Demographic and Enrollment Analysis

Elementary School Boundary Team

September 16, 2024

APPLIED ECONOMICS

Scope of Study

Enrollment Trends
- Total and grade level characteristics
- Geographic distribution
- Alternative providers

Demographic Characteristics
- Population characteristics
- Household tenure and age structure
- Housing supply and occupancy rates
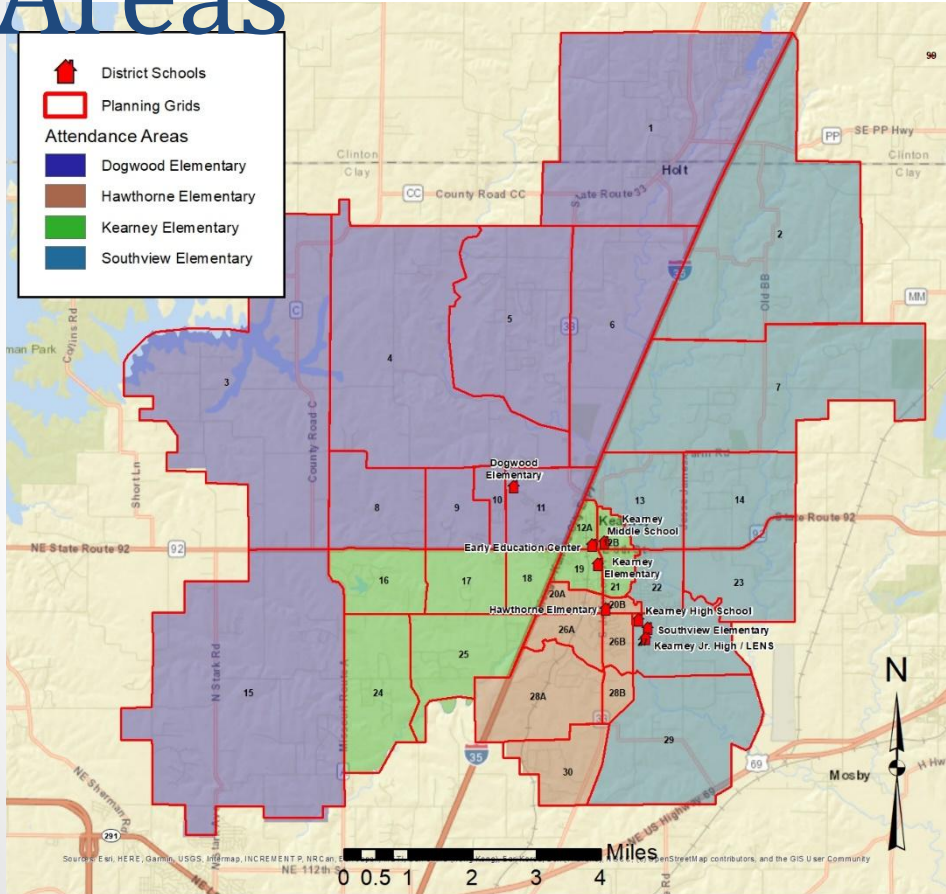
Residential Development Impacts
- Current development activity
- Housing market conditions
- Future development potential

Enrollment Projections
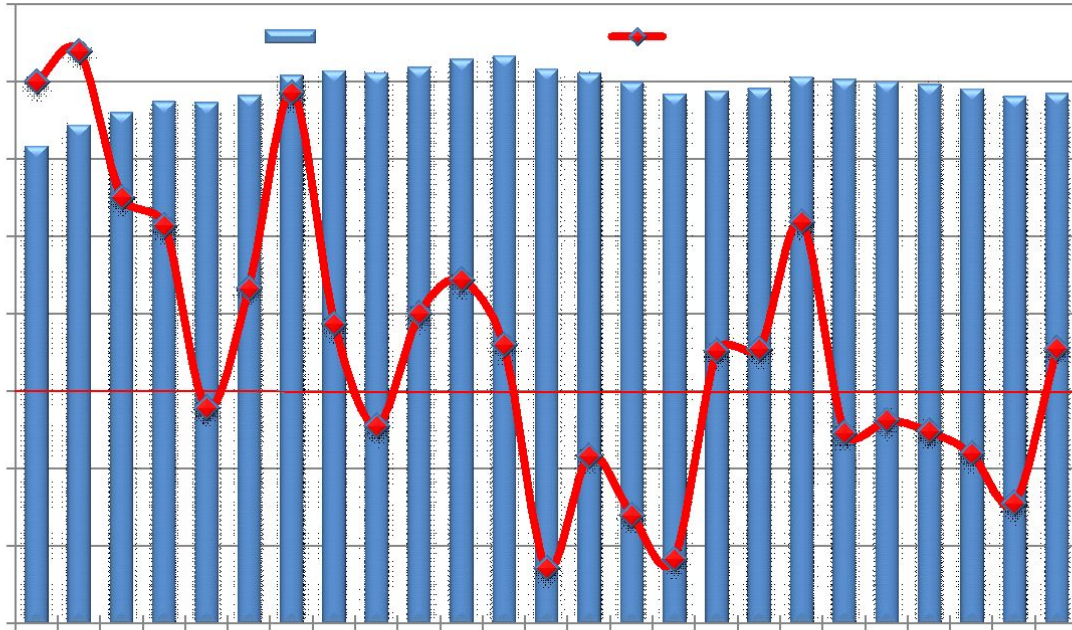- District
- Sub-District

Sub-District Planning Areas

To facilitate facility and attendance area planning, the District is divided into 34 sub-district planning areas, herein referred to as "grids."

Unlike school attendance areas, grids remain consistent over time, providing a consistent basis for sub-District enrollment projections.

Enrollment Trends

District enrollment grew at a moderate and consistent rate during the 2000's, increasing by about 600 students (19%) and about 1,400 new housing units.

From 2010 through 2015, enrollment declined as construction slowed dramatically, and lower birth rates started to impact elementary enrollment.

The same pattern is repeating itself now as new residential projects have been slow to get underway and market conditions weaken.

4

Enrollment Characteristics

Average Enrollment Per Grade
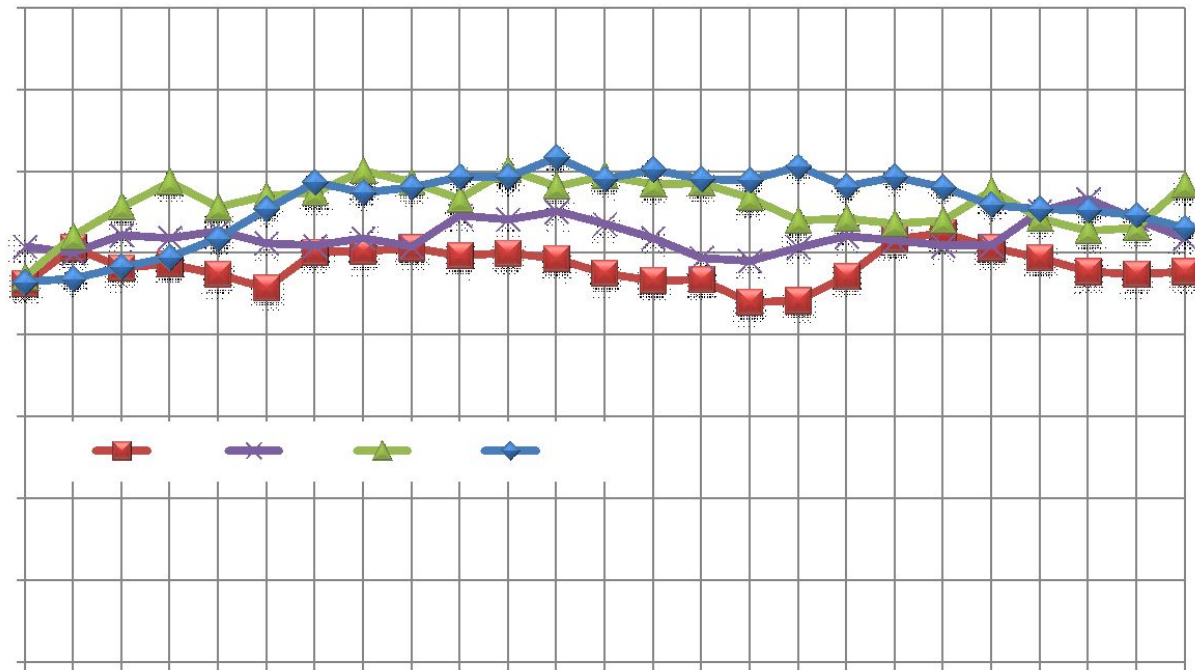
High school enrollment had consistently been the largest group since 2006/07, but in the last two years, the 3-5 grade group has spiked, an echo of the K-2 increases from 2015 through 2019.

Enrollment in the K-2 group surged during the peak of the last housing cycle, but has slowly retreated as prices and interest rates have excluded many young home buyers.

Distribution of Students
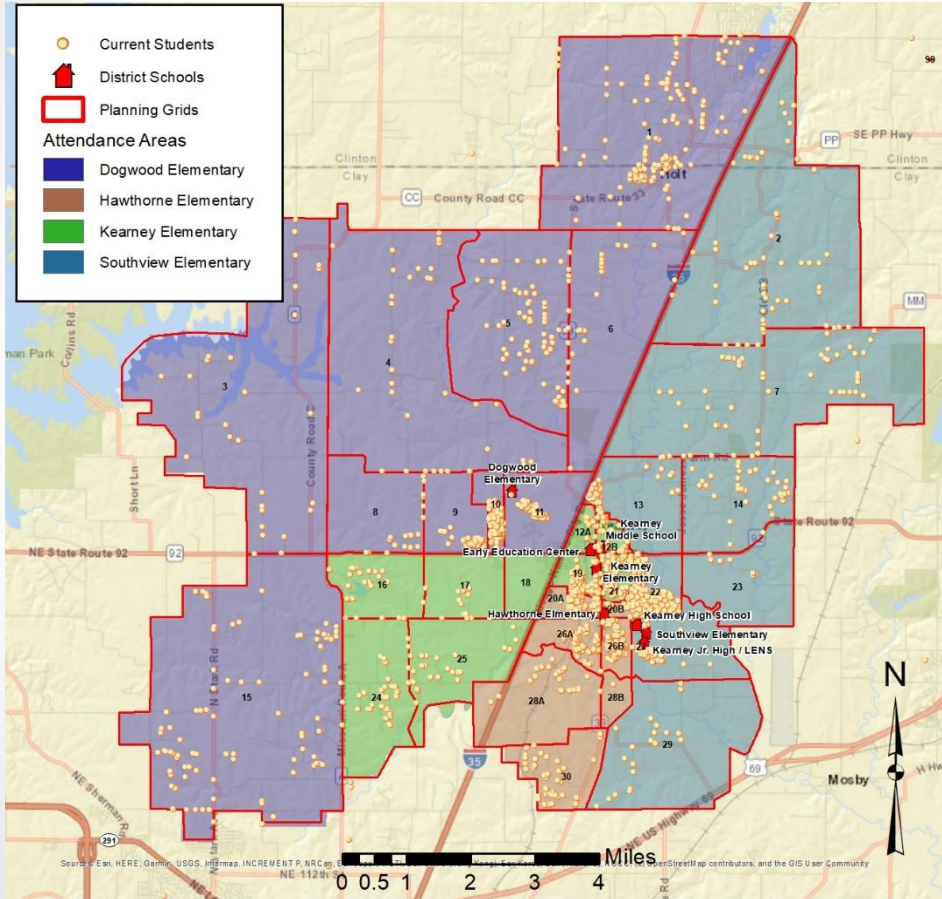
A slim majority of current students (53%), are located in the District quadrant east of I-35 and south of State Route 92.

Outside the developed portions of the City of Kearney, and near the community of Holt, students are scattered across a large area making both facility and attendance area planning difficult.

6

2024/25 Enrollment by Grid
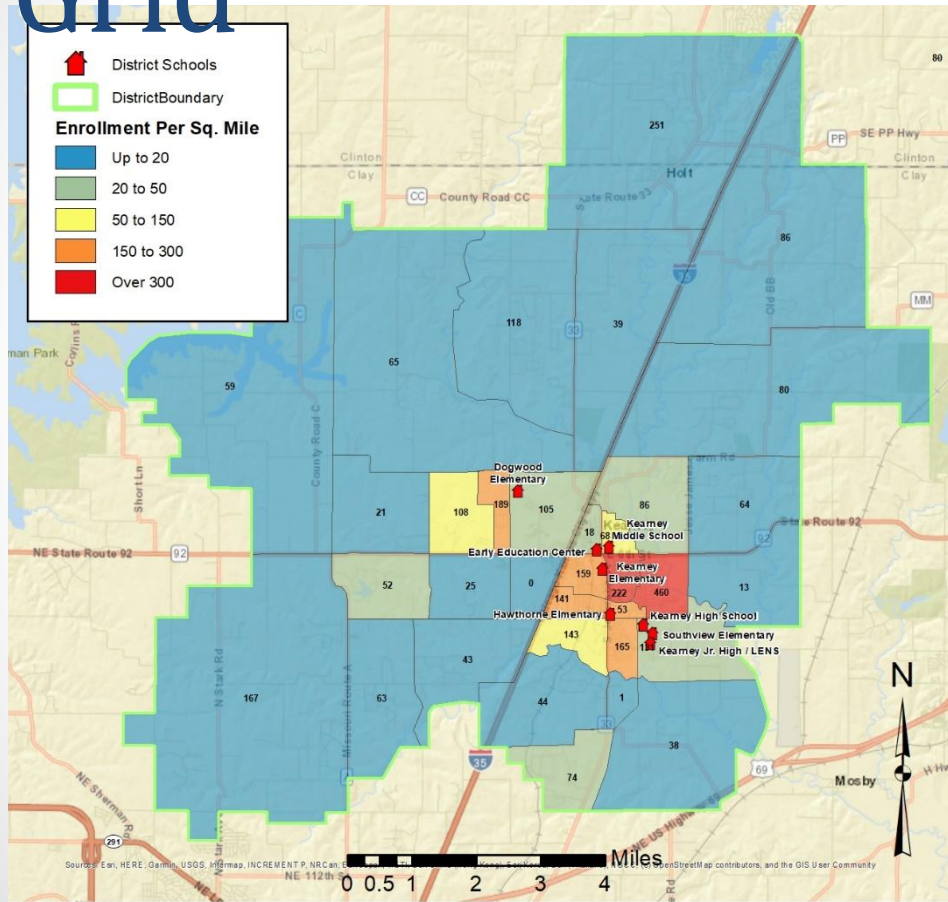
Student data aggregated by grid shows relatively high enrollment density in the City of Kearney, but lower density elsewhere.

The total count of current K-12 students by grid is shown on this map, but data was collected by grade for 2017/18 through 2024/25 for use in the projection model, and for facility and attendance area planning.

Change in Enrollment:

K-12 Enrollment Change
2018/19 - 2024/25
-37   0   +66
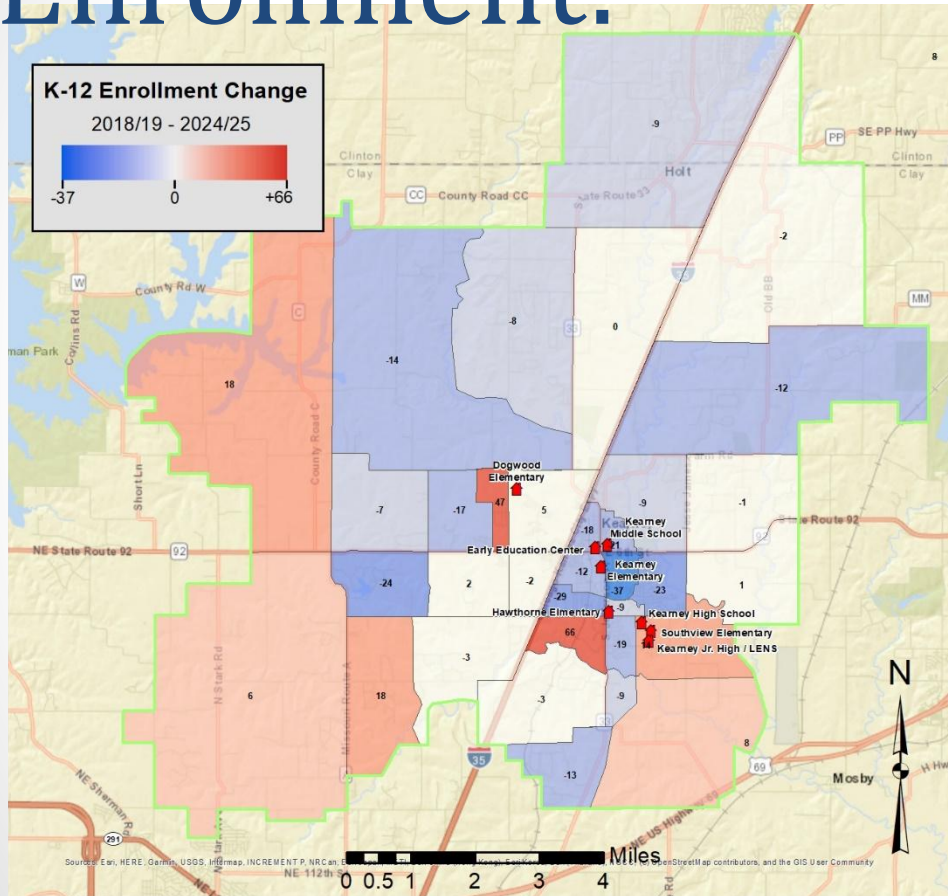
Despite almost no net change in total District enrollment during the past five years, the map shows a shift in enrollment from the area east of I-35, and from Holt, to the area northwest of I-35 and State Route 92 which has featured new homes affordable to families with children.

8

Demographic Trends

	2000 Census	2010 Census	2020 Census	Change* 2000-10	Change* 2010-20
Population	14,275	17,877	20,104	2.3%	1.2%
Under 5	7.2%	5.5%	5.5%	-0.5%	1.2%
5 to 13	16.4%	14.5%	12.4%	1.0%	-0.4%
14 to 17	6.7%	7.8%	6.4%	3.9%	-0.8%
18 to 21	3.7%	4.1%	5.1%	3.4%	3.5%
22 to 54	47.6%	44.7%	41.5%	1.6%	0.4%
55 to 59	6.2%	6.4%	6.9%	2.5%	2.0%
60 to 74	8.8%	13.3%	15.8%	6.6%	3.0%
75 and up	3.4%	3.7%	6.3%	3.2%	6.7%
Housing Units	5,210	6,718	7,706	2.6%	1.4%
Single Family	86.0%	87.9%	88.0%	2.8%	1.4%
Multifamily	14.0%	12.1%	12.0%	1.1%	1.3%
Households	4,975	6,403	7,386	2.6%	1.4%
15 to 24	2.5%	1.6%	0.6%	-2.0%	-8.6%
25 to 34	17.9%	11.4%	13.0%	-2.0%	2.8%
35 to 44	27.2%	21.6%	16.6%	0.2%	-1.2%
45 to 54	20.2%	26.6%	21.6%	5.4%	-0.7%
55 to 64	19.1%	18.9%	19.5%	2.4%	1.8%
65 to 74	7.8%	12.6%	19.6%	7.5%	6.1%
Over 75	5.2%	7.4%	9.1%	6.1%	3.6%
Population Per	2.87	2.79	2.72	-0.27%	-0.25%

30.3%   27.8%   24.3%

45.1%   33.0%   29.6%

Sources: U.S. Bureau of the Census, 2000, 2010 and 2020; ACS, 2022.

* Annual compound rate of change.

Population and housing continues to grow, albeit at a very modest rate compared to the 2000's.

The share of the population under 18 years is still large, but is declining, with a notable shift toward the older age cohorts now evident.

Households headed by persons age 65 and over accounted for 53% of the increase in households between 2000 and 2020.

Birthrates: Live Births per 1,000 People Aged 15 to 39
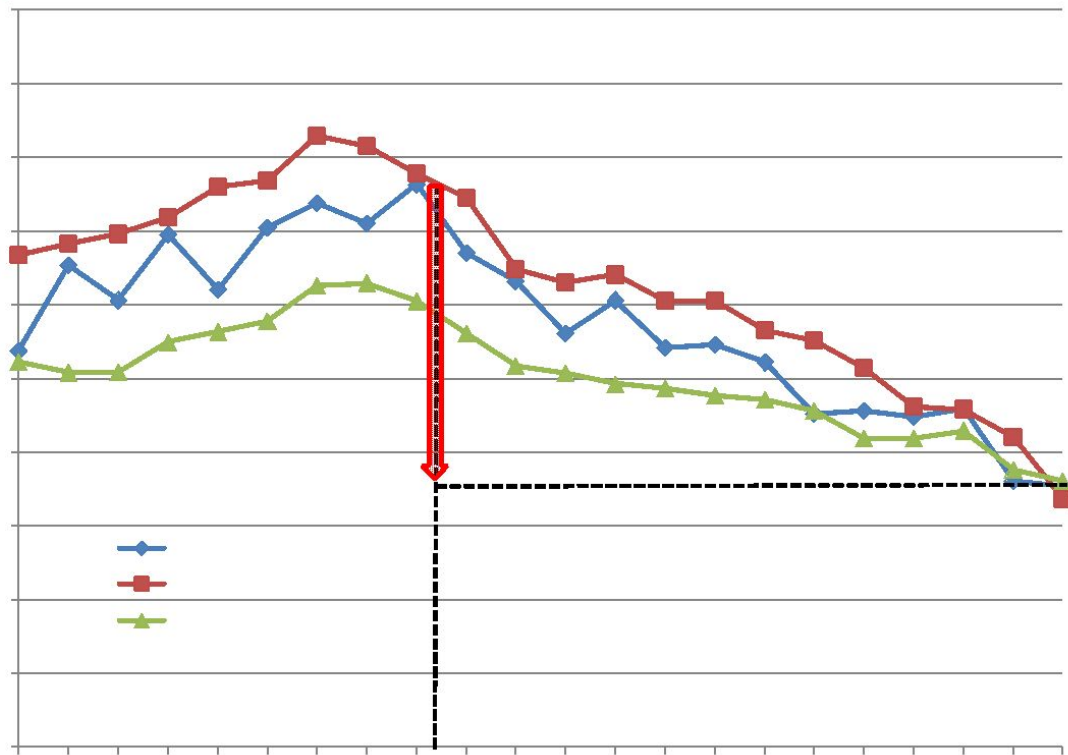
Birth rates in Clay County have declined by about 23% since the start of the Great Recession, resulting in an 10% decline in the number of births since 2008.

While birth rates have continued to fall, the number of births in Clay County was fairly stable between 2016 and 2019, but dropped sharply again in 2020 and modestly in 2021.

Residential Development

About 900 housing units have been added in the District over the last 10 years; all but 92 were single family residences.

The increase in single family home construction from 2015 through 2018 substantially exhausted the ready supply of lots, causing the rate of construction to fall sharply, but it has now stabilized due to small projects and widespread rural development.
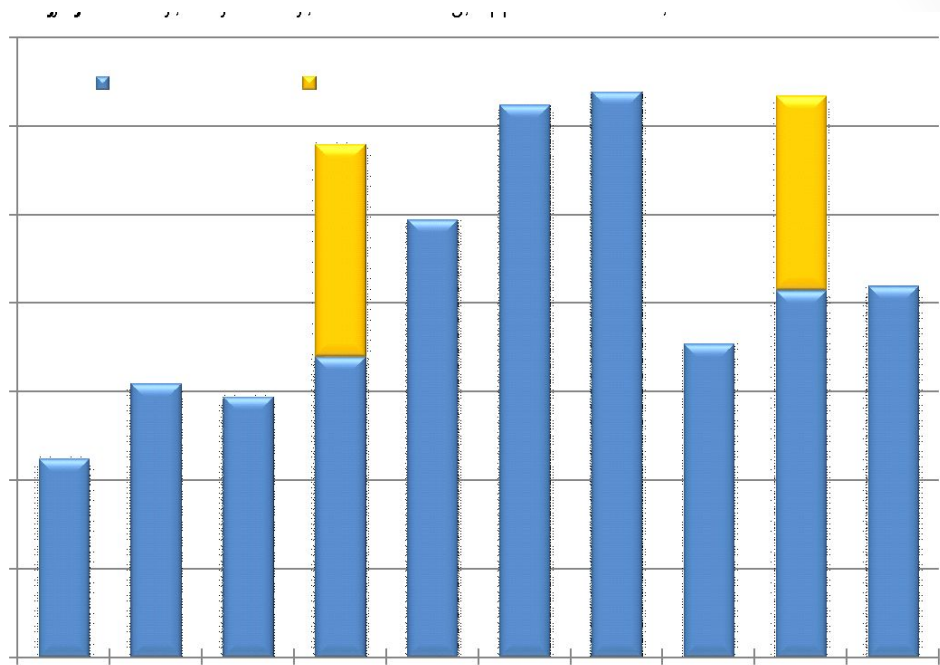
Development Potential

The residential development potential of known projects and vacant land that <u>could</u> begin development during the next ten years totals roughly 4,600 units, including about 750 units that remain in active projects.

The near-term potential is in active development projects like Greenfield, Noah's Landing and Dovecott, with Stollings Ranch likely to be the next large project to get underway.
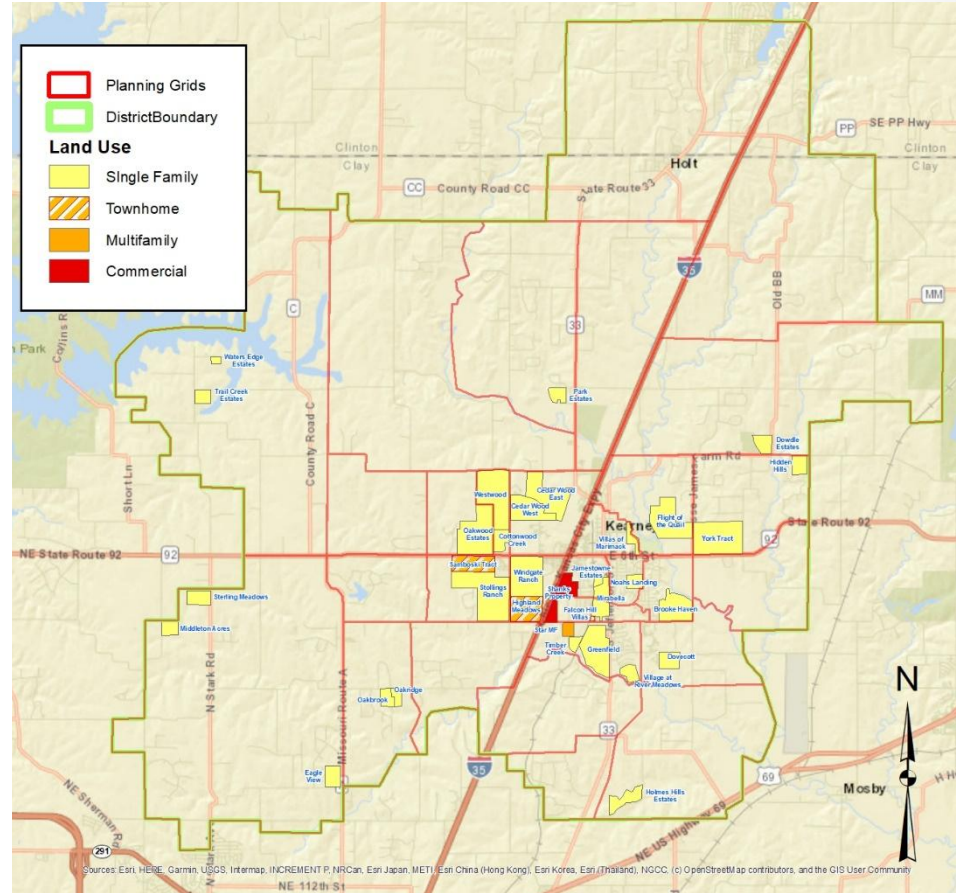
Development Timing

Other than Stollings Ranch, Westwood is the most likely project to have new housing units in the next five years, as well as perhaps Cedar Wood West, River Meadows and a multifamily project near the new I-35 interchange.

The majority of the potential new housing units are single family, however more multifamily projects are expected to emerge.

13
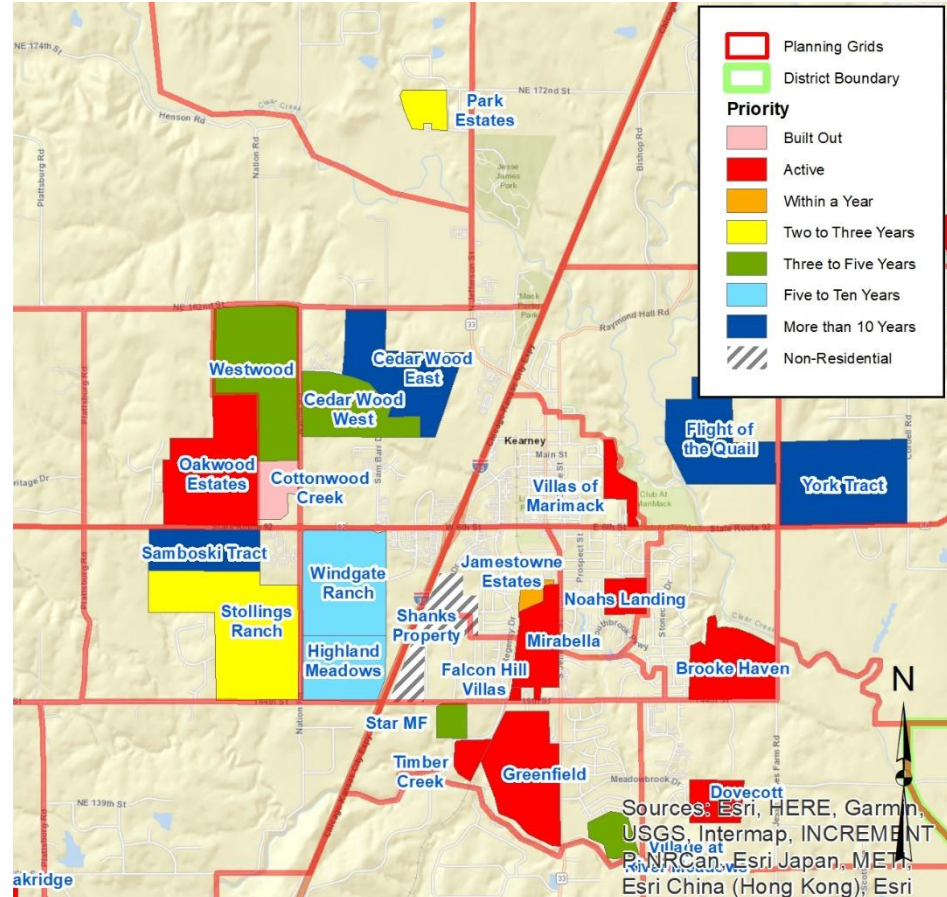
Projections: Housing and Population

Year	Population	Housing Units	New Units Total	New Units SF	New Units MF	Occupancy Rate	Households Total	Households Change	Pop/HH
2010/11	**17,877**	**6,718**	**111**	**51**	**60**	**95.3%**	**6,403**	**103**	**2.792**
2011/12	**17,735**	**6,784**	**66**	**66**	**0**	**93.9%**	**6,370**	**-33**	**2.784**
2012/13	**17,733**	**6,822**	**38**	**38**	**0**	**93.7%**	**6,391**	**21**	**2.775**
2013/14	**17,787**	**6,880**	**57**	**57**	**0**	**93.5%**	**6,429**	**38**	**2.767**
2014/15	**17,902**	**6,958**	**79**	**79**	**0**	**93.2%**	**6,488**	**58**	**2.759**
2015/16	**18,235**	**7,033**	**75**	**75**	**0**	**94.2%**	**6,626**	**138**	**2.752**
2016/17	**18,558**	**7,168**	**134**	**86**	**48**	**94.5%**	**6,776**	**150**	**2.739**
2017/18	**18,919**	**7,294**	**126**	**126**	**0**	**94.9%**	**6,919**	**143**	**2.734**
2018/19	**19,378**	**7,453**	**159**	**159**	**0**	**95.2%**	**7,094**	**175**	**2.731**
2019/20	**19,849**	**7,616**	**163**	**163**	**0**	**95.5%**	**7,274**	**180**	**2.729**
2020/21	**20,104**	**7,706**	**90**	**90**	**0**	**95.8%**	**7,386**	**112**	**2.722**
2021/22	**20,350**	**7,853**	**147**	**103**	**44**	**95.5%**	**7,500**	**114**	**2.713**
2022/23	**20,555**	**7,957**	**104**	**104**	**0**	**95.3%**	**7,583**	**83**	**2.711**
2023/24	20,761	8,062	105	99	6	95.1%	7,667	84	2.708
2024/25	20,953	8,154	92	89	3	95.0%	7,746	79	2.705
2025/26	21,187	8,254	100	95	5	95.0%	7,841	95	2.702
2026/27	21,672	8,492	238	111	127	95.0%	8,067	226	2.686
2027/28	22,045	8,637	145	143	2	95.0%	8,205	138	2.687
2028/29	22,574	8,878	241	141	100	95.0%	8,434	229	2.676
2029/30	23,152	9,147	269	144	125	95.0%	8,690	256	2.664
2030/31	23,794	9,449	302	152	150	95.0%	8,977	287	2.651
2031/32	24,411	9,730	281	161	120	95.0%	9,244	267	2.641
2032/33	24,842	9,905	175	155	20	95.0%	9,410	166	2.640
2023/24 - 2032/33			1,948	1,290	658			1,827	

Sources: Land Marketing Inc., 2023; Applied Economics, 2023.
Bolding indicates historical estimates.

About 1,000 new housing units were added during the 2010's, increasing population by 2,500 people to a total of 20,104 people, according the 2020 Census.

Over 1,900 new homes are expected to be added over the next ten years; this will add about 4,400 new residents, with the growth being mostly in the second half of the projection period.

Projections: School-Age Population and Enrollment

Year	Households	School-Age Population *		K-12 Enrollment		Enrollment - Population Ratio
		Total	Per Household	Total	Per Household	
2010/11	6,403	3,991	0.623	3,652	0.570	0.915
2011/12	6,370	3,893	0.611	3,674	0.577	0.944
2012/13	6,391	3,829	0.599	3,590	0.562	0.938
2013/14	6,429	3,776	0.587	3,560	0.554	0.943
2014/15	6,488	3,736	0.576	3,503	0.540	0.938
2015/16	6,626	3,741	0.565	3,427	0.517	0.916
2016/17	6,776	3,750	0.554	3,445	0.508	0.919
2017/18	6,919	3,755	0.543	3,464	0.501	0.923
2018/19	7,094	3,774	0.532	3,540	0.499	0.938
2019/20	7,274	3,794	0.522	3,521	0.484	0.928
2020/21	7,386	3,777	0.511	3,508	0.475	0.929
2021/22	7,500	3,785	0.505	3,490	0.465	0.922
2022/23	7,583	3,778	0.498	3,462	0.457	0.916
2023/24	7,667	3,770	0.492	3,440	0.449	0.913
2024/25	7,746	3,759	0.485	3,433	0.443	0.913
2025/26	7,841	3,756	0.479	3,431	0.438	0.913
2026/27	8,067	3,814	0.473	3,466	0.430	0.909
2027/28	8,205	3,829	0.467	3,474	0.423	0.907
2028/29	8,434	3,884	0.461	3,559	0.422	0.916
2029/30	8,690	3,950	0.455	3,622	0.417	0.917
2030/31	8,977	4,027	0.449	3,668	0.409	0.911
2031/32	9,244	4,093	0.443	3,705	0.401	0.905
2032/33	9,410	4,113	0.437	3,731	0.396	0.907

Source: Applied Economics, 2023.

* Population age 5 through 17, corresponds with Kindergartern through 12th grade.

The school-age population per household has been declining rapidly since 2010/11, but the Enrollment – Population (E-P) ratio has been stable.

Current estimates show about 3,800 school-age persons living in the District, and total enrollment of about 3,500 students.

The school-age population per household is expected to continue to decline throughout the projection period.

Enrollment Projections

| Year	Enrollment by Level				K-12 Enrollment	Change	
	K-5	6-7	8-9	10-12		Number	Percent
2010/11	**1,562**	**586**	**618**	**886**	**3,652**	**52**	**1.4%**
2011/12	**1,566**	**597**	**593**	**918**	**3,674**	**22**	**0.6%**
2012/13	**1,516**	**567**	**601**	**906**	**3,590**	**-84**	**-2.3%**
2013/14	**1,478**	**599**	**612**	**871**	**3,560**	**-30**	**-0.8%**
2014/15	**1,442**	**571**	**589**	**901**	**3,503**	**-57**	**-1.6%**
2015/16	**1,396**	**544**	**610**	**877**	**3,427**	**-76**	**-2.2%**
2016/17	**1,423**	**534**	**588**	**900**	**3,445**	**18**	**0.5%**
2017/18	**1,487**	**531**	**569**	**877**	**3,464**	**19**	**0.6%**
2018/19	**1,549**	**524**	**575**	**892**	**3,540**	**76**	**2.2%**
2019/20	**1,550**	**552**	**544**	**875**	**3,521**	**-19**	**-0.5%**
2020/21	**1,524**	**584**	**561**	**839**	**3,508**	**-13**	**-0.4%**
2021/22	**1,568**	**528**	**559**	**835**	**3,490**	**-18**	**-0.5%**
2022/23	**1,565**	**500**	**571**	**826**	**3,462**	**-28**	**-0.8%**
2023/24	**1,522**	**554**	**531**	**805**	**3,412**	**-50**	**-1.4%**
2024/25	**1,493**	**600**	**517**	**821**	**3,431**	**19**	**0.6%**
2025/26	1,482	577	585	786	3,430	-1	0.0%
2026/27	1,507	548	618	791	3,464	34	1.0%
2027/28	1,531	534	598	829	3,492	28	0.8%
2028/29	1,593	513	570	904	3,580	88	2.5%
2029/30	1,619	540	559	919	3,637	57	1.6%
2030/31	1,662	583	539	894	3,678	41	1.1%
2031/32	1,707	581	567	866	3,721	43	1.2%
2032/33	1,737	590	606	827	3,760	39	1.0%

Source: Applied Economics, 2024.
Bolding indicates actuals.

Between 2010/11 and 2017/18 enrollment fell by 0.7% per year, but it has been nearly unchanged since then.

The projections show enrollment continuing to decline over the next three years, as the impact of the aging of the population and reductions in the E-P ratio outweigh the impact of housing and population growth, before new developments again add to the size of the school-age population.

16

Change in Enrollment: 2024/25 - 2028/29

K-12 Enrollment Change
2024/25 - 2028/29
-27   0   +111
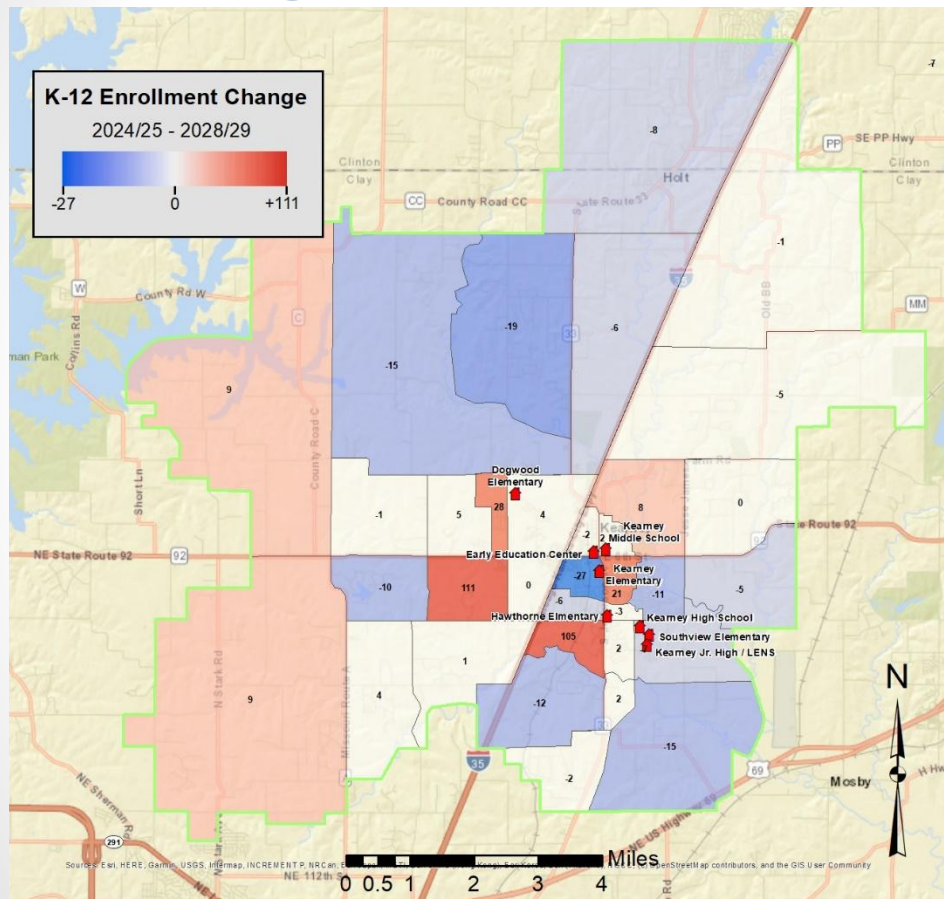
Enrollment increases should continue in the near term in areas where there are active development projects, and near the end of period in Stollings Ranch.

All, or nearly all, of the enrollment impacts of development in this period are expected to be offset by the aging of the existing population.

Change in Enrollment: 2028/29 - 2032/33

During the second half of the projection period the acceleration of Stollings Ranch, and the advance of Westwood and other projects, should result in net enrollment growth.

18

Attendance Area Projections

Attendance Area	Actual							Projected								Change		
	2017/18	2018/19	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2030/31	2031/32	2017-24	2024-28	2028-32
Elementary (K-5):																		
Dogwood	460	512	509	531	537	506	485	470	465	462	482	497	510	527	541	25	-3	59
Hawthorne	244	259	234	251	247	252	271	274	300	314	329	333	341	350	356	27	58	26
Kearney	322	337	281	307	286	295	263	278	293	311	340	354	380	400	415	-59	77	75
Southview	422	401	425	449	442	438	430	418	409	410	409	402	401	400	397	8	-21	-11
Out-of-District	39	39	38	32	53	31	44	42	40	34	34	33	31	29	28	5	-10	-6
Sub-total	1,487	1,548	1,487	1,570	1,565	1,522	1,493	1,482	1,507	1,531	1,593	1,619	1,662	1,707	1,737	6	100	144
Middle/Junior High School:																		
Kearney Middle	526	515	557	519	483	543	590	567	535	518	498	530	572	570	580	64	-92	82
Kearney Jr. High	557	566	541	548	562	523	504	572	609	589	558	544	525	558	596	-53	54	38
Out-of-District	16	18	19	19	26	19	23	22	22	25	27	25	24	20	20	7	4	-7
Sub-total	1,099	1,099	1,117	1,086	1,071	1,085	1,117	1,162	1,166	1,132	1,083	1,099	1,122	1,148	1,196	18	-34	113
High School																		
Kearney High	860	877	794	823	817	792	808	773	776	812	891	905	881	847	810	-52	83	-81
Out-of-District	18	15	12	11	9	13	13	13	15	17	13	14	13	19	17	-5	0	4
Sub-total	878	892	806	834	826	805	821	786	791	829	904	919	894	866	827	-57	83	-77
Grand Total	3,464	3,539	3,410	3,490	3,462	3,412	3,431	3,430	3,464	3,492	3,580	3,637	3,678	3,721	3,760	-33	149	180

Sources: Kearney Schools; Applied Economics, 2024.

Projections by attendance area are based on where students live, not where they attend.

Attend vs. Reside: 2024/25

School		Attendance Area				Outside	Total Attend	Total Reside	Difference	Reside 2022/23	Change SY23-SY25
		1	2	3	4						
Elementary											
Dogwood	1	424	7	18	7	14	470	485	-15	537	-52
Hawthorne	2	13	221	19	13	8	274	271	3	247	24
Kearney	3	2	13	206	4	1	226	263	-37	286	-23
Southview	4	20	24	19	380	18	461	430	31	452	-22
LENS		26	6	1	26	3	62	0	62	0	0
Total Reside		485	271	263	430	44	1,493	1,449	44	1,522	-73
Attend = Reside		87%	82%	78%	88%		85%				

Source: Kearney School District; Applied Economics, 2024.

The amount of movement of students between elementary schools is relatively small, with much of it being driven by the LENS program.

While small, these variations can impact classroom planning and teacher staffing.

20

School Projections

School	Actual							Projected								Change		
	2017/18	2018/19	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2017-24	2024-28	2028-32
Elementary (K-5):																		
Dogwood	452	490	466	458	465	436	470	461	459	456	475	490	503	520	534	18	5	59
Hawthorne	279	295	260	263	254	264	274	278	305	319	334	338	346	355	360	-5	60	26
Kearney	273	286	244	243	234	238	226	256	277	294	323	337	362	383	397	-47	97	74
Southview	483	477	461	473	479	457	461	462	466	462	461	453	451	450	446	-22	0	-15
LENS	0	0	56	131	133	127	62	25	0	0	0	0	0	0	0	62	-62	0
Sub-total	1,487	1,548	1,487	1,568	1,565	1,522	1,493	1,482	1,507	1,531	1,593	1,619	1,662	1,707	1,737	6	100	144
Middle/Junior High School:																		
Kearney Middle	531	524	568	528	500	554	600	577	548	534	513	540	583	581	590	69	-87	77
Kearney Jr. High	568	575	549	558	571	531	517	585	618	598	570	559	539	567	606	-51	53	36
Sub-total	1,099	1,099	1,117	1,086	1,071	1,085	1,117	1,162	1,166	1,132	1,083	1,099	1,122	1,148	1,196	18	-34	113
High School																		
Kearney High	878	892	806	834	826	805	821	786	791	829	904	919	894	866	827	-57	83	-77
Grand Total	3,464	3,539	3,410	3,488	3,462	3,412	3,431	3,430	3,464	3,492	3,580	3,637	3,678	3,721	3,760	-33	149	180

Sources: Kearney Schools; Applied Economics, 2024.

Projections by school incorporate current attend/reside patterns, which are likely to shift over time.

Conclusions

The District's geographic position, freeway accessibility and high quality suburban and rural lifestyle choices make it a great exurb destination for those seeking to escape the congestion and the other negative aspects of urban life.

The rate of enrollment growth, particularly in the lower grades, is directly tied to the availability of affordable housing. Presently there are very few options, and none could really be considered affordable to young families.

Several new residential development projects are expected to break ground in the next four to five years, with enrollment impacts being felt toward the end of that time period.

In the longer term, the District has fairly large potential for housing development, and is well-situated to benefit from economic expansion in the area, but how much and where that growth occurs will depend on housing options and affordability.