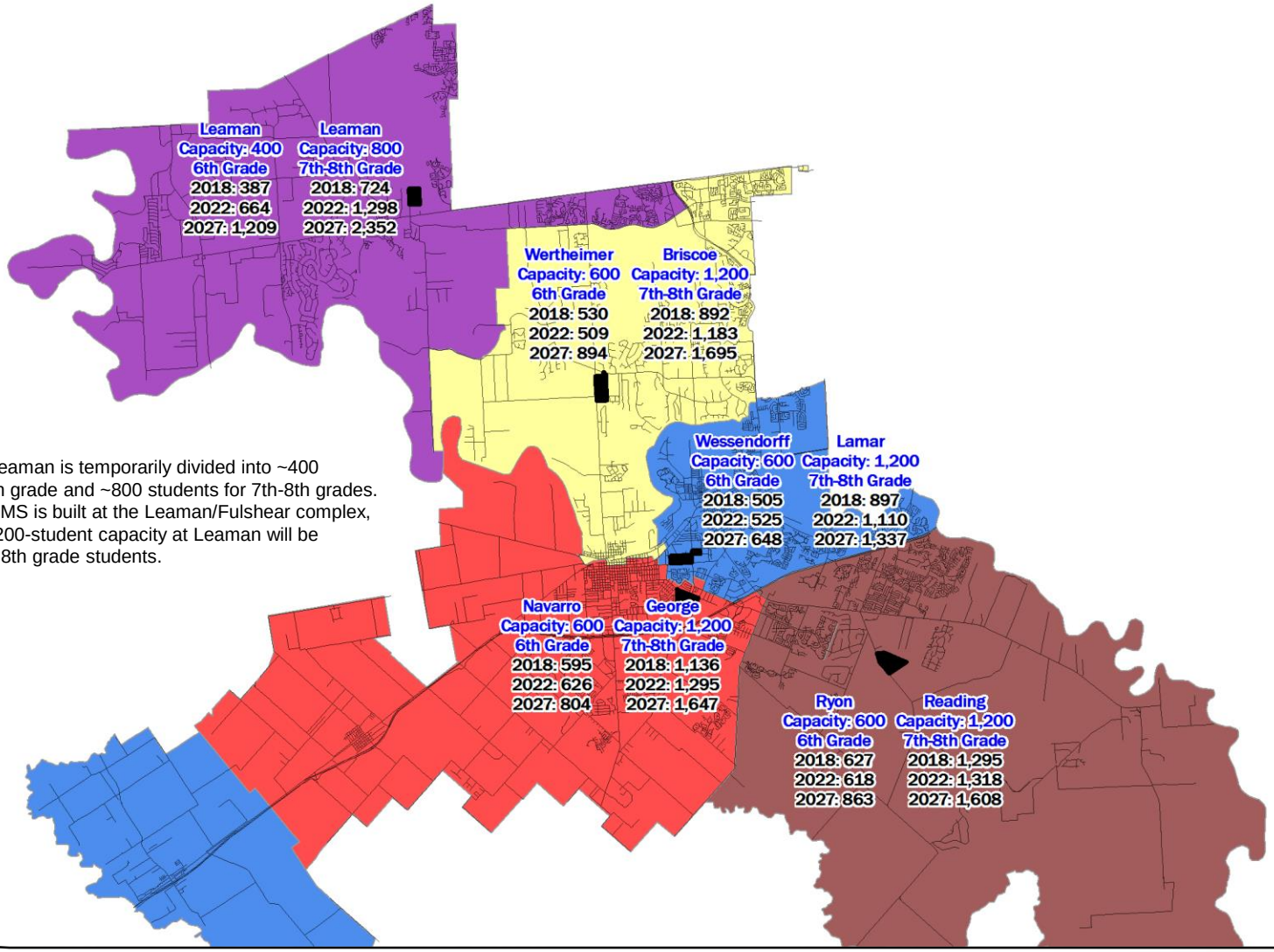
Elementary Long Range Plan

New Elementary Schools Needed

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	Total
2017-18 Study									1	1	2	2	2	4-5					12-13
2016-17 Study								1	2		3	1	5						12
2015-16 Study							1	2		3		1	1	3					11
2014-15 Study						1	2	1	1	3	1	3							12
2013-14 Study						1	1	1	2	1		2		1					9
2012-13 Study				1	1		1		2	2		1							8
2011-12 Study				1	1			1		2									5
2010-11 Study				1		1		2	1	1									6
2009-10 Study			1		1	2	1	2	1										8

Secondary Long Range Planning

Projected Resident Students: 2017-18 to 2027-28



* Capacity at Leaman is temporarily divided into ~400 students for 6th grade and ~800 students for 7th-8th grades. When Roberts MS is built at the Leaman/Fulshear complex, then the full 1,200-student capacity at Leaman will be devoted to 7th-8th grade students.

Projected Resident 6th Grade Students

Middle School	Functional Capacity	Current	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Leaman	400	343	387	403	515	573	664	756	855	967	1,093	1,209
Navarro	600	558	595	609	604	593	626	611	641	688	751	804
Polly Ryon	600	614	627	631	672	608	618	669	697	743	807	863
Wertheimer	600	407	530	511	560	583	509	655	700	757	829	894
Wessendorff	600	451	505	528	511	513	525	561	570	596	628	648
Total	2,800	2,373	2,644	2,682	2,862	2,870	2,942	3,252	3,463	3,751	4,108	4,418

Highlights indicate >120% utilization

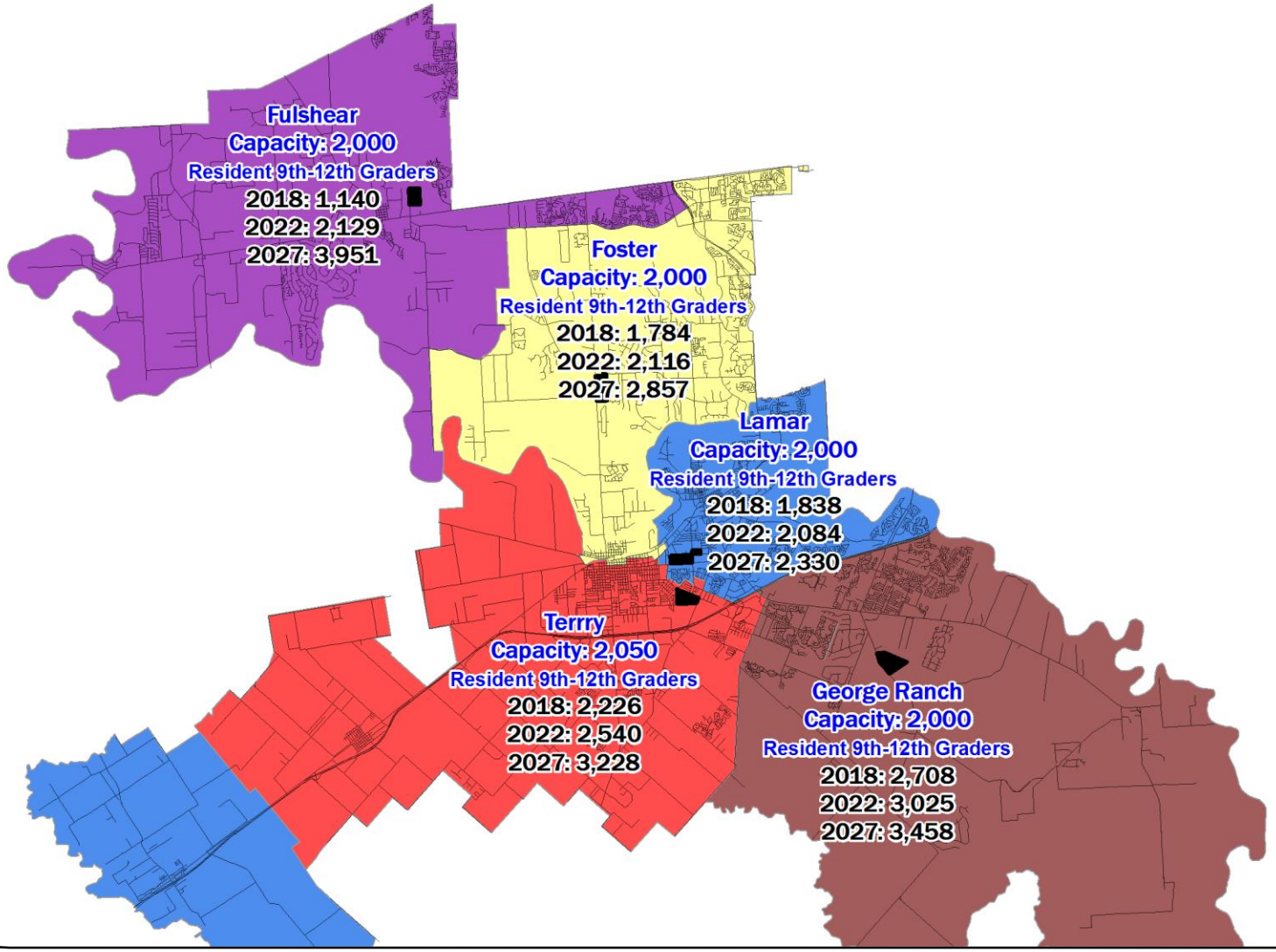
Projected Resident 7th-8th Grade Students

Junior High	Functional Capacity	Current	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Briscoe	1,200	871	892	1,004	1,101	1,117	1,183	1,141	1,225	1,430	1,546	1,695
George	1,200	1,113	1,136	1,169	1,246	1,284	1,295	1,337	1,374	1,415	1,514	1,647
Lamar	1,200	885	897	975	1,072	1,103	1,110	1,135	1,184	1,240	1,278	1,337
Leaman	800	601	724	864	951	1,101	1,298	1,478	1,681	1,886	2,114	2,352
Reading	1,200	1,273	1,295	1,313	1,321	1,347	1,318	1,256	1,313	1,400	1,483	1,608
Total	5,600	4,743	4,944	5,325	5,691	5,952	6,204	6,347	6,777	7,371	7,935	8,639

Highlights indicate >120% utilization

Secondary Long Range Planning

Projected Resident Students: 2017-18 to 2027-28



Projected Resident 9th-12th Grade Students

High School	Functional Capacity	Current	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Foster	2,000	1,707	1,784	1,849	1,903	2,014	2,116	2,254	2,394	2,507	2,676	2,857
Fulshear	2,000	997	1,140	1,330	1,535	1,820	2,129	2,492	2,861	3,194	3,582	3,951
George Ranch	2,000	2,614	2,708	2,780	2,830	2,932	3,025	3,132	3,209	3,237	3,342	3,458
Lamar	2,000	1,781	1,838	1,879	1,912	1,998	2,084	2,175	2,242	2,247	2,292	2,330
Terry	2,050	2,166	2,226	2,271	2,309	2,421	2,540	2,690	2,835	2,917	3,073	3,228
Total	10,050	9,265	9,696	10,109	10,489	11,185	11,894	12,743	13,541	14,102	14,965	15,824

Highlights indicate >120% utilization

Lamar C.I.S.D.

Demographic Update

February 15, 2018

PASA