Sumner-Bonney Lake School District – Demographic Observations and Enrollment Forecast

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Western Demographics, Inc.

5/1/23

Sumner – Bonney Lake School District – Demographics and Enrollment Findings

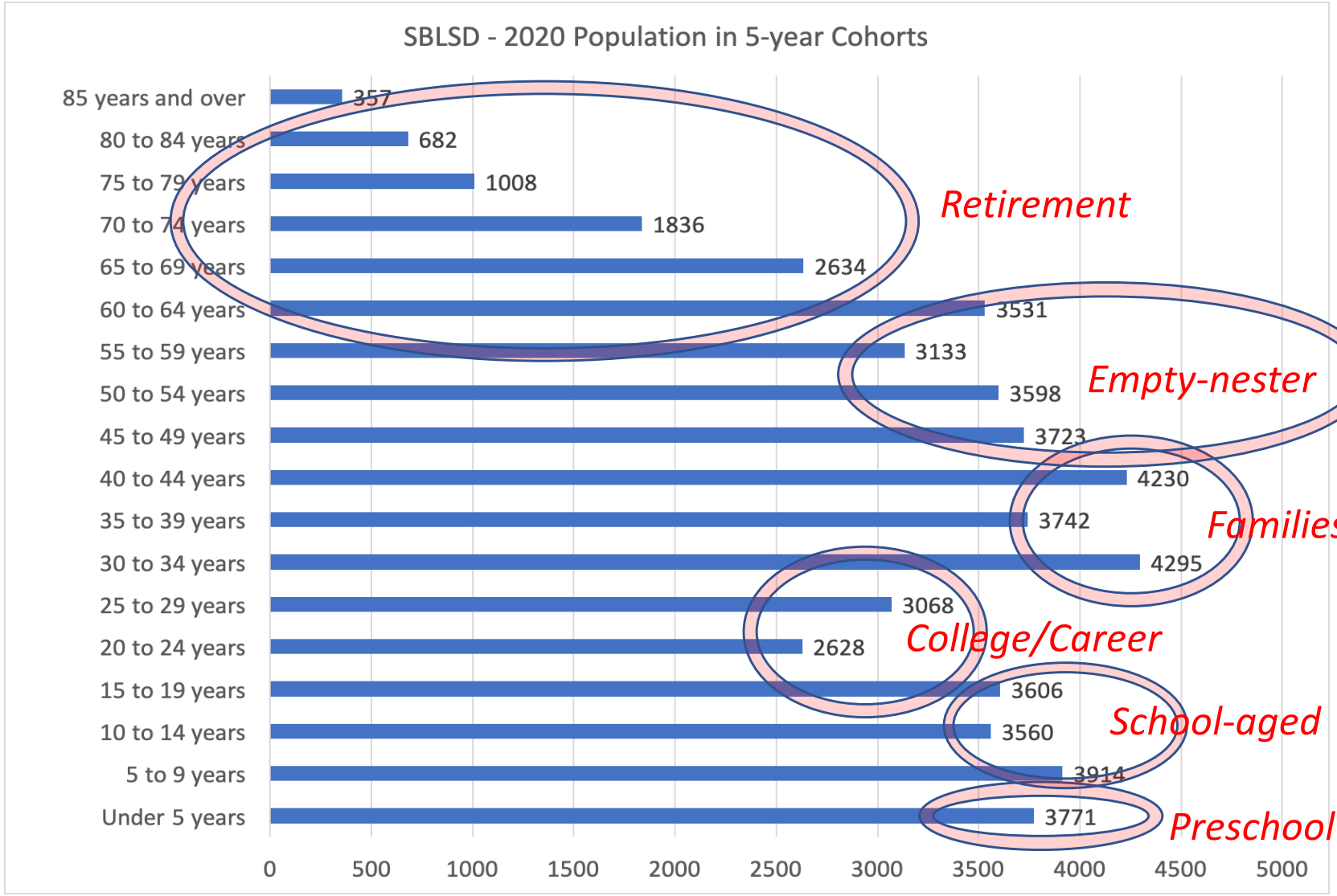
- SBLSD School District has not been dramatically affected by regional and National demographic and social changes that have affected enrollment elsewhere.
- Housing costs in the district remained affordable relative to the region and young families still have many opportunities here.
- The population has a consistent range of ages, has grown and families continue to be well-represented in the age distribution
- The Pandemic drastically affected enrollment in many higher housing value districts in the region – SBLSD has largely recovered.
- Interest rates will be elevated for the next 18 – 24 months and home sales are diminished, but are expected to recover with many builders poised to offer housing to families. Vacant lots are under construction.
- Enrollment is expected to increase during the next 5 years with the 3 schools in Tehaleh expected to grow as new housing increases the overall population.
- Several large apartment buildings will contribute to enrollment stability and possibly limited growth in Sumner.
- Enrollment trends in the district are remarkably stable.
- The district's housing is a well-kept secret, well-served by regional transit and will be discovered.

Post Pandemic School Demographics – National Perspective

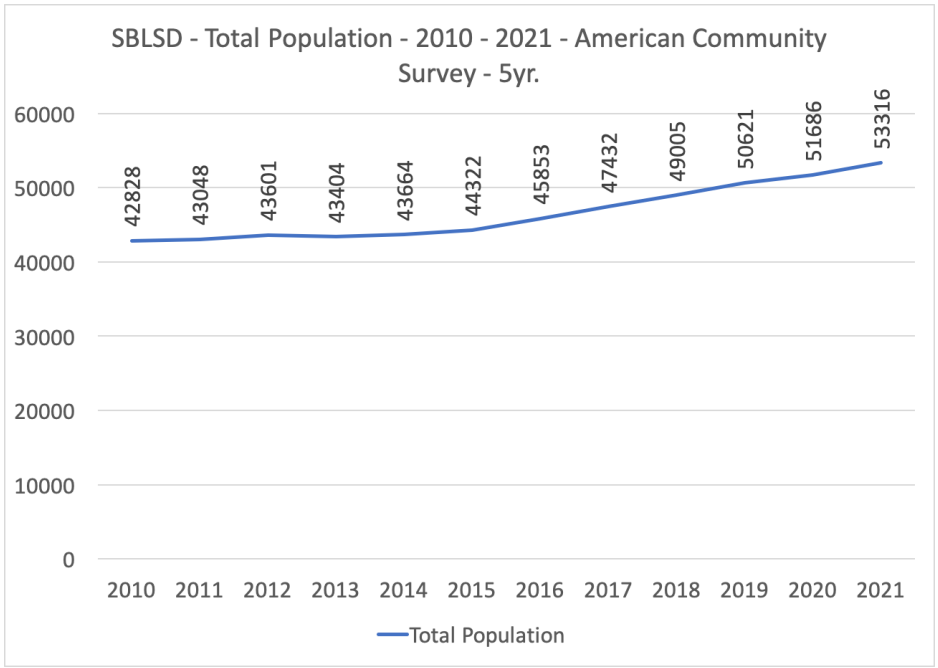
- The Millenial-age population is not having children at the rate of prior generations.
- Birth rates and family sizes have declined in almost every State and throughout Washington.
- Housing costs in the Puget Sound region have affected family size and location decisions for many young families.
- The Pandemic worsened already declining enrollments (Pandemic-linked enrollment declines average 3% among suburban districts in the West and have been largely permanent).
- Competition from on-line and non-neighborhood schools has accelerated as families try them and continue post Pandemic.

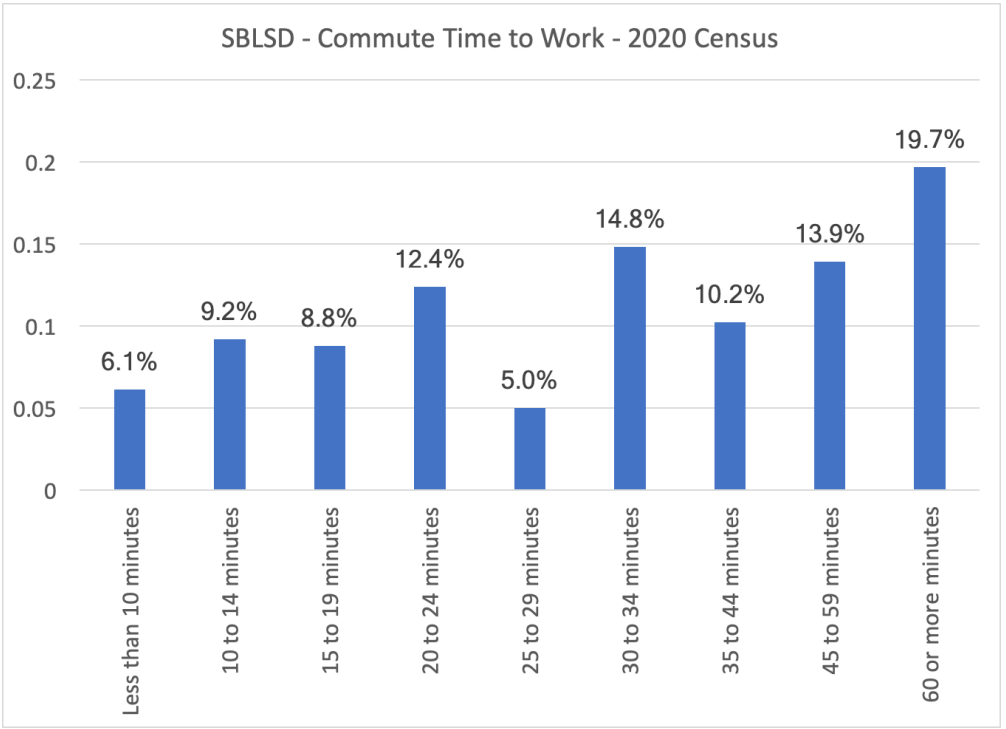
SBLSD School District Age Groupings

*Population distribution in the district is **balanced** with families and school-aged population strongly represented. The preschool age cohort is **robust** and indicates continuing high birth counts and elementary stability from existing housing.*

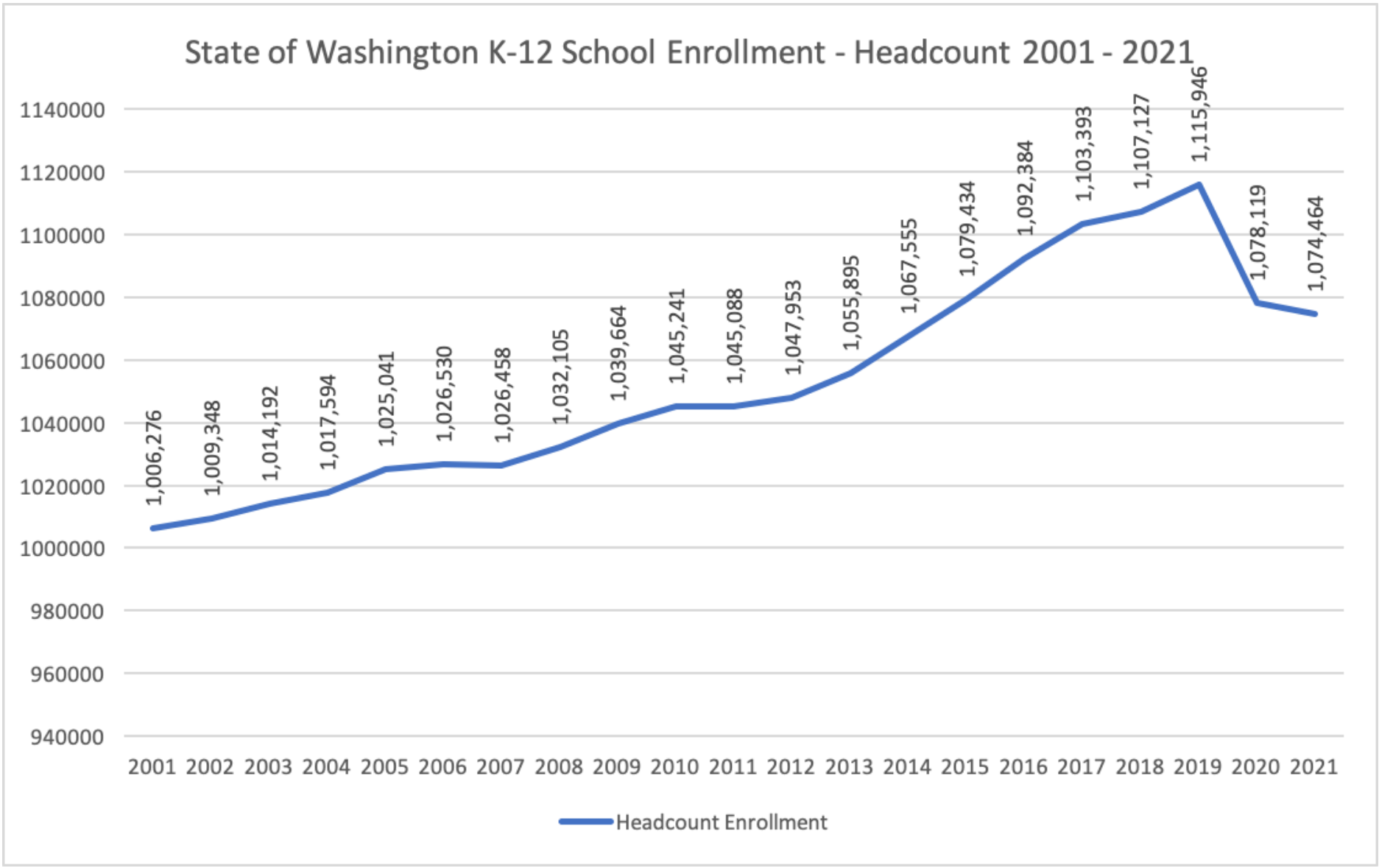


SBLSD School District – Total Population – 2010 – 2021 / Commuting



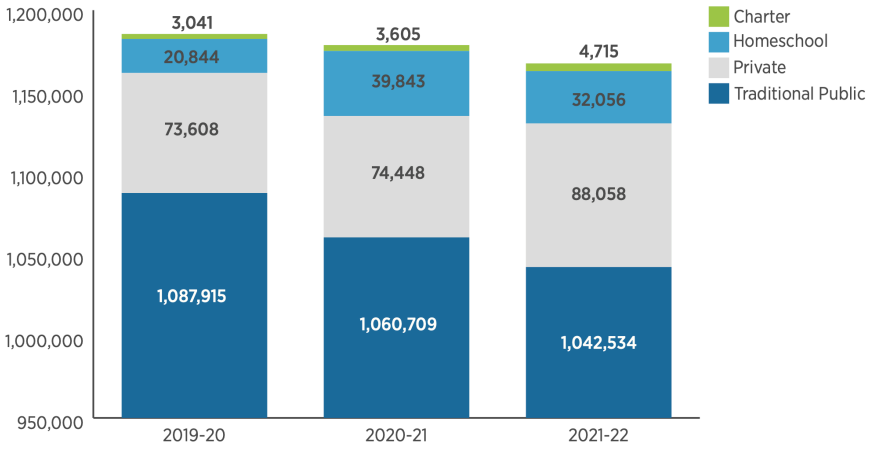


Washington State Enrollment Trend – 2001 - 2021



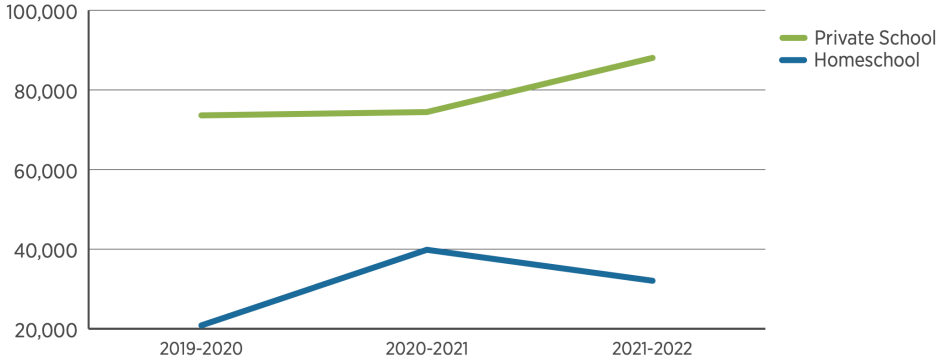
Washington State Trends – Charter and Private Schools Up, Neighborhood Schools Down

Washington State Enrollment Change, Fall 2021–Spring 2022



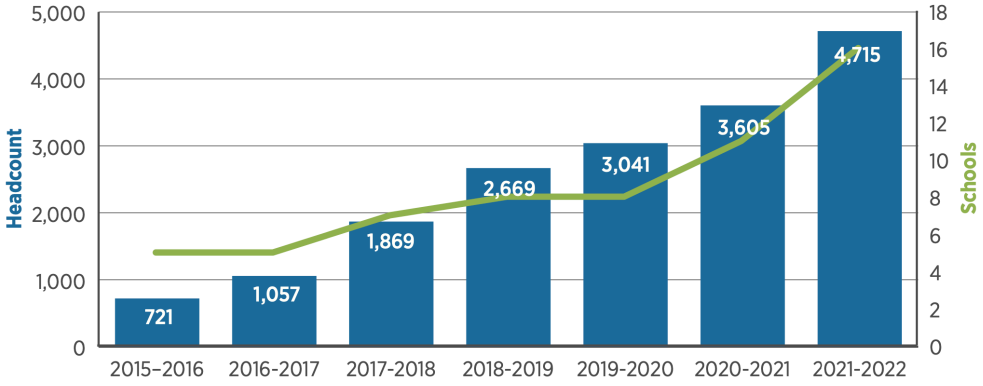
Source: Apportionment, Enrollment, and Fiscal reports, OSPI; Home-based Instruction Annual Reports, OSPI; Private School Enrollment, Washington State Board of Education

Washington State Homeschool and Private School Enrollment, 2019-2022



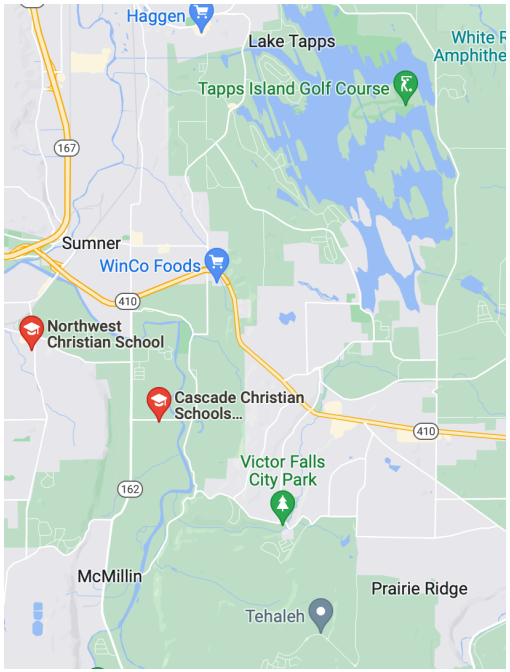
Source: Home-based Instruction Annual Reports, OSPI; Private School Enrollment, Washington State Board of Education

Washington State Charter School Enrollment, 2013–2022



Source: Apportionment, Enrollment, and Fiscal reports, OSPI

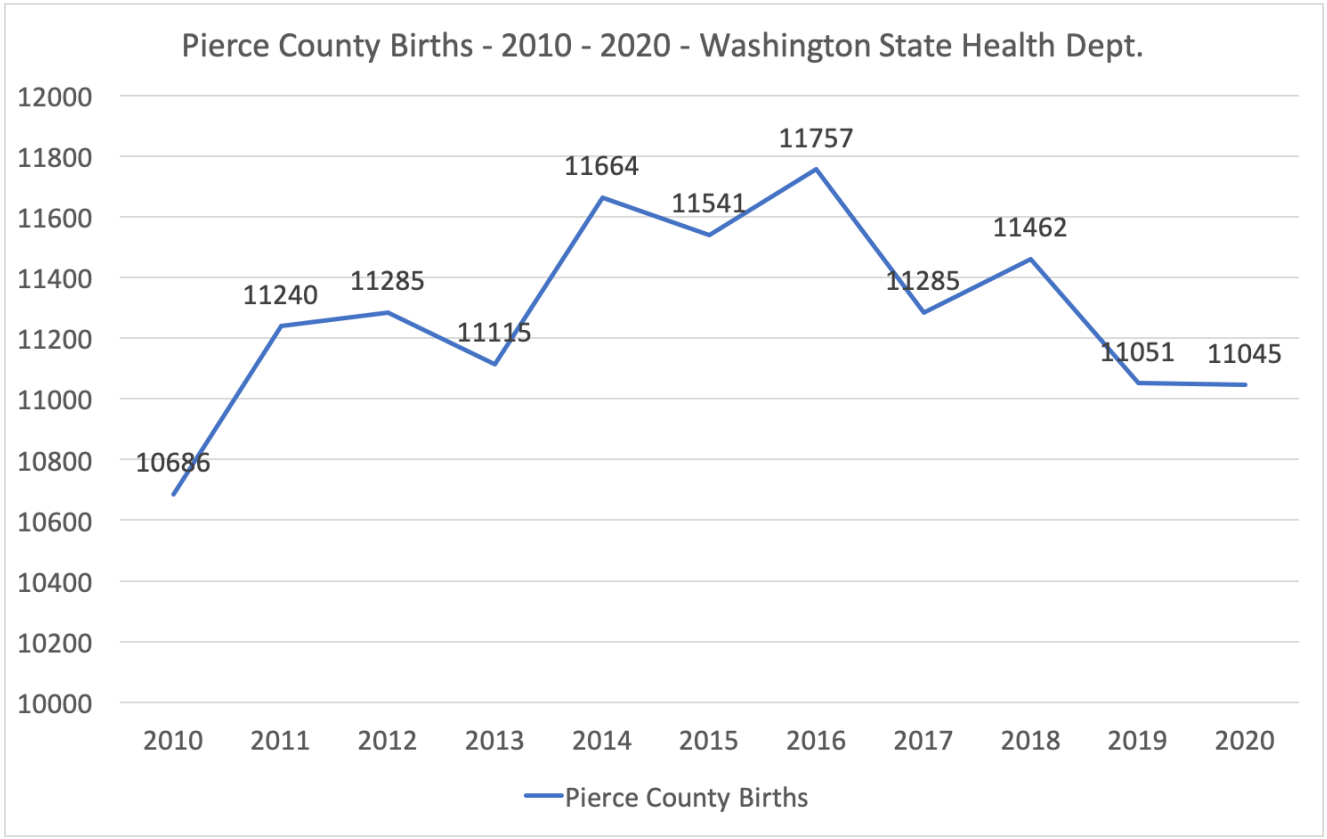
Private Schools are not a large factor in SBLSD



Data *from* OSPI

Data from Google

Pierce County Births – 2010 - 2020



Birth rates have declined throughout the State and Nationally and fewer school-aged children are available.

Pierce County has had a remarkably consistent birth count and birth rate.

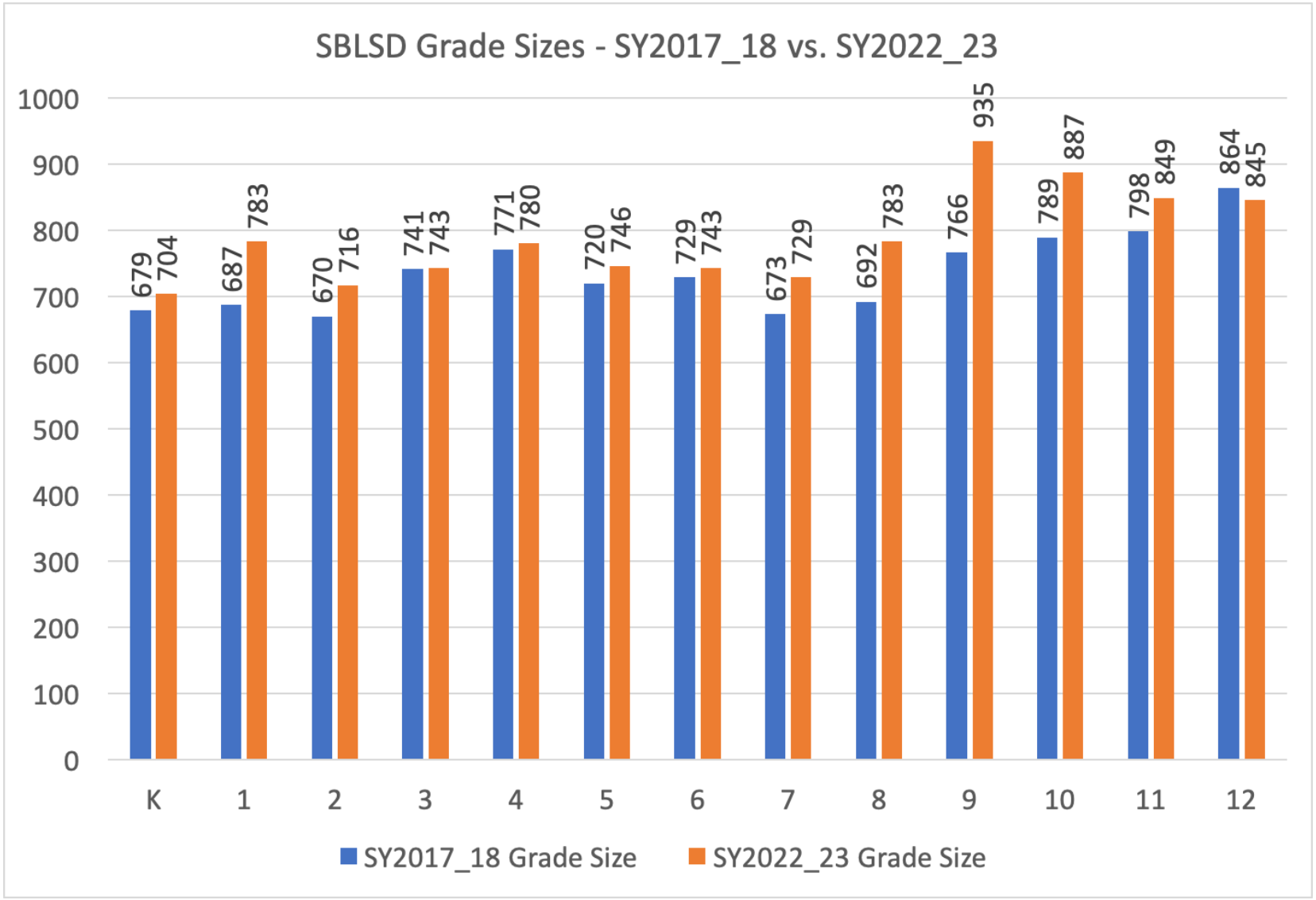
Washington State birth rates by region.

Geography	2020	2019	2018	2017	2016	2015	2014
State Total	55.6	57.7	59.5	61.5	64.6	64.4	64.6
Better Health Together	58.6	60.2	60.9	63.1	65.7	64.1	63.4
Cascade Pacific Action Alliance	60.8	62.5	63.8	63.6	66.6	63.5	63.4
Greater Columbia	62.9	64.2	67.1	68.6	72.5	72.4	72.4
King	45.5	47.4	49.1	53.1	56.7	57.9	58.8
North Central	69.1	73.9	75.9	76.9	78.3	79.2	78.2
North Sound	58.2	60.6	62.4	63.7	65.8	64.9	63.6
Olympic	65.5	69.3	70.1	69.2	72.0	69.8	69.6
Pierce	62.3	63.2	67.1	66.8	70.4	69.7	70.4
SW WA Regional Health Allian..	58.3	61.8	61.6	62.4	64.3	63.6	64.3

Pierce County Birth rates have declined, but are relatively stable as compared to other regions.

Data from Washington Health

SBLSD School District Grade Distribution



Grade sizes have grown in every year. Larger high school grades will eventually matriculate out of the system and the overall grade distribution will be relatively even K through 12. That change will be "back-filled" by elementary growth.

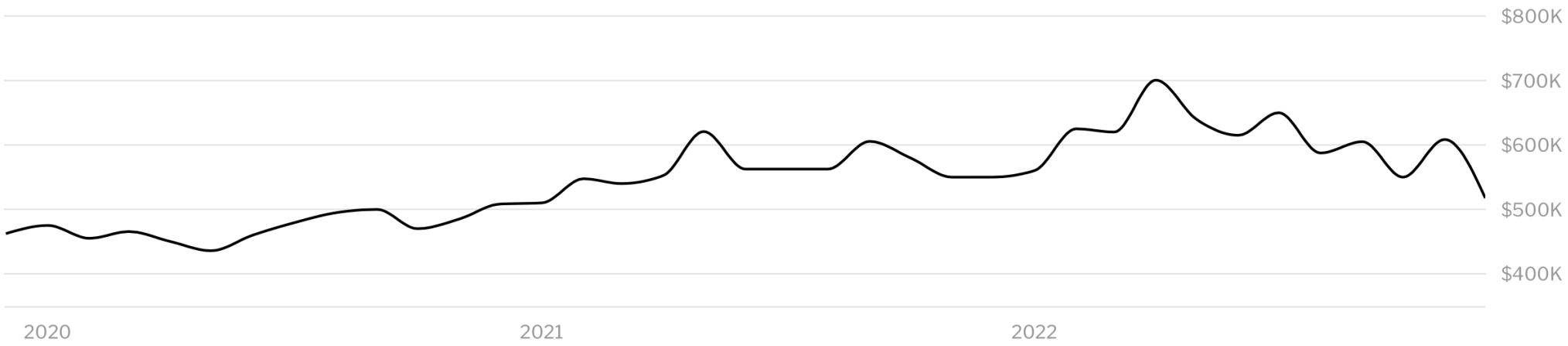
Home Sales Prices

Single Family Homes – Average Price $517,500

Median Sale Price	# of Homes Sold	Median Days on Market
$517,500	16	18
-5.9% year-over-year	-59.0% year-over-year	+6 year-over-year

Single Family Homes

1 year | 3 years | 5 years



Housing Prices Have Remarkably Affordable and High Interest Rates have Pushed Prices Lower

Data from Redfin

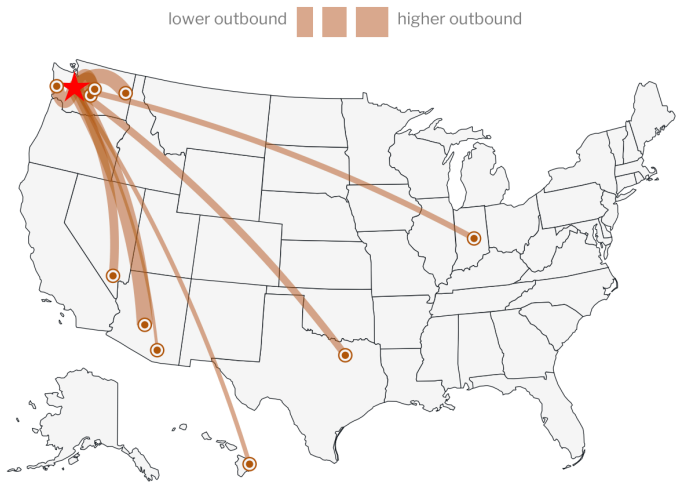
Housing Desire Lines Based on Redfin Web Inquiry Traffic

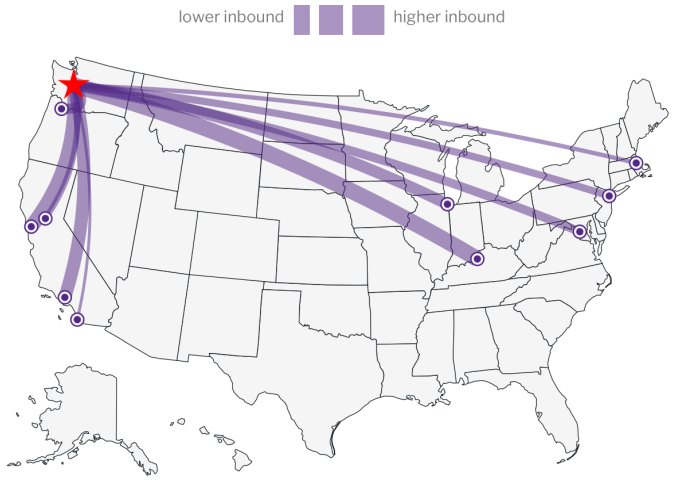
People are leaving Bonney Lake for

	Outbound Metros	Net Search Flow Oct '22 - Dec '22
1	Phoenix, AZ +1	2,317
2	Spokane, WA +2	1,328
3	Aberdeen, WA +0	1,120
4	Ellensburg, WA +0	1,036
5	Wenatchee, WA +0	960
6	Las Vegas, NV +1	645
7	Dallas, TX +1	432
8	Indianapolis, IN +2	427
9	Hilo, HI +0	414
10	Tucson, AZ +1	390

People are moving to Bonney Lake from

	Inbound Metros	Net Search Flow Oct '22 - Dec '22
1	Louisville, KY +2	6,240
2	San Francisco, CA +2	2,820
3	Los Angeles, CA +1	1,078
4	Chicago, IL +1	837
5	Portland, OR +2	382
6	Washington, DC +2	337
7	New York, NY +1	226
8	Sacramento, CA +1	148
9	Boston, MA +2	126
10	San Diego, CA +2	124





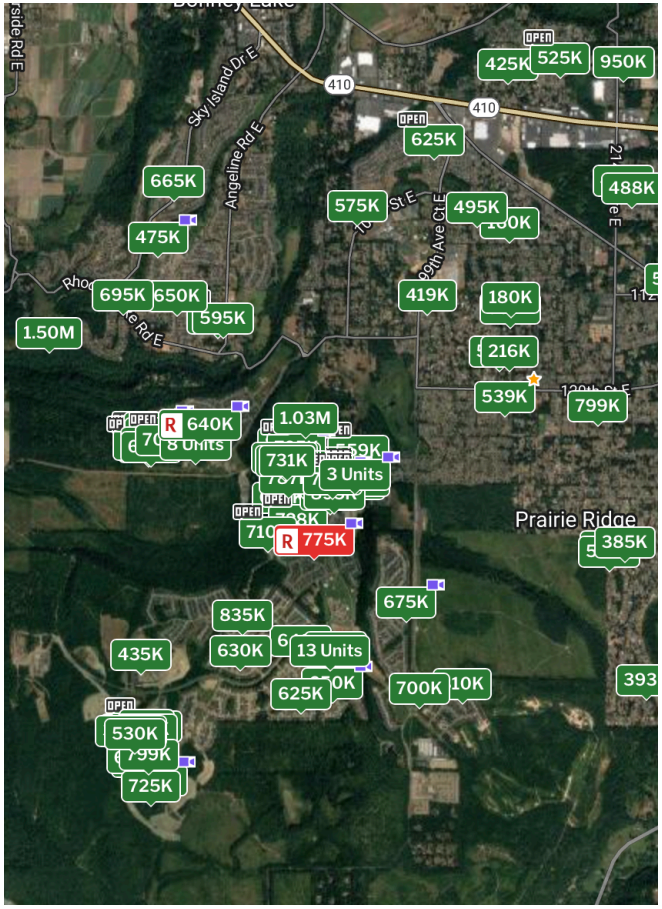
Residents who are exploring leaving are generally headed for less expensive housing markets in Eastern and Southern Washington, Texas, Arizona and Nevada.

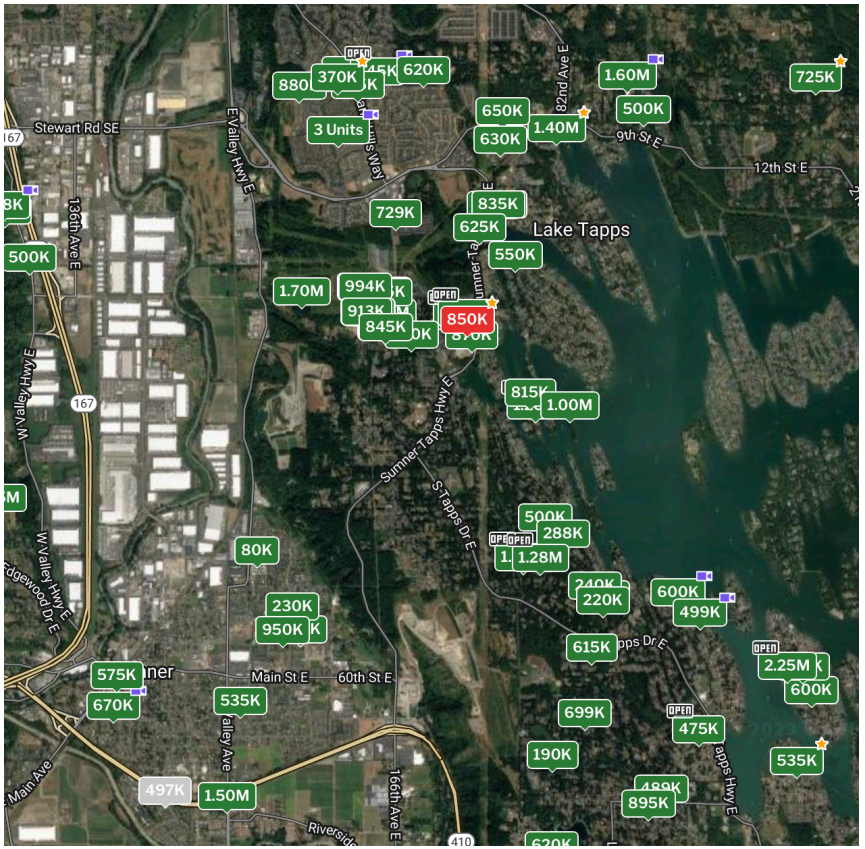
Prospective home buyers are conducting enquiries from expensive housing markets where they may have significant equity to contribute to a purchase.

Data from Redfin

Housing Observations

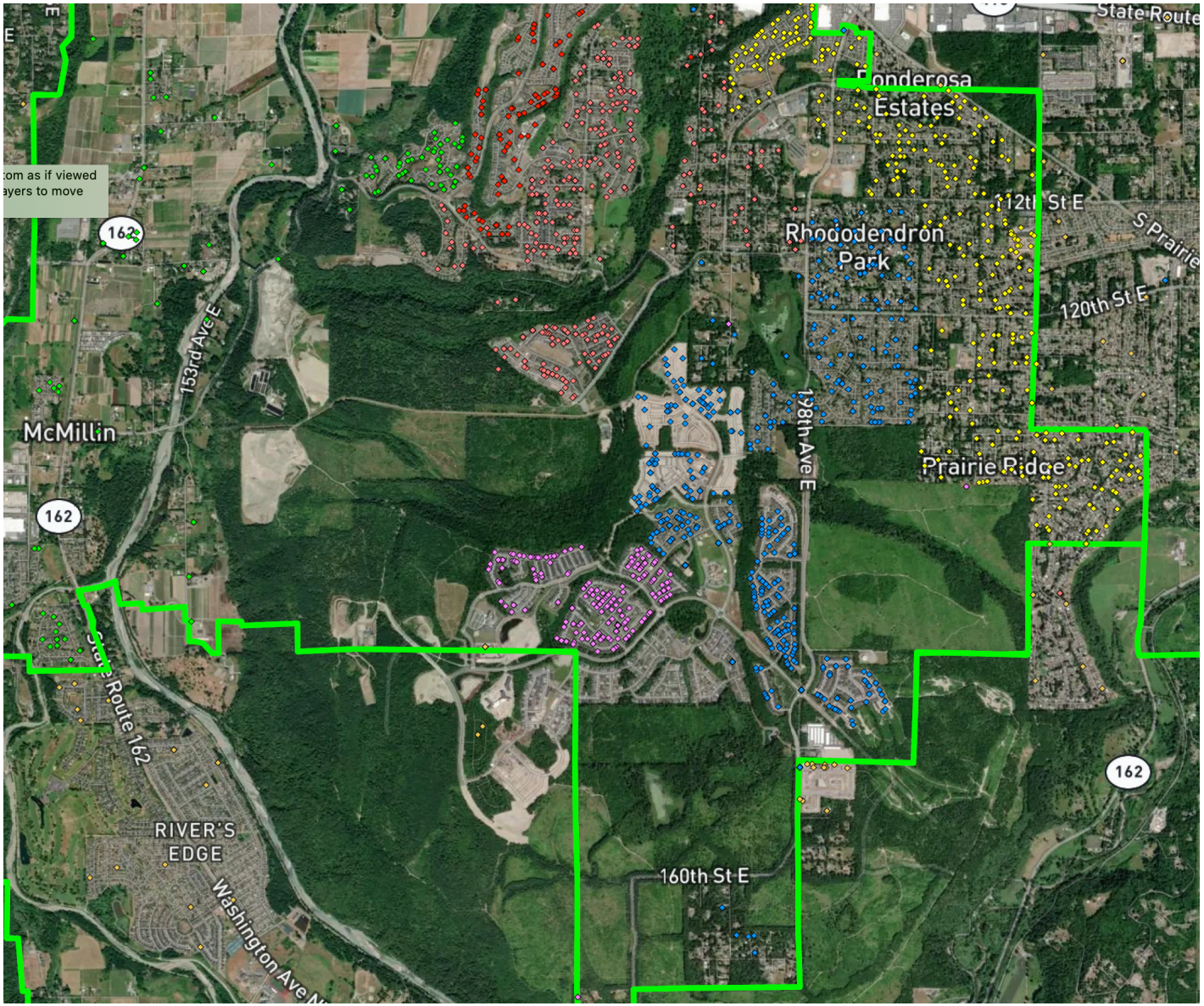
- Most new housing is under construction in the Tehaleh development
- Sumner and the north Bonney Lake is largely built-out and only listed resales
- Approximately 200 homes were available in January of 2023
- Interest rates have had a significant effect on the market with sales and construction down – recovery over the next 18 months is expected
- New housing infrastructure and vacant lots were under construction in the field
- Few homes were under construction, most builders are waiting



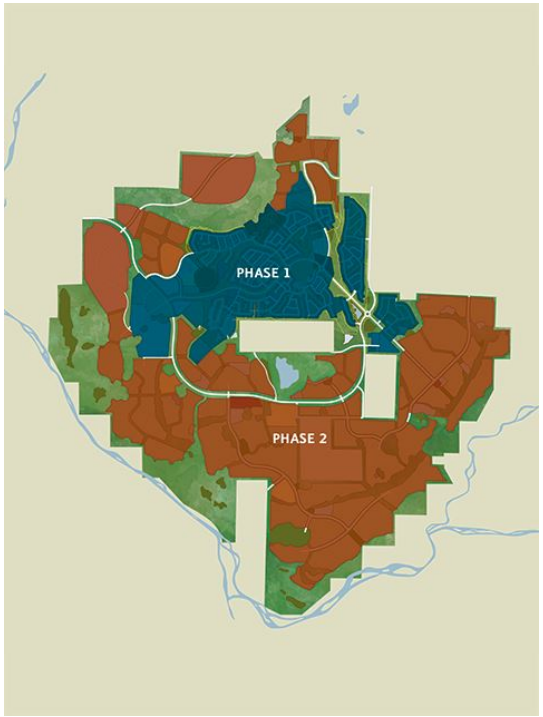


Redfin

Tehaleh is Smartly Divided Among Three Elementary Schools, but Fragmented Between Two School Districts



Parts of Phase 2 of the Tehaleh development is in Orting School District with an Awkward, Older Geographic Dividing Line



As Tehaleh recovers from interest rate downturn elementary boundaries may require adjustment.

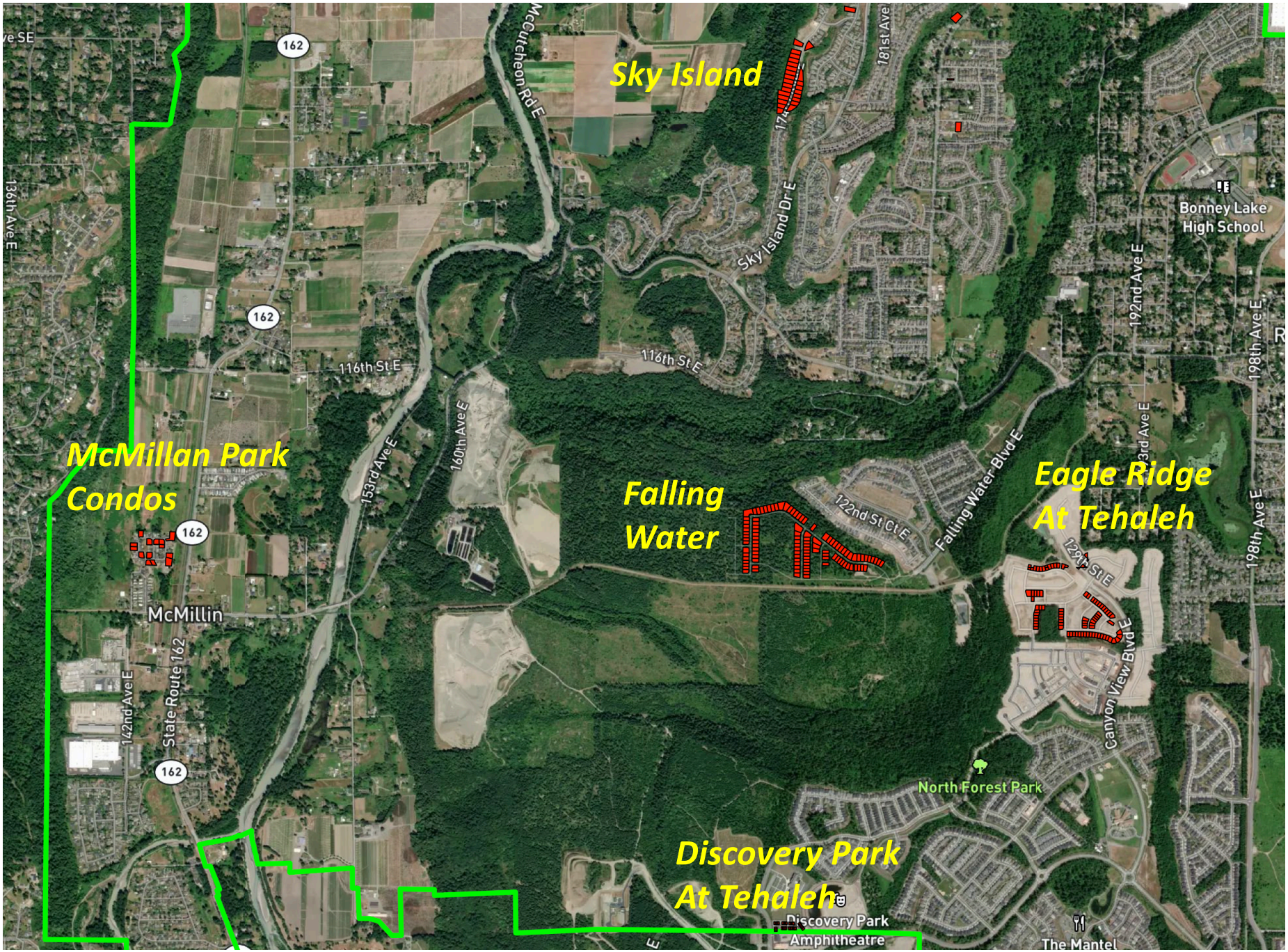
Remaining Platted Vacant Lots and Glacier Point Potential

SBLSD Vacant Lots in Platted Subdivisions - 5/1/23

Subdivision	ES Atta	CD	SFD	Total
Discovery Park at Tehaleh	**THE**	31		**31**
Eagle Ridge at Tehaleh	**DEE**		87	**87**
Falling Water Division 4	**VFE**		109	**109**
McMillan Park Condos	**MLE**	14		**14**
Sky Island	**BLE**		29	**29**
Total		**45**	**225**	**270**

Glacier Point *– Remaining Tehaleh Lots South of the Existing Area:*
254 family home lots are in the Sumner-Bonney Lake SD
Orting SD will have 1,268 - 483 of those will be Age Qualified

Vacant Platted Lots – South Bonney Lake



New Apartment Buildings - Sumner

- East Sumner Apts. - 102 Units, 20% Affordable
- The Main
- Others



New Apartment Buildings - Sumner









Creekside Town Homes



Overall Historical Enrollment and Headcount Forecast – SY2023-24 – SY2027_28

Historical	Totals by School Type						
Year	(K-5)	(6-8)	(9-12)	(K-12)	ps	Tot w PS	Net Growth
2017	4268	2094	3217	9579	344	9923	
2018	4374	2207	3166	9747	353	10100	177
2019	4500	2360	3131	9991	345	10336	236
2020	4082	2357	3198	9637	0	9637	-699
2021	4336	2297	3348	9981	344	10325	688
2022	4472	2255	3516	10243	344	10587	262

SBLSD	(K-5)	(6-8)	(9-12)	(K-12)	ps	Tot w PS	Net Growth
2023	4543	2255	3577	10375	344	10719	132
2024	4690	2358	3564	10612	344	10956	237
2025	4898	2424	3531	10853	344	11197	241
2026	5131	2479	3502	11111	344	11455	258
2027	5303	2583	3559	11445	344	11789	334

Overall Enrollment Forecast – *(FTE Forecast is Preliminary)*

Headcount	K	1	2	3	4	5	6	7	8	9	10	11	12	(K-5)	(6-8)	(9-12)	(K-12)	ps	Tot w PS	Net Growth
2023	709	749	799	750	750	787	767	748	740	904	916	881	876	4543	2255	3577	10375	344	10719	132
2024	752	771	777	854	767	769	822	777	760	858	884	907	915	4690	2358	3564	10612	344	10956	237
2025	795	814	799	832	871	787	804	831	789	878	838	875	941	4898	2424	3531	10853	344	11197	241
2026	838	857	842	854	849	891	822	814	843	907	858	829	908	5131	2479	3502	11111	344	11455	258
2027	881	900	885	897	872	869	926	831	826	961	887	849	862	5303	2583	3559	11445	344	11789	334
Ratio	1.000	0.996	0.997	0.997	0.995	1.000	0.996	0.996	0.996	0.998	0.999	0.893	0.911							
FTE	K	1	2	3	4	5	6	7	8	9	10	11	12	(K-5)	(6-8)	(9-12)	(K-12)			
2023	709	746	797	748	746	787	764	745	737	902	915	787	798	4533	2246	3402	10181			
2024	752	768	775	852	763	769	819	774	757	856	883	810	833	4679	2350	3382	10411			
2025	795	811	797	830	866	787	801	828	786	876	837	781	857	4886	2415	3351	10652			
2026	838	853	840	852	844	891	819	811	840	905	857	740	827	5118	2470	3329	10917			
2027	881	896	883	895	867	869	922	828	823	959	886	758	785	5291	2573	3388	11252			

Headcount Forecast by School

SBLSD - Headcount Forecast - By Year, by School

Level	Year	School Name	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
ES	SY23_24	Bonney Lake	65	61	72	72	81	84								435
ES	SY24_25	Bonney Lake	66	62	60	75	75	83								421
ES	SY25_26	Bonney Lake	67	63	61	61	78	78								408
ES	SY26_27	Bonney Lake	68	64	62	62	65	80								401
ES	SY27_28	Bonney Lake	69	65	63	63	66	67								393
ES	SY23_24	Crestwood	64	66	63	54	56	75								378
ES	SY24_25	Crestwood	64	66	66	62	54	54								366
ES	SY25_26	Crestwood	64	66	66	64	62	53								375
ES	SY26_27	Crestwood	64	66	66	64	65	60								385
ES	SY27_28	Crestwood	64	66	66	64	65	63								388
ES	SY23_24	Daffodil Valley	0	74	66	55	68	73								336
ES	SY24_25	Daffodil Valley	0	74	68	72	50	69								333
ES	SY25_26	Daffodil Valley	0	74	67	72	66	51								330
ES	SY26_27	Daffodil Valley	0	74	67	72	67	67								347
ES	SY27_28	Daffodil Valley	0	74	67	72	67	68								348
ES	SY23_24	Donald Eismann	123	127	138	106	114	110								718
ES	SY24_25	Donald Eismann	127	130	129	145	105	118								754
ES	SY25_26	Donald Eismann	131	135	133	136	144	109								788
ES	SY26_27	Donald Eismann	135	139	137	140	135	147								833
ES	SY27_28	Donald Eismann	139	143	141	144	139	138								844
ES	SY23_24	Early Learning Center	161	0	0	0	0	0								161
ES	SY24_25	Early Learning Center	161	0	0	0	0	0								161
ES	SY25_26	Early Learning Center	161	0	0	0	0	0								161
ES	SY27_28	Early Learning Center	161	0	0	0	0	0								161

Headcount Forecast by School

Level	Year	School Name	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
ES	SY23_24	Emerald Hills	71	81	97	104	91	94								538
ES	SY24_25	Emerald Hills	71	81	83	118	102	93								548
ES	SY25_26	Emerald Hills	71	81	83	104	116	104								559
ES	SY26_27	Emerald Hills	71	81	83	104	102	117								558
ES	SY27_28	Emerald Hills	71	81	83	104	102	104								545
ES	SY23_24	Liberty Ridge	70	78	82	78	76	78								462
ES	SY24_25	Liberty Ridge	70	78	77	87	81	78								471
ES	SY25_26	Liberty Ridge	70	78	77	81	89	84								479
ES	SY26_27	Liberty Ridge	70	78	77	81	85	92								483
ES	SY27_28	Liberty Ridge	70	78	77	81	85	87								478
ES	SY23_24	Maple Lawn	0	93	96	110	104	109								512
ES	SY24_25	Maple Lawn	0	93	99	98	111	109								510
ES	SY25_26	Maple Lawn	0	93	99	101	99	115								507
ES	SY26_27	Maple Lawn	0	93	99	101	102	104								499
ES	SY27_28	Maple Lawn	0	93	99	101	102	107								502
ES	SY23_24	Tehaleh Heights	75	81	83	84	82	70								475
ES	SY24_25	Tehaleh Heights	77	83	80	93	86	85								504
ES	SY25_26	Tehaleh Heights	79	85	82	89	94	90								519
ES	SY26_27	Tehaleh Heights	81	87	84	91	91	98								532
ES	SY27_28	Tehaleh Heights	83	89	86	93	93	95								539
ES	SY23_24	Victor Falls	79	87	102	86	79	95								528
ES	SY24_25	Victor Falls	81	89	94	106	85	73								528
ES	SY25_26	Victor Falls	83	91	96	97	104	80								551
ES	SY26_27	Victor Falls	85	93	98	100	96	99								571
ES	SY27_28	Victor Falls	87	95	100	102	98	91								573

Headcount Forecast by School

Level	Year	School Name	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
MS	SY23_24	LAKERIDGE_MS							261	236	235					732
MS	SY24_25	LAKERIDGE_MS							269	262	235					766
MS	SY25_26	LAKERIDGE_MS							242	269	261					772
MS	SY26_27	LAKERIDGE_MS							257	242	269					768
MS	SY27_28	LAKERIDGE_MS							289	257	241					787
MS	SY23_24	MOUNTAIN_VIEW_MS							309	290	270					869
MS	SY24_25	MOUNTAIN_VIEW_MS							337	313	292					942
MS	SY25_26	MOUNTAIN_VIEW_MS							350	341	315					1006
MS	SY26_27	MOUNTAIN_VIEW_MS							357	355	344					1056
MS	SY27_28	MOUNTAIN_VIEW_MS							426	361	357					1144
MS	SY23_24	SUMNER_MS							197	222	234					653
MS	SY24_25	SUMNER_MS							216	202	232					650
MS	SY25_26	SUMNER_MS							212	221	213					646
MS	SY26_27	SUMNER_MS							209	217	231					657
MS	SY27_28	SUMNER_MS							210	214	227					651
SHS	SY23_24	BONNEY LAKE HS										457	437	442	423	1759
SHS	SY24_25	BONNEY LAKE HS										429	441	435	455	1760
SHS	SY25_26	BONNEY LAKE HS										450	414	439	448	1751
SHS	SY26_27	BONNEY LAKE HS										490	435	412	452	1789
SHS	SY27_28	BONNEY LAKE HS										522	475	433	425	1855
SHS	SY23_24	SUMNER HS										447	479	440	453	1819
SHS	SY24_25	SUMNER HS										428	443	472	460	1803
SHS	SY25_26	SUMNER HS										427	424	435	493	1779
SHS	SY26_27	SUMNER HS										417	422	417	456	1712
SHS	SY27_28	SUMNER HS										439	412	415	437	1703

Prior elementary growth is headed for the middle schools. High schools will enjoy stability as larger grades matriculate out and incoming grades increased by prior growth offset them.

Questions / Discussion