Lamar C.I.S.D. Demographic Update

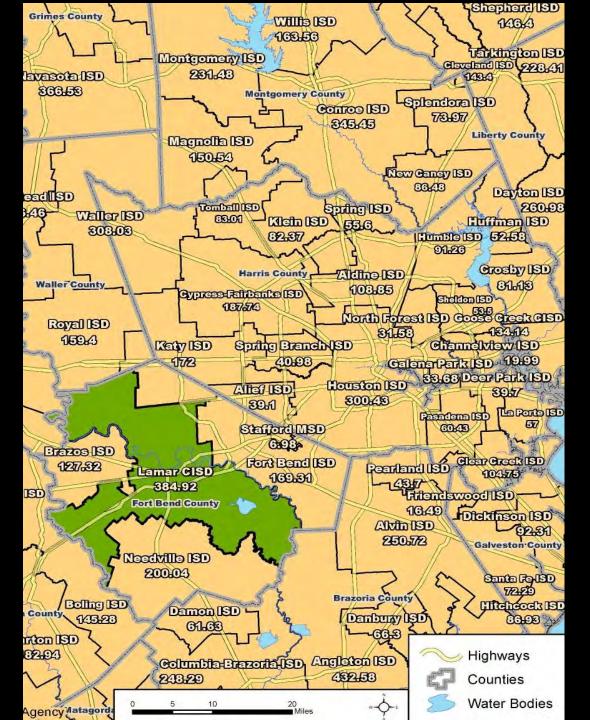
February 19, 2015



Population & Survey Analysts

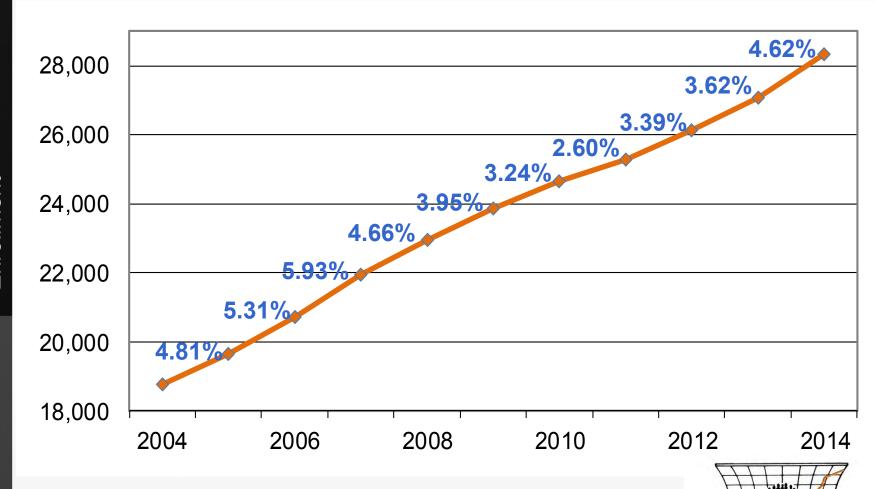
→ L.C.I.S.D. Demographic Trends **Employment Trends Housing Projections** Ratios: Students per Household **Projected Student Enrollment Long Range Planning**

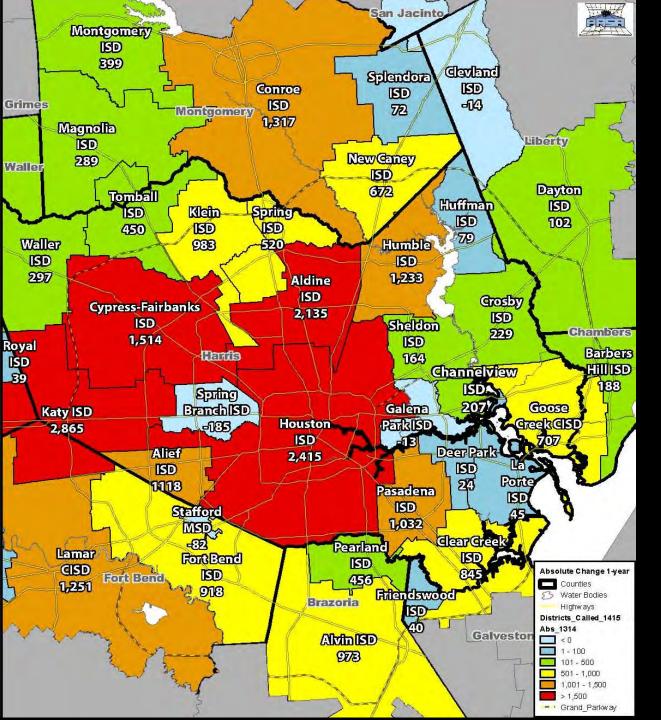




Square Miles in Lamar C.I.S.D.

Past Growth Rates





Numeric Change in Student Enrollment

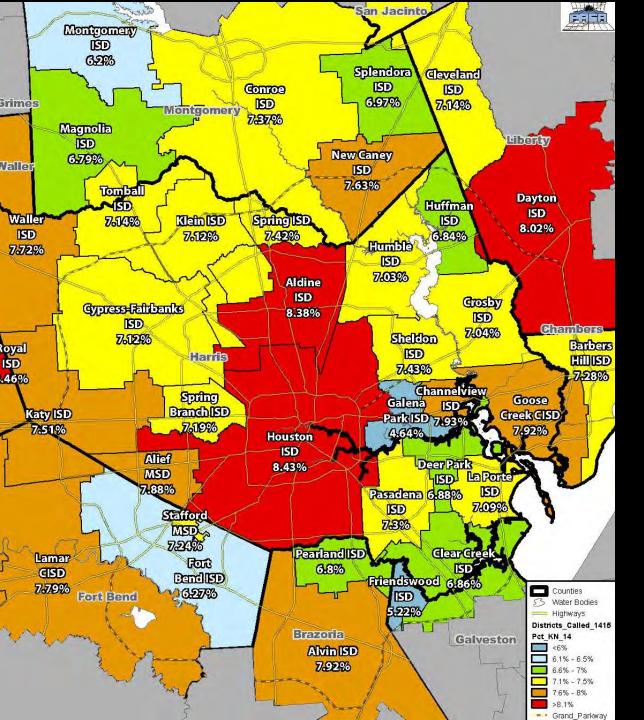
Fall 2014 to Fall 2015

Highest Growth School Districts 2013-14 to 2014-15

		PEIMS	Pre-PEIMS	Student	Percent
Rank	District	2013 Enroll.	2014 Enroll.	Growth	Growth
1	Frisco ISD	46,053	49,448	3,395	7.4%
2	Katy ISD	67,213	70,078	2,865	4.3%
3	Houston ISD	211,552	213,967	2,415	1.1%
4	Aldine ISD	67,381	69,516	2,135	3.2%
5	Cypress-Fairbanks ISD	111,440	113,124	1,684	1.5%
6	Conroe ISD	55,009	56,407	1,398	2.5%
7	Humble ISD	38,235	39,530	1,295	3.4%
8	Lamar CISD	27,081	28,332	1,251	4.6%
9	Fort Bend ISD	70,931	72,142	1,211	1.7%
10	Klein ISD	48,253	49,379	1,126	2.3%

- Of the 60 Districts with 20,000 or more students
- Pre-PEIMS enrollment estimates





KN Students as a Percent of Total Enrollment

Fall 2014

School	1st Grade	5th Grade	Difference (1st-4th)	% Difference
Adolphus	94	78	16	17%
Austin	98	82	16	16%
Beasley	61	67	-6	-10%
Bowie	100	94	6	6%
Campbell	91	132	-41	-45%
Dickinson	99	102	-3	-3%
Frost	75	85	-10	-13%
Hubenak	158	139	19	12%
Huggins	89	96	-7	-8%
Hutchison	129	104	25	19%
Jackson	57	57	0	0%
Long	100	75	25	25%
McNeill	133	98	35	26%
Meyer	137	123	14	10%
Pink	111	98	13	12%
Ray	109	102	7	6%
Smith	96	80	16	17%
Thomas	173	159	14	8%
Travis	106	112	-6	-6%
Velasquez	104	89	15	14%
Williams	137	136	1	1%
Total	2,257	2,108	149	7%

Comparison of 1st and 5th Grade Resident Students by Attendance Zone

Fall 2014

Green = Growth (14 zones)

Yellow = Decline (6 zones)

Historical Growth Trends

		% Chg		% Chg
	Sept 2013	2013 to 2014	Sept 2014	2014 to 2015
EE	152	9.35%	168	10.53%
PK	853	-4.80%	808	-5.28%
KN	2,053	-1.16%	2,207	7.50%
1	2,242	9.10%	2,276	1.52%
2	2,082	0.73%	2,282	9.61%
3	2,101	1.60%	2,137	1.71%
4	2,108	4.56%	2,168	2.85%
5	2,071	3.34%	2,140	3.33%
6	2,034	2.26%	2,133	4.87%
7	2,059	5.70%	2,146	4.23%
8	2,019	6.04%	2,125	5.25%
9	2,161	6.93%	2,306	6.71%
10	1,789	-2.03%	2,005	12.07%
11	1,741	5.90%	1,758	0.98%
12	1,616	9.12%	1,673	3.53%
Total	27,081	3.62%	28,332	4.62%

Unique Demographic Characteristics Lamar C.I.S.D.

Several factors give Lamar C.I.S.D. a competitive advantage for development (developers choosing to build in the District):

- Low Economically Disadvantaged student population (47.5%)
- High STAAR passage rate (80.9%) --- based on PASA's assessment of all Texas school districts (Spring 2014)
- Highly educated population (35% have bachelor's degree)
- High median income level (\$70,145)
- High growth due to land availability <u>in</u> development path and other factors



		Percent
Rank	District Name	Economically
		Disadvantaged
1	FRISCO ISD	11.3%
2	ALLEN ISD	15.8%
3	LEANDER ISD	18.9%
4	KELLER ISD	23.5%
5	CLEAR CREEK ISD	27.4%
6	PLANO ISD	27.5%
7	PEARLAND ISD	27.7%
8	KATY ISD	29.0%
9	ROUND ROCK ISD	29.1%
10	MCKINNEY ISD	30.3%
11	LEWISVILLE ISD	30.8%
12	HUMBLE ISD	34.3%
13	FORT BEND ISD	35.8%
14	CONROE ISD	36.1%
15	MANSFIELD ISD	38.1%
16	KLEIN ISD	40.8%
17	DENTON ISD	42.6%
18	MIDLAND ISD	46.3%
19	NORTH EAST ISD	46.4%
20	LAMAR CISD	47.5%

Economically Disadvantaged Student Population: 2013-14

* Of 60 Districts with 20,000 or More Students



Rank	District Name	2013-14 Enrollment	Level II or
1	ALLEN ISD	20,381	92.0%
2	FRISCO ISD	46,053	91.9%
3	KATY ISD	67,213	87.2%
4	PLANO ISD	54,822	86.1%
5	PEARLAND ISD	20,034	85.8%
6	MCKINNEY ISD	24,565	84.8%
7	KELLER ISD	33,763	84.3%
8	CONROE ISD	55,009	84.1%
9	ROUND ROCK ISD	46,666	84.0%
10	CLEAR CREEK ISD	39,998	83.6%
11	LEANDER ISD	35,450	83.3%
12	H-E-B ISD	22,180	83.3%
13	LAMAR CISD	27,079	80.9%
14	CY-FAIR ISD	111,440	80.7%
15	MANSFIELD ISD	32,779	80.7%
16	FORT BEND ISD	70,931	80.2%
17	KLEIN ISD	48,253	79.8%
18	HUMBLE ISD	38,235	79.4%

Percent of Students Passing STAAR

3rd-8th Grade 2013-14

* Of 60 Districts with 20,000 or More Students



Private and Charter Schools

	Current Enrollment			Projected Enrollment in 5 Years	
School	Grades	Current Enrollment	Estimated Students from LCISD in KN+	Enrollment in 5 yrs.	Estimated Students from LCISD in KN+
Calvary Epsicopal School	PK-12th	186	137	250	184
Cambridge Montessori School	1yr-2nd	190	0	190	0
Children's Lighthouse	6wks-K,AS	175	0	200	0
Chirst Church School	PK-K	200	0	200	0
Darul Arqam - Southwest	PK-8th	181	0	225	0
First Colony Montessori South	PK-K	85	0	100	0
Fort Bend Christian Academy	PK-12th	875	168	900	173
Fort Bend Montessori School	PK-1st	70	0	75	0
God's Rainbow Christian Academy	PK-6th	15	0	50	0
Holy Rosary Catholic School	PK-8th	152	24	200	32
Kn.I.L.E. Prep Academy	3rd-12th	31	23	100	75
Living Water Christian School	Inf-9th	117	15	200	26
Montessori - Greatwood School	18mos-K	130	9	156	10
New Southwest Montessori Center	18mos-1st	35	0	75	0



Private and Charter Schools (cont'd)

	Current Enrollment			Projected Enrollment in 5 Years	
School	Grades	Current Enrollment	Estimated Students from LCISD in KN+	Enrollment in 5 yrs.	Estimated Students from LCISD in KN+
Park Point Montessori North	3mos-3rd	80	0	100	0
Riverbend Montessori School	PK-6th	100	2	110	3
Shady Oak Christian School	PK-K	76	4	85	5
Shady Oak Primary School	1st-5th	20	10	60	30
Simonton Christian Academy	PK-7th	92	31	100	34
St. John's Methodist School	PK-K	92	3	100	3
St. Laurence Catholic School	PK-8th	725	167	725	167
Sugar Grove Christian School	PK-6th	270	0	275	0
Sugar Mill Montessori School	Inf-K	110	0	150	0
The Honor Roll School	PK-8th	700	22	725	23
Total		925	616	5,351	764

Overall percentage of LCISD residents in private/charter schools:

2.13%

2.07%



Population & Survey Analysts

L.C.I.S.D. Demographic Trends

Employment Trends
Housing Projections
Ratios: Students per Household
Projected Student Enrollment
Long Range Planning



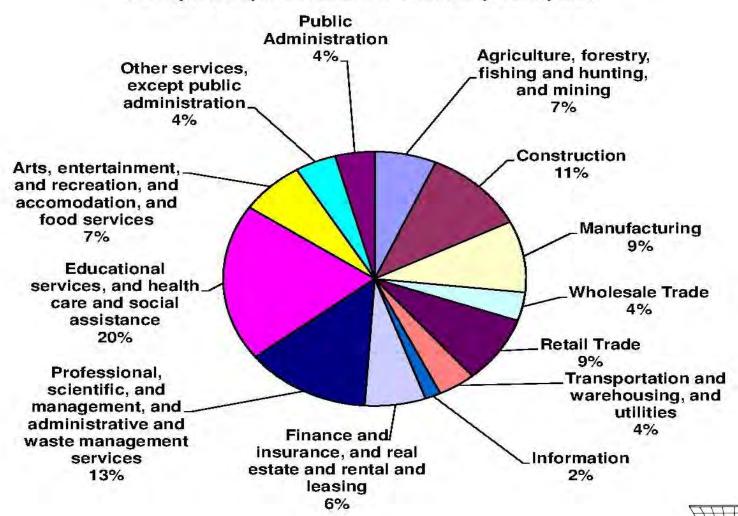
Annual Employment Trends

	December	June	December	6-Month	Annual
	2013	2014	2014	Pct. Change	Pct. Change
City of Houston					
Employment	991,811	1,008,388	1,027,955	1.94%	3.64%
Unemployment Rate	5.5	5.5	4.1		
City of Rosenburg					
Employment	14,609	14,854	15,142	1.94%	3.65%
Unemployment Rate	5	4.9	3.5		
Fort Bend County					
Employment	2,028,591	2,062,498	2,102,517	1.94%	3.64%
Unemployment Rate	5.5	5.4	4.1		
Harris County					
Employment	308,504	313,661	319,747	1.94%	3.64%
Unemployment Rate	5	5	3.8		



Lamar CISD Employment by Sector

(Out of Civilian Employed Population 16 Years and Over)
Employed Population: 59,762 (out of 132,931 Total Residents in LCISD)
As Reported by 2013 American Community Survey Data



Houston & L.C.I.S.D. Employment Trends

Part I: Employment Growth and Critical Employment Centers
Both Act as Local Population Growth Stimuli

- * Houston area gained ~120,000 jobs in 2014 and may gain from 50,000 and up to 62,000 jobs in 2015 (PASA)
- * Houston area unemployment has been the lowest since 2008 with City of Conroe down significantly to 3.4%
- * Job stability and job growth *including the potential for job growth* -- are typically the most important variables in estimating housing growth and population growth
- * 9 of the 10 highest growth districts in Texas this year were in the Houston area and depended on strong employment increases in energy
- * Lamar C.I.S.D.'s unemployment is down from 5%-5.5% to 3.5%-4.1%

Houston & L.C.I.S.D. Employment Trends

Part II: Employment Growth & Local Population Growth with the Downturn in Oil Prices

- * Dr. Mark Dotzour of the Texas A&M Real Estate Center suggested that Houston area housing construction could be between 20,000 and 30,000 in 2015 which would suggest that housing starts could be down anywhere from 1% to 34%
- * The percent that housing construction is affected depends on the <u>location</u> within the <u>Houston area</u> and amount of new office & other work space
- * The moderate growth scenario for homes and for students in Lamar C.I.S.D. suggests very little impact for the coming year due to the high demand that already existed but a low growth scenario has also been prepared
- * Types of oil & gas jobs per school district plays a big role with suburban districts and suburban housing growth is less affected
- * Historically, neighbor Katy I.S.D. has NOT been affected by oil price declines

Population & Survey Analysts

L.C.I.S.D. Demographic Trends Employment Trends

→ Housing Projections Ratios: Students per Household Projected Student Enrollment Long Range Planning



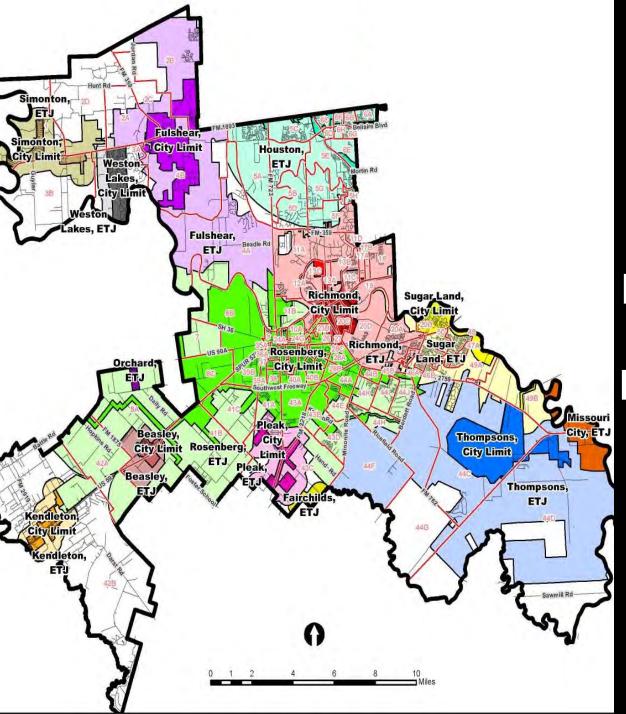
Lamar C.I.S.D. Future Housing Trends

- ❖ Apartments will remain stable or decline slightly in the next 1-3 years with 4 more complexes opening by in the next 1 to 12 months –- and <u>~600-800 units</u> becoming newly leased by Oct. 2015
- Due to the 5,834 existing multi-family units, and 7,485 planned apt. units, Lamar C.I.S.D. is <u>becoming a home for younger residents</u>
- But, existing, older subdivisions are increasing with older (secondary) students at almost double the numbers as there are added elementary students
- ❖ <u>Built-out, older neighborhoods</u> are − in the net − gaining students − which is important in that these existing subdivisions have 16,137 out of 28,332 students (57%)
- Lamar C.I.S.D. is creeping up in the ranking of housing starts, now 6th behind Katy, Houston, Fort Bend, Cy-Fair, and Conroe w/2,295 housing starts in 2014 and PASA projects 2,156 new home occupancies over the next 8 months (Feb.-Oct.)
- ❖ However, over the coming decade, Lamar C.I.S.D. has housing projections that are almost as high as Katy and Cy-Fair − with 45,574 for L.C.I.S.D. -- and ~ 46,171 projected for Katy and ~46,800 added housing units for Cy-Fair

L.C.I.S.D. Future Transportation Trends

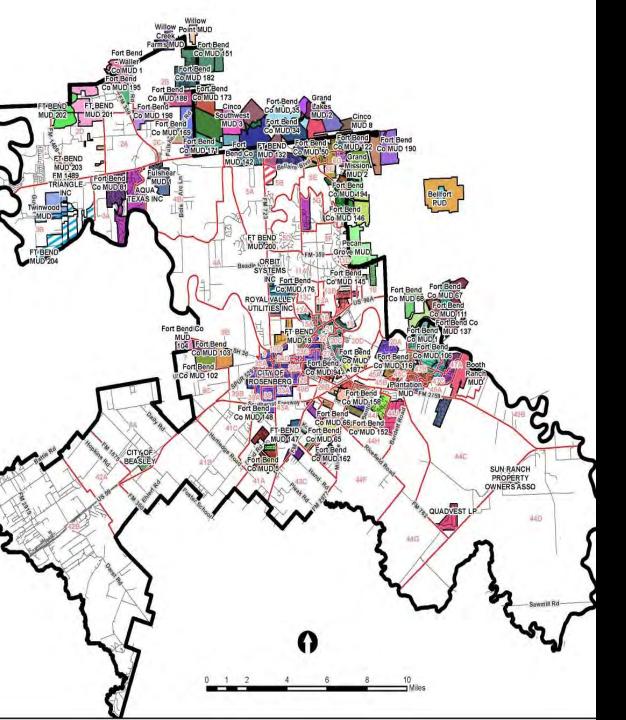
Transportation Improvements Act as Local Economic Development Stimuli

- * Construction of two segments of I-69 from spur 10 to FM 762 and from FM 762 to the Grand Parkway so that drivers can use US59/I-69 from Fort Bend to Montgomery County sometime this year without entering the inner loop of Houston.
- * The above I-69 improvements will be in concert with (and followed by) intersecting arterial improvements which will open up undeveloped parcels for residential development
- * The Fort Bend Parkway is under construction W. of SH 36 and over to Spur 10 opening up ag land for residential land uses which area now difficult to access
- * Fort Bend Parkway's path in the E. through northern portion the City of Thompsons will have a dramatic impact on build-out for the School District, but its timing is uncertain
- * Finally, the Grand Parkway's path through the S.E. sector of L.C.I.S.D. will allow the southern portion of Thompsons to develop as well



Municipalities in Lamar C.I.S.D.

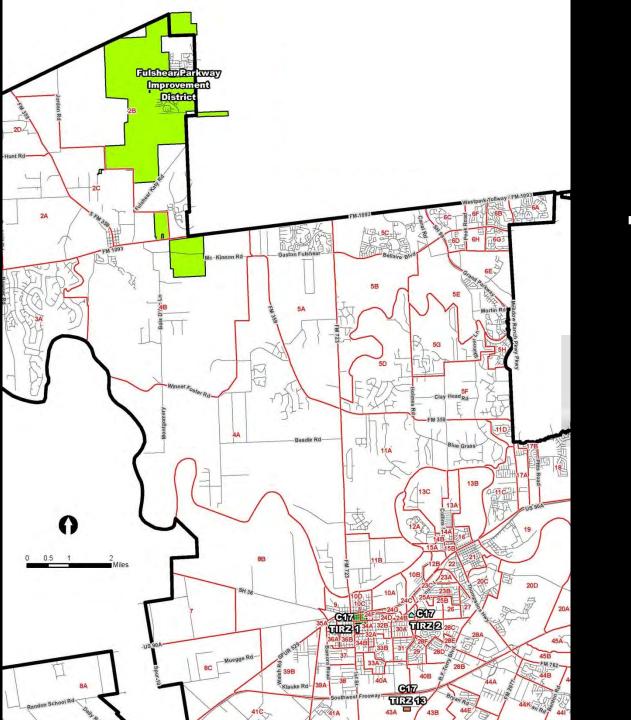




Utility Districts in Lamar C.I.S.D.

(per Fort Bend County, City of Houston, Houston-Galveston Area Council. & PUC)





Tax Increment
Refinance
Zones
in
Lamar C.I.S.D.

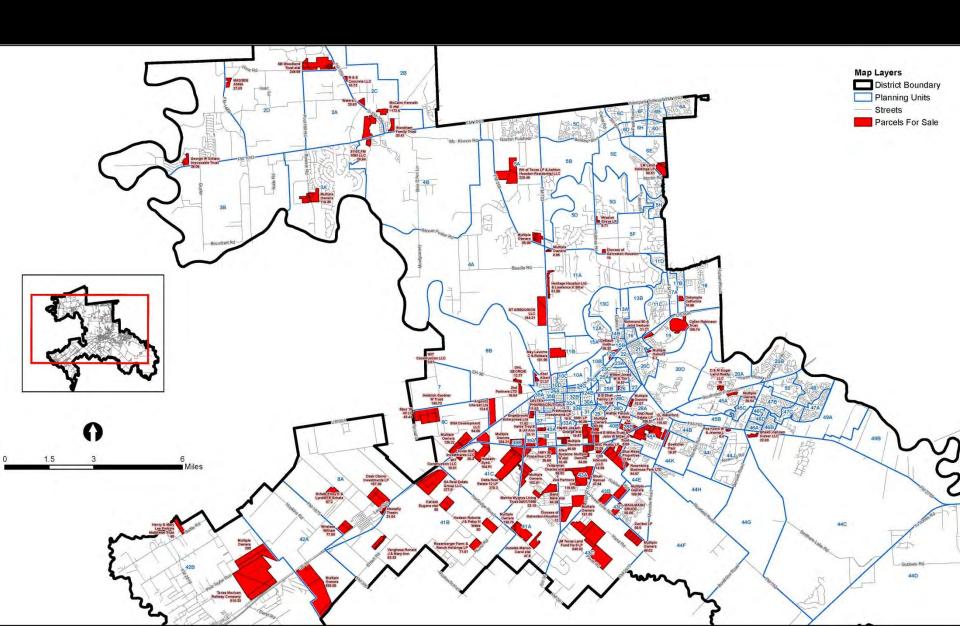


Ownership Changes

10/13 to 11/14 and 12/12 to 10/13

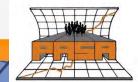


Parcels 5+ Acres For Sale in L.C.I.S.D.



Student Growth by Type of Housing

	Resident Students	Resident Students	Added S 2014 to	Percent of	
	in 2014	in 2015	#	%	Growth
Apartments	2,162	2,240	78	4%	6%
МНР	1,190	1,177	-13	-1%	
Subdivisions - Built-out	16,137	16,395	258	2%	21%
Subdivisions - Actively Building	4,769	5,664	895	19%	73%



Subdivisions with Most Student Gains and Losses

		Student Growth (2014 to 2015)
	Tara Colony	59
	Westheimer Lakes - The Villas	38
Built-	Lakemont - Shores	31
Out	Lakemont - West Ridge	28
	Villages of Town Center	-36
	Pecan Grove Plantation	-46
	River's Run at the Brazos	92
Actively Building	Bonbrook Plantation	89
	Firethorne West	71

Highest Growth Single-Family Developments

Diamaina Hait	Single Family Dovelopment	New Housing Occupancies		
Planning Unit	Single-Family Development	2015 - 2019	2019 - 2024	2015 - 2024
2B	Tamarron Lakes	750	1,600	2,350
4B	Harrison Interests/Foster Farms	162	1,910	2,072
2B	Cross Creek Ranch	580	1,173	1,753
44 D,F,G,H	George Foundation	263	1,082	1,345
2B, 2C	Fulshear Farms	212	1,082	1,294
1, 2D	Twinwood	80	1,010	1,090
4B	Fulbrook at Fulshear Creek	519	560	1,079
2B	Jordan Tract	270	695	965
2B	Firethorne West	806	4	810
5C	Lakes of Bella Terra	719	0	719
2A	Fulshear Lakes	188	485	673
44H	Walnut Creek	249	342	591
5A	Creekside Ranch	178	405	583
44H	Dry Creek	164	387	551
20D	Del Webb Sweetgrass	538	0	538
6E, 5H	Long Meadow Farms	514	0	514
441	Bonbrook Plantation	493	13	506
2A	Fulshear Polo Ranch	152	349	501
To	tal (Above-Listed Subdvisions):	6,837	11,097	17,934

Total Single Family Projected: 14,024 24,065 38,089

Highest Growth Multi-Family Developments

Planning	Marki Familia Davada marata	New H	lousing Occupa	ancies
Unit	Multi-Family Developments	2015 - 2019	2019 - 2024	2015 - 2024
6E	Davis Brothers MF (Long Meadow Farms)	660	20	680
6C	former Parkway Lakes (MF)	220	350	570
2B	Jordan Tract (MF)	60	450	510
6H	Parkway Lakes (MF)	160	300	460
4B	Fulshear Run (MF)	70	380	450
5A	Pot. MF near FM 723/FM 359	100	350	450
6E	Pot. MF along Grand Parkway	90	330	420
45A	Pot. MF along Hwy 59	150	250	400
20A	River Park West (MF)	230	110	340
2B	Cross Creek Ranch (MF)	100	150	250
	Total (Above-Listed Developments):	2,405	2,690	5,095
	Total Multi-Family Units Projected:	3,159	4,326	7,485



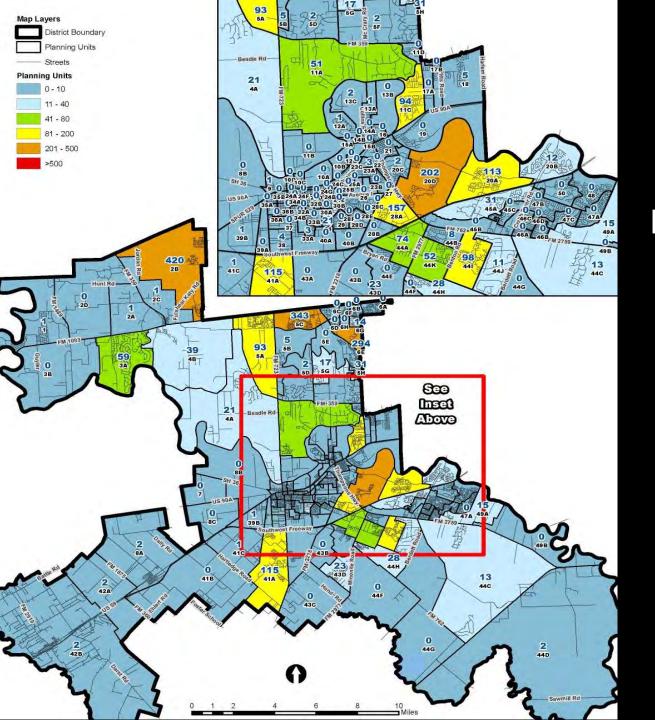
New <u>Multi-Family</u> Developments Newly Platted or Currently Under Construction

		New Housing Occupancies				
Planning	Multi-Family Opening Soon	2015 -	2019 -	2015 -		
Unit		2019	2024	2024		
6E	Long Meadow Farms-Landmark MF	336	0	336		
28A	Brazos Town Center - near 2 other apts.	234	0	234		
5A	Lakes of Bella Terra - S. on FM 1093	342	0	342		
			11			
20A	Venue at Richmond - about to open	230	0	230		



Projected
New Housing
Occupancies
2014 –2024

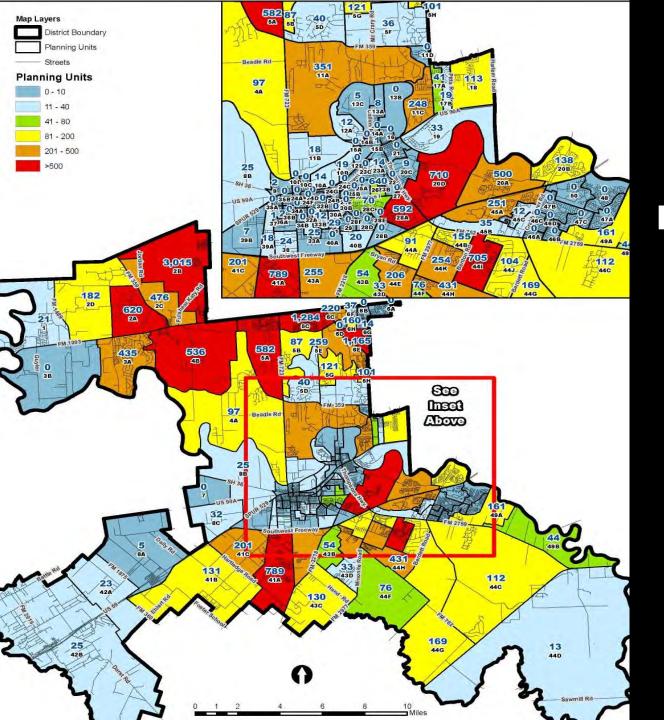
Year Ending in October:	Single Family	Multi- Family	Total New Housing Units
2015	2,156	600	2,756
2016	2,501	324	2,825
2017	2,661	522	3,183
2018	3,170	749	3,919
2019	3,536	964	4,500
2020	3,716	1,028	4,744
2021	4,363	1,006	5,369
2022	4,853	885	5,738
2023	5,409	710	6,119
2024	5,724	697	6,421
2014-2019	14,024	3,159	17,183
2019-2024	24,065	4,326	28,391
2014-2024	38,089	7,485	45,574



Projected New Housing Occupancies

January 2015 to October 2015

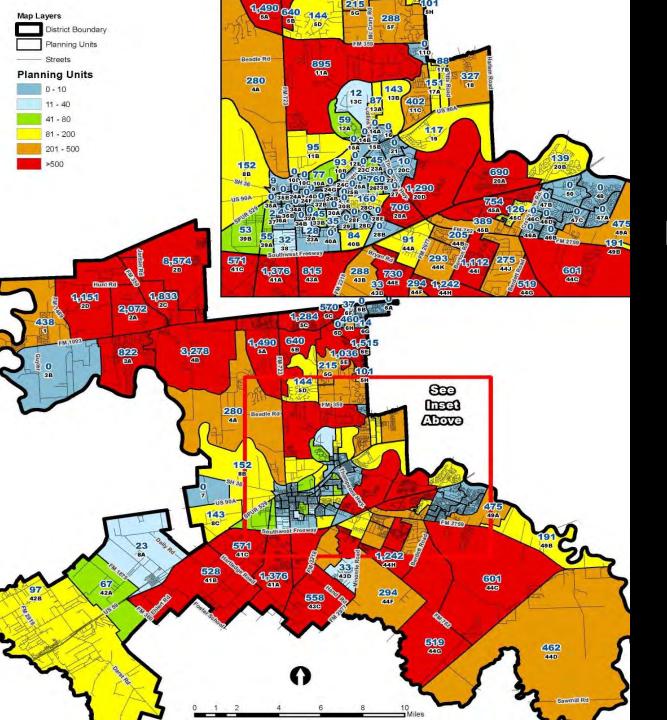




Projected New Housing Occupancies

January 2015 to October 2019





Projected New Housing Occupancies

January 2015 to October 2024



Housing Units in Lamar C.I.S.D. Current and Future

	Single-F	amily	Multi-Family		
	#	%	#	%	
Current ACS (2013)	42,068	88%	5,614	12%	
Estimated Growth (2013-2014)	1,360	86%	220	14%	
Projected Growth (2015-2024)	37,761	83%	7,485	17%	
Projected Total (2024)	81,189	86%	13,319	14%	



Changes in Projected New Housing Occupancies

	0000 00	0000 40	0040 44	0044.40	0040 40	0040 44	004445
Year	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
rear	Study						
2009	627						
2010	909	350					
2011	1,250	556	596				
2012	1,905	999	908	1,010			
2013	2,976	1,900	1,203	1,327	1,361		
2014	4,125	3,124	1,691	1,574	1,681	1,584	
2015	4,704	3,887	2,409	1,825	2,041	2,532	2,756
2016	4,824	4,468	3,360	2,486	2,421	2,674	2,825
2017	4,605	4,600	3,996	3,254	2,828	3,397	3,183
2018	4,639	4,487	4,228	3,582	3,371	4,192	3,919
2019		4,434	4,491	3,839	3,754	4,687	4,500
2020			4,659	3,957	3,859	4,946	4,744
2021				4,234	4,015	5,234	5,369
2022					4,200	5,392	5,738
2023						5,405	6,119
2024							6,421
10-Year Total	30,564	28,805	27,541	27,088	29,531	40,043	45,574

Population & Survey Analysts

- L.C.I.S.D. Demographic Trends Employment Trends Housing Projections
- → Ratios: Students per Household Projected Student Enrollment Long Range Planning



Ratios of Students per Household

	2013	2014	2015
Single-Family Homes	0.58	0.58	0.58 students per home
Apartments	0.41	0.40	0.39 students per unit



Highest Ratios of Students per Household

PU	Development	Ratio
21	609 Front MHP	2.42
43A	Seabourne Creek Farms	2.07
28B	Homestead Park MHP	1.71
16	501 Newton MHP	1.58
15A	Richmond Trailer Village	1.49
33B	Pine Village	1.45
34B	Fleetwood Park	1.38
43A	Trails at Seabourne Parke	1.36
33B	Austin	1.33
13B	Richland MHP	1.32
15A	Rocky Falls Parkway	1.29
44A	Blume Addition	1.22
23B	Pecan Park	1.2



Population & Survey Analysts

L.C.I.S.D. Demographic Trends Employment Trends Housing Projections Ratios: Students per Household

Projected Student Enrollment Long Range Planning

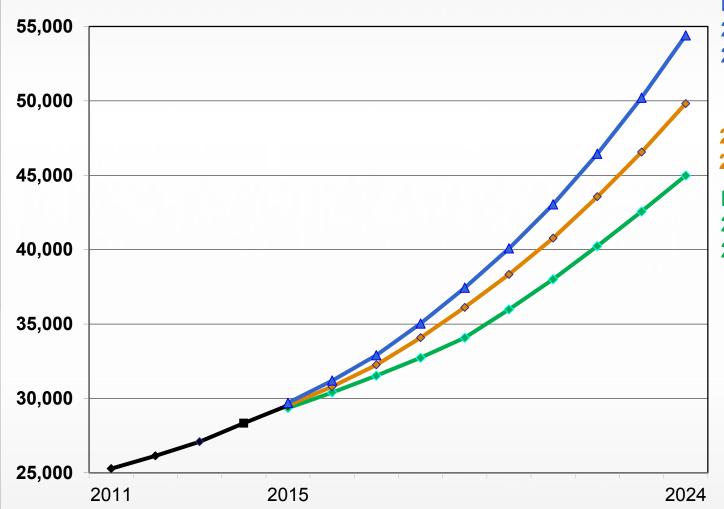


Moderate Growth Scenario

	Projected Enrollment at PEIMS Snapshot											
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024		
Enrollment	29,531	30,796	32,251	34,079	36,115	38,331	40,776	43,555	46,559	49,819		
% Growth	4.23	4.28	4.72	5.67	5.98	6.17	6.38	6.82	6.90	7.00		
Growth	1,199	1,265	1,455	1,828	2,036	2,216	2,445	2,779	3,003	3,261		



Three Scenarios of Growth



High Growth
2019 - 37,436
2024 - 54,405
Moderate
Growth
2019 - 36,115
2024 - 49,819

Low Growth 2019 - 34,074 2024 - 44,981



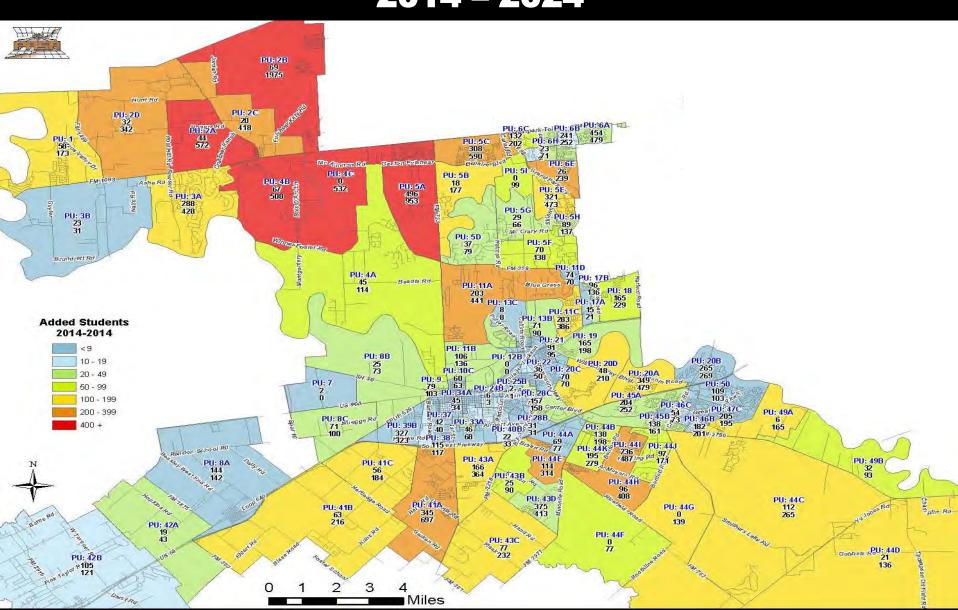
Population & Survey Analysts

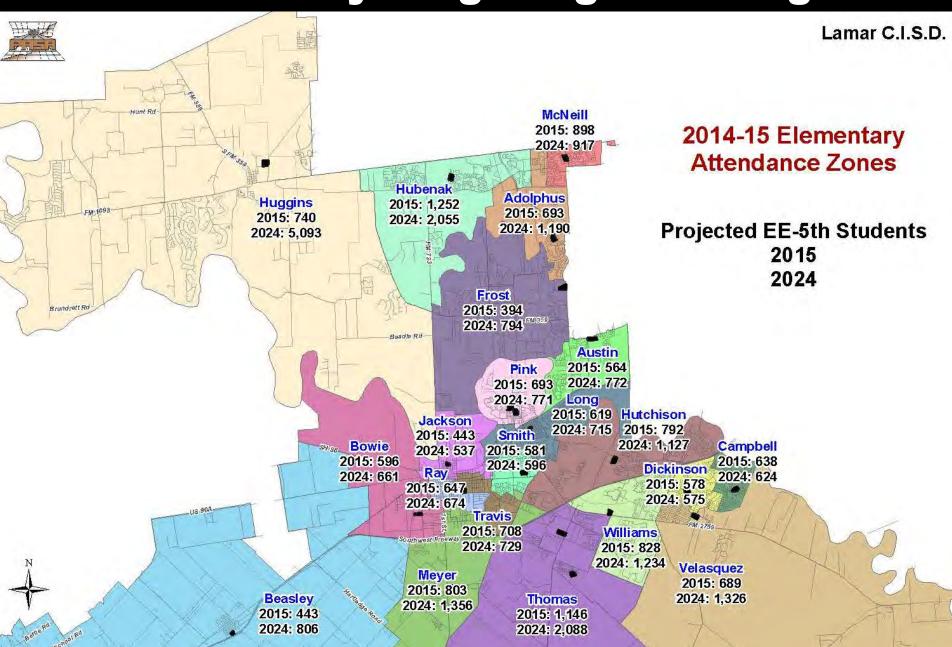
L.C.I.S.D. Demographic Trends
Employment Trends
Housing Projections
Ratios: Students per Household
Projected Student Enrollment

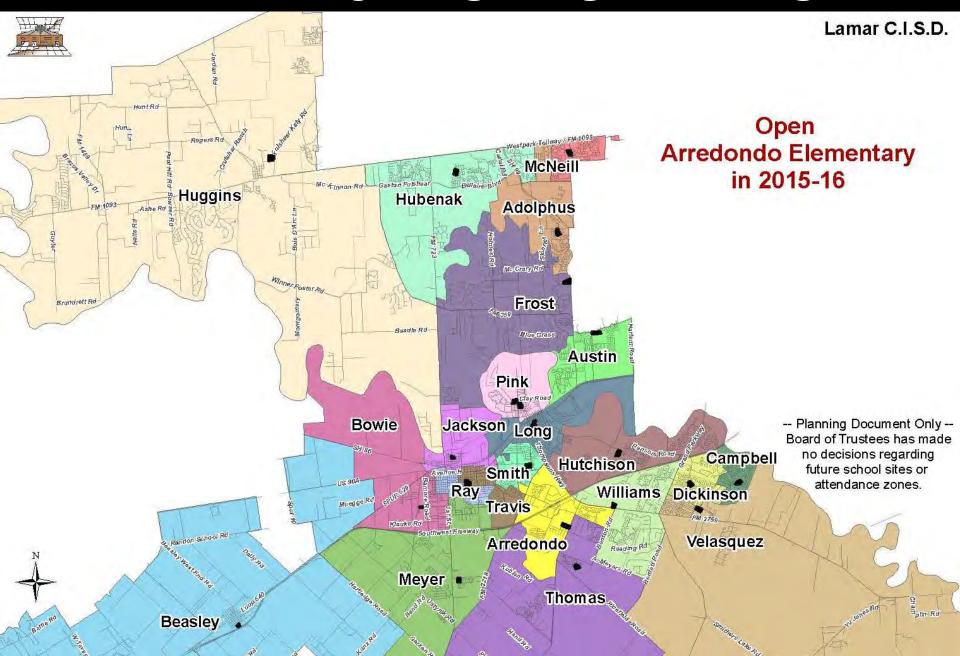
→ Long Range Planning

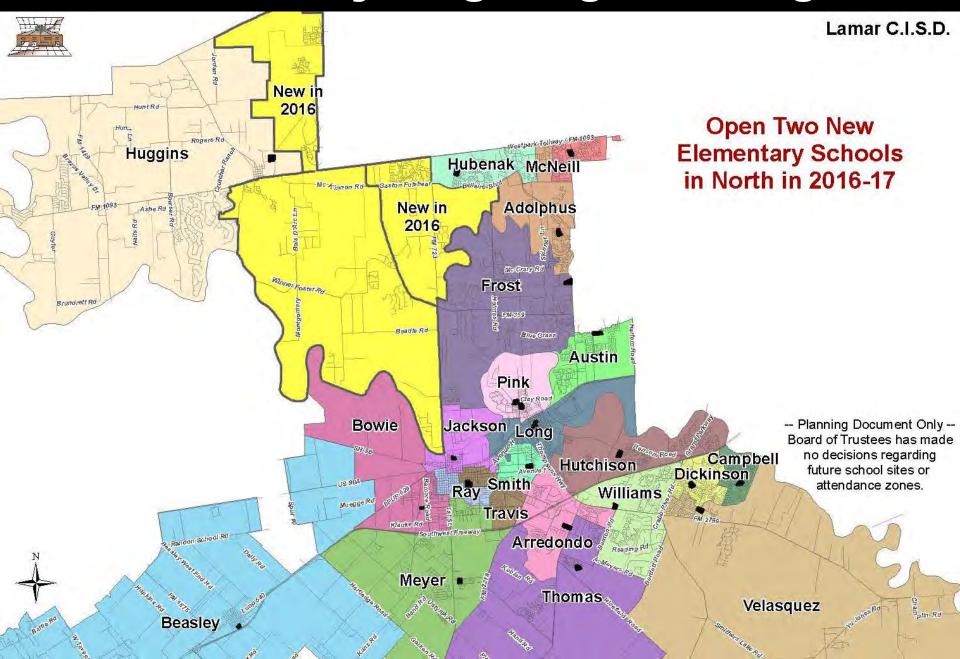


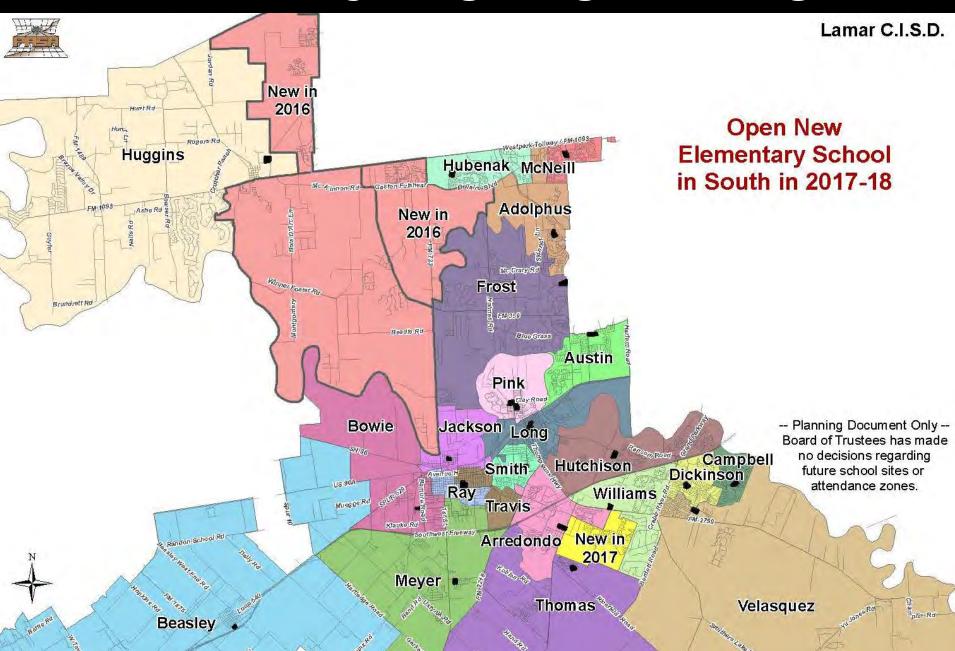
Projected Growth in Resident Elementary School Students 2014 – 2024

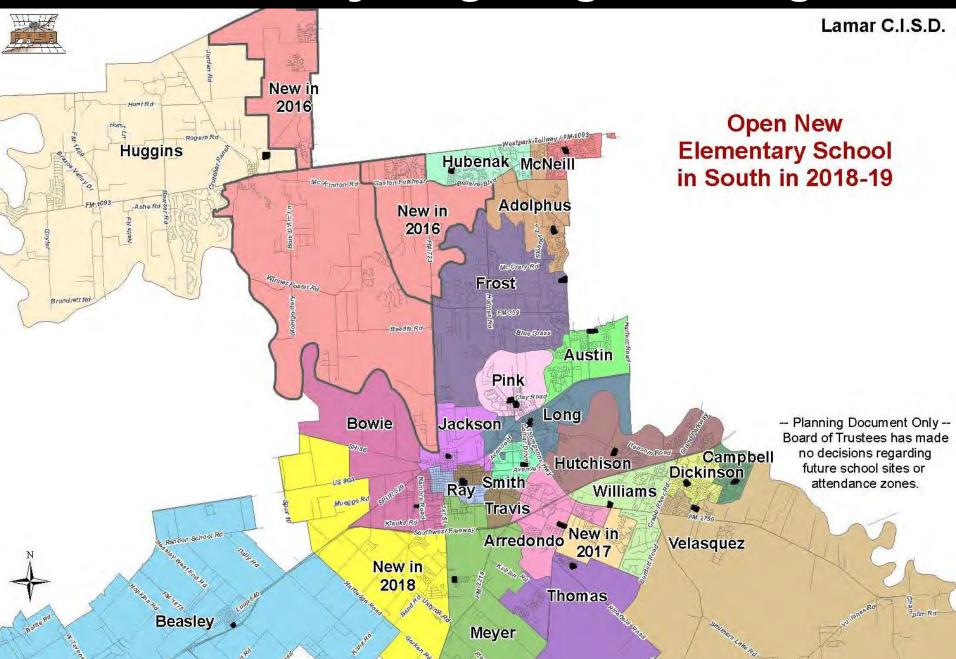


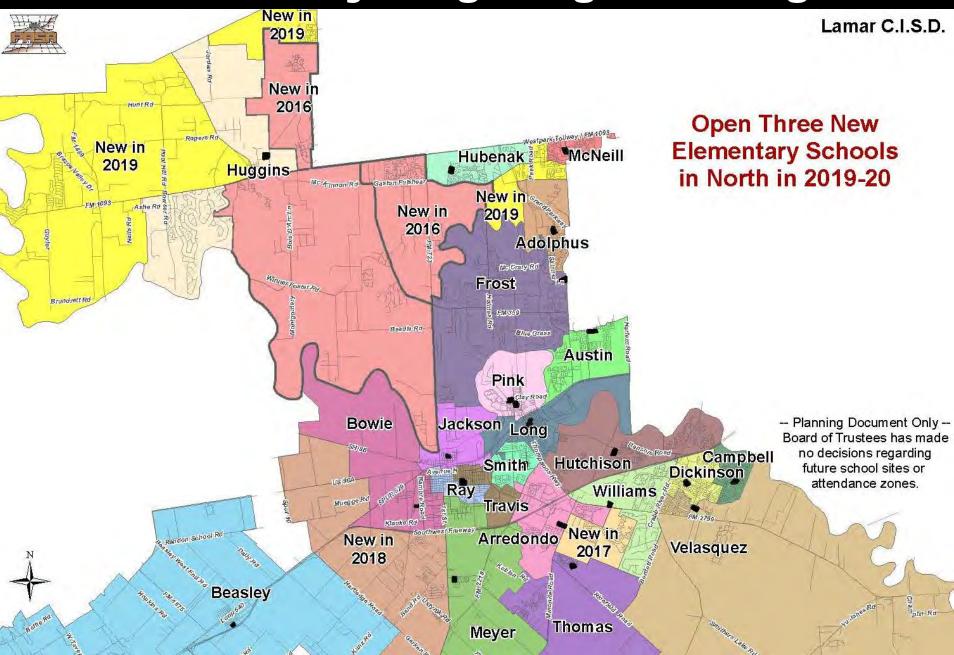


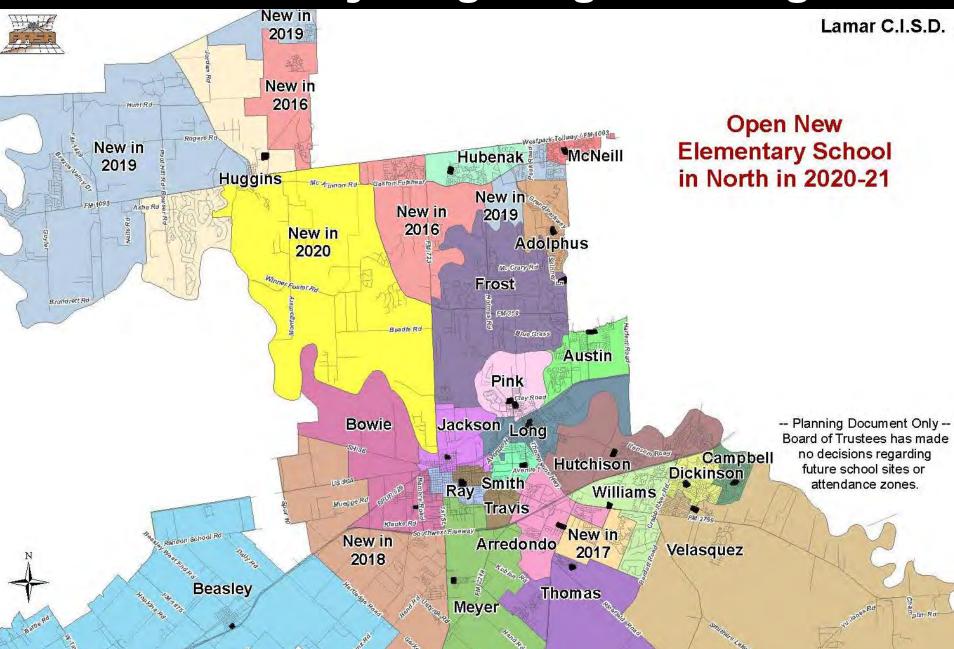


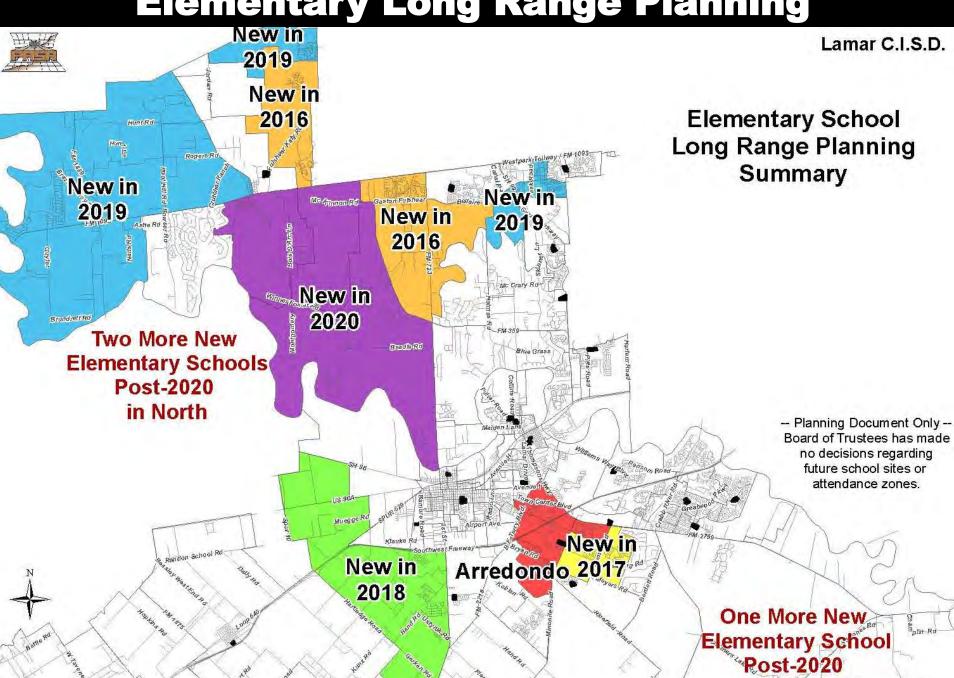










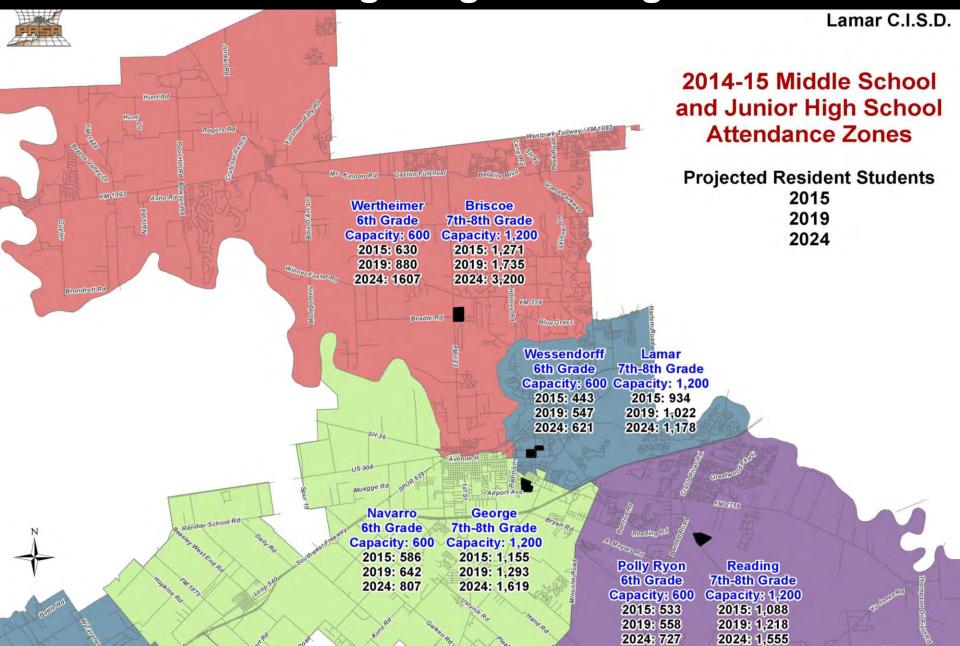


Elementary School Long Range Plan Comparison to Previous Years

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Total
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		2	2		1				
2011-12 Study			1		2						



Middle School and Junior High Long Range Planning



Middle School and Junior High Long Range Planning

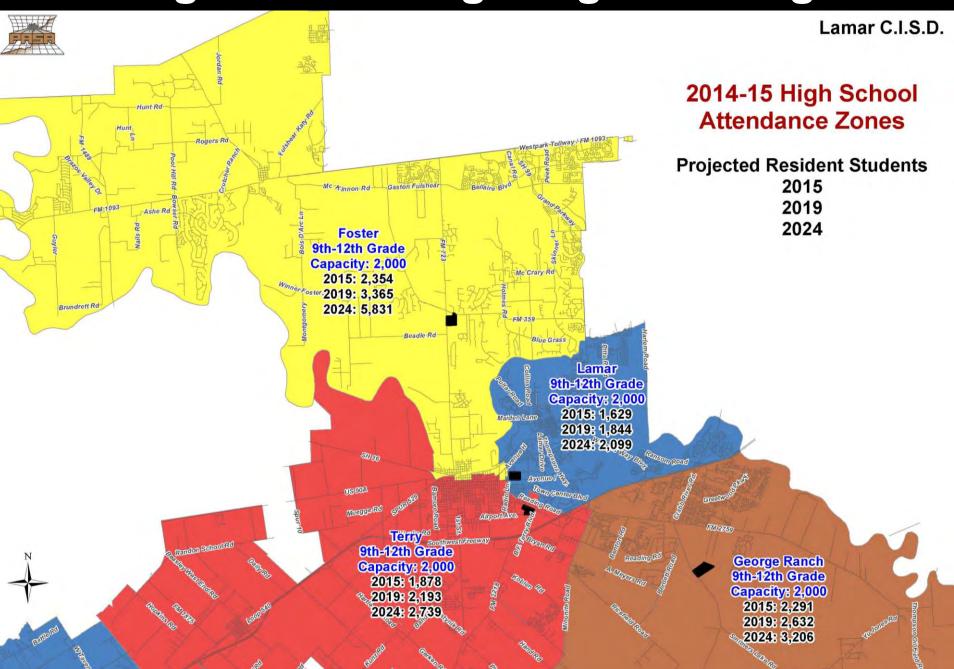
Projected Resident Students

2015 2016 2017 2018 2019 2020 2021 2022 2023 2024

6th Grade Campuses										
Navarro	586	583	588	629	642	675	708	741	775	807
Polly Ryon	533	497	503	545	558	592	623	656	695	727
Wertheimer	630	673	692	829	880	1,009	1,147	1,303	1,461	1,607
Wessendorff	443	509	514	540	547	563	579	594	608	621
7th-8th Grade Campuses										
Briscoe	1,271	1,341	1,429	1,531	1,735	1,966	2,187	2,519	2,853	3,200
George	1,155	1,185	1,209	1,237	1,293	1,354	1,407	1,475	1,545	1,619
Lamar	934	956	973	995	1,022	1,057	1,081	1,113	1,143	1,178
Reading	1,088	1,102	1,135	1,163	1,218	1,274	1,324	1,396	1,475	1,555



High School Long Range Planning



High School Long Range Planning

	Projected Resident Students										
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	
9th-12th Grade Campuses											
Foster HS	2,354	2,551	2,777	3,053	3,365	3,659	4,105	4,577	5,147	5,831	
George Ranch HS	2,291	2,395	2,473	2,552	2,632	2,702	2,805	2,910	3,040	3,206	
Lamar HS	1,629	1,696	1,745	1,798	1,844	1,884	1,933	1,979	2,034	2,099	
Terry HS	1,878	1,959	2,026	2,108	2,193	2,272	2,375	2,473	2,595	2,739	



Lamar C.I.S.D. Demographic Update

February 19, 2015

