



**FRIENDSWOOD ISD**

September 2019

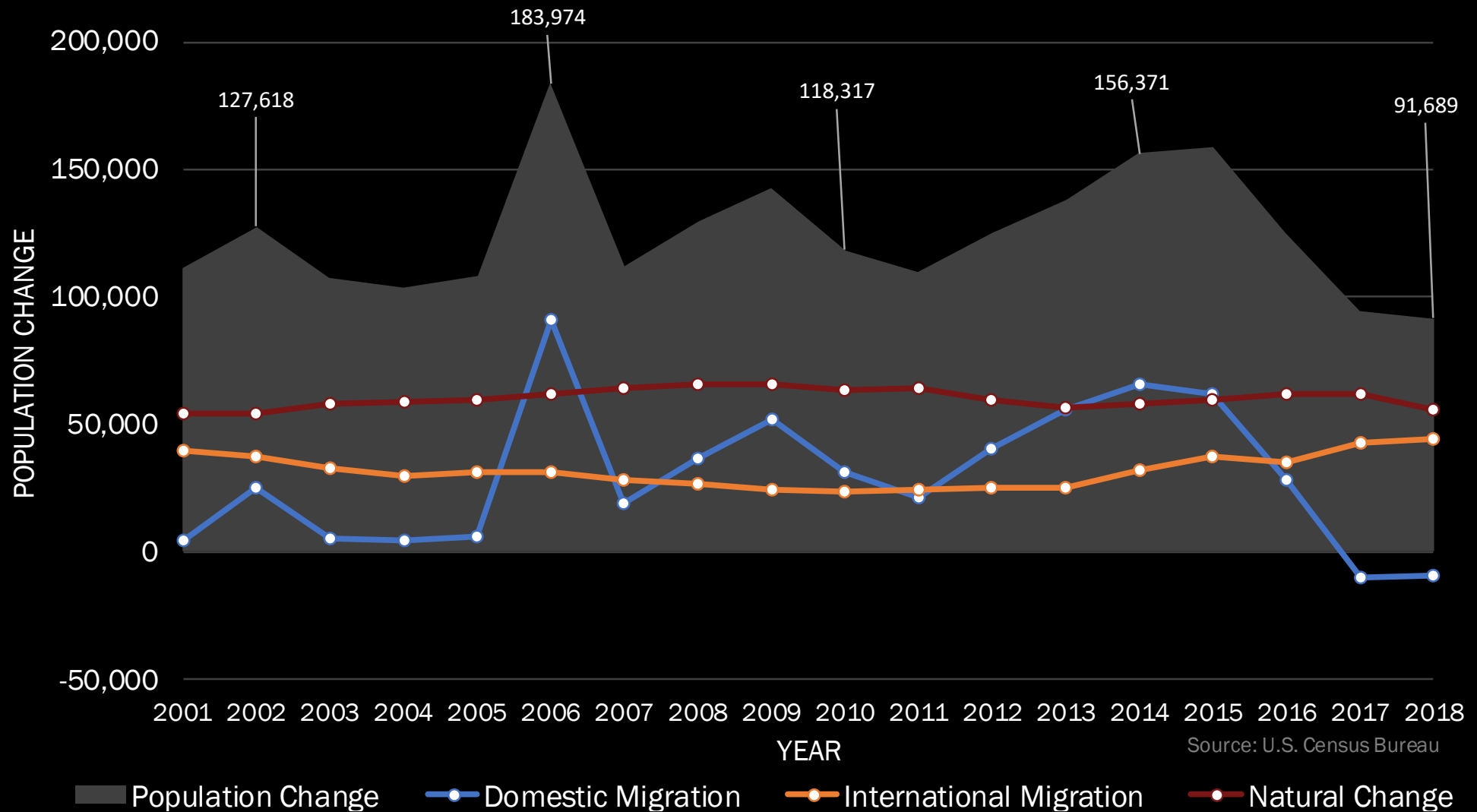
# 2019 Demographic Update

- ▶ **Last Study: September 2017**
  - ▶ Harvey flooding occurred during the last study
- ▶ **Economic and Housing Projections**
  - ▶ West Ranch nearing completion
  - ▶ New housing developments since last study
- ▶ **Enrollment Projections**
  - ▶ Potential grade configuration changes
  - ▶ Potential new elementary campus planning



# Annual Population Change

## Houston Metro

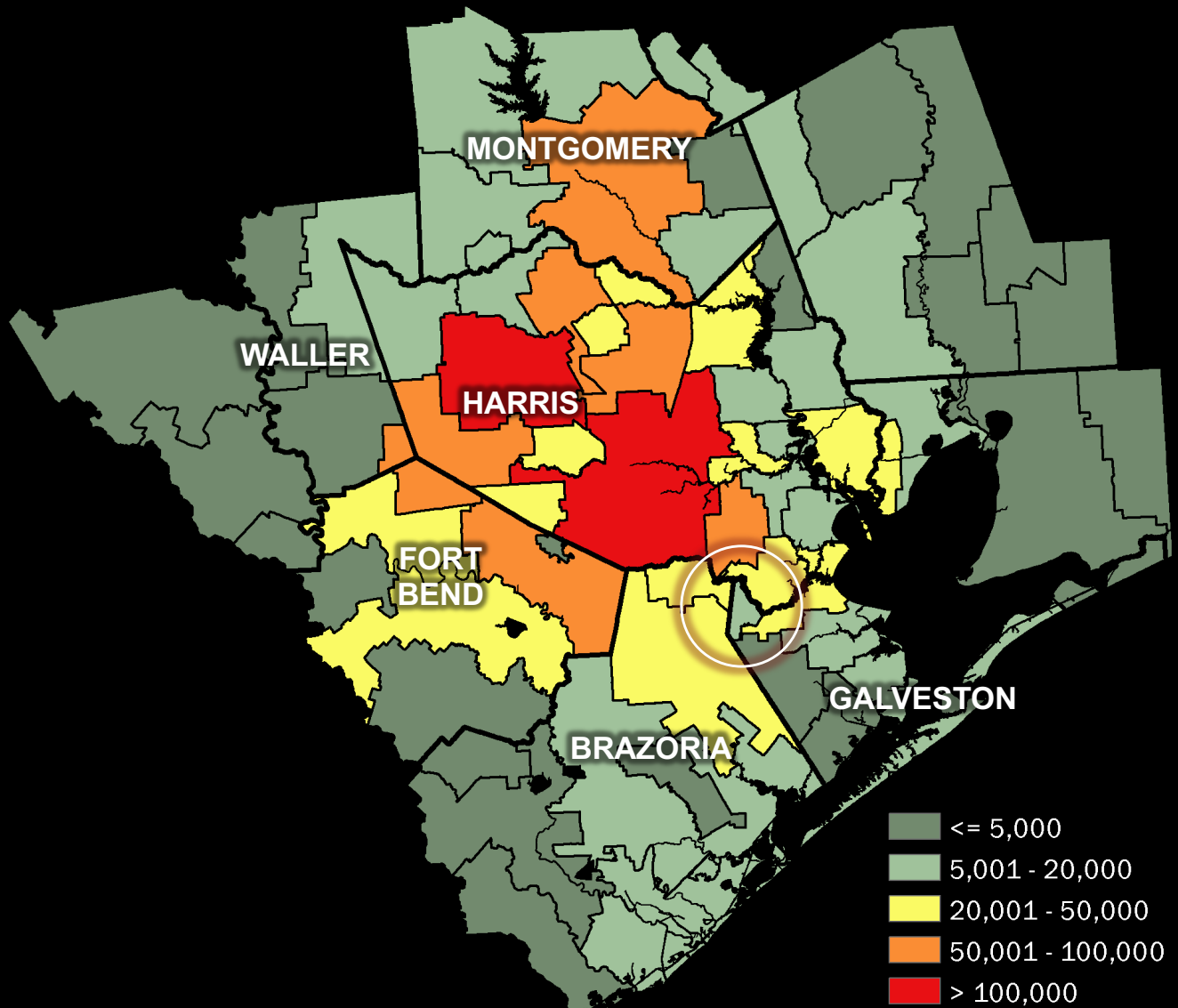


# Total School District Enrollment

Fall 2018, Houston Metro



	School District	Enrollment
1	Houston ISD	209,772
2	Cypress-Fairbanks ISD	116,512
3	Katy ISD	79,913
4	Fort Bend ISD	76,122
5	Aldine ISD	66,854
6	Conroe ISD	62,837
7	Klein ISD	53,328
8	Pasadena ISD	53,291
9	Alief ISD	45,436
10	Humble ISD	43,553
11	Clear Creek ISD	42,205
12	Spring ISD	35,385
13	Spring Branch ISD	34,681
14	Lamar CISD	33,444
15	Alvin ISD	25,945
36	Friendswood ISD	6,070



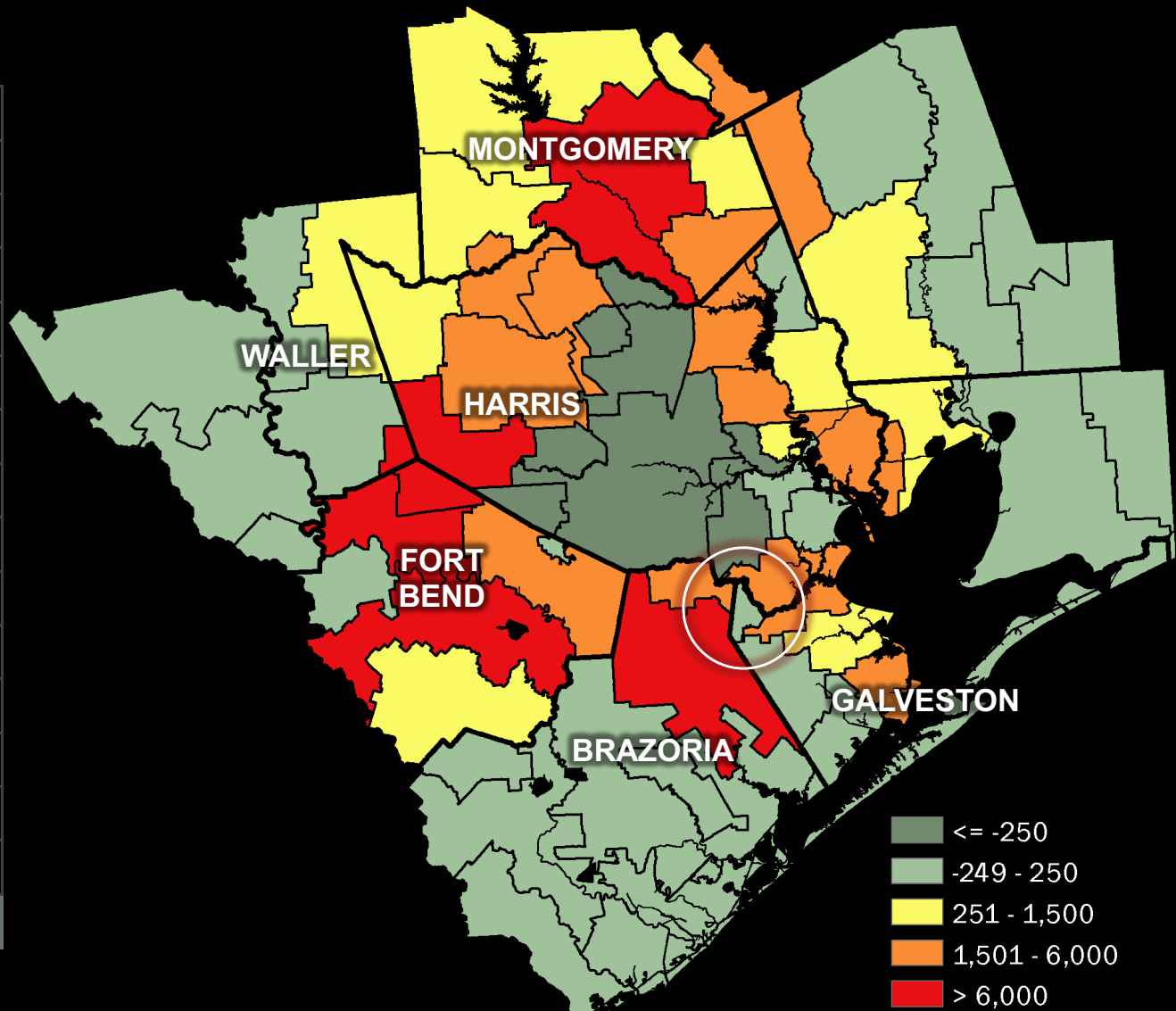


# Numeric Change in Enrollment

## Fall 2013 to Fall 2018, Houston Metro



	School District	Change
1	Katy ISD	12,700
2	Conroe ISD	7,828
3	Lamar CISD	6,365
4	Alvin ISD	6,136
5	Humble ISD	5,318
6	Fort Bend ISD	5,191
7	Klein ISD	5,075
8	Cypress-Fairbanks ISD	5,072
9	Tomball ISD	4,463
10	New Caney ISD	3,062
11	Cleveland ISD	2,746
12	Texas City ISD	2,478
13	Clear Creek ISD	2,207
14	Sheldon ISD	1,641
15	Pearland ISD	1,572
46	Friendswood ISD	-1



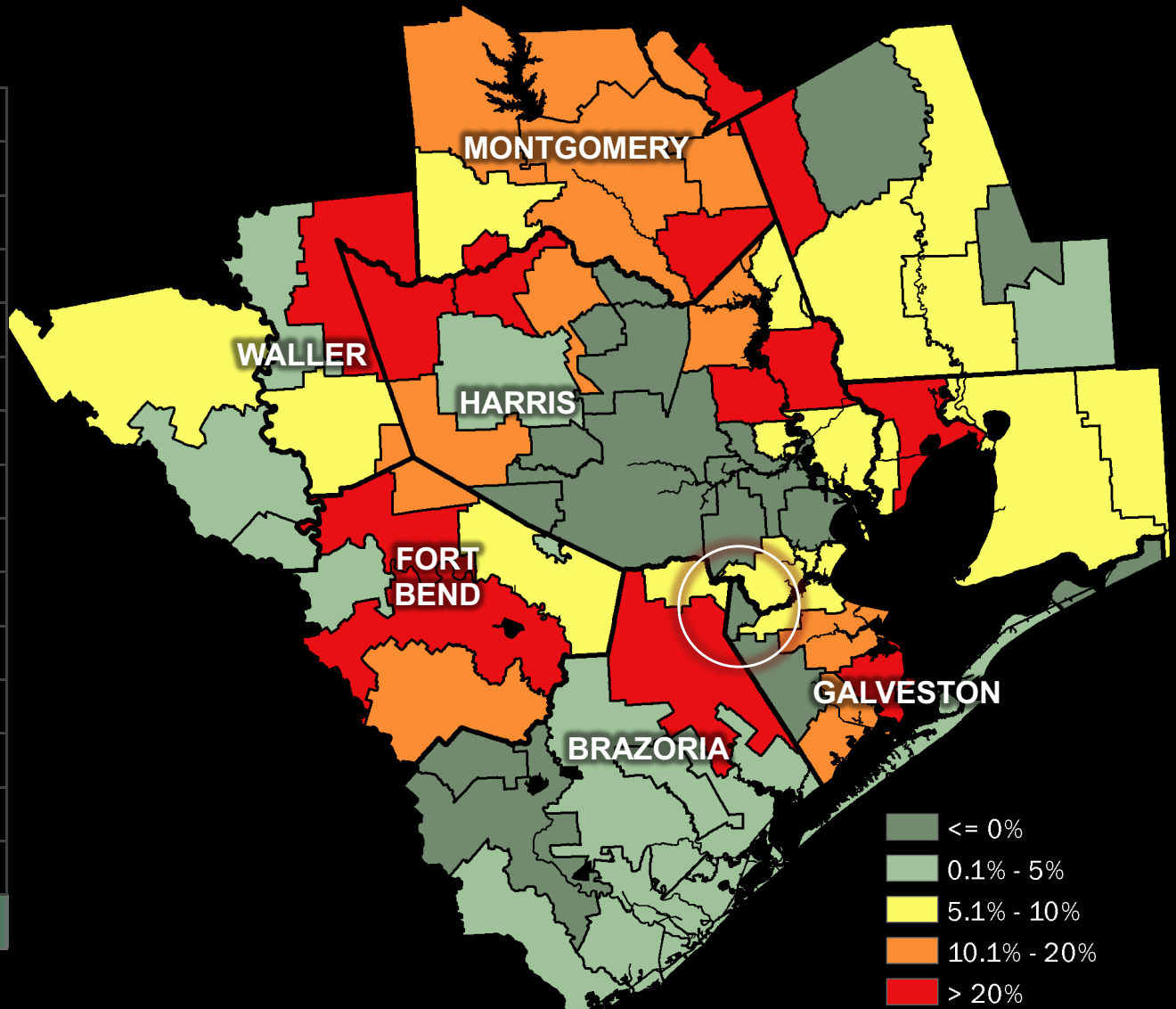
Source: Texas Education Agency

# Percent Change in Enrollment

## Fall 2013 to Fall 2018, Houston Metro



	School District	Change
1	Cleveland ISD	71.5%
2	Texas City ISD	40.2%
3	Tomball ISD	35.7%
4	Alvin ISD	31.0%
5	Waller ISD	25.3%
6	New Caney ISD	24.9%
7	Lamar CISD	23.5%
8	Barbers Hill ISD	22.3%
9	Crosby ISD	21.4%
10	Sheldon ISD	21.1%
11	Katy ISD	18.9%
12	Montgomery ISD	17.4%
13	Needville ISD	15.2%
14	Splendora ISD	15.0%
15	Hitchcock ISD	14.2%
46	Friendswood ISD	0.0%



Source: Texas Education Agency



# Demographic Characteristics



**42.3** Median Age

Houston Metro– 34.4

Population  
Ages 5–17



**23%**

Houston Metro 19%



Median  
Household  
Income

**\$119,571**

Houston Metro \$63,802

Mean Travel  
Time to Work

**32.6**



Houston Metro 29.9 minutes

**STAAR Passage Rate**

State of Texas 74%

**91%**



**Bachelor's Degree**

**53%**



Houston Metro 32%

**9.9%** Economically Disadvantaged Student Population

State of Texas 60.6%



Sources: U.S. Census Bureau, American Community Survey, 5-Year Estimate;  
Texas Education Agency

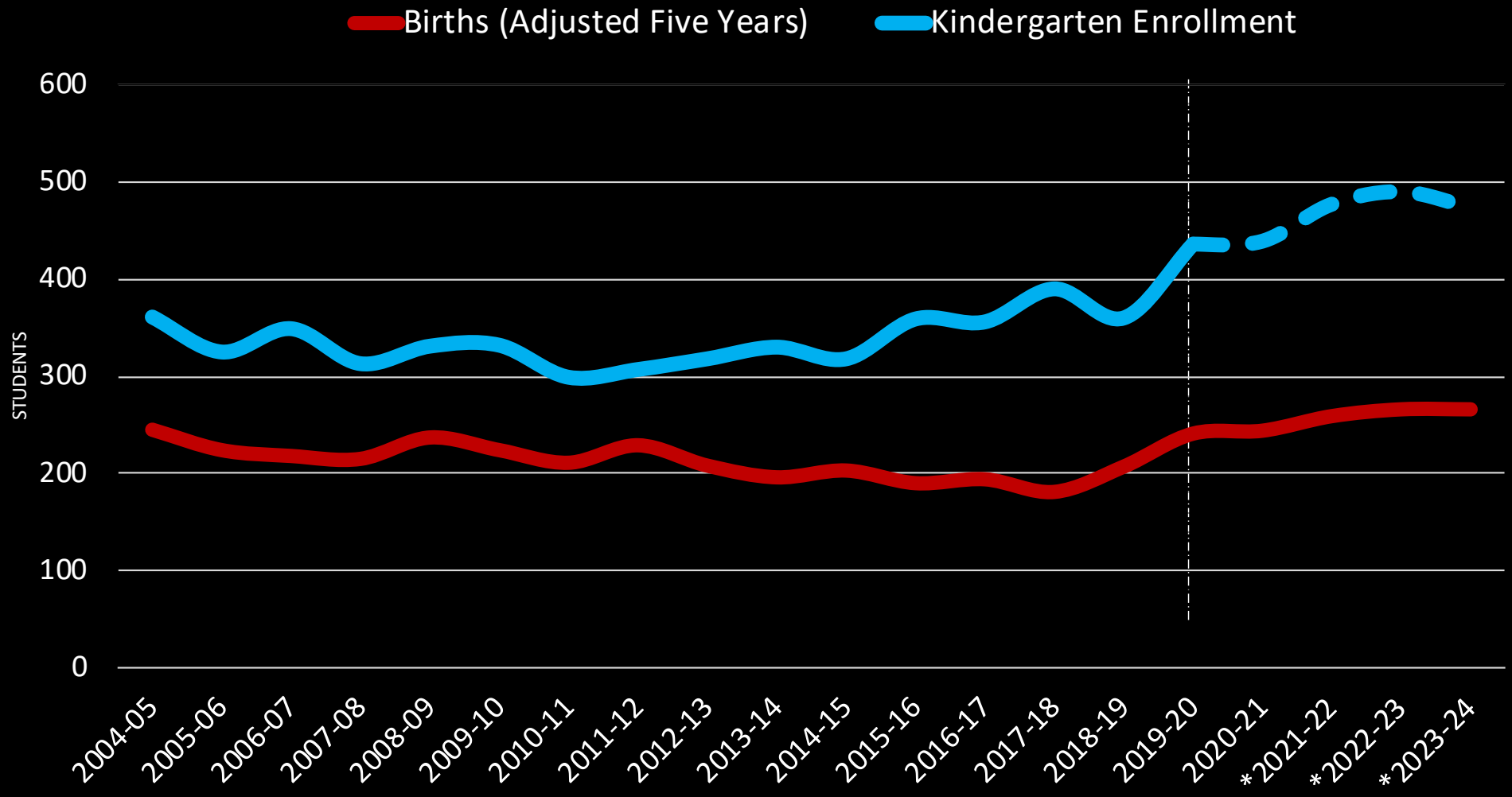
# 2018-19 STAAR Passage Rates



For the 181 Districts Larger than 5,000 Students

Rank	District Name	2018-19 Enrollment	STAAR Passage Rate			
			2018-19	2017-18	2016-17	2015-16
1	CARROLL ISD	8,366	97.1%	96.7%	96.9%	98.4%
2	HIGHLAND PARK ISD	6,840	95.9%	95.5%	95.7%	97.2%
3	EANES ISD	8,132	94.6%	94.9%	94.8%	95.5%
4	COPPELL ISD	12,925	92.2%	92.3%	91.1%	91.6%
5	<b>FRIENDSWOOD ISD</b>	<b>6,070</b>	<b>91.1%</b>	<b>91.3%</b>	<b>90.2%</b>	<b>94.1%</b>
6	BARBERS HILL ISD	5,732	90.9%	90.9%	87.4%	87.8%
7	ALLEN ISD	21,557	90.4%	91.2%	90.7%	91.9%
8	FRISCO ISD	60,182	90.2%	90.2%	89.8%	90.6%
9	PROSPER ISD	14,348	89.8%	90.5%	89.4%	91.2%
10	ALEDO ISD	6,129	89.8%	89.4%	89.4%	92.0%
11	LAKE TRAVIS ISD	10,738	89.7%	90.5%	91.1%	93.4%
12	WYLIE ISD	16,527	89.6%	89.1%	87.5%	89.6%
13	TOMBALL ISD	16,962	89.1%	88.8%	87.9%	90.2%
14	BOERNE ISD	9,170	87.9%	88.5%	87.0%	88.3%
15	DRIPPING SPRINGS ISD	6,873	87.8%	88.4%	87.6%	91.4%

# Kindergarten vs. Births



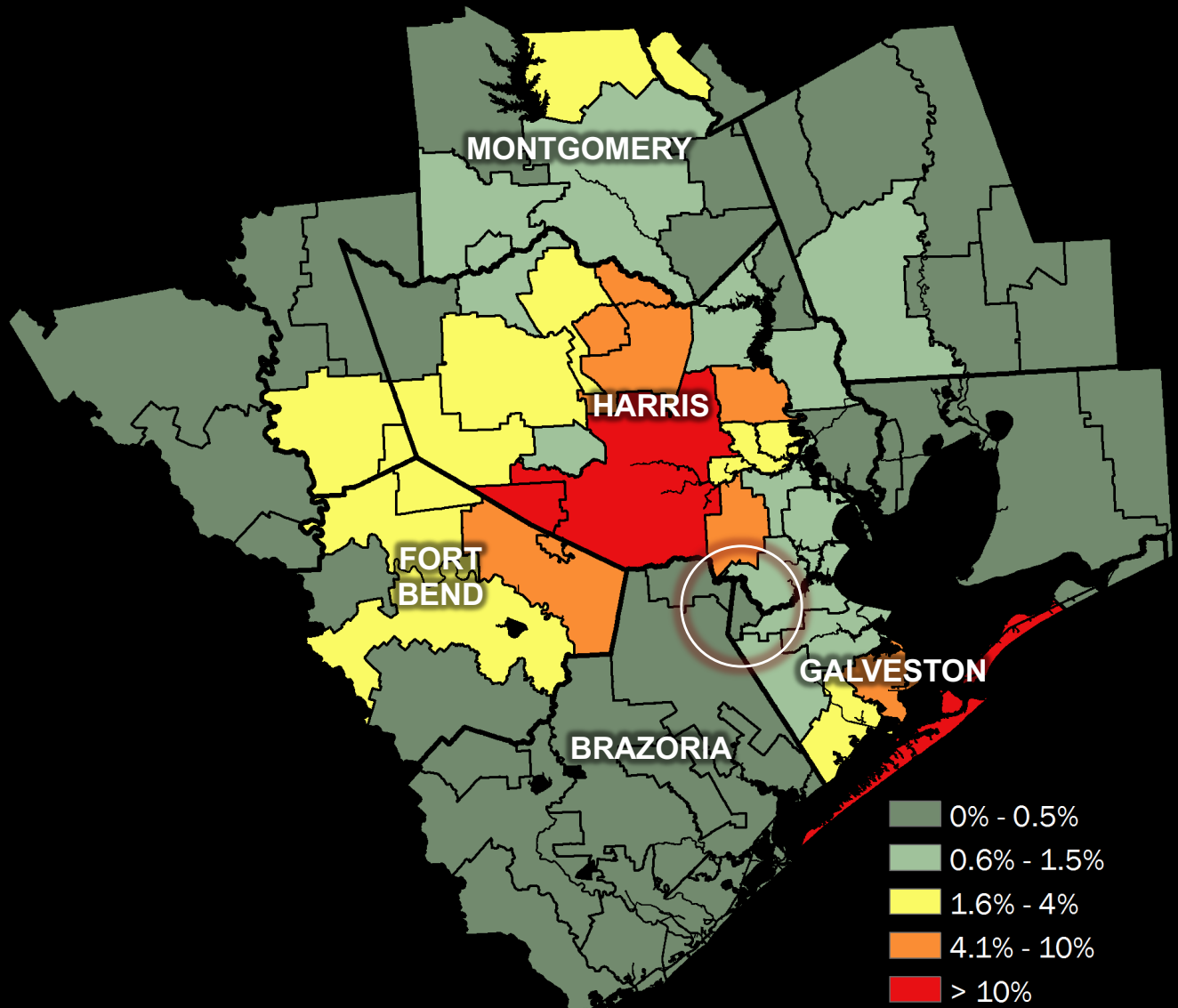
# Percent of Students in Charters

## Fall 2018, Houston Metro, All Public Schools



	School District	Percent
1	Houston ISD	19.0%
2	Alief ISD	15.8%
3	Galveston ISD	13.8%
4	Texas City ISD	7.6%
5	Spring ISD	6.4%
6	Pasadena ISD	5.8%
7	Aldine ISD	5.4%
8	Stafford MSD	5.0%
9	Fort Bend ISD	4.9%
10	Sheldon ISD	4.4%
11	Hitchcock ISD	3.4%
12	Cypress-Fairbanks ISD	3.0%
13	Katy ISD	3.0%
14	Royal ISD	2.7%
15	Galena Park ISD	2.2%
44	Friendswood ISD	0.2%

Source: Texas Education Agency



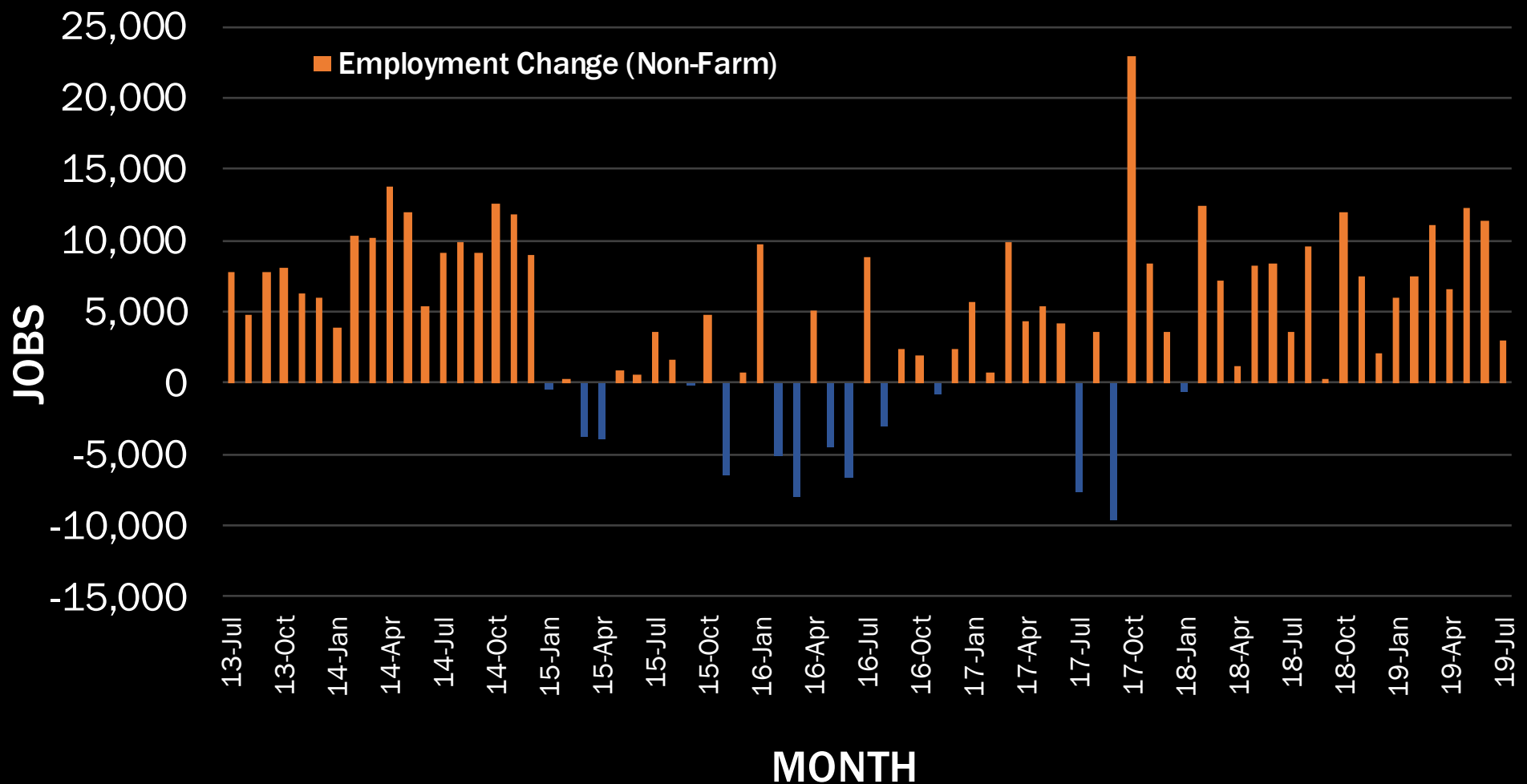


EMPLOYMENT



# Monthly Employment Change

## Houston Metro, Seasonally Adjusted

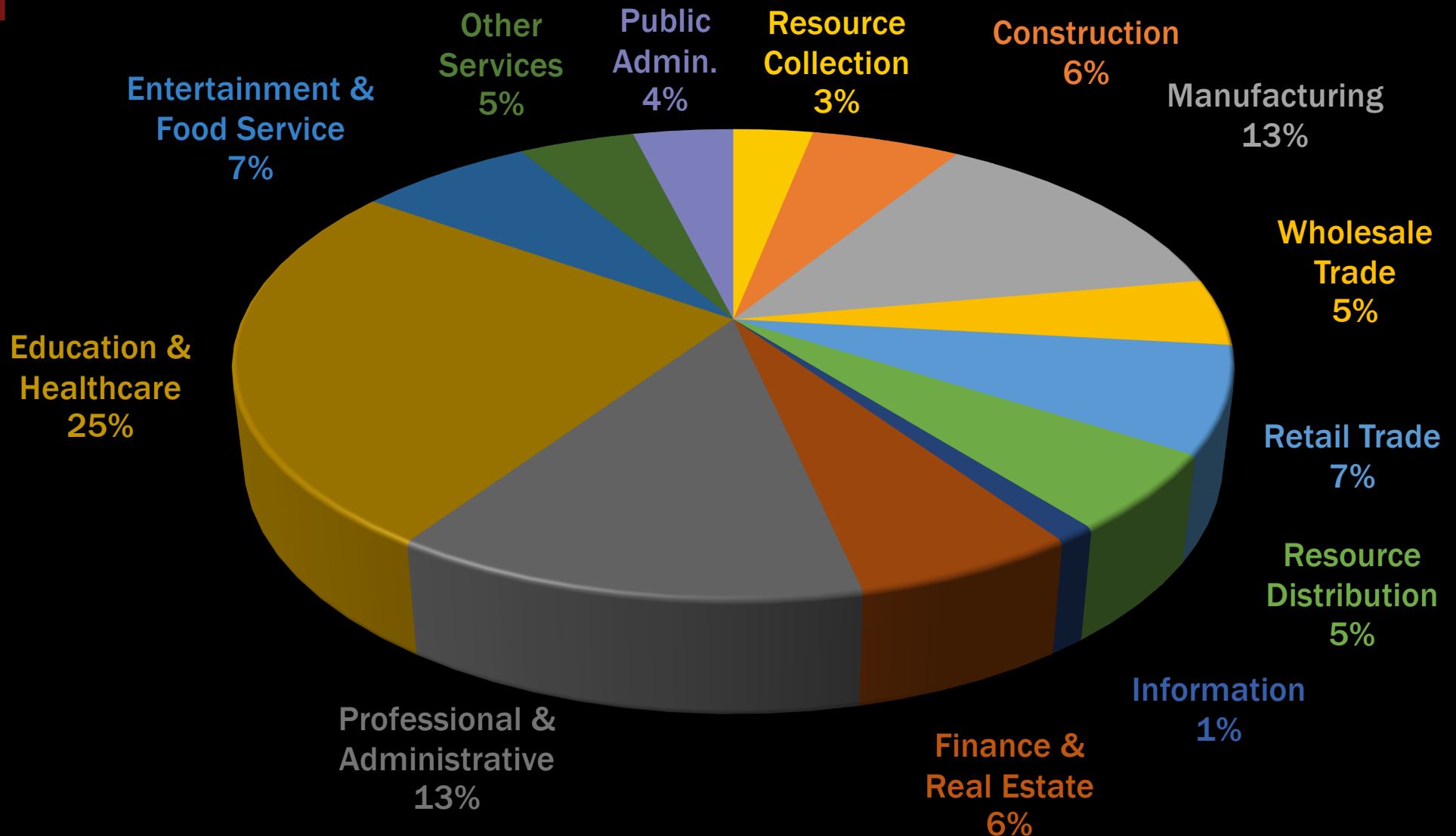


Source: Texas Workforce Commission

# Employment by Sector



## District Residents in the Workforce, 2017 Estimate



Sources: U.S. Census Bureau, American Community Survey 5-Year Estimates



# Metro Area Economy



- ▶ **89,000 jobs created between July 2018 and 2019 in Houston Metro**
  - ▶ Medical, manufacturing/warehousing sectors continuing to grow
- ▶ **Medical universities and research facilities growing briskly**
- ▶ 4 hospitals with \$3B in expansion projects
  - 1,000 beds to be added, 4,500-6,500 full-time employees
  - UTHealth Harris County Psychiatric Center



# Economic Trends

## ► Strong Employment

- Unemployment continues to drop - now 3.9% in Houston

## ► Industrial Development

- Southeast industrial submarket is strong
  - 1.4 million sq. ft. of space absorbed in 2Q19 alone
- Brazoria County Manufacturing/Petrochemical Sector
  - Growth slowing now but more expansions planned





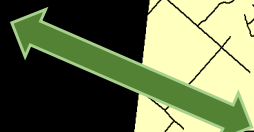
# Infrastructure

- ▶ **Friendswood Lakes Boulevard**
  - ▶ FM 528 to west of West Boulevard: Galveston Co. bond project + landowner contributions
  - ▶ Planning Stage: connection to Pearland Parkway
- ▶ **Grand Parkway**
  - ▶ Remains on TxDOT's 10-year plan
  - ▶ Segment B from IH 45 to SH 288 is likely next
- ▶ **Gulf Freeway Widening**
  - ▶ SE of Friendswood
  - ▶ Minimal impact on F.I.S.D.



# Planned Thoroughfares

Future  
Friendswood  
Lakes Blvd.  
to connect with  
Pearland Pkwy.

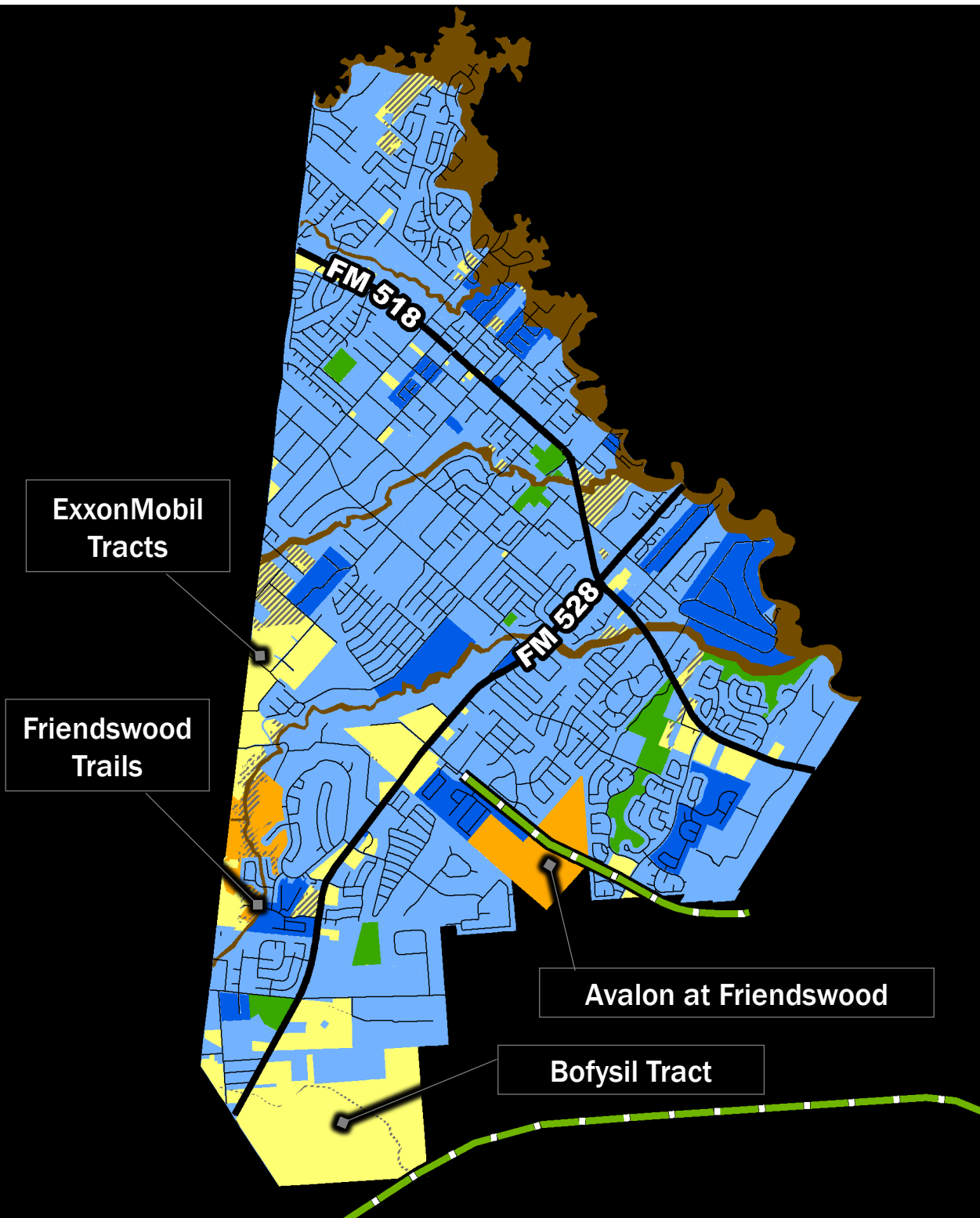


Friendswood  
Lakes Blvd.

Grand Pkwy.  
(TX-99)

Planned Thoroughfares

# Land Use & Development Analysis



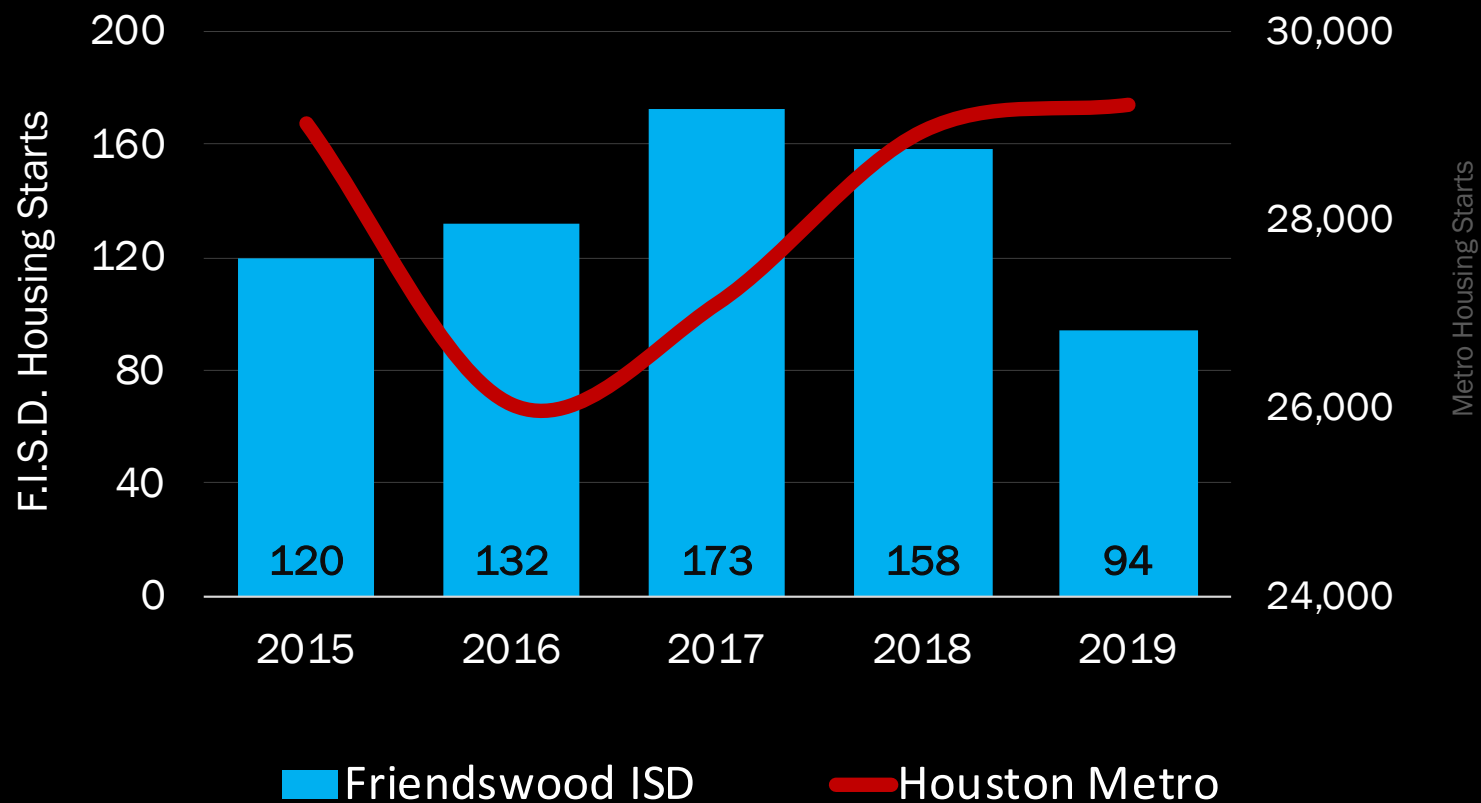
- Planned Thoroughfares
- Floodway
- 100 and 500 Year Floodplain in Undeveloped Parcels
- Existing/Built-Out
- Actively Developing
- Planned Development
- Undeveloped
- Parks



# Annual Housing Starts



## Friendswood I.S.D. Compared to Metro Houston





# Single-Family Housing



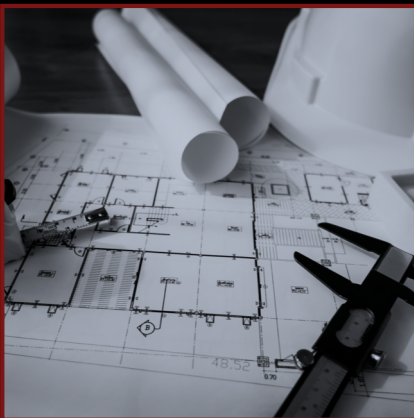
## ► Ongoing Single-Family Developments

- Sterling Creek: ~139 lots remain; expect rapid build-out
- Friendswood Trails: 130 lots in first phase developed; new builder selected; The remaining land is still planned for development minus 30 acres purchased by Denbury.



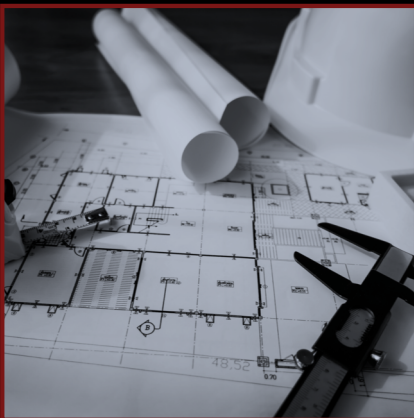
## ► Upcoming Single-Family

- Avalon at Friendswood: Taylor Morrison is planning ~265 homesites south of West Ranch. Development expected to follow the Friendswood Lakes Blvd. construction.
- ExxonMobil Tracts: Initial engineering and drainage planning is beginning but no known timeline.



# Housing Potential

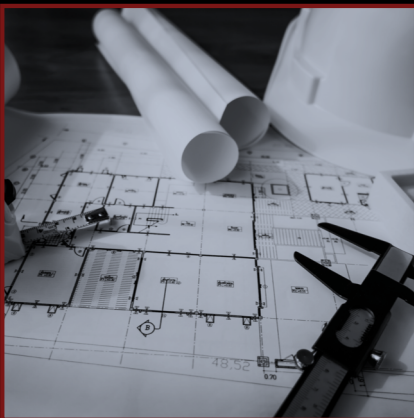
## ► Potential Single-Family Development



- Wischnewsky Tract: the White House Ranch mansion may not be rebuilt. This ~60-acre site is ripe for commercial and SF development
- Bofysil Tract: D.R. Horton began platting “Georgetown” in late 2018 but has shelved plans and has no plans to develop the site in the near future; 389 acres.

# Housing Highlights

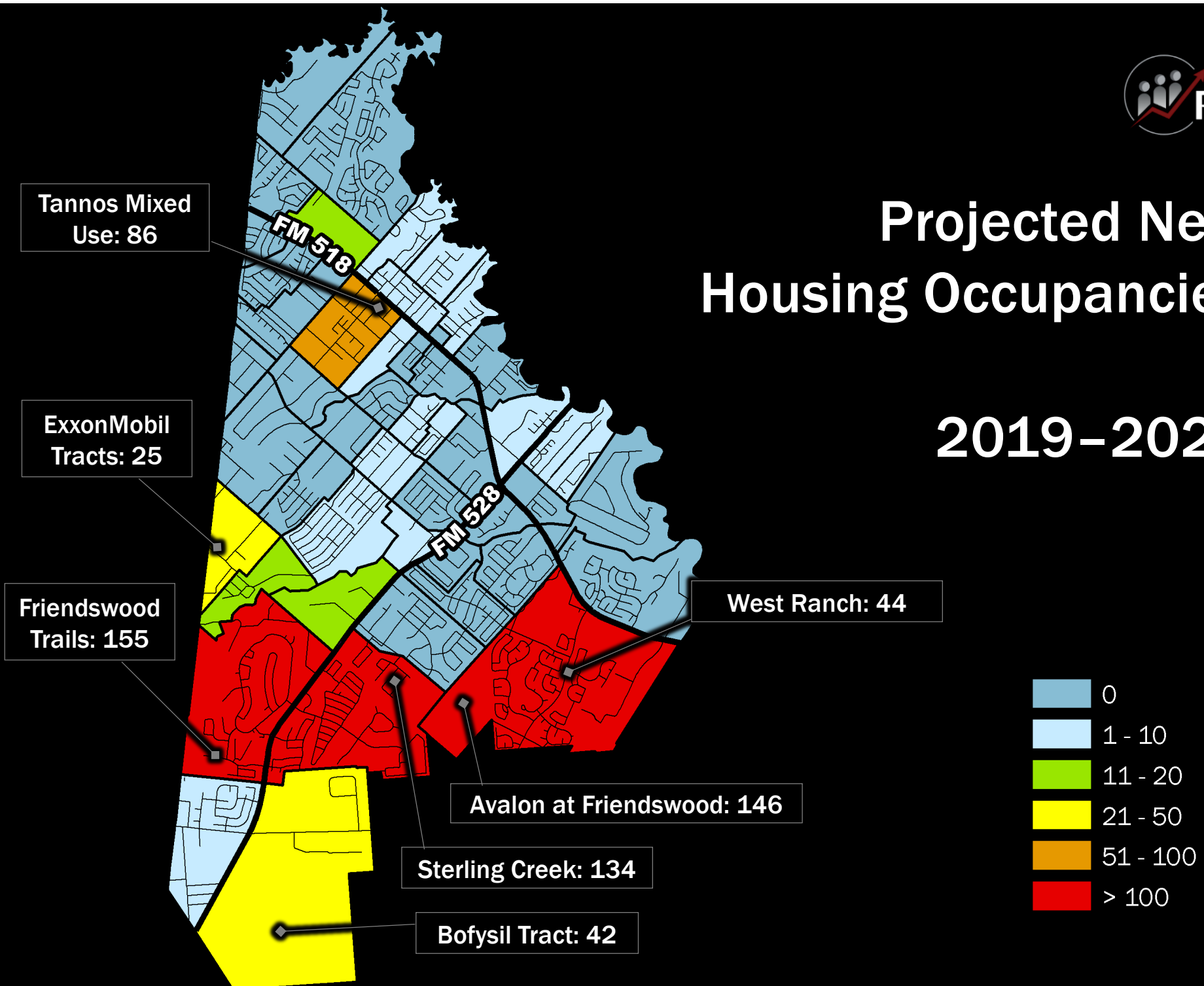
## ► Multi-Family Development



- Beldon – age-restricted. Nearly completely leased
- Tannos Land Holdings planning MF atop retail; 86 units; 408 S. Friendswood Dr.
- Commercial reserves in West Ranch still undeveloped but could have denser SF, townhome, or MF.

# Projected New Housing Occupancies

## 2019–2024



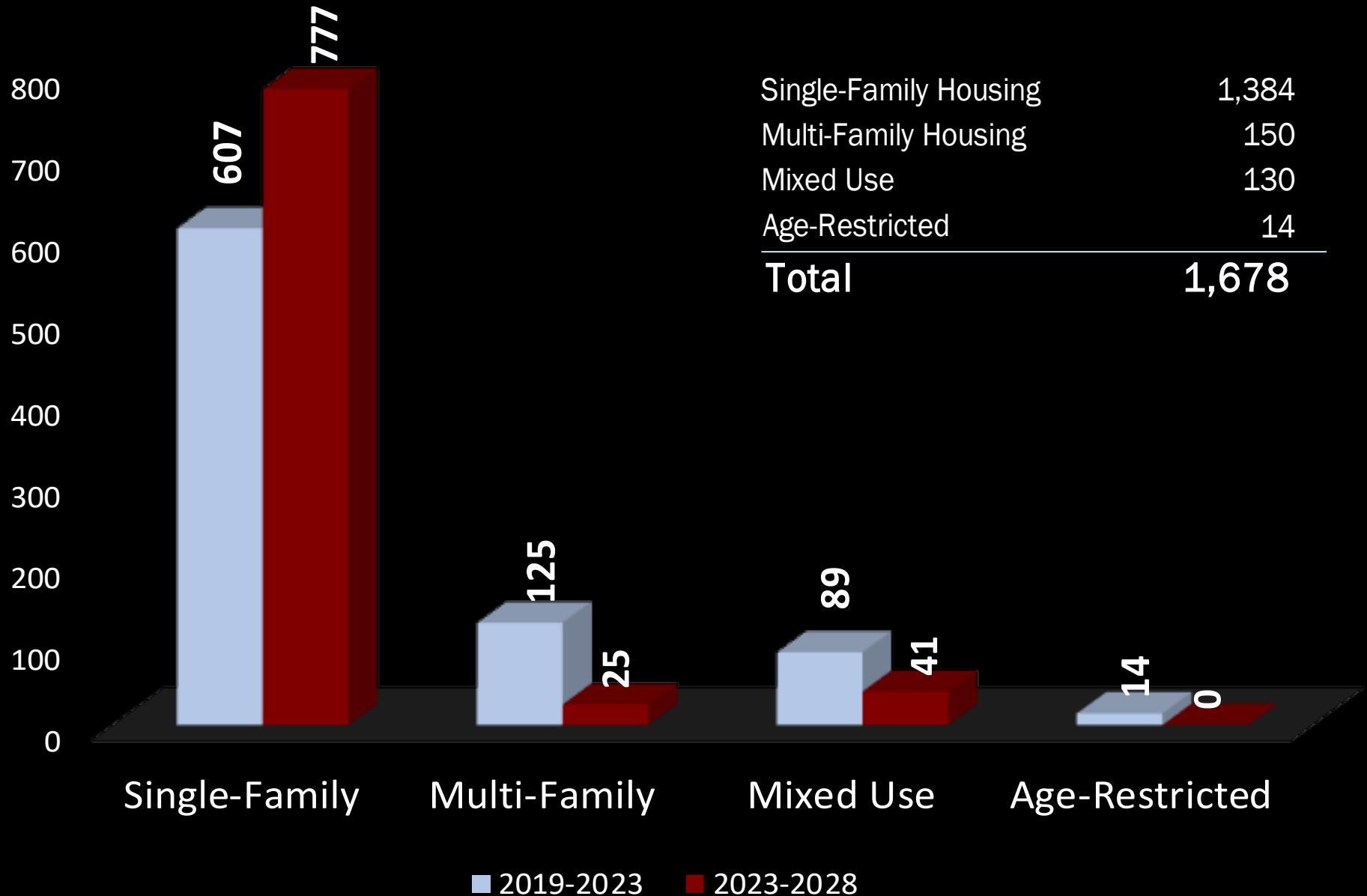




# Projected New Housing Occupancies 2019-2029



## TOTAL



Single-Family Housing	1,384
Multi-Family Housing	150
Mixed Use	130
Age-Restricted	14
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Total	1,678



STUDENTS  
per HOME



# Students per Occupied Home

Districtwide



0.61

**Single-Family**

0.47

**Multi-Family**



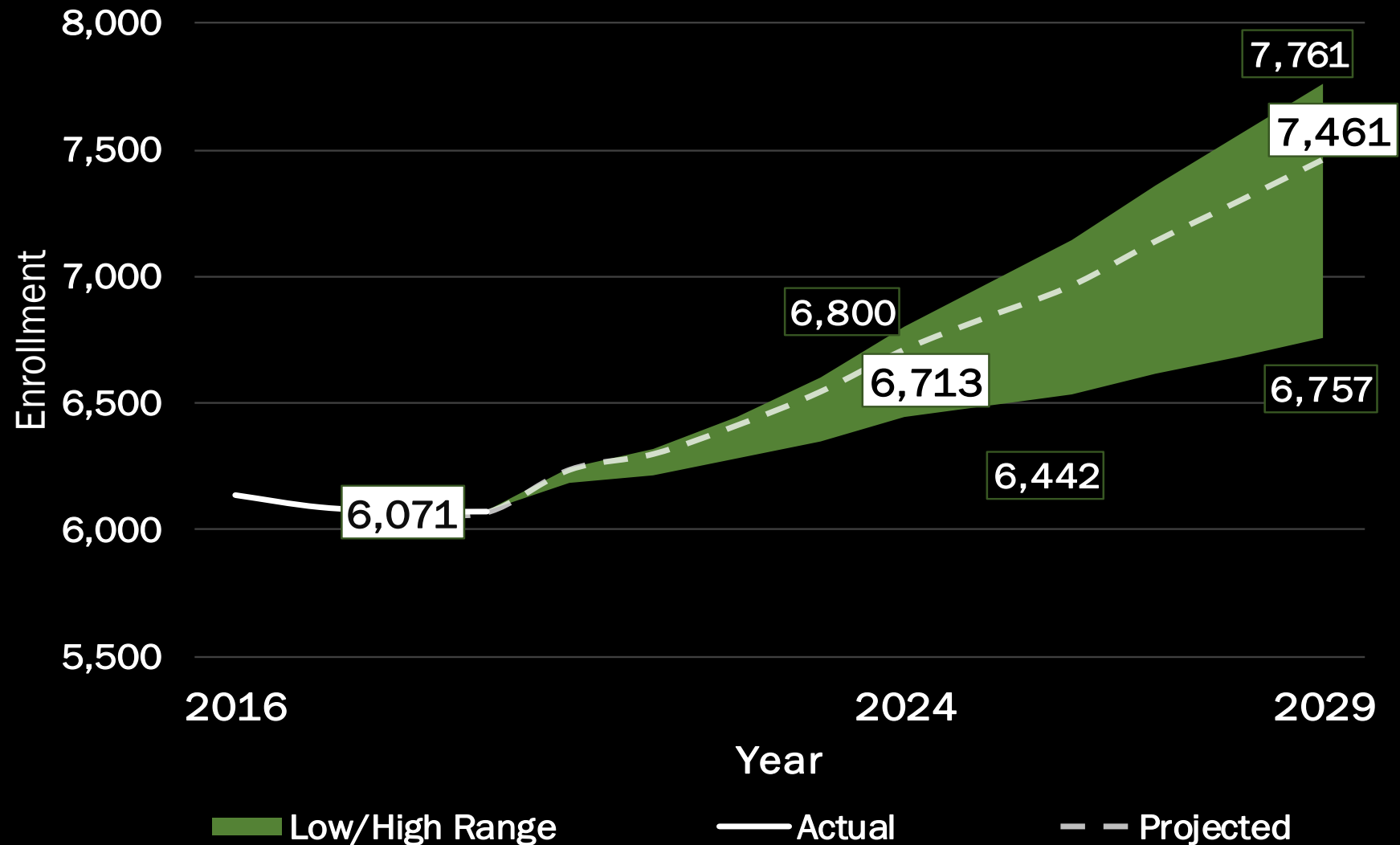
# Moderate Growth Scenario



## Projected Enrollment at PEIMS Snapshot Date

	2020	2021	2022	2023	2024
<b>Enrollment</b>	<b>6,239</b>	<b>6,301</b>	<b>6,414</b>	<b>6,547</b>	<b>6,713</b>
<b>% Growth</b>	<b>0.95%</b>	<b>0.99%</b>	<b>1.79%</b>	<b>2.07%</b>	<b>2.54%</b>
<b>Growth</b>	<b>59</b>	<b>62</b>	<b>113</b>	<b>133</b>	<b>166</b>
	2025	2026	2027	2028	2029
<b>Enrollment</b>	<b>6,842</b>	<b>6,965</b>	<b>7,139</b>	<b>7,298</b>	<b>7,461</b>
<b>% Growth</b>	<b>1.92%</b>	<b>1.80%</b>	<b>2.50%</b>	<b>2.23%</b>	<b>2.23%</b>
<b>Growth</b>	<b>129</b>	<b>123</b>	<b>174</b>	<b>159</b>	<b>163</b>

# Three Scenarios of Growth

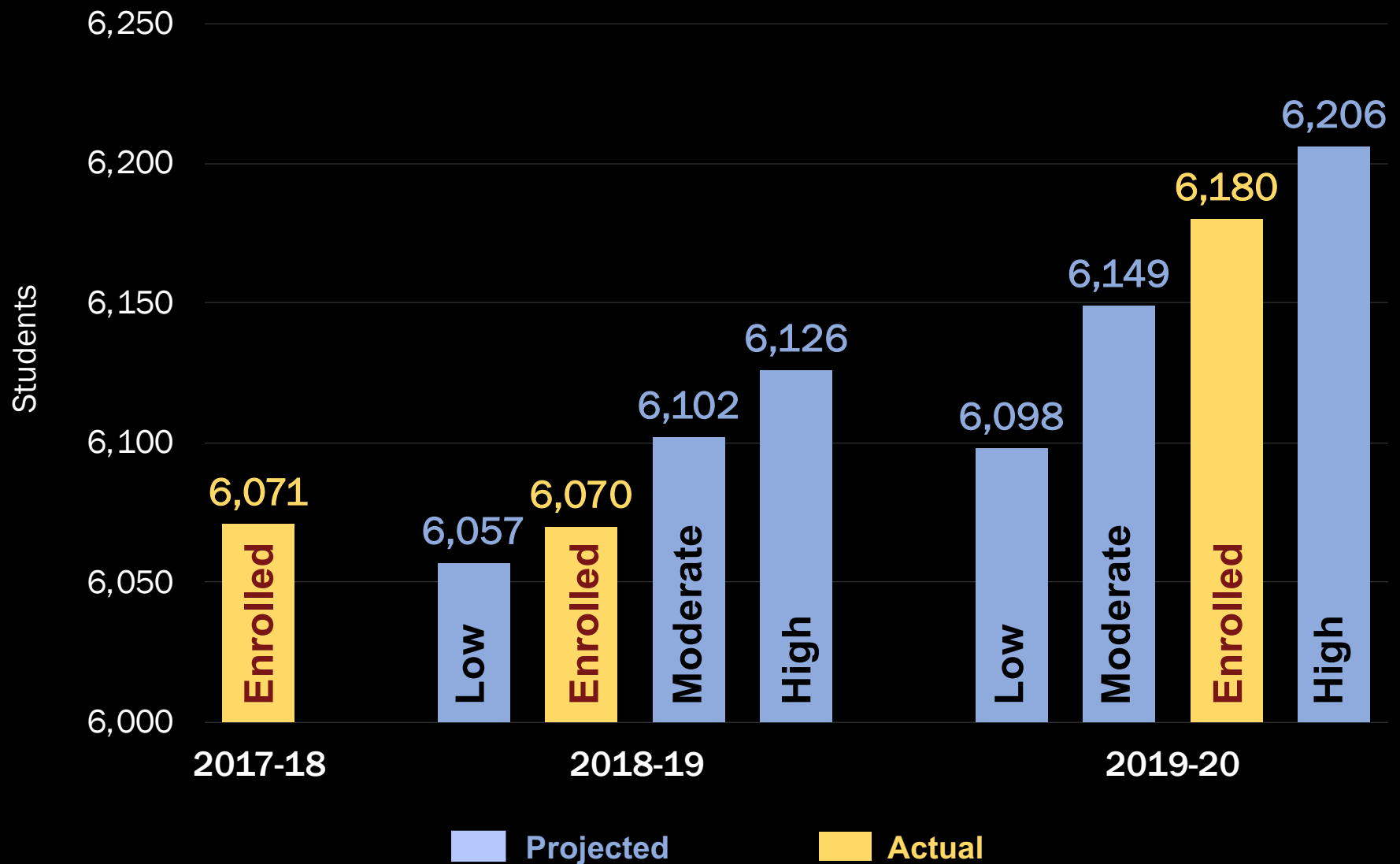




# Previous Demographic Update

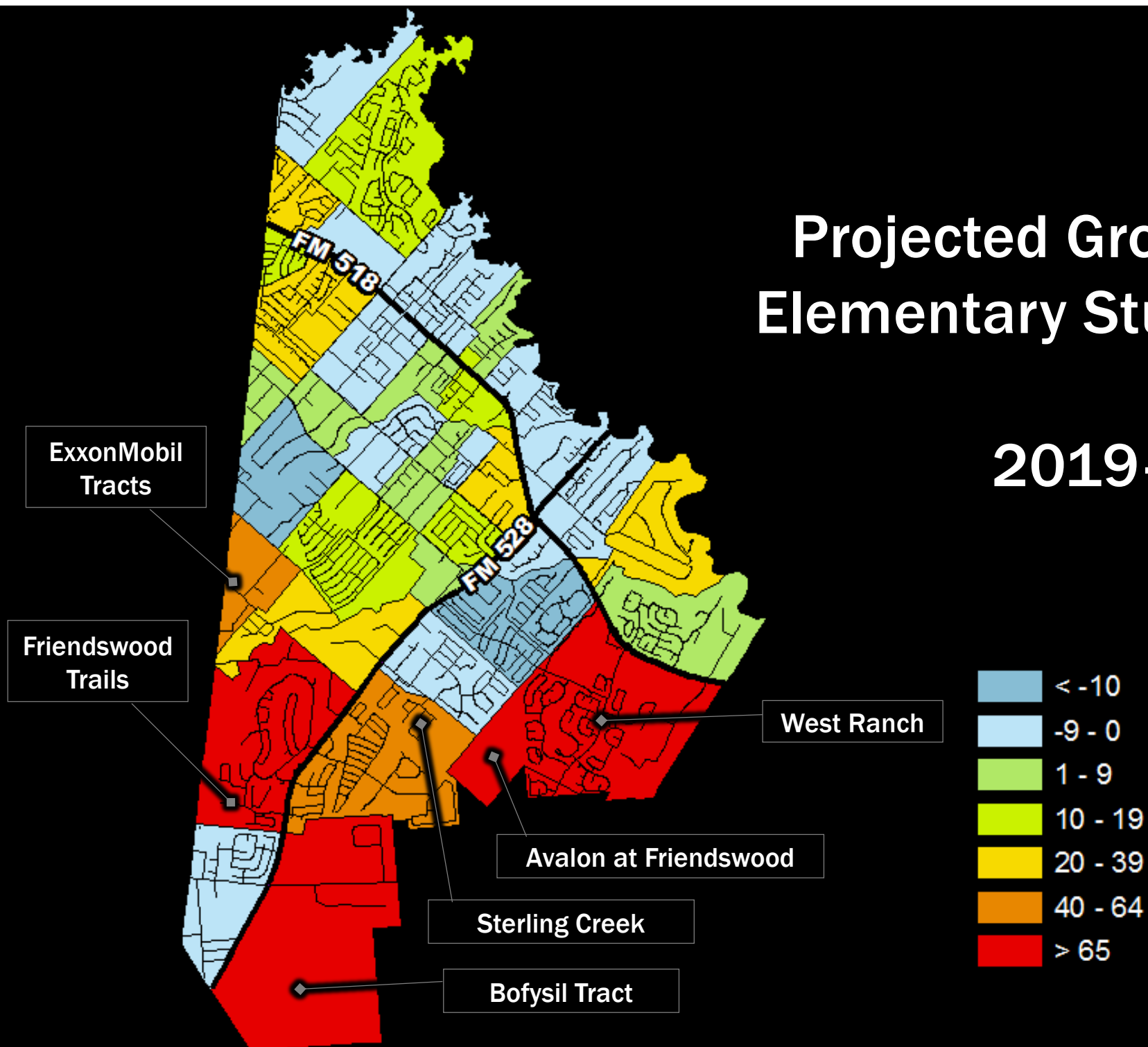


## Projected vs. Actual Enrollment



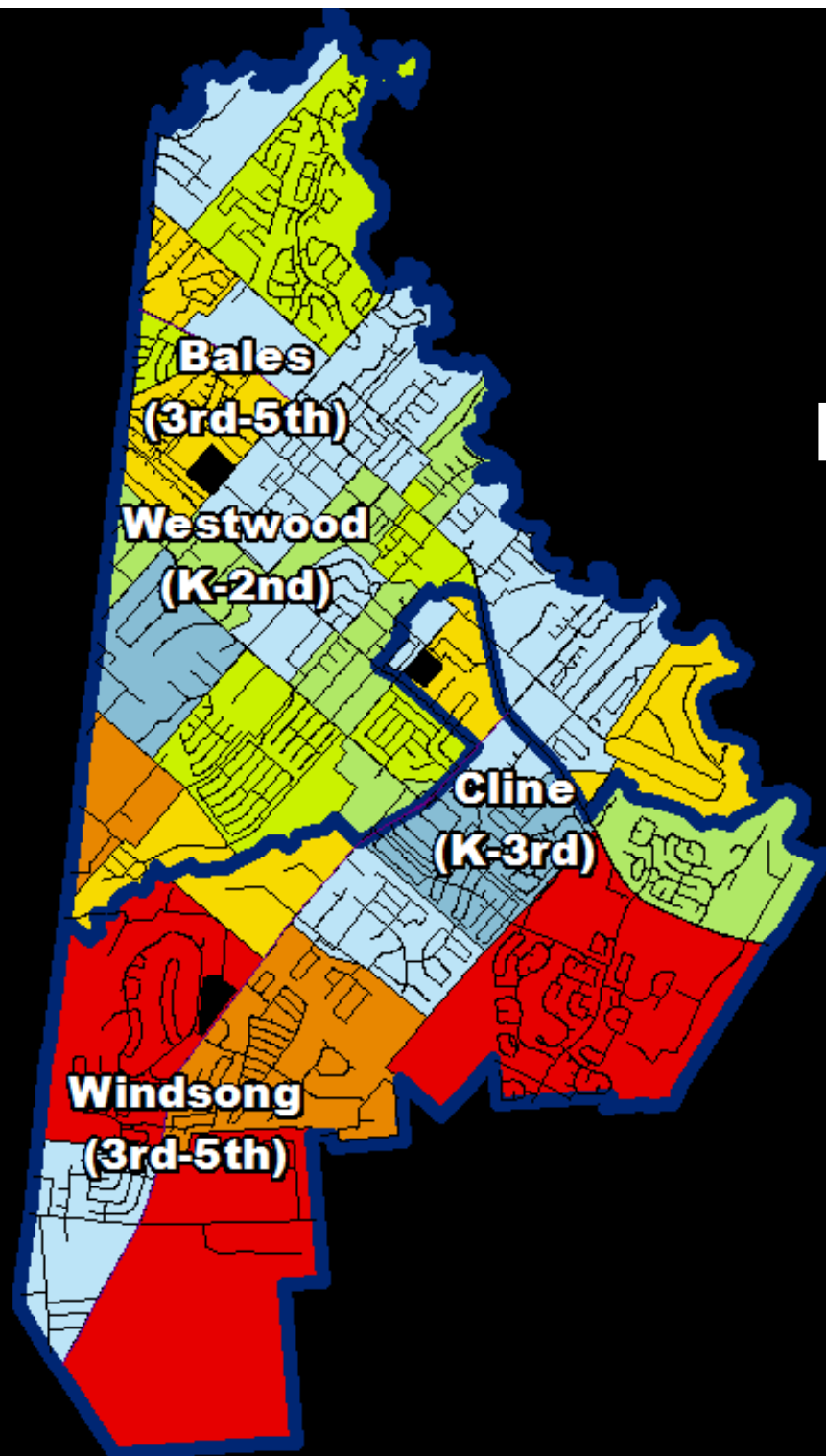
# Projected Growth in Elementary Students

## 2019–2029



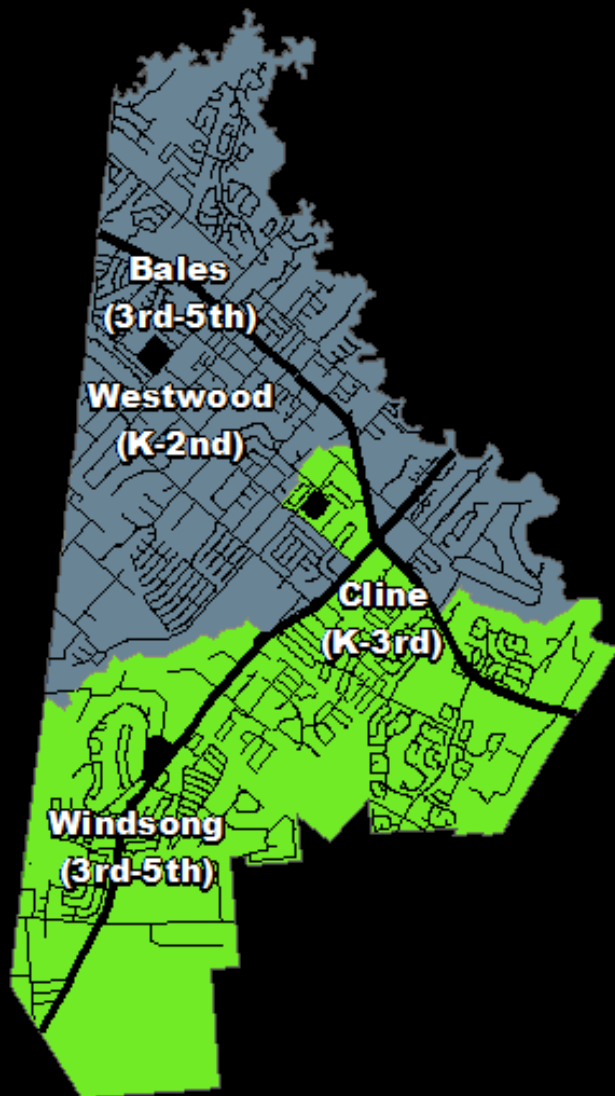
# Projected Growth in Elementary Students

2019–2029





# Projected Growth in Elementary Students



# Projected Growth in Elementary Students

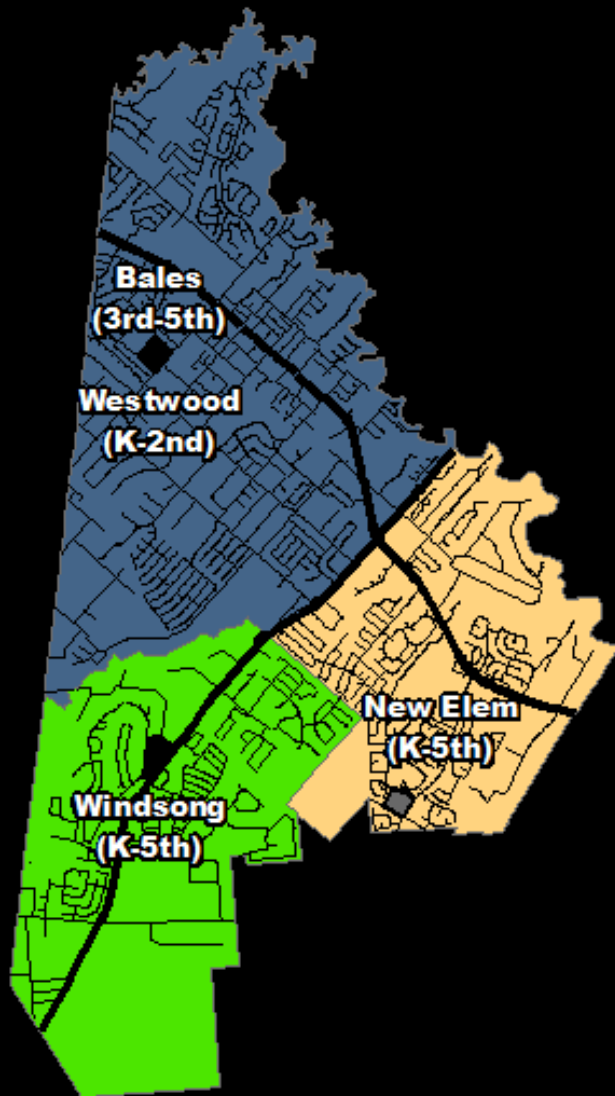


Moderate Growth Scenario

# Projected Growth in Elementary Students



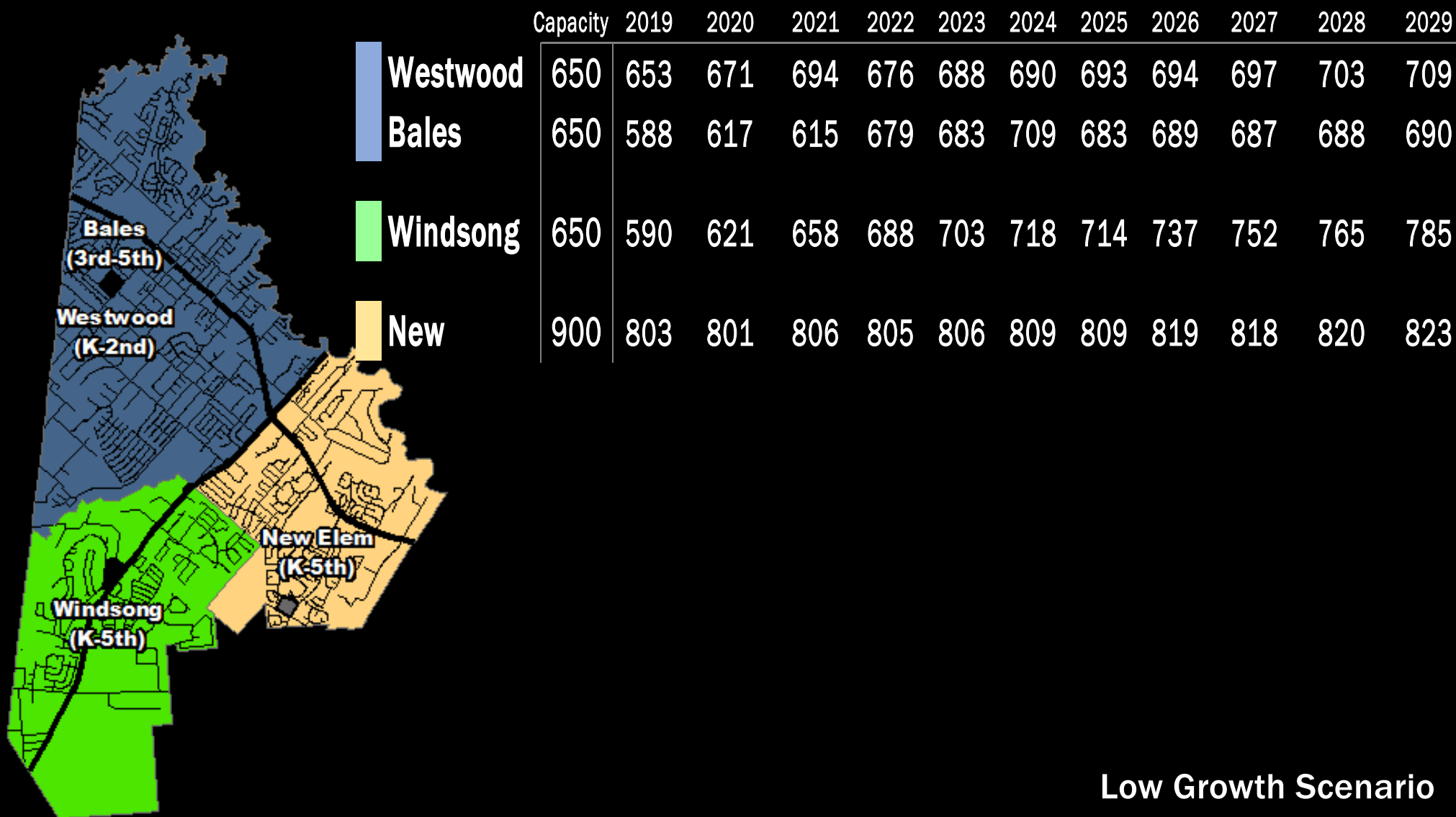
# Elementary Long-Range Planning



# Elementary Long-Range Planning



# Elementary Long-Range Planning



# Secondary Long-Range Planning



## Low Growth

	Capacity	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Junior High	1,856	1,461	1,464	1,456	1,441	1,516	1,537	1,624	1,606	1,634	1,596	1,625
High School	2,450	2,085	2,014	1,984	1,991	1,954	1,979	1,968	1,987	2,028	2,112	2,125

## Moderate Growth

	Capacity	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Junior High	1,856	1,461	1,464	1,456	1,441	1,522	1,553	1,657	1,707	1,803	1,832	1,868
High School	2,450	2,085	2,014	1,984	1,991	1,958	1,993	1,995	2,030	2,090	2,201	2,296



QUESTIONS?





# FRIENDSWOOD ISD

September 2019