

Spring 2022

Population and Survey Analysts

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East Central ISD

Demographic Study

2021-22 Demographic Study

Pandemic's Effect on Enrollment

PASA estimates an additional 150–275 students could remain at home or in alternative virtual schooling.

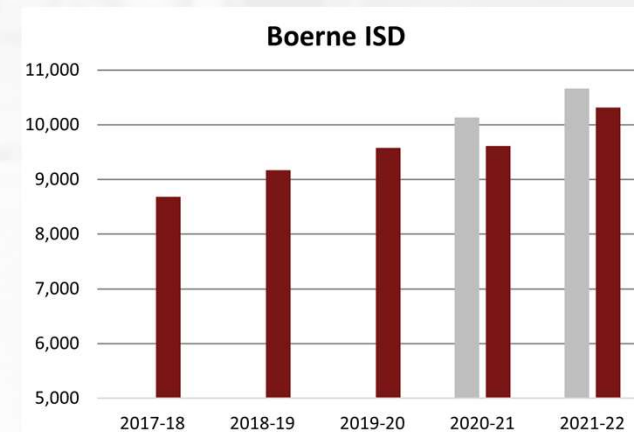
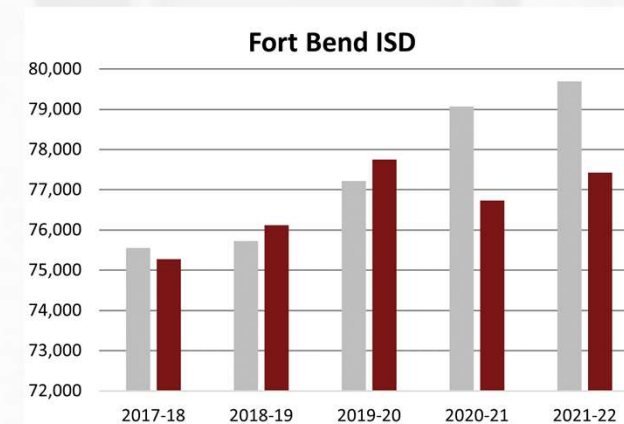
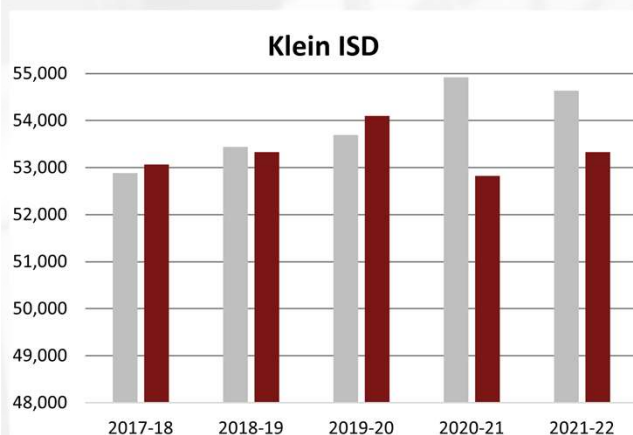
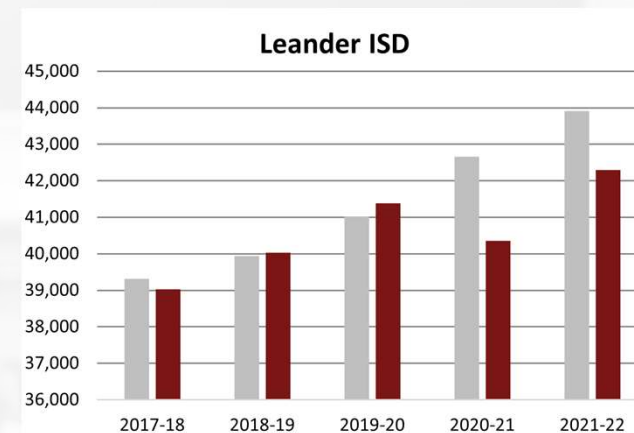
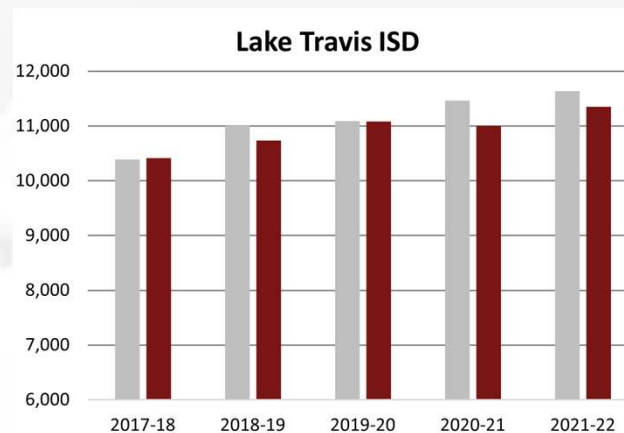
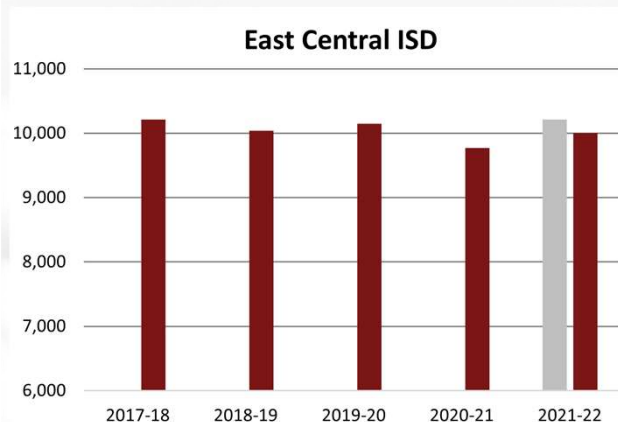
2021 Housing Acceleration

Happened in tandem with an already-projected increase in housing in ECISD

Recent Charter School Expansions



COVID Impact on Enrollment



■ Projected ■ Enrollment

Regional Economy



01 Employment in San Antonio Metro

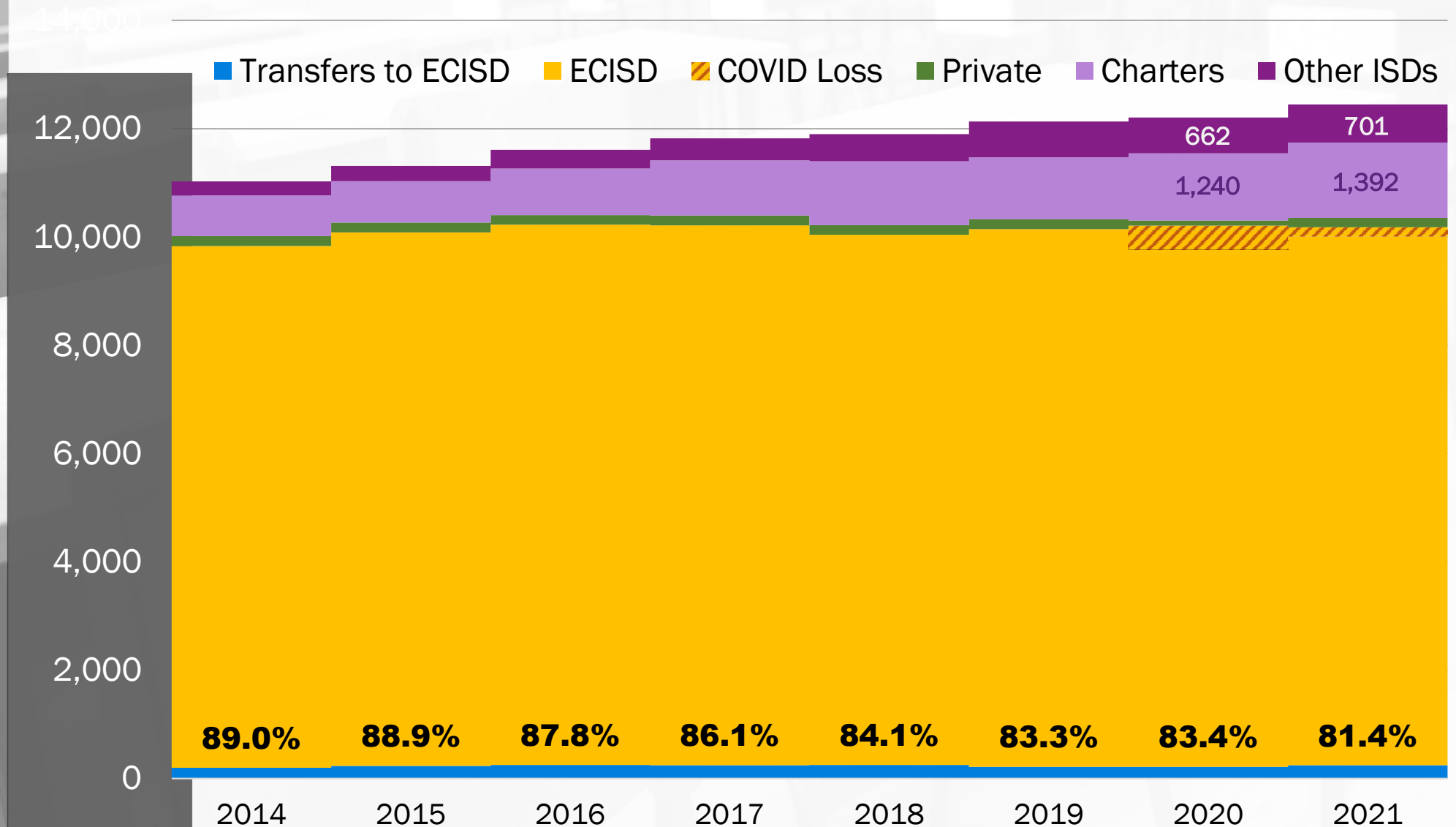
- 103% of jobs recovered from the March 2020 decline

02 New Home Construction

- The new housing market has been robust
 - Historically low mortgage rates in '21
 - Mortgage rates rising in '22

Share of Student Population

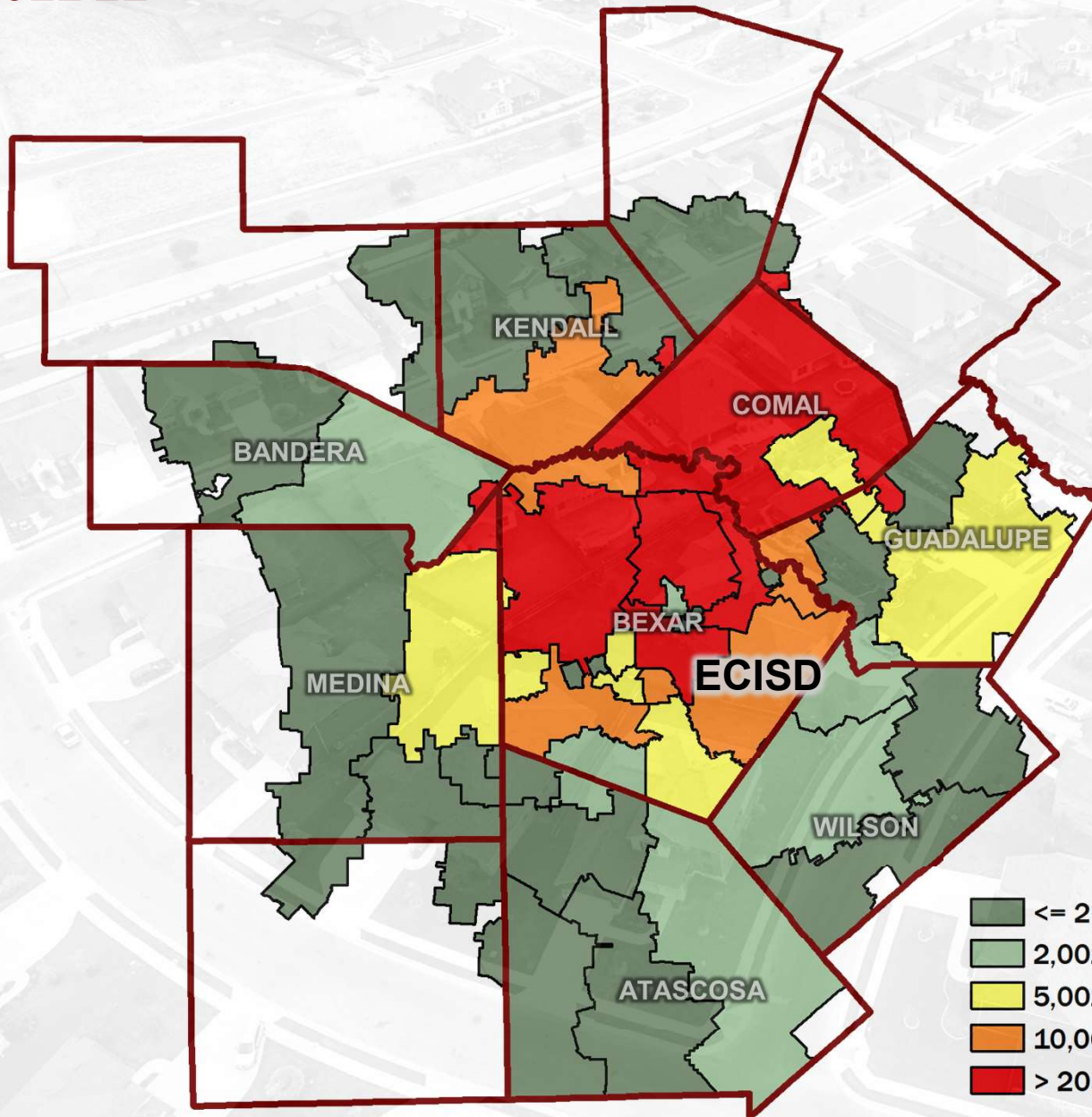
ECISD Resident Students, 2014 to 2021



Demographic Trends

Total Enrollment

2021-22

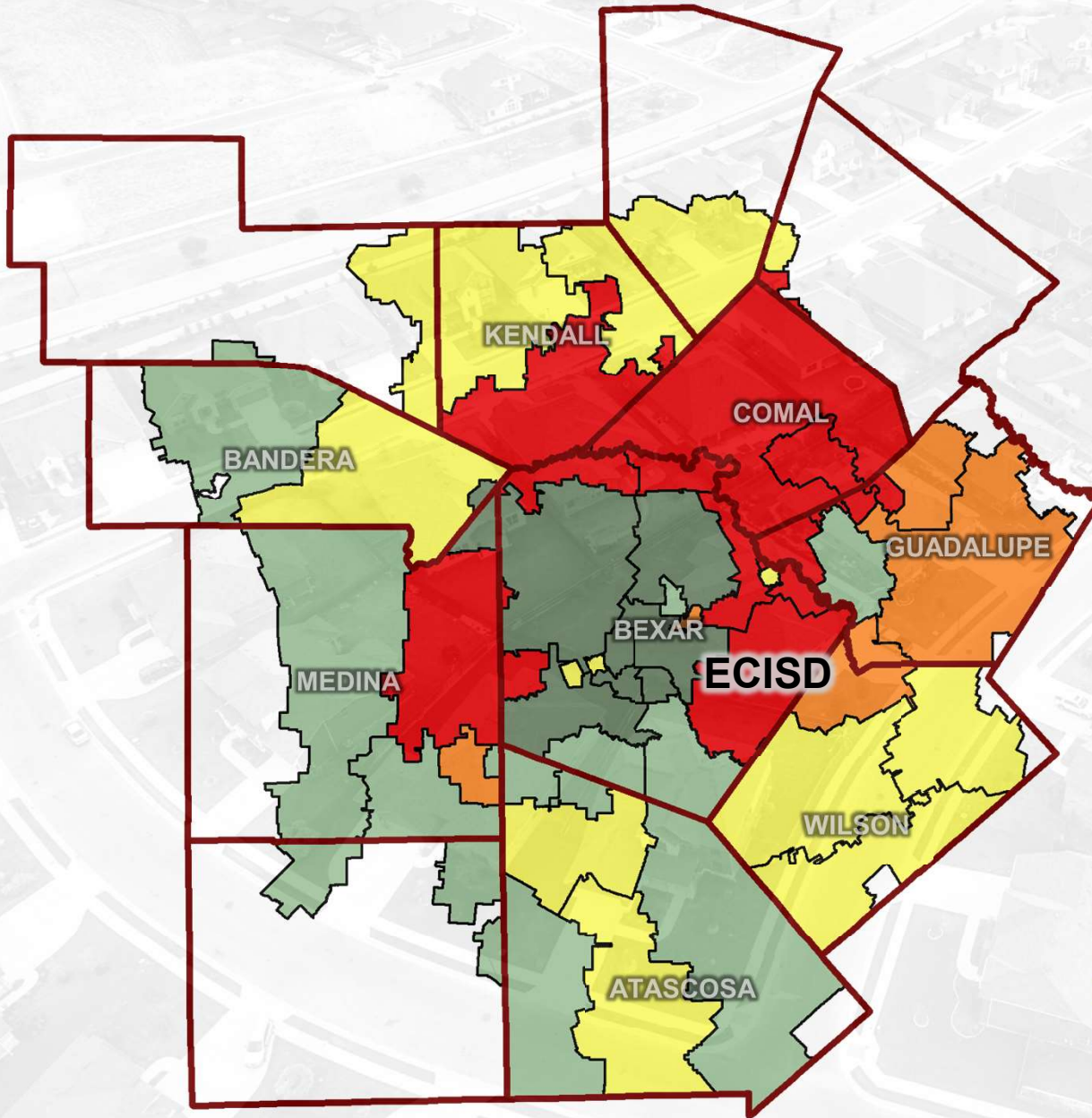


	School District	Enrollment
1	Northside ISD	102,377
2	North East ISD	59,830
3	San Antonio ISD	44,710
4	Comal ISD	27,288
5	Judson ISD	24,536
6	Schertz-Cibolo-U City	15,890
7	Southwest ISD	13,277
8	Harlandale ISD	12,080
9	Boerne ISD	10,327
10	East Central ISD	10,006
11	New Braunfels ISD	9,676
12	Edgewood ISD	8,393
13	South San Antonio ISD	7,922
14	Seguin ISD	7,064
15	Medina Valley ISD	6,785

Source: Texas Education Agency

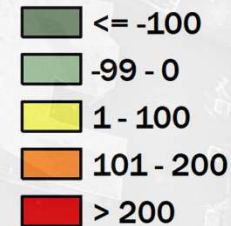
Change in Enrollment

1-Year: 2020-21 to 2021-22

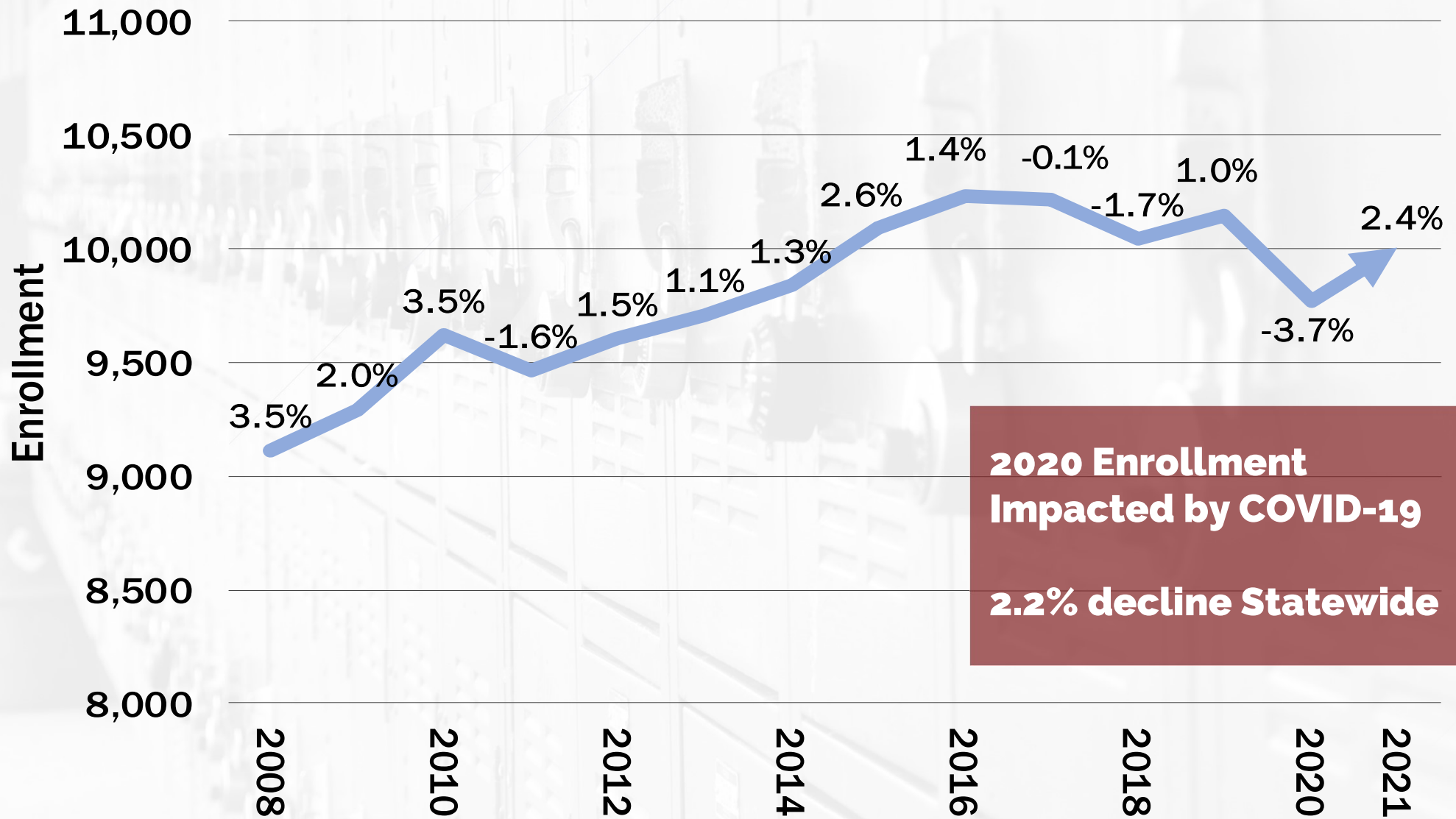


	School District	Change
1	Comal ISD	1,829
2	Judson ISD	711
3	Boerne ISD	710
4	Medina Valley ISD	651
5	New Braunfels ISD	394
6	East Central ISD	236
7	Schertz-Cibolo-U City	217
8	Seguin ISD	165
9	Navarro ISD	143
10	La Vernia ISD	140
11	Fort Sam Houston ISD	138
12	Natalia ISD	122
13	Bandera ISD	86
14	Poteet ISD	77
15	Poth ISD	66

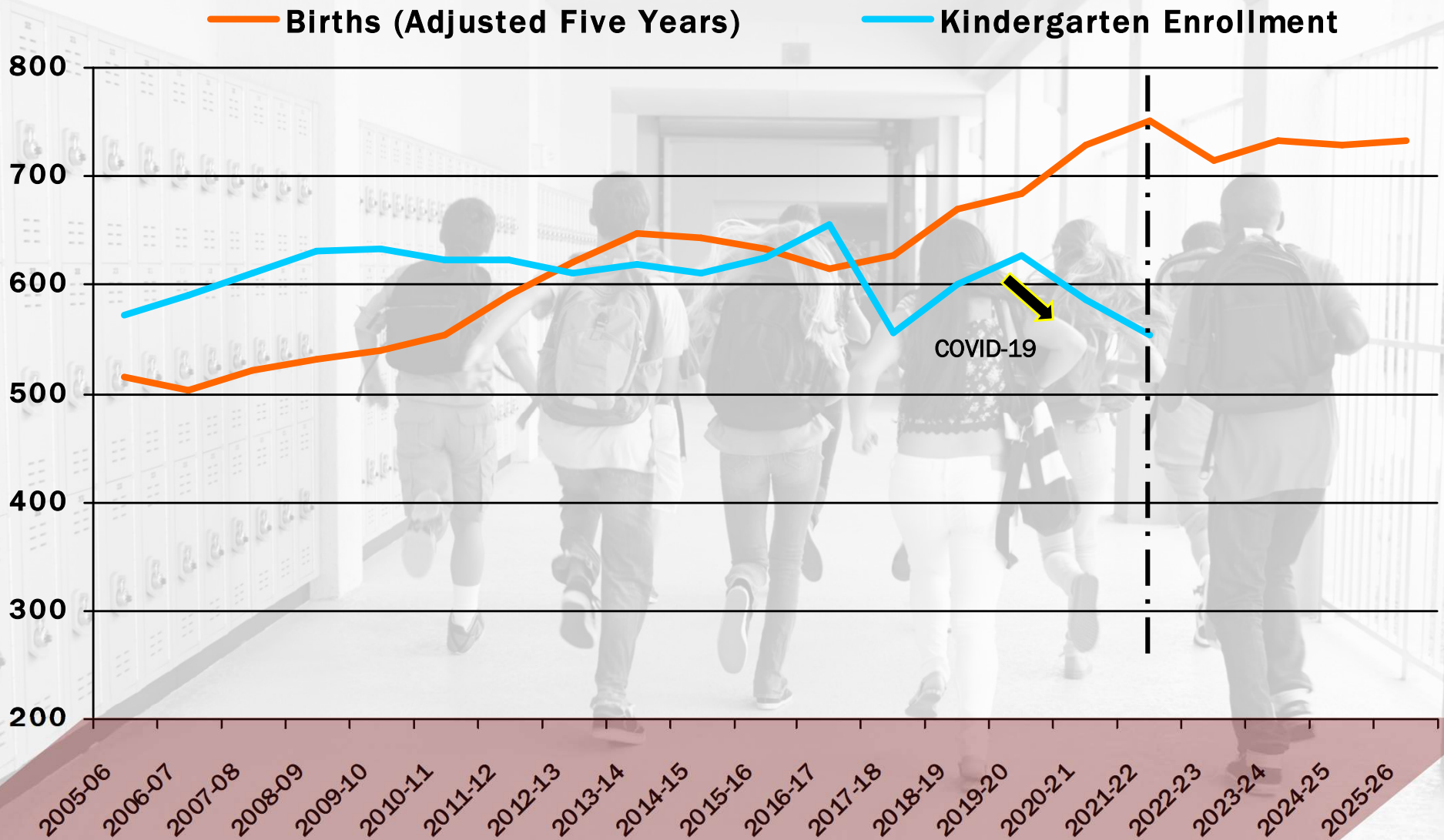
Source: Texas Education Agency



Annual Growth Rates



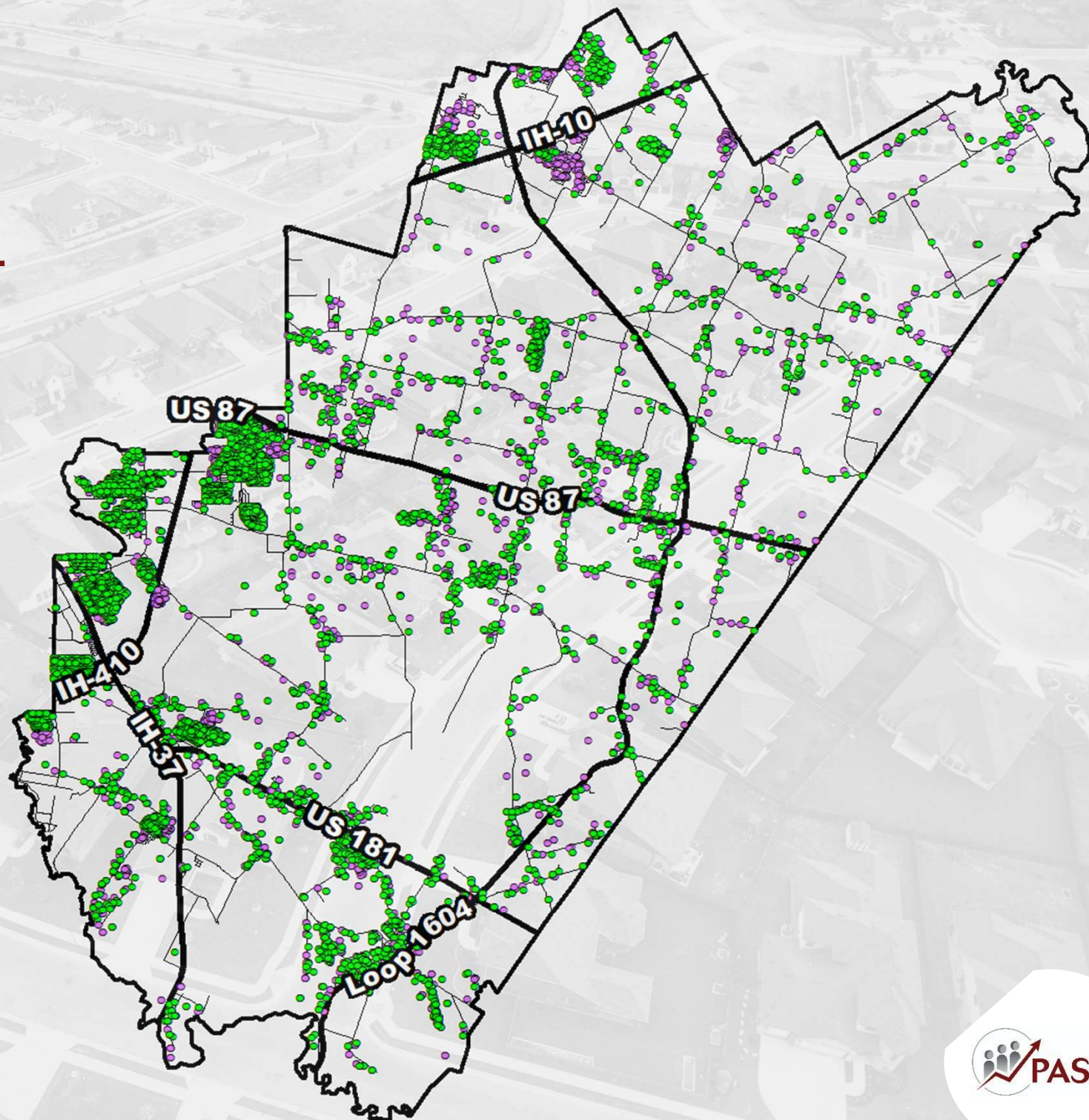
Kindergarten Enrollment vs. Births



Student Trends

Student Geo-Code

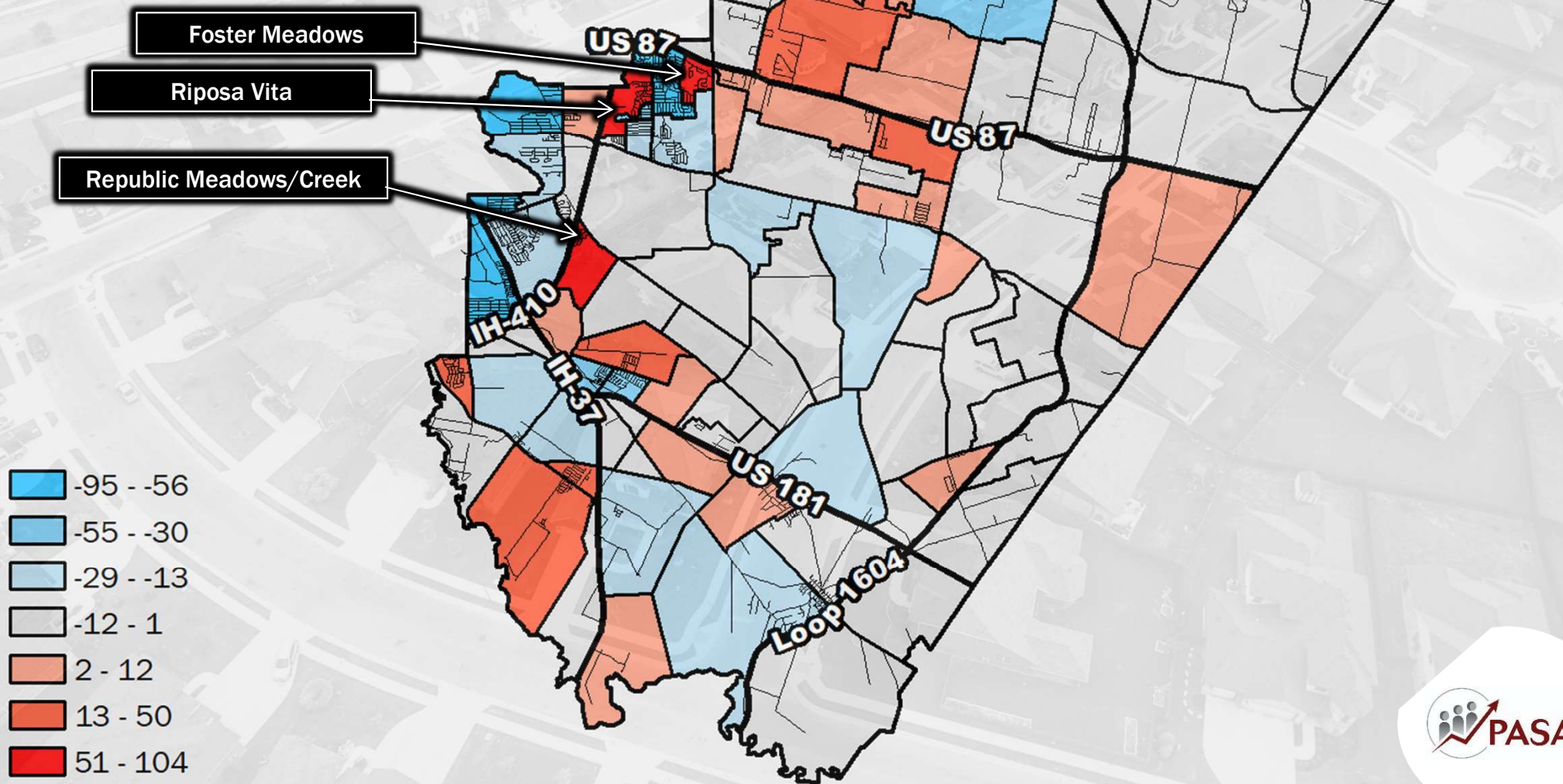
99.7% Accuracy



- Students 2018
- Students 2021

Student Change by Planning Unit

Fall 2020 to Fall 2021



Students per Household



.39

Single-Family



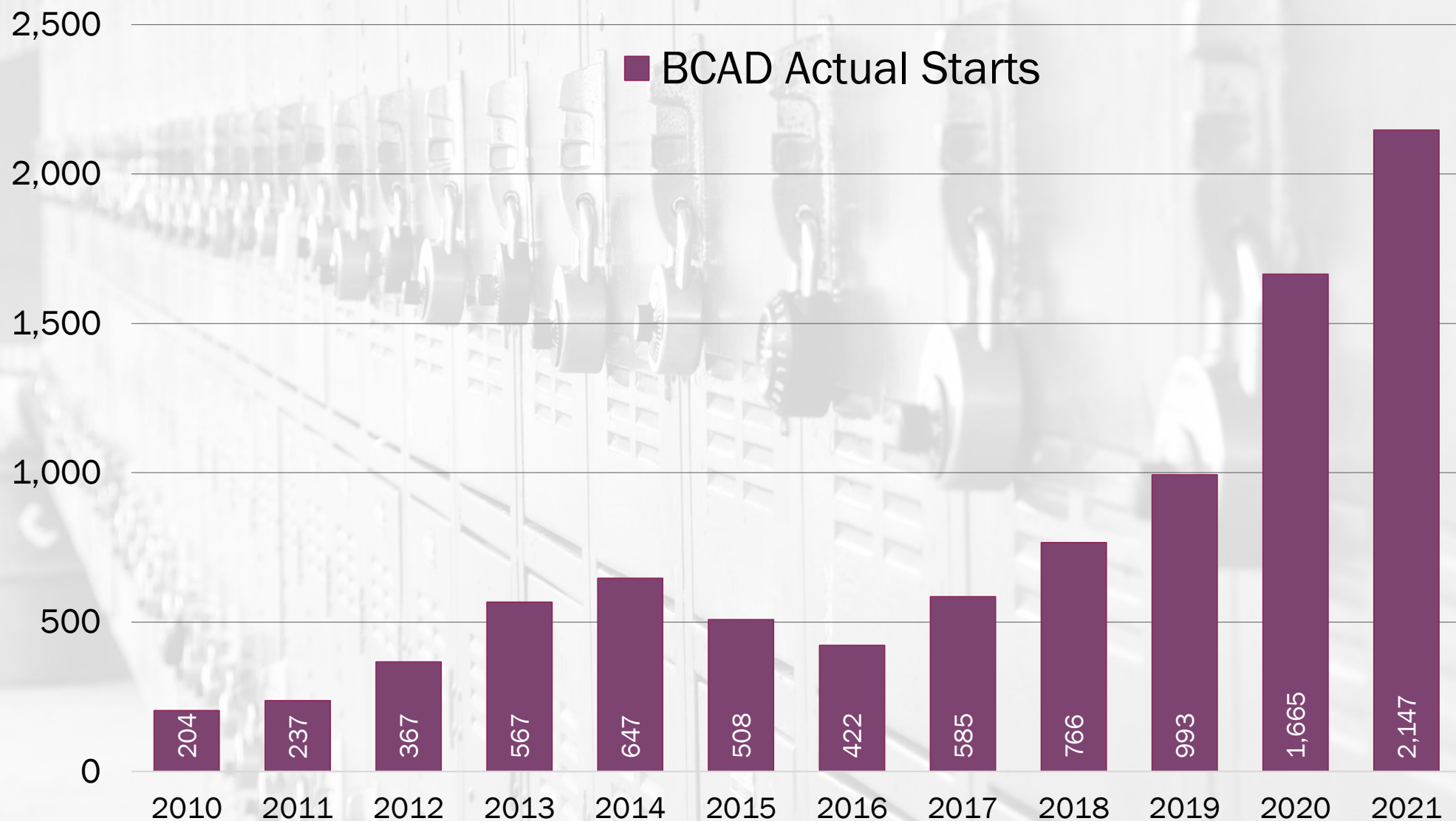
.27

Multi-Family

Housing Trends

Annual Housing Starts

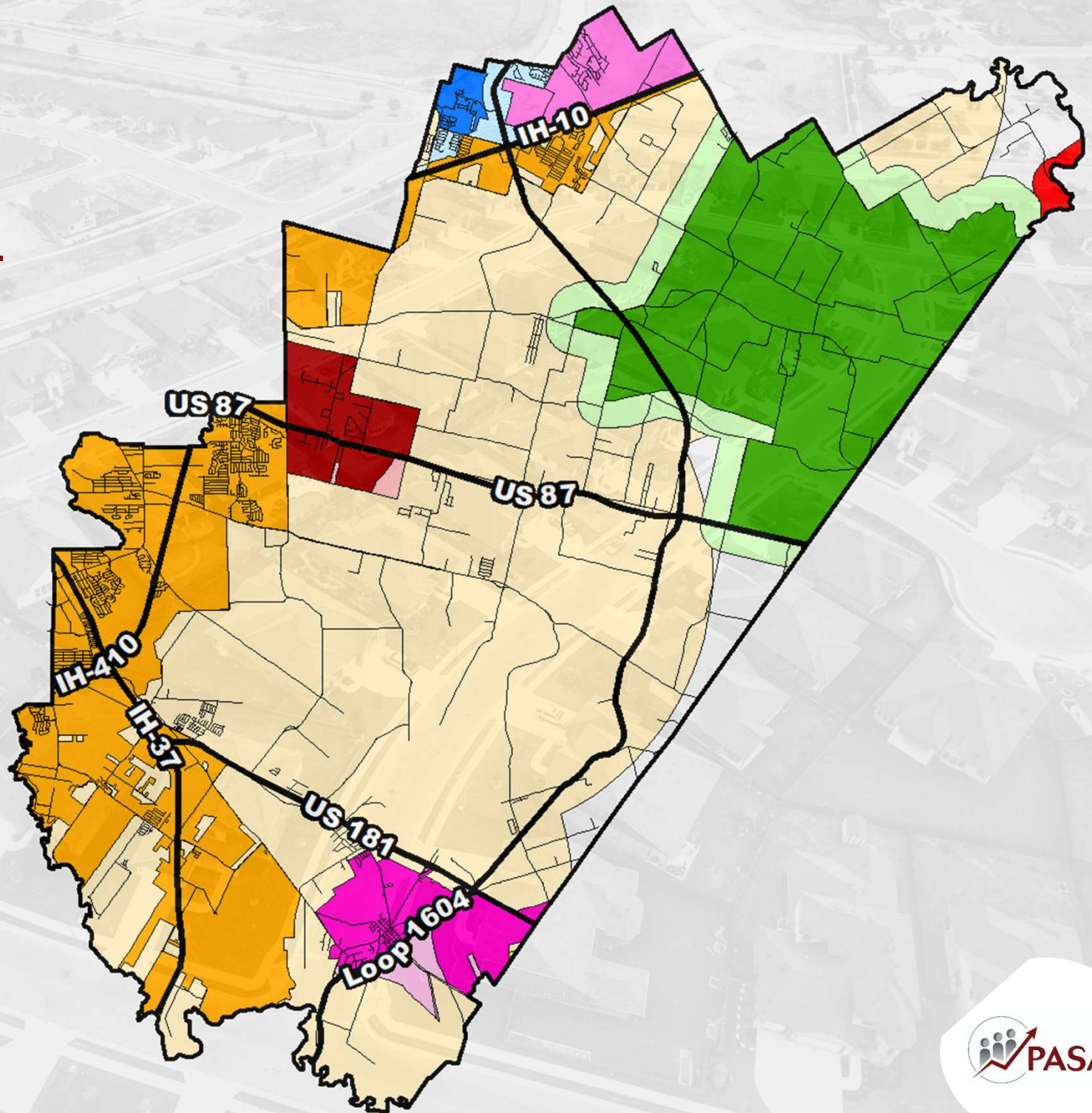
Single-Family in ECISD



Municipal Subdivision Planning

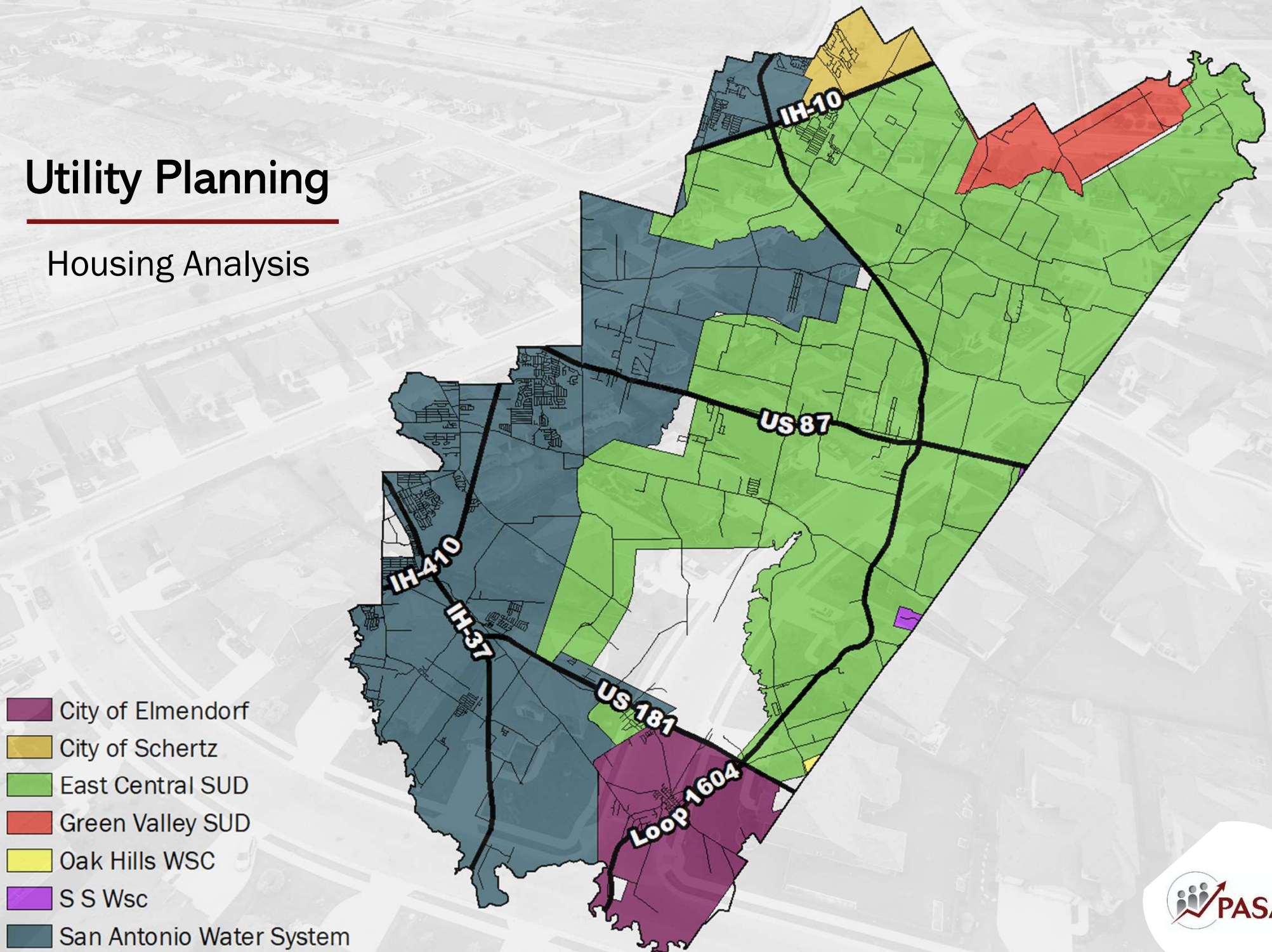
Housing Analysis

- China Grove, City Limit
- China Grove, ETJ
- Converse, ETJ
- Converse, City Limit
- Elmendorf, City Limit
- Elmendorf, ETJ
- Floresville, City Limit
- New Berlin, ETJ
- San Antonio, City Limit
- San Antonio, ETJ
- Schertz, City Limit
- St. Hedwig, City Limit
- St. Hedwig, ETJ



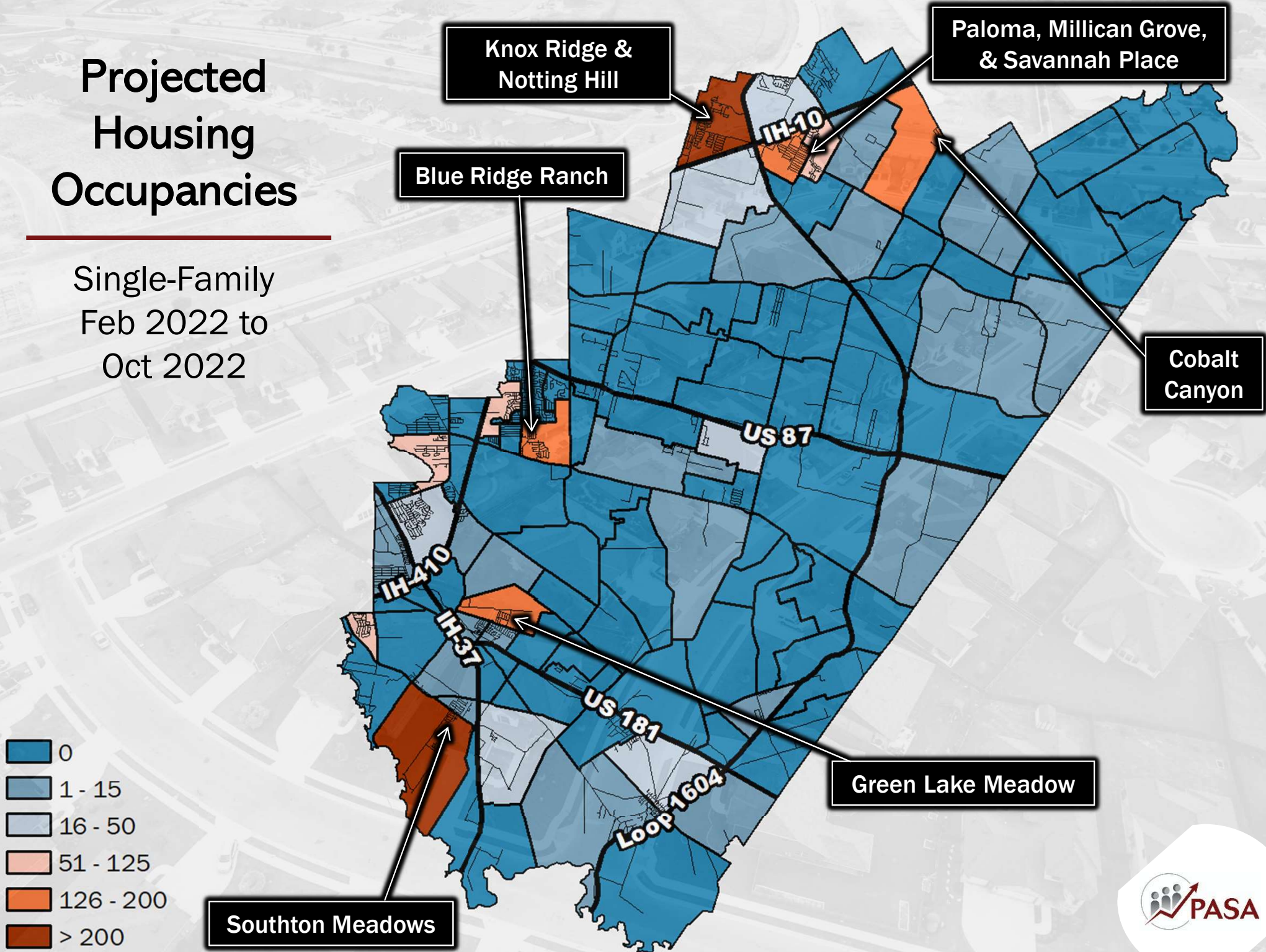
Utility Planning

Housing Analysis

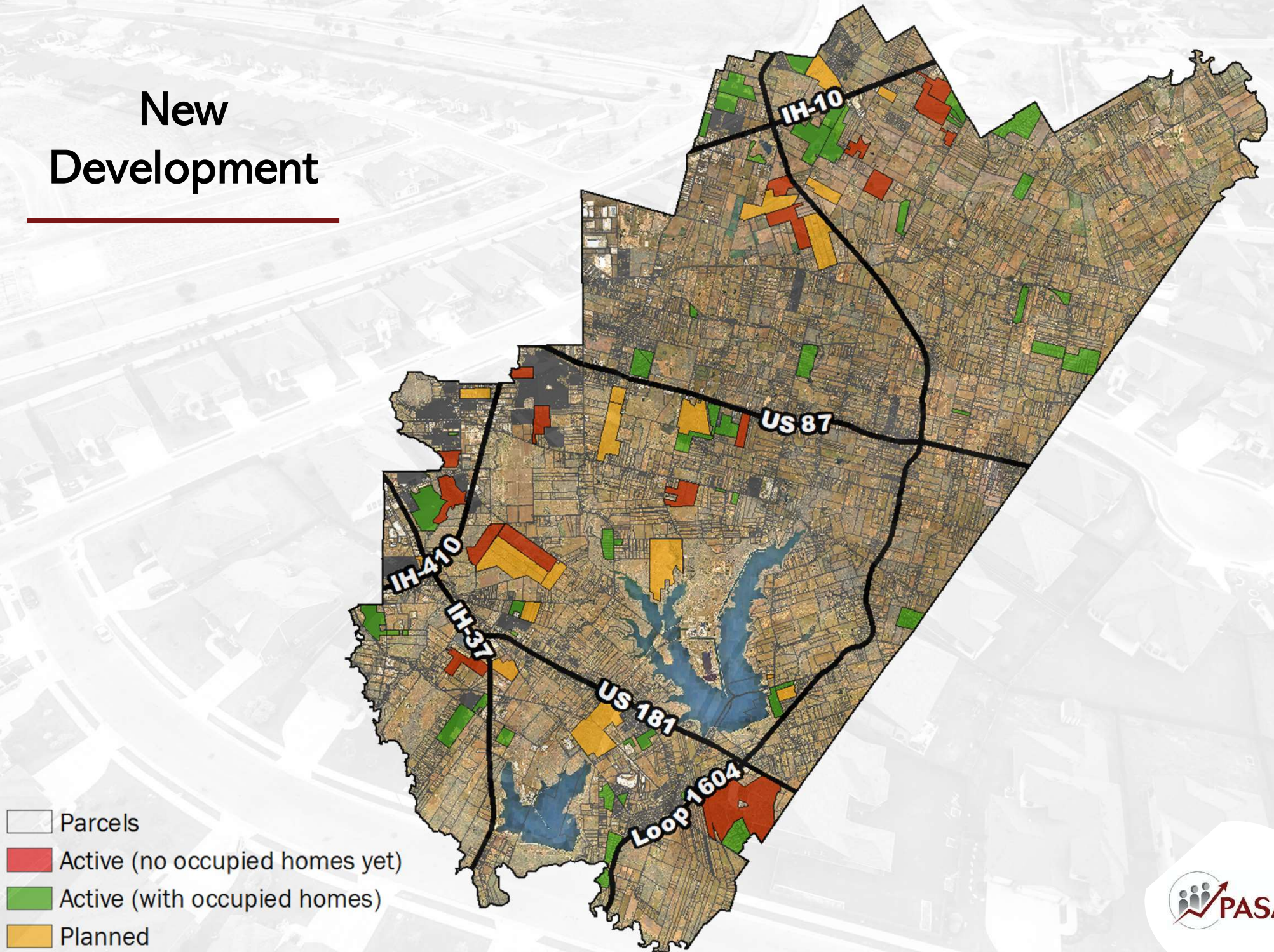


Projected Housing Occupancies

Single-Family
Feb 2022 to
Oct 2022

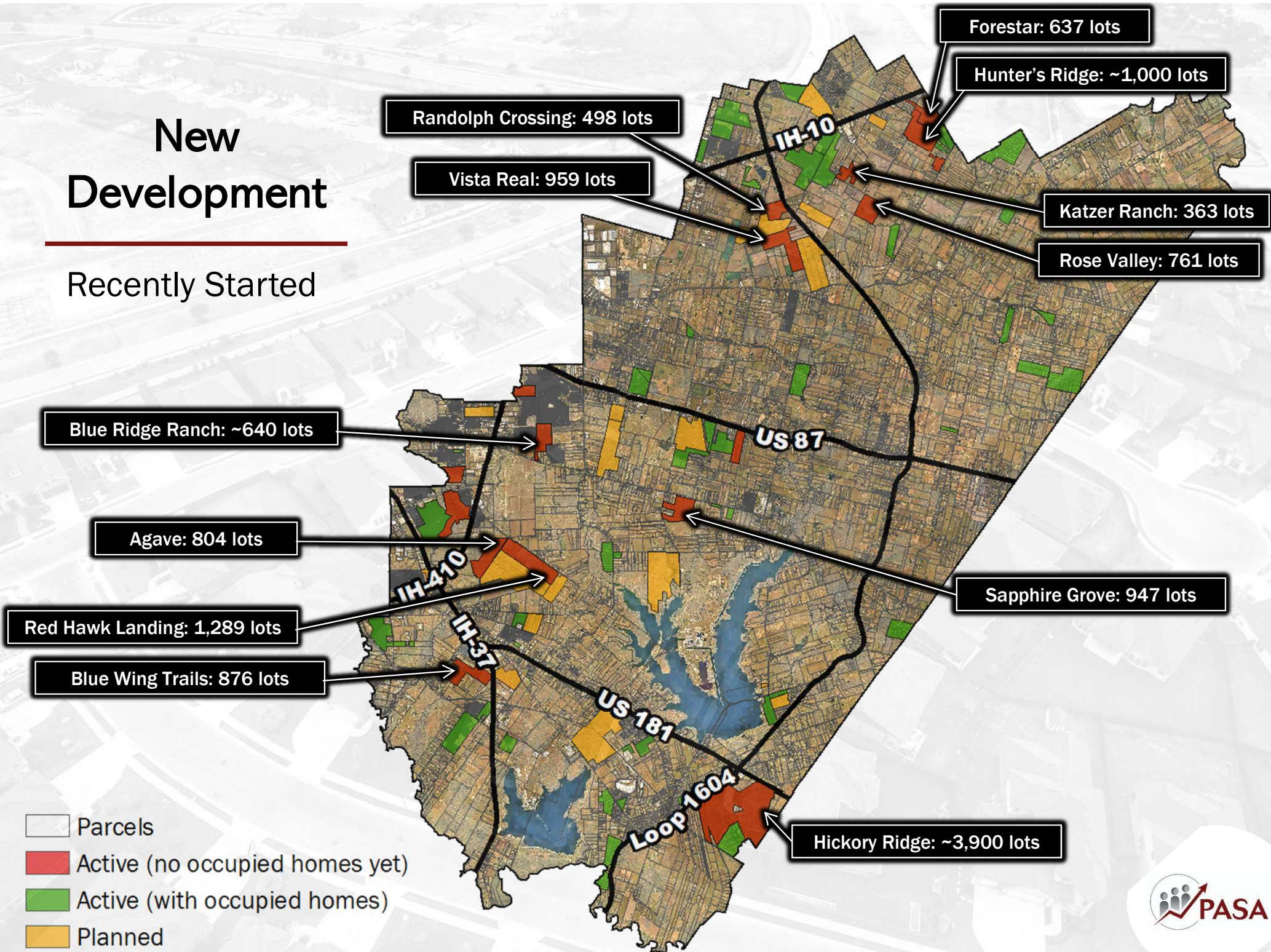


New Development



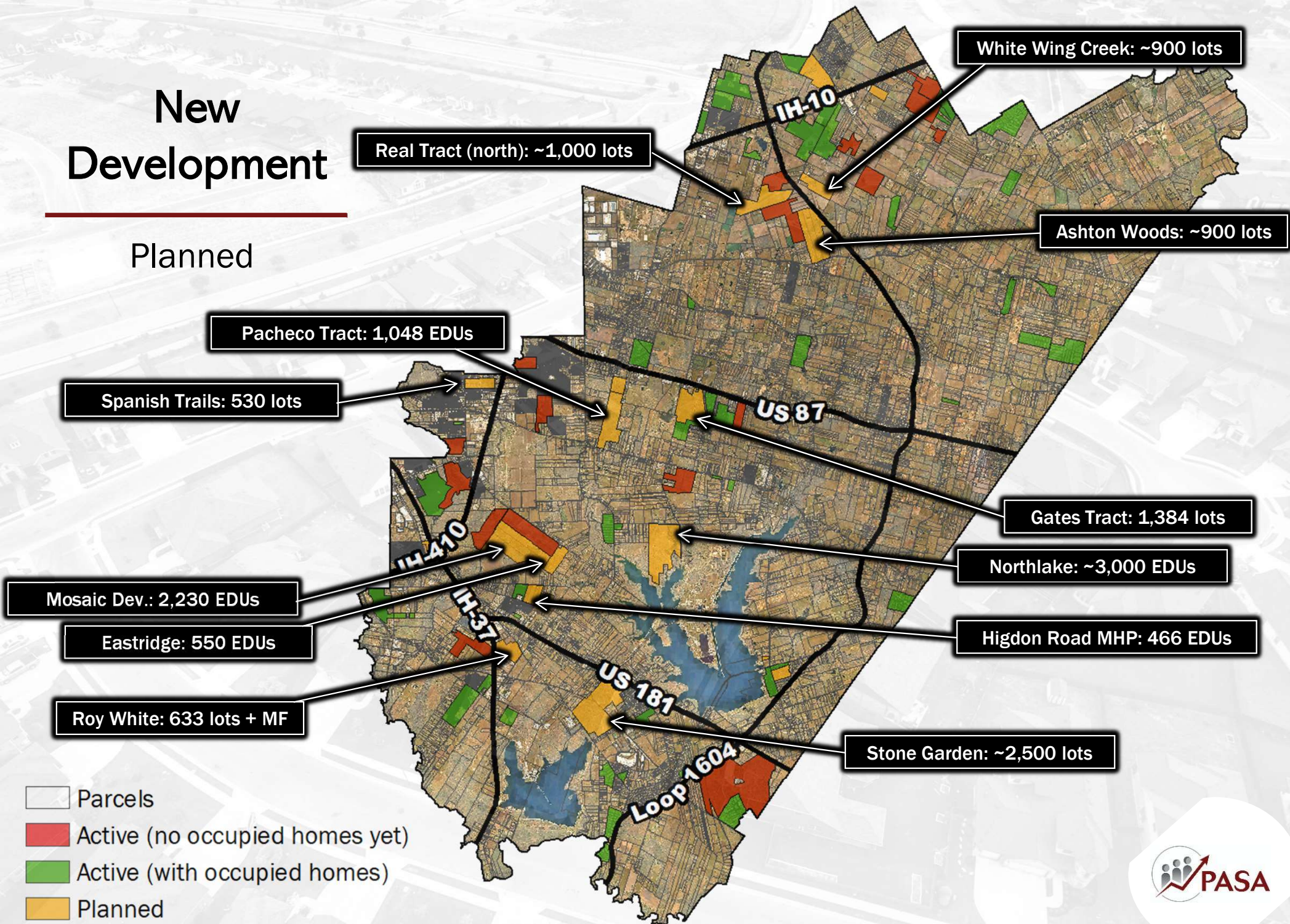
New Development

Recently Started



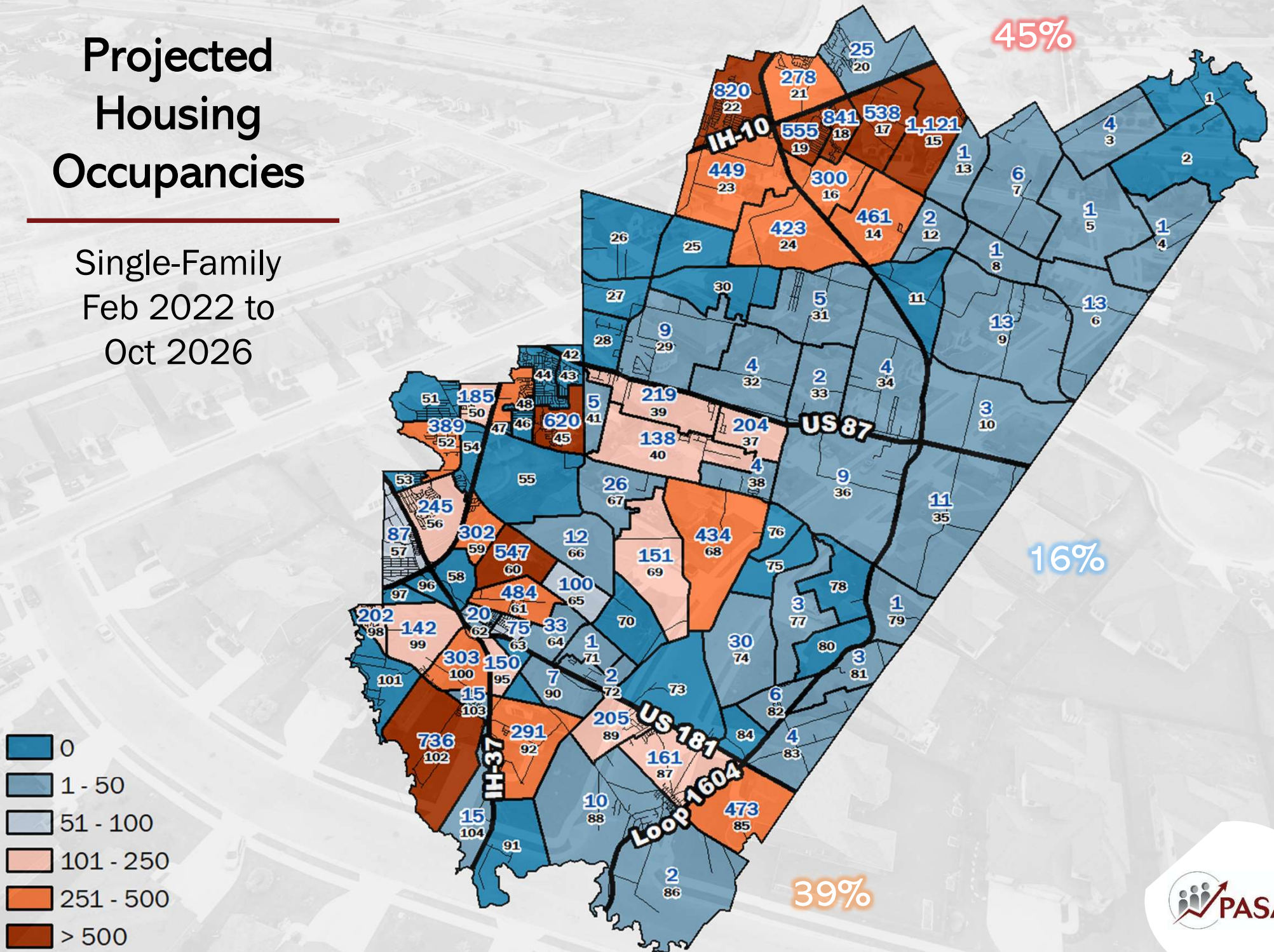
New Development

Planned



Projected Housing Occupancies

Single-Family
Feb 2022 to
Oct 2026



Housing Growth Focus

I-10 Corridor



- 01** The Arcadian is now 42% occupied
 - Construction will wrap up soon
 - 43 students enrolled since November
- 02** Paloma, Millican Grove, Savannah Place
 - 1,357 homes left to be occupied
 - Projected to be occupied by 2026
- 03** New Developments
 - 4,200+ homes planned in 7 developments that recently broke ground
 - 3,400+ lots planned in 5 planned developments in the area

Housing Growth Focus

US 87/New Sulphur Springs Corridor



01 SAWS wastewater expansion

- New extensions along NSS and numerous new approved utility service agreements in this area

02 New Developments

- Approximately 7,000 homes planned now
- Development expected to increase within 3–4 years as infrastructure is installed

Housing Growth Focus

I-37/US 181 Corridor



- 01** Southton Meadows is hot
- 271 homes under construction
 - 244 homes occupied
 - 460 lots remain

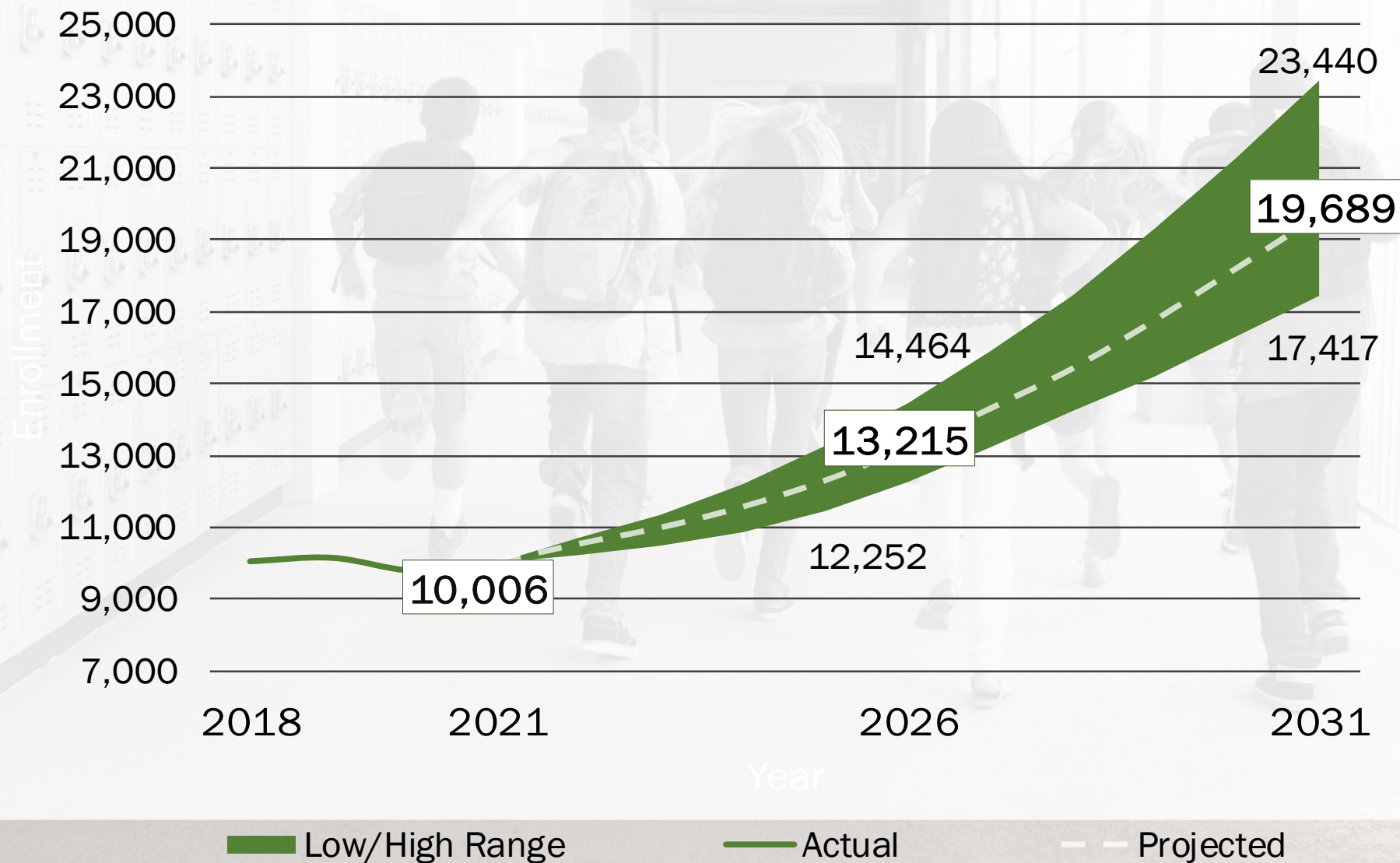
- 02** New Developments
- 13,000+ homes planned in numerous future communities.

Projected New Housing Occupancies

	Single Family	Multi- Family	Mixed Use	Age- Restricted/ Student Housing	Mobile Homes	RVs	Grand Total
Feb 2022-Oct 2022	1,628	170	0	0	10	0	1,808
Oct 2022-Oct 2023	2,444	18	0	0	62	9	2,533
Oct 2023-Oct 2024	2,858	0	35	0	94	12	2,999
Oct 2024-Oct 2025	2,929	220	65	0	110	9	3,333
Oct 2025-Oct 2026	2,974	360	65	0	75	0	3,474
Oct 2026-Oct 2027	3,121	430	80	0	19	0	3,650
Oct 2027-Oct 2028	3,345	530	80	0	22	0	3,977
Oct 2028-Oct 2029	3,520	450	80	0	19	0	4,069
Oct 2029-Oct 2030	3,610	370	80	0	20	0	4,080
Oct 2030-Oct 2031	3,899	395	80	0	19	0	4,393
Feb 2022-Oct 2026	12,833	768	165	0	351	30	14,147
Oct 2026-Oct 2031	17,495	2,175	400	0	99	0	20,169
Feb 2022-Oct 2031	30,328	2,943	565	0	450	30	34,316

Student Projections

Three Scenarios of Growth



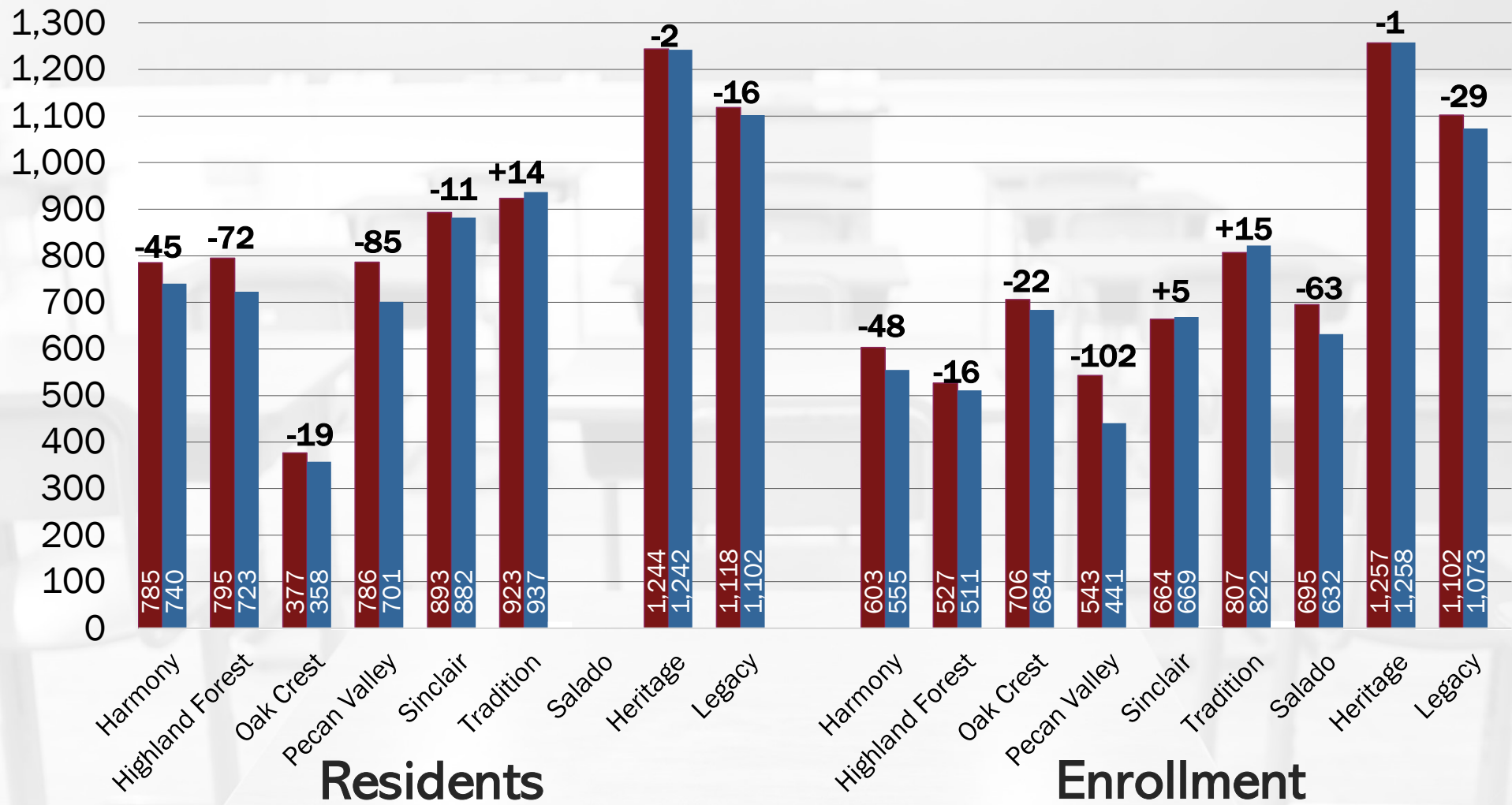
Moderate Growth Scenario

	2022	2023	2024	2025	2026
Enrollment	10,516	10,975	11,559	12,292	13,215
% Growth	5.10%	4.36%	5.32%	6.34%	7.51%
Growth	510	459	584	733	923
	2027	2028	2029	2030	2031
Enrollment	14,295	15,412	16,759	18,218	19,689
% Growth	8.17%	7.81%	8.74%	8.71%	8.07%
Growth	1,080	1,117	1,347	1,459	1,471

Long-Range Planning

2021-22 Actual vs. Projected by Campus

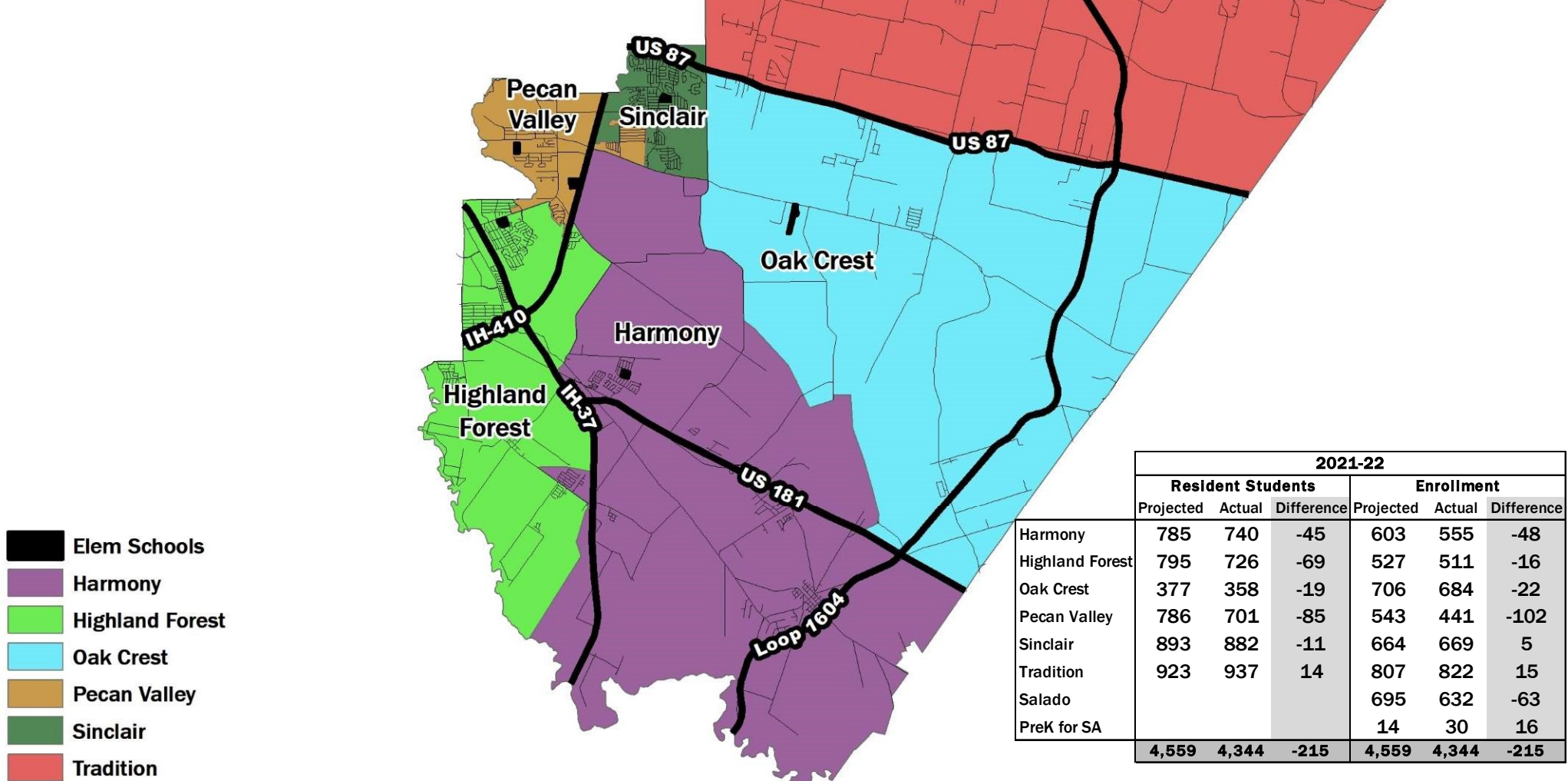
■ Projected ■ Actual



	Projected	Actual	Difference
Elementary	4,559	4,344	-215
Middle School	2,362	2,344	-18
High School	3,295	3,317	22

Actual vs. Projected Student Population

2021-22

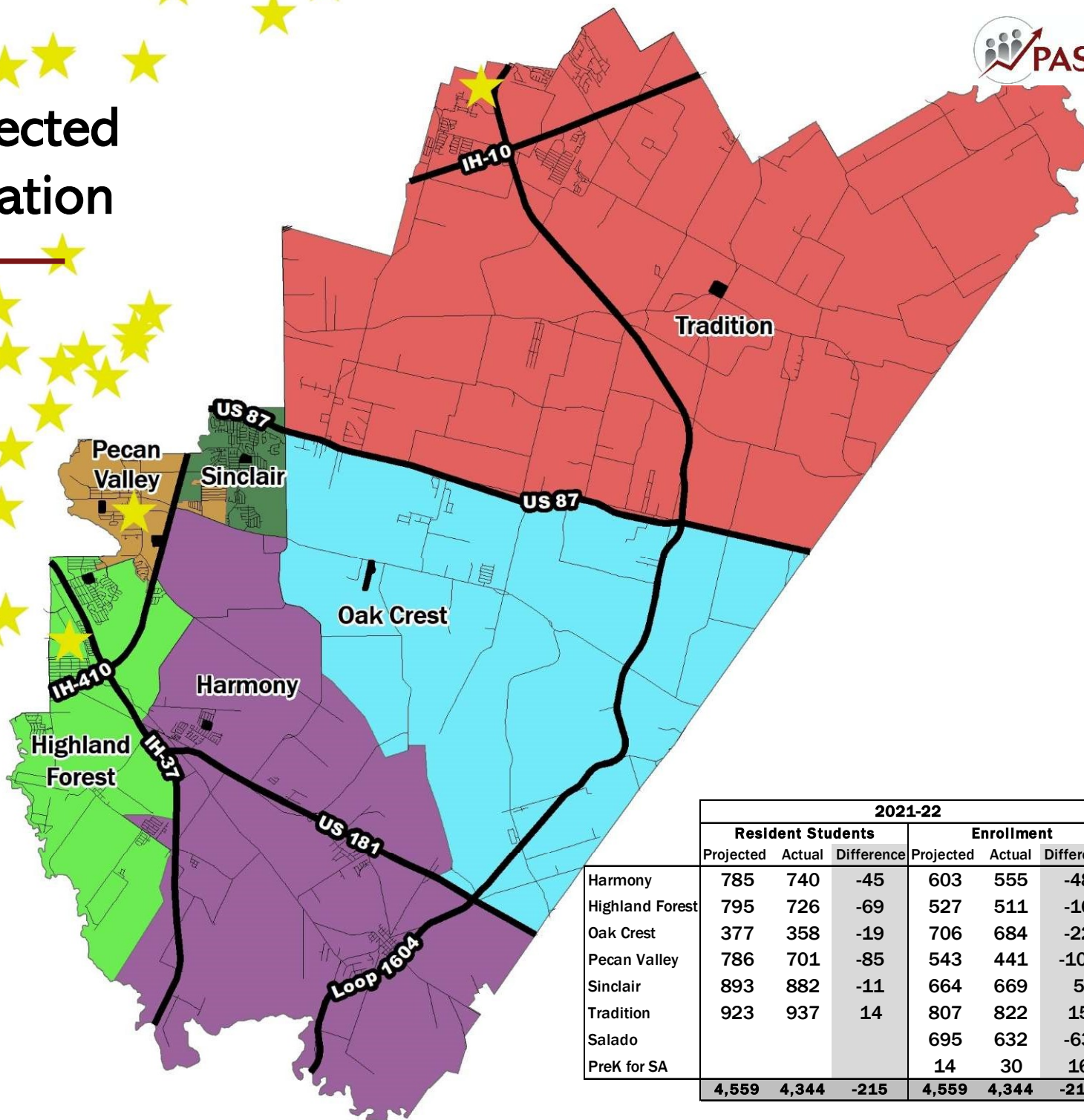


Actual vs. Projected Student Population

2021-22

★ Charter Schools

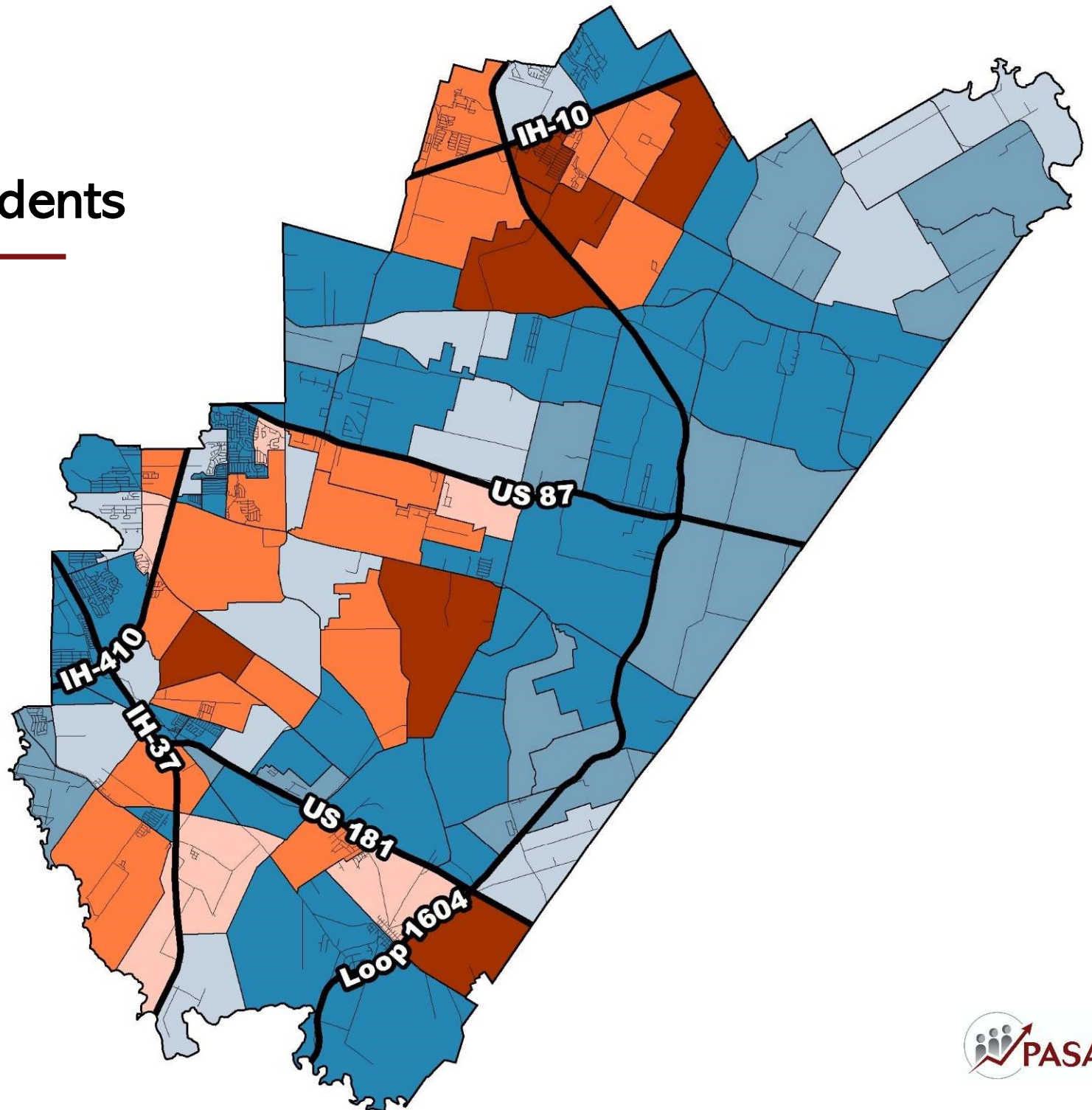
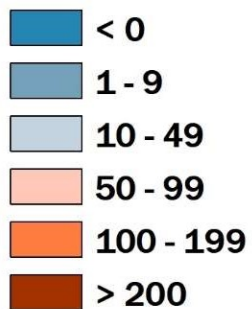
-  Elem Schools
-  Harmony
-  Highland Forest
-  Oak Crest
-  Pecan Valley
-  Sinclair
-  Tradition



	2021-22					
	Resident Students			Enrollment		
	Projected	Actual	Difference	Projected	Actual	Difference
Harmony	785	740	-45	603	555	-48
Highland Forest	795	726	-69	527	511	-16
Oak Crest	377	358	-19	706	684	-22
Pecan Valley	786	701	-85	543	441	-102
Sinclair	893	882	-11	664	669	5
Tradition	923	937	14	807	822	15
Salado				695	632	-63
PreK for SA				14	30	16
	4,559	4,344	-215	4,559	4,344	-215

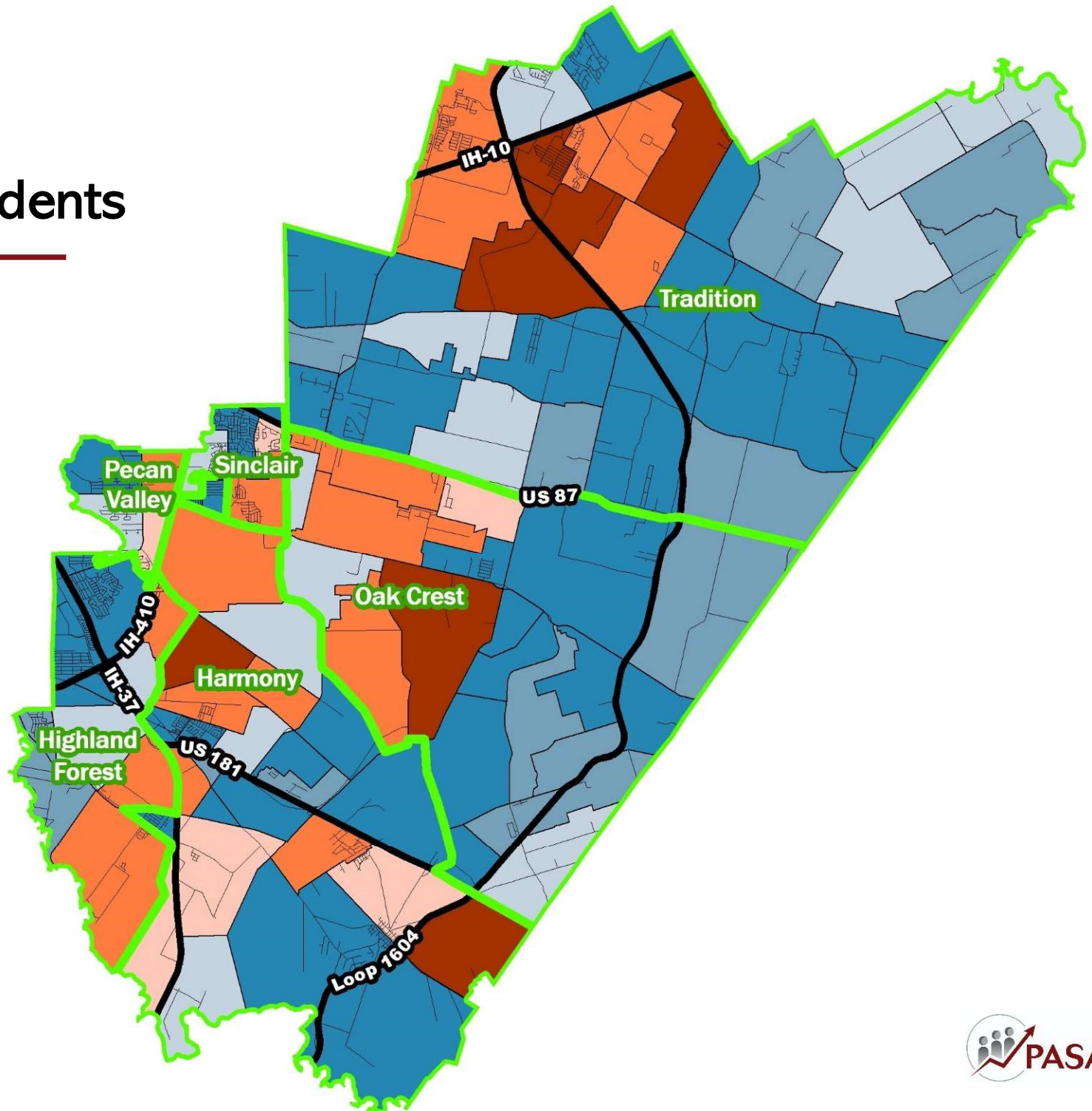
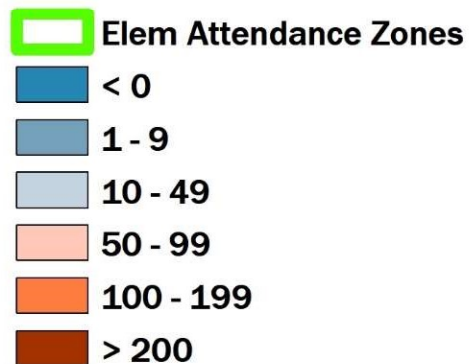
Projected Growth in Elementary Students

2021-22
to
2031-32



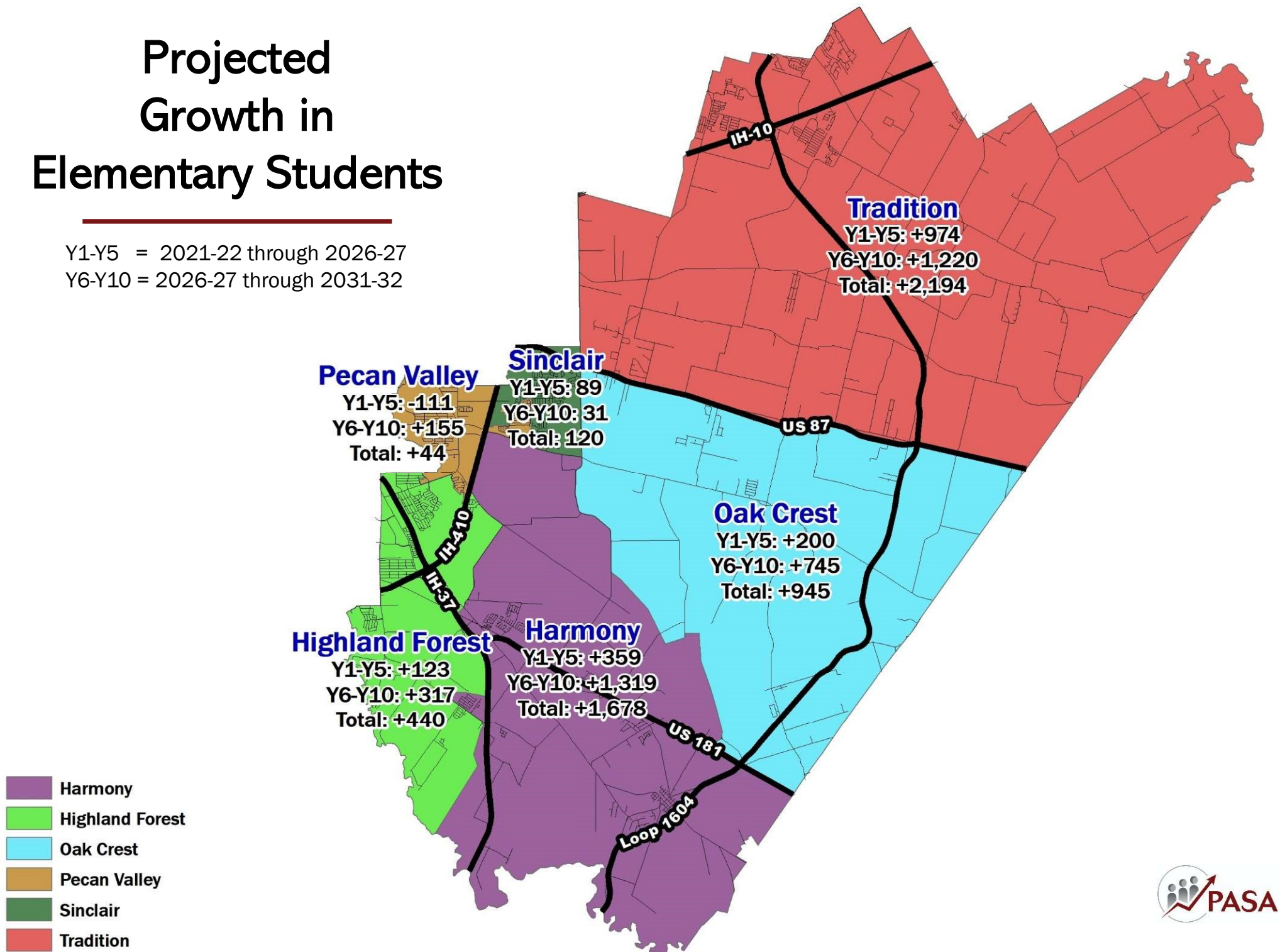
Projected Growth in Elementary Students

2021-22
to
2031-32



Projected Growth in Elementary Students

Y1-Y5 = 2021-22 through 2026-27
Y6-Y10 = 2026-27 through 2031-32



Elementary School Long-Range Planning

Projected Enrolled Students

	Capacity	Current	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32
Harmony	747	555	588	648	685	787	914	1,099	1,324	1,583	1,886	2,233
Highland Forest	713	511	549	584	595	629	634	665	707	773	859	951
Oak Crest	713	684	598	602	633	701	799	934	1,076	1,241	1,388	1,544
Pecan Valley	730	441	430	420	369	327	330	359	383	408	451	485
Sinclair	756	669	714	730	762	770	758	768	754	751	769	789
Tradition	901	822	985	1,159	1,334	1,572	1,796	2,022	2,253	2,482	2,728	3,016
Salado	756	632	717	717	717	717	717	717	717	717	717	717
PreK for SA		30	30	30	30	30	30	30	30	30	30	30
Elementary	5,316	4,344	4,611	4,890	5,125	5,533	5,978	6,594	7,244	7,985	8,828	9,765

↑
Elem #8

↑
Elem #9

↑
Elem #10

↑
Elem #11

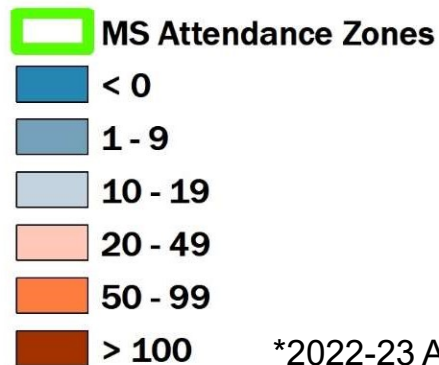
Moderate Growth Scenario

Yellow highlights = Projected population exceeds capacity by >120%

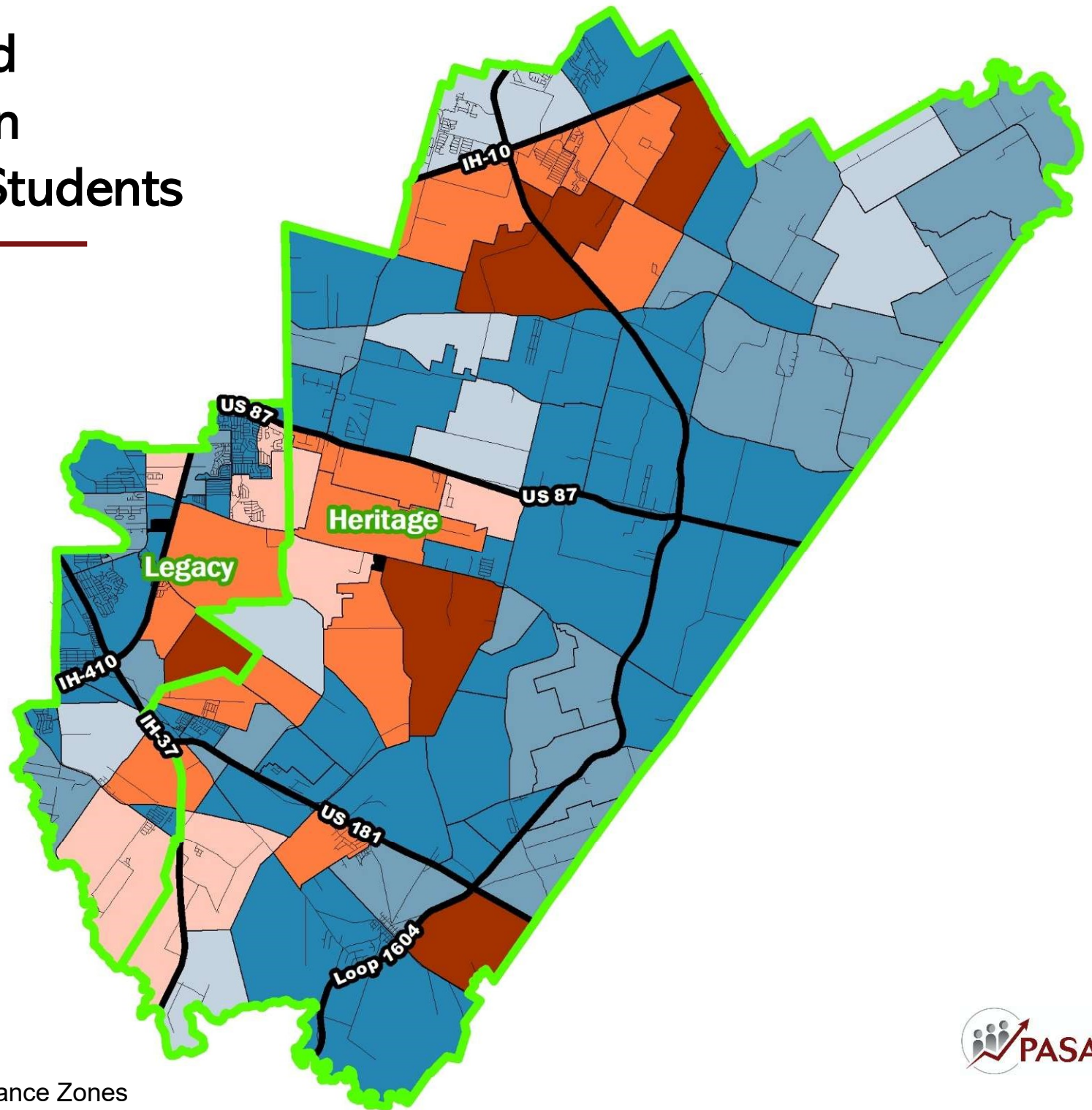
Projected Enrollment assumes all transfer patterns remain the same in the future, with the exception of 85 Dual Language students moving from Oak Crest to Salado in 2022-23.

Projected Growth in Middle School Students

2021-22
to
2031-32

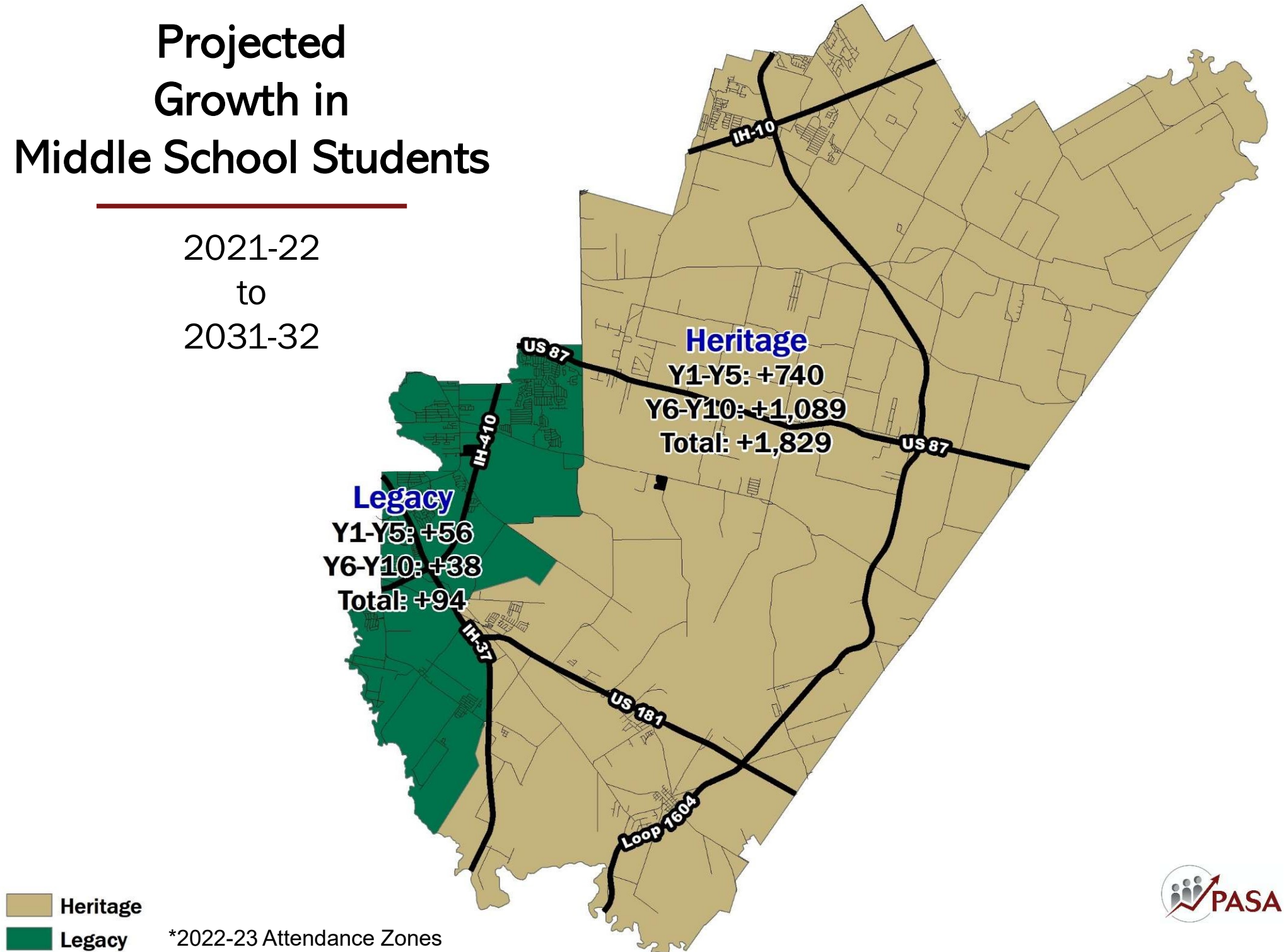


*2022-23 Attendance Zones



Projected Growth in Middle School Students

2021-22
to
2031-32



Middle School Long-Range Planning

Projected Enrolled Students

	Capacity	Current	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32
Heritage	1,335	993	1,051	1,138	1,302	1,486	1,733	1,903	2,142	2,351	2,577	2,822
Legacy	1,342	1,338	1,341	1,292	1,301	1,320	1,394	1,394	1,391	1,362	1,404	1,432
Other		13	13	13	13	13	13	13	13	13	13	13
Elementary	2,677	2,344	2,405	2,443	2,616	2,819	3,140	3,310	3,546	3,726	3,994	4,267

MS #3

Calculations based on 2022-23 Attendance Zones
 Moderate Growth Scenario

Yellow highlights = Projected population exceeds capacity by >120%

Projected Enrollment assumes all transfer patterns remain the same in the future.

High School Long-Range Planning

Projected Enrolled Students

	Capacity	Current	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32
East Central HS	3,666	3,180	3,303	3,365	3,493	3,565	3,682	3,946	4,152	4,553	4,871	5,132
CAST Lead HS		92	152	232	280	330	370	400	425	450	480	480
Other		45	45	45	45	45	45	45	45	45	45	45
Elementary	3,666	3,317	3,500	3,642	3,818	3,940	4,097	4,391	4,622	5,048	5,396	5,657


HS
Capacity

CAST Lead Enrollment:

- excludes any potential 8th grade students who might join beginning in 2022-23
- estimates 9th-12th grade population assuming each incoming 9th grade class will increase in size up to a maximum of 120 students per grade.

Moderate Growth Scenario

Yellow highlights = Projected population exceeds capacity by >120%

Projected Enrollment assumes all transfer patterns remain the same in the future.



Long-Range Planning Summary

	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32
Elementary		ES #8 North			ES #9 South		ES #10 North	ES #11 South		
Middle School					MS #3					
High School								HS Capacity		

Questions?

Spring 2022

Population and Survey Analysts

www.pasatx.com



East Central ISD

Demographic Study