



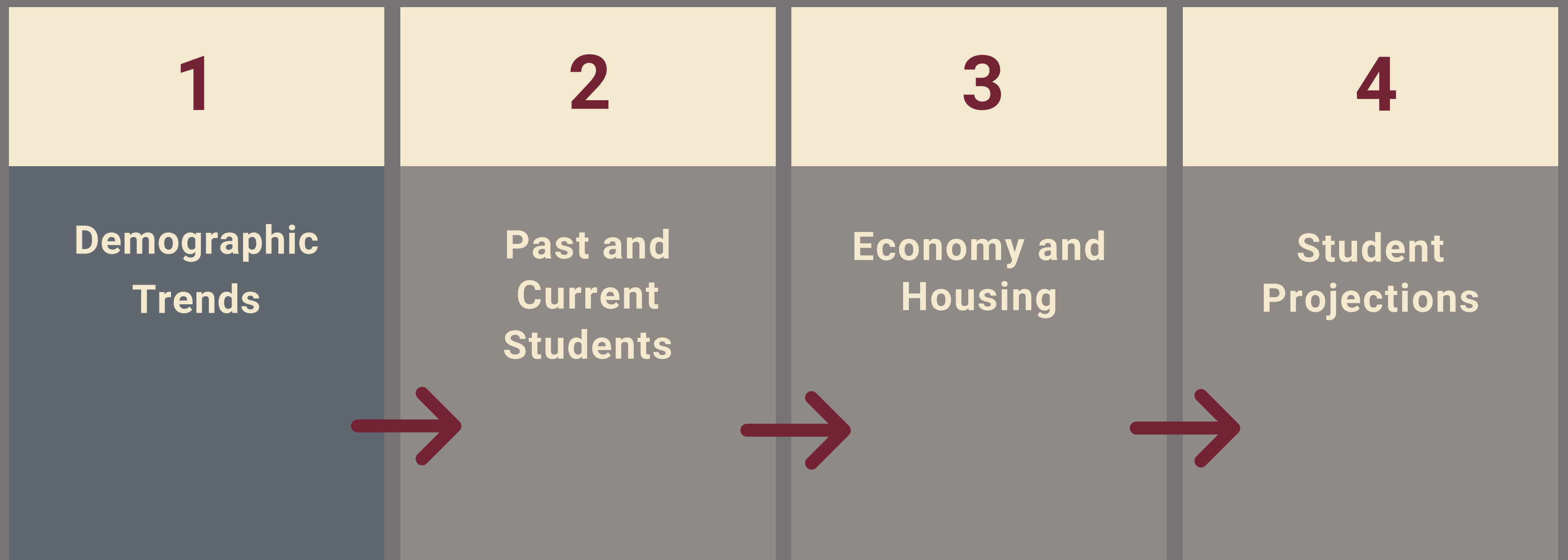
Population &  
Survey Analysts  
[www.pasatx.com](http://www.pasatx.com)

# East Central ISD Demographic Study

## Spring 2024

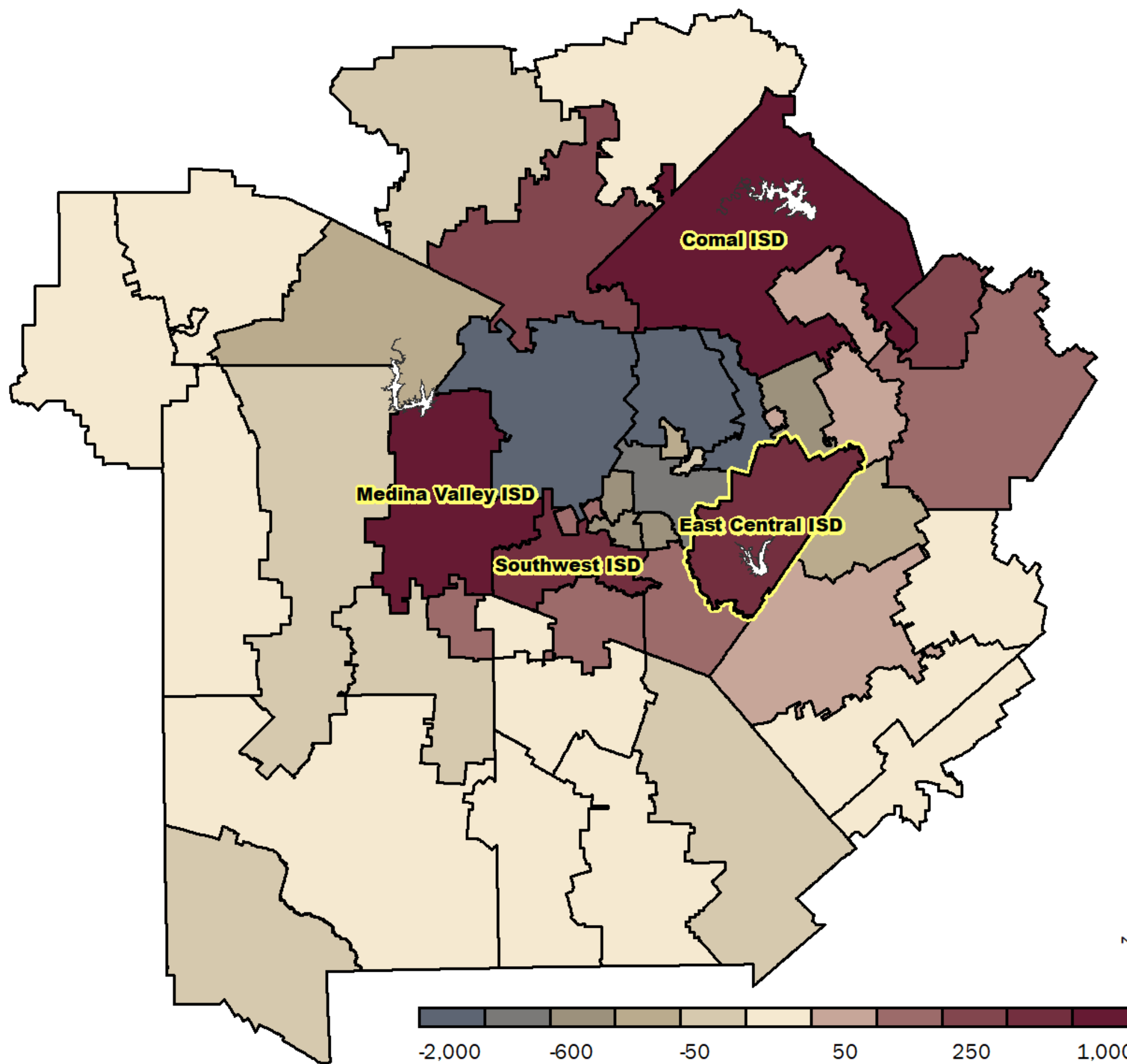


## Demographic Study Components



# 1-Year Change in Enrollment

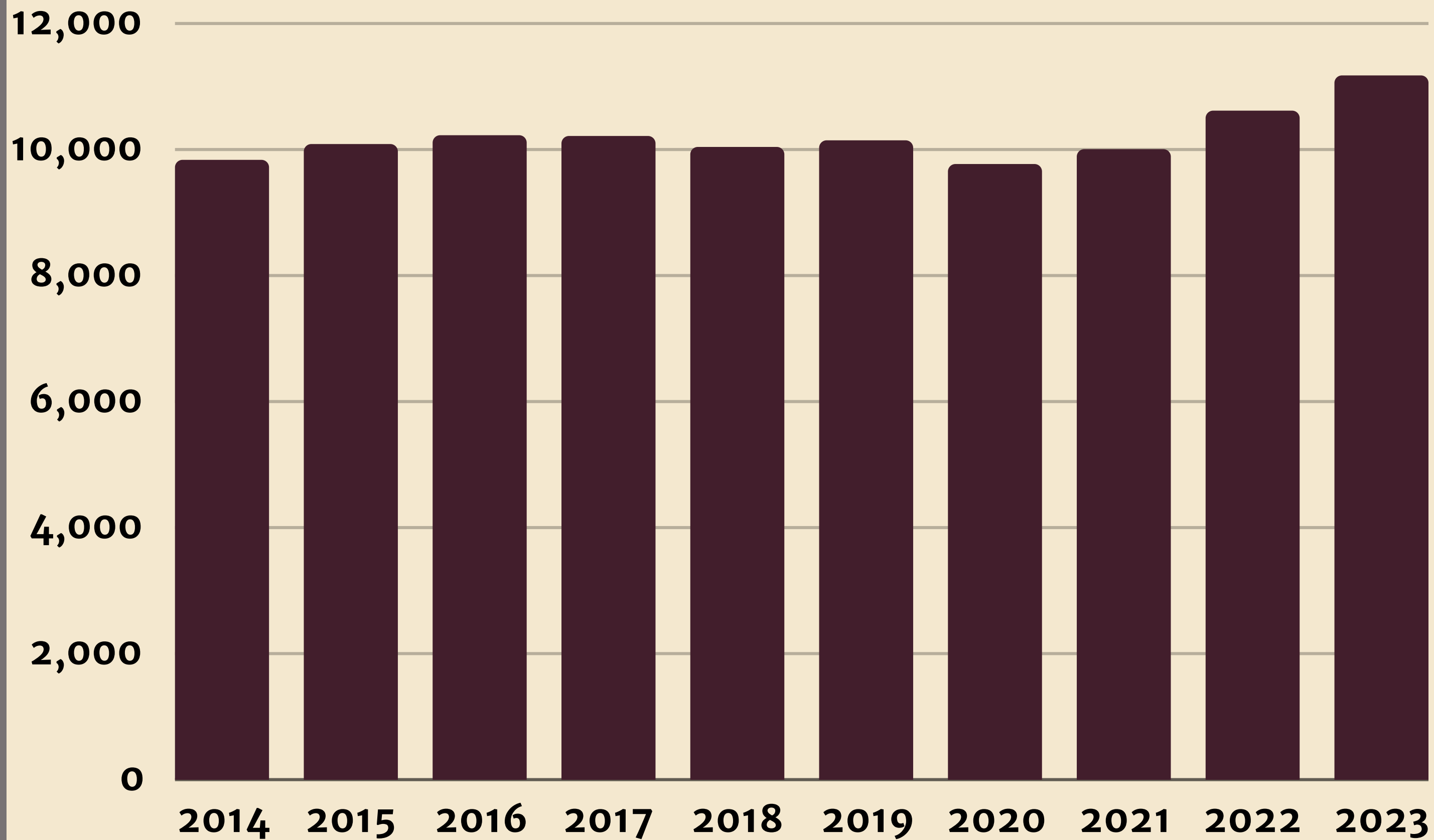
San Antonio Metro Area, Fall 2022–Fall 2023



District	Enrollment 2023-24	1-Year Change			
		Enrollment	Rank	% Change	Rank
Medina Valley ISD	8,700	877	1	11.2%	2
Comal ISD	29,263	752	2	2.6%	11
<b>East Central ISD</b>	<b>11,176</b>	<b>559</b>	<b>3</b>	<b>5.3%</b>	<b>7</b>
Southwest ISD	14,202	455	4	3.3%	9
Navarro ISD	2,438	258	5	11.8%	1
Boerne ISD	10,910	147	6	1.4%	18
Somerset ISD	4,252	105	7	2.5%	13
Natalia ISD	1,268	98	8	8.4%	4
Seguin ISD	7,314	75	9	1.0%	20
Southside ISD	6,033	68	10	1.1%	19
Lackland ISD	1,035	67	11	6.9%	5
Marion ISD	1,570	43	12	2.8%	10
Kenedy ISD	770	41	13	5.6%	6
Sabinal ISD	466	38	14	8.9%	3
Floresville ISD	4,080	38	14	0.9%	21
New Braunfels ISD	9,779	34	16	0.3%	24
Randolph Field ISD	1,494	32	17	2.2%	15
Blanco ISD	1,105	17	18	1.6%	16
Poth ISD	949	14	19	1.5%	17
Charlotte ISD	444	11	20	2.5%	12
Lytle ISD	1,821	11	20	0.6%	22
Utopia ISD	201	7	22	3.6%	8
Waelder ISD	297	7	22	2.4%	14
Stockdale ISD	862	5	24	0.6%	23
Poteet ISD	1,842	5	24	0.3%	25

Source: Texas Education Agency (TEA)

# Past Enrollment Change



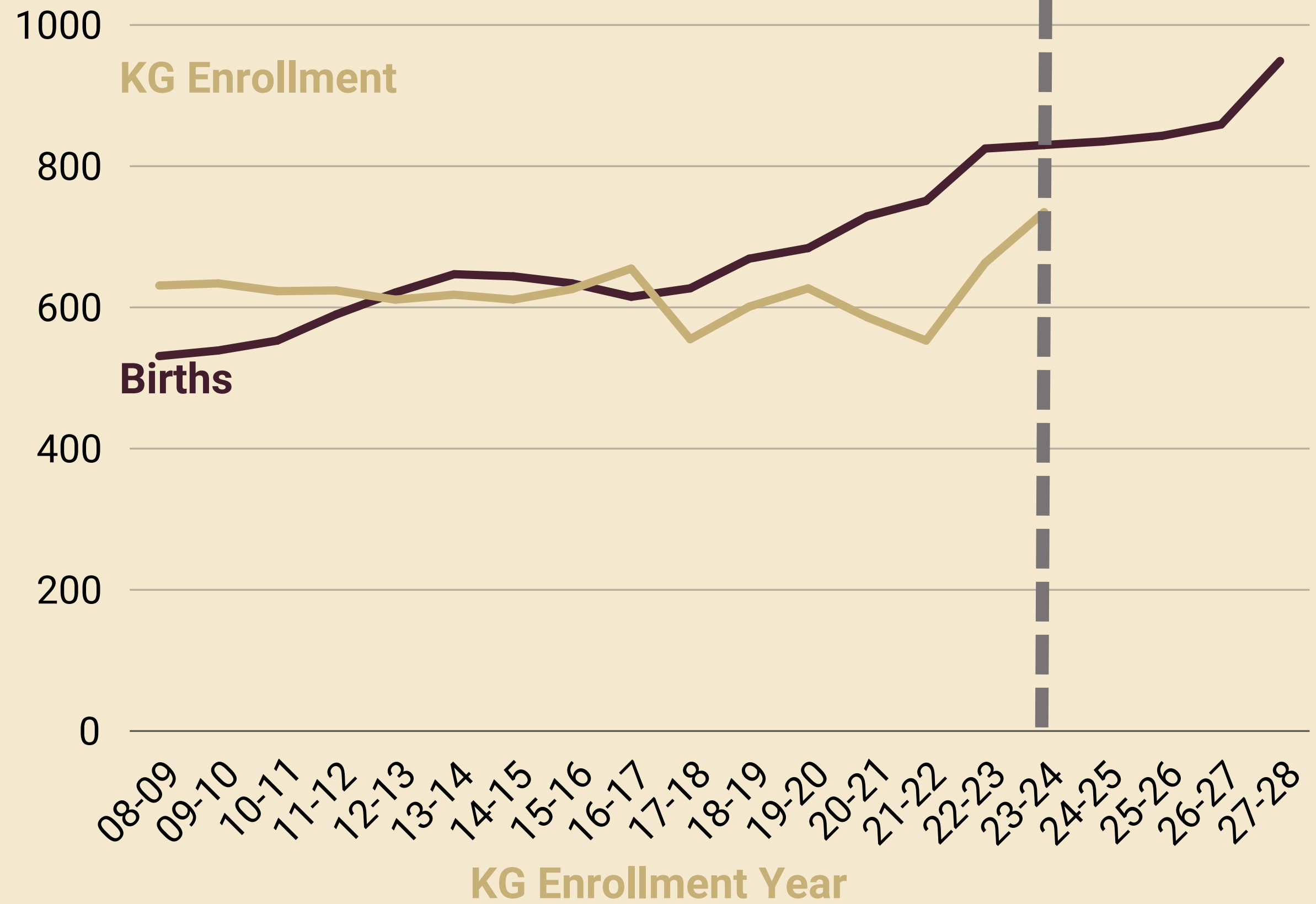
**11,176**

October 27, 2023  
Enrollment

Source: Texas Education Agency (TEA)



# KG Enrollment vs. Births



Difference between two lines shows in-migration of young children after birth

Births adjusted 5 years to align with KG Enrollment

Births by Zip Code of Birth Mother

Source: Texas Education Agency (TEA)  
Source: Texas Department of Health and Human Services, Vital Statistics



## Demographic Study Components

**1**

**Demographic  
Trends**

**2**

**Past and  
Current  
Students**

**3**

**Economy and  
Housing**

**4**

**Student  
Projections**

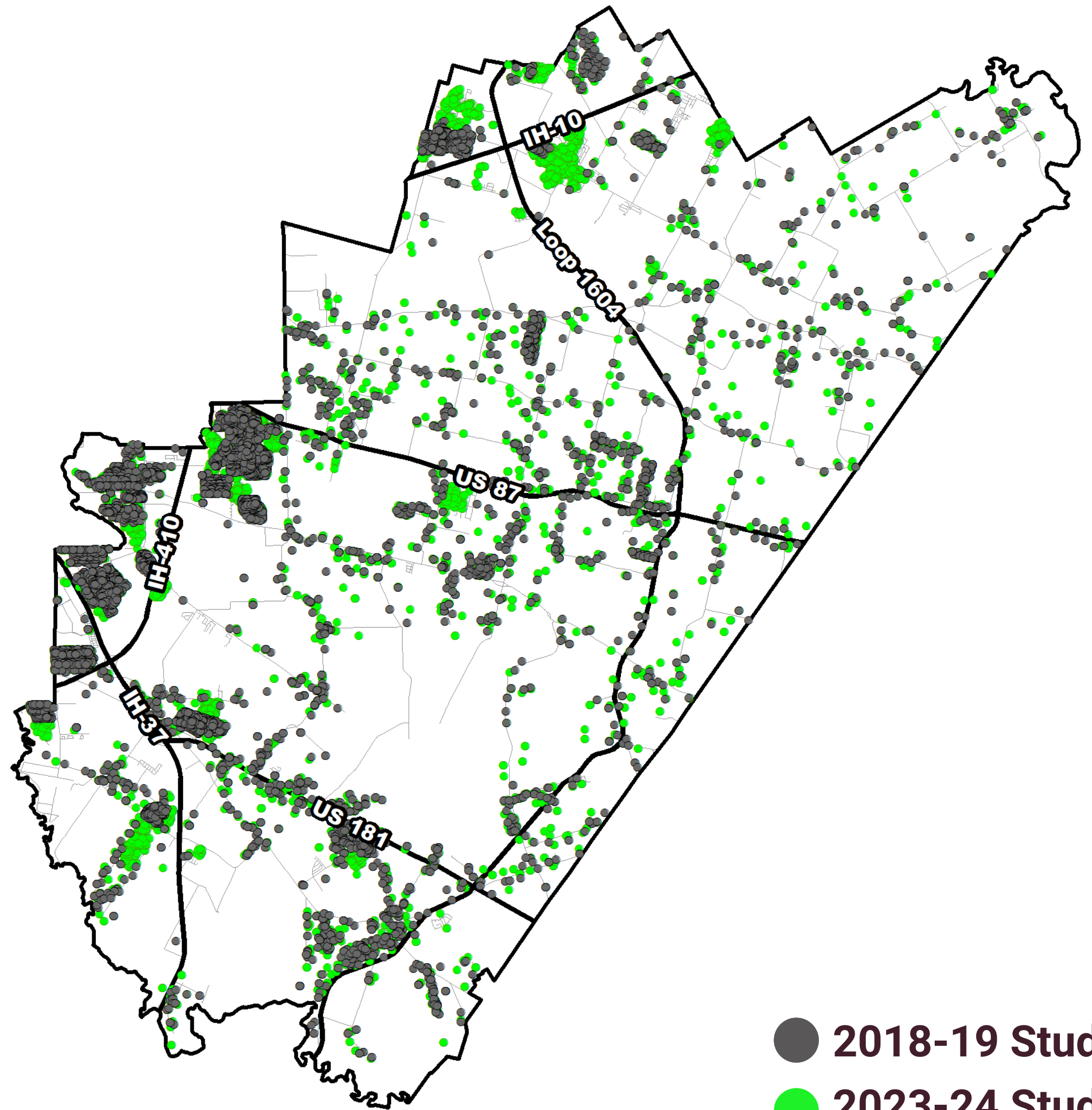


# Student Geocode



- Place each student on the map
- 99% accuracy
- Starting point for projections

**Green clusters highlight  
new students that  
didn't exist in 2018-19**



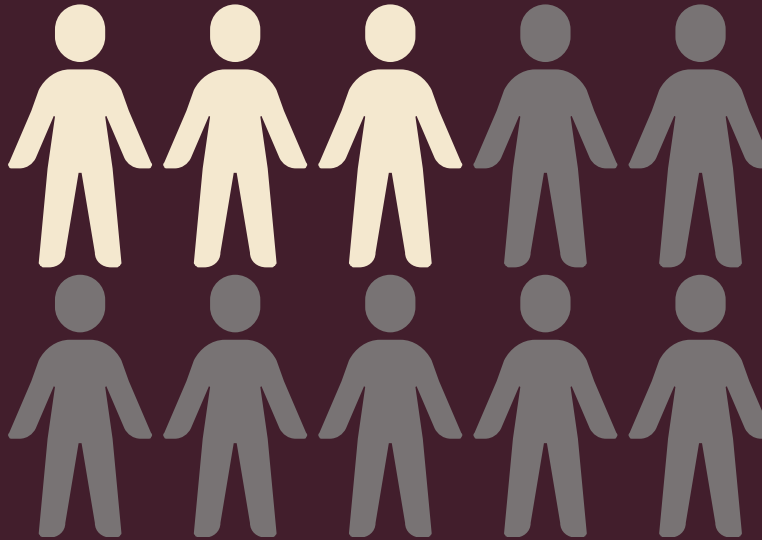
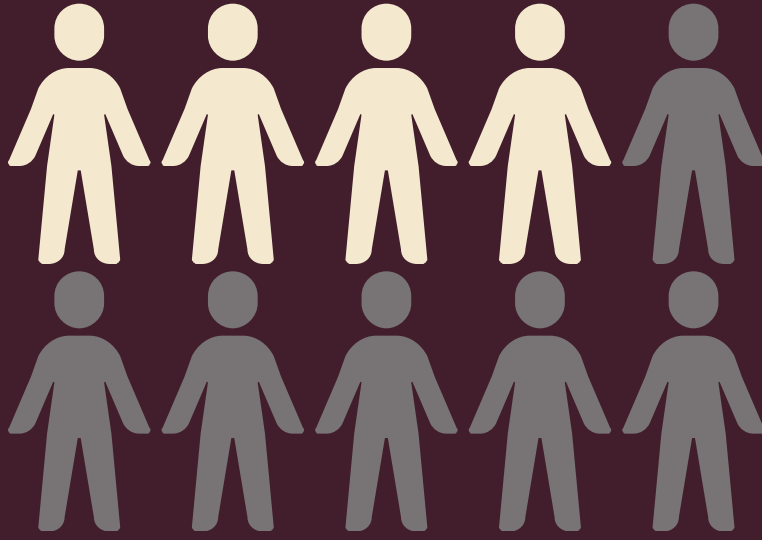
# Students Per Home

Single-Family

Multi-Family

0.36

0.28

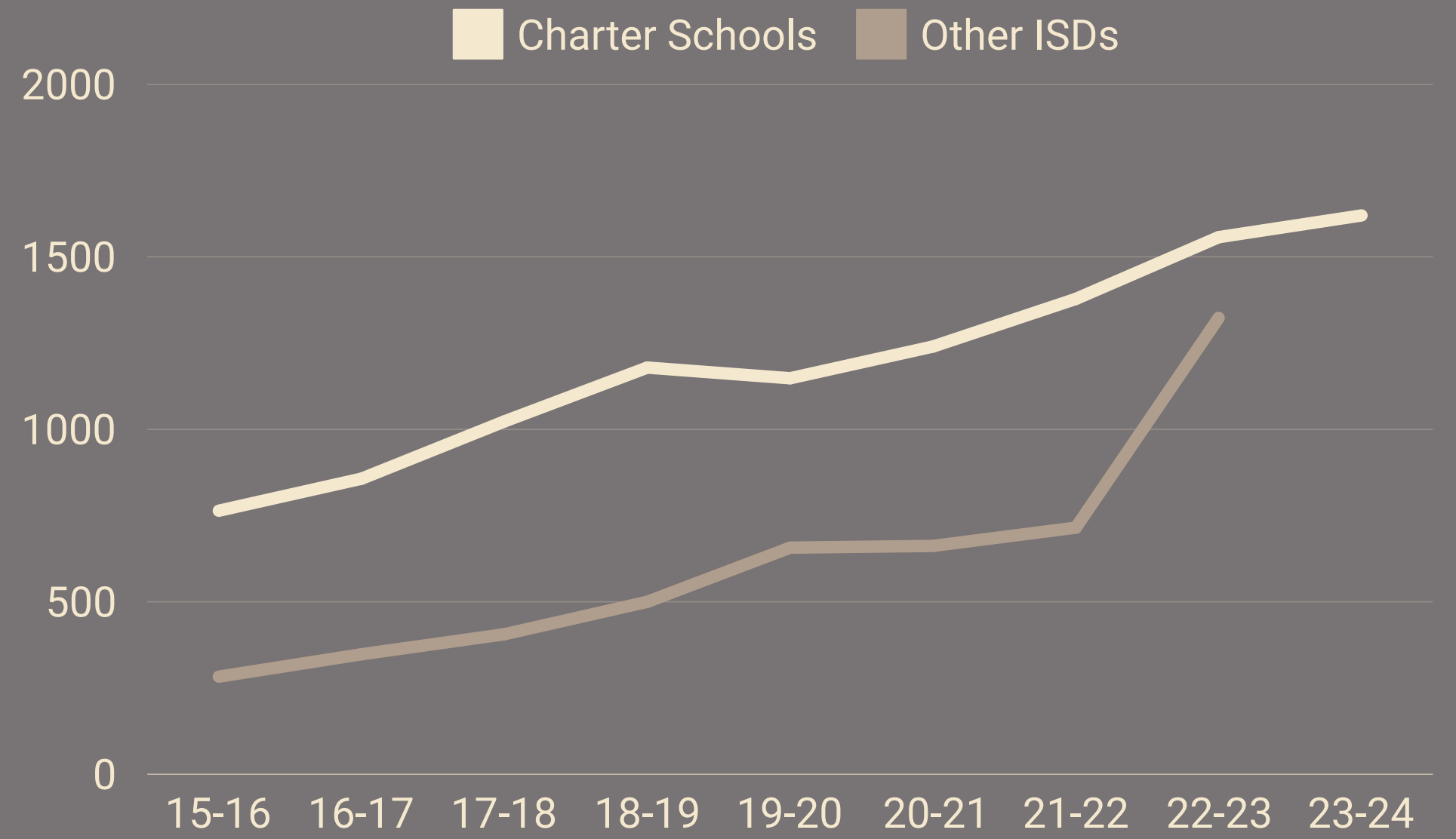
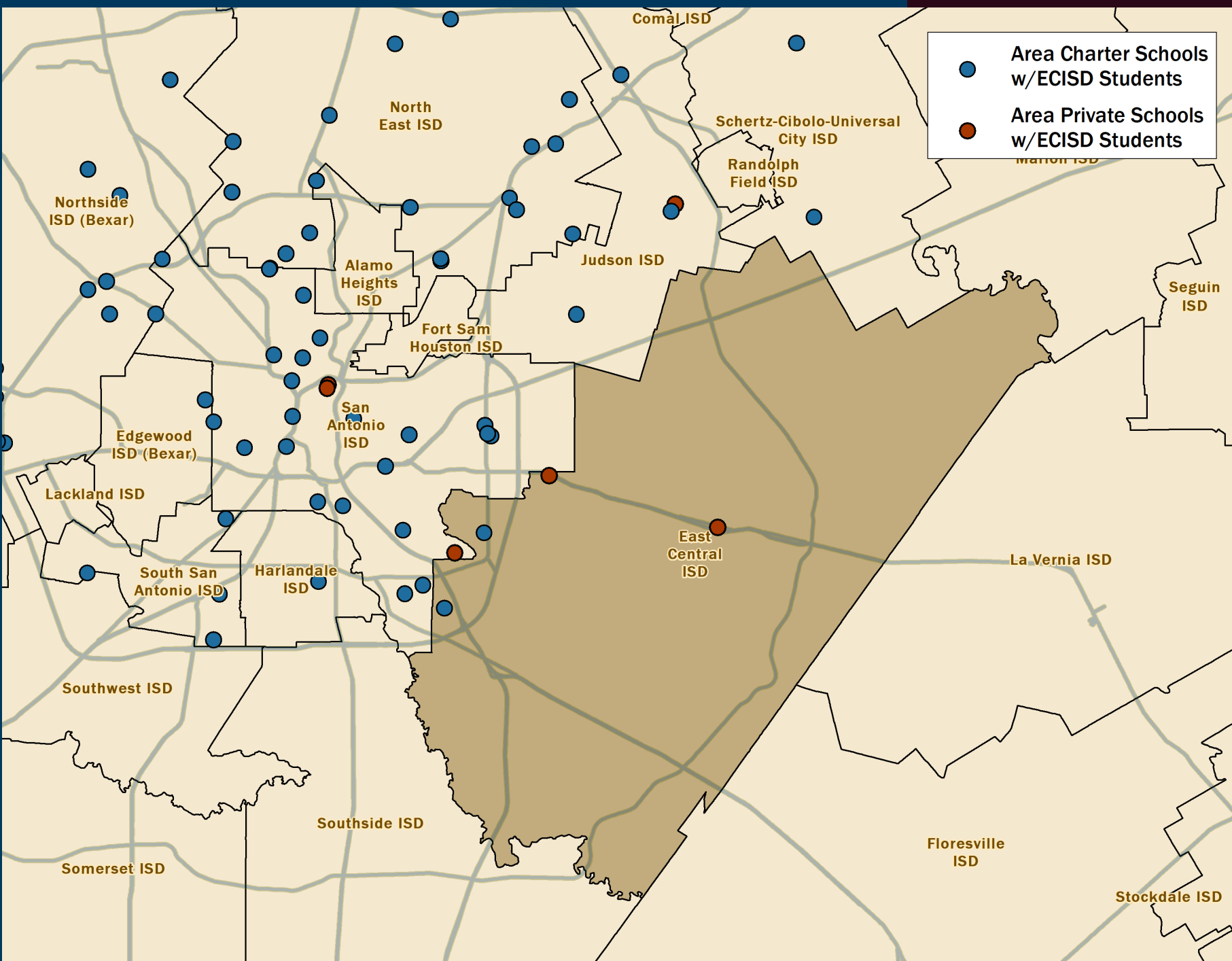




# Historical Students Per Home

Neighborhood	2020	2021	2022	2023
Savannah Place	0.23	0.28	0.26	0.38
Millican Grove	0.16	0.19	0.23	0.25
Cobalt Canyon	0.27	0.36	0.31	0.33
Paloma	0.28	0.20	0.22	0.25
Republic Meadows	0.09	0.29	0.40	0.44
Republic Creek	0.21	0.30	0.41	0.47

# Charter & Private Schools



Sources: TEA Transfer Reports and PASA Interviews

<b>77.8%</b> Reside in and Attend ECISD	<b>11.6%</b> Attend Charter Schools	<b>1.1%</b> Attend Private Schools
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Currently, TEA does not provide data regarding Homeschooling.

## Diaspora School for Sephardic Heritage

- Submitted an application with TEA for a proposed open-enrollment charter. The application includes the desire to be located in the San Antonio area. The application is currently under review.

## Somerset Brooks Academy

- Somerset Brooks Academy plans to open a school in the northwest portion of San Antonio, with grade levels PK-8. This site will have little to no impact on ECISD.



# Demographic Study Components

**1**

**Demographic  
Trends**

**2**

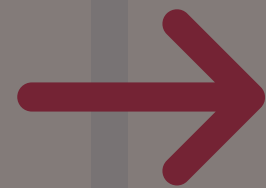
**Past and  
Current  
Students**

**3**

**Economy and  
Housing**

**4**

**Student  
Projections**





# Noteworthy Updates



**Interest Rates Stabilizing in 2024**



**Lily Trails**



**Boralis Tract**



**Live Lone Star and Empowerment Communities off Higdon Road**



**2 Apartment Properties Developing**

# Projected New Housing Occupancies

Oct 2023-Oct 2033

**35,068**

79.1% of Total

SINGLE-FAMILY

**6,680**

15.1% of Total

MULTI-FAMILY

**241**

0.5% of Total

BUILD-TO-RENT

**44,357**

TOTAL PROJECTED  
NEW OCCUPANCIES

**2,609**

5.9% of Total

MANUFACTURED

# Developments with Largest 10-year Single-Family Projections

**1,914  
units**

## Hickory Ridge

Builders: Castlerock & First America Homes; Camillo purchased over 120 acres in the development and is planning new sections under the Legend brand in mid-2024

**1,712  
units**

## Avenida

This Forestar development is in full swing off I-10 in far north ECISD. D.R. Horton is building here. The land plan shows two build-to-rent sections in the initial phases. This development absorbed the neighboring subdivision formerly called Hunters Ridge.

**1,641  
units**

## Grace Gardens

Mosaic is planning over 2,000 homes on 435 acres along S. W.W. White; initial sitework is now occurring. The developer is in talks with multiple builders. A golf course and commercial elements are also planned.

**1,538  
units**

## Stone Garden

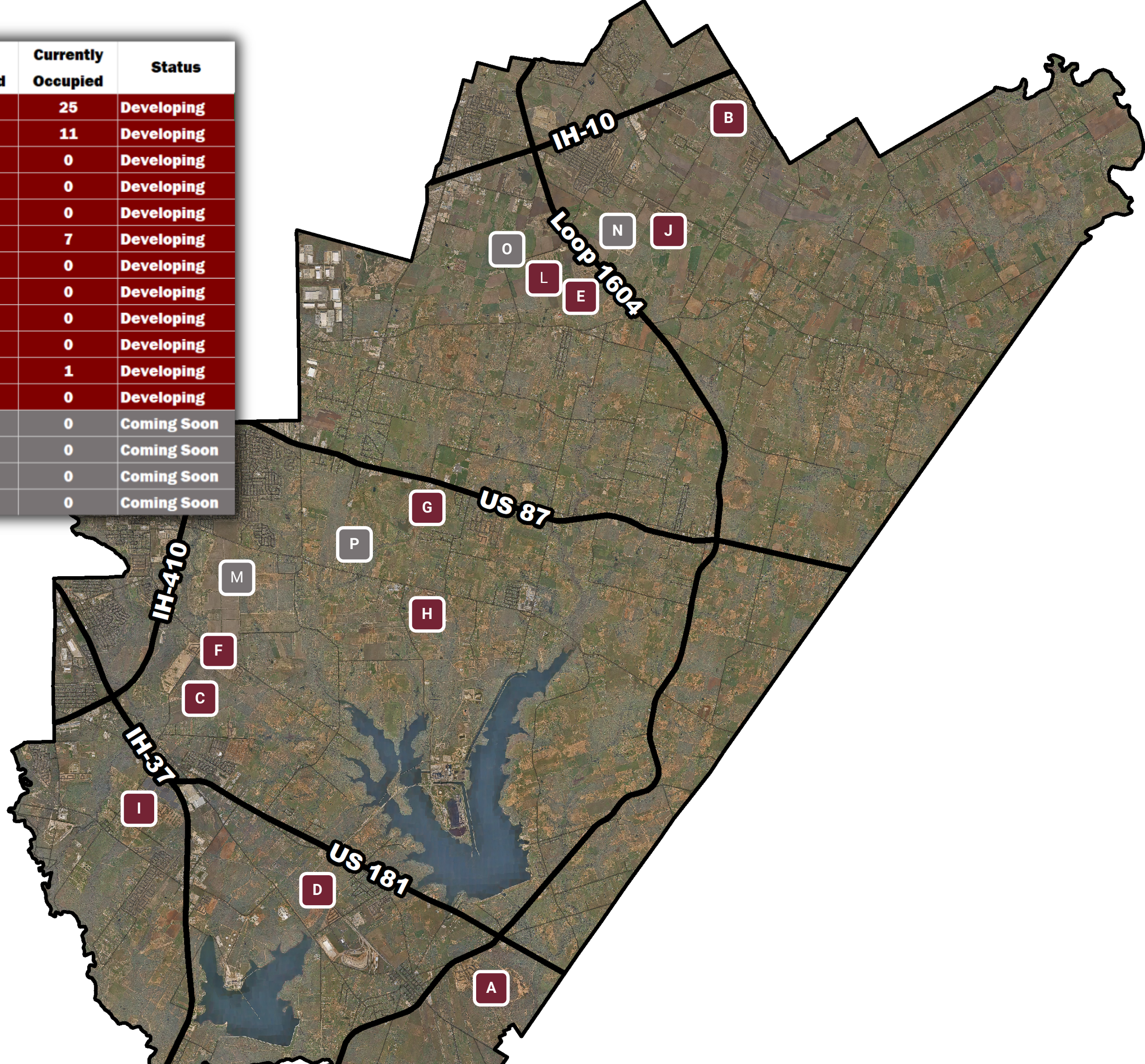
Lennar has started on the first section of this new development located between US 181 and Old Corpus Christi Road. The first section is off Richter Road

**1,526  
units**

## The Wilder

Ashton Woods has purchased ~430 acres along FM 1346; the builder will build its Starlight Homes brand here; Martinez Creek bisects the tract so ~300 acres outside flood plain

	Development	Units Projected	Currently Occupied	Status
A	Hickory Ridge	1,914	25	Developing
B	Avenida	1,712	11	Developing
C	Grace Gardens	1,641	0	Developing
D	Stone Garden	1,538	0	Developing
E	Wilder, The	1,526	0	Developing
F	Red Hawk Landing	1,282	7	Developing
G	Southeast Meadows	1,140	0	Developing
H	Sapphire Grove	964	0	Developing
I	Blue Wing Trails	850	0	Developing
J	Rose Valley	812	0	Developing
K	Agave	803	1	Developing
L	Vista Real	734	0	Developing
M	Boralis Tract	960	0	Coming Soon
N	White Wing Creek	900	0	Coming Soon
O	WBW Development Tract	715	0	Coming Soon
P	Pacheco Tract	600	0	Coming Soon



# Multi-Family and Build-to-Rent Communities

**6,680**

New multi-family  
units projected  
in ten years

**15.1%**

of all new housing  
projected to be  
multi-family

**241**

Projected BTR  
units in first five  
years

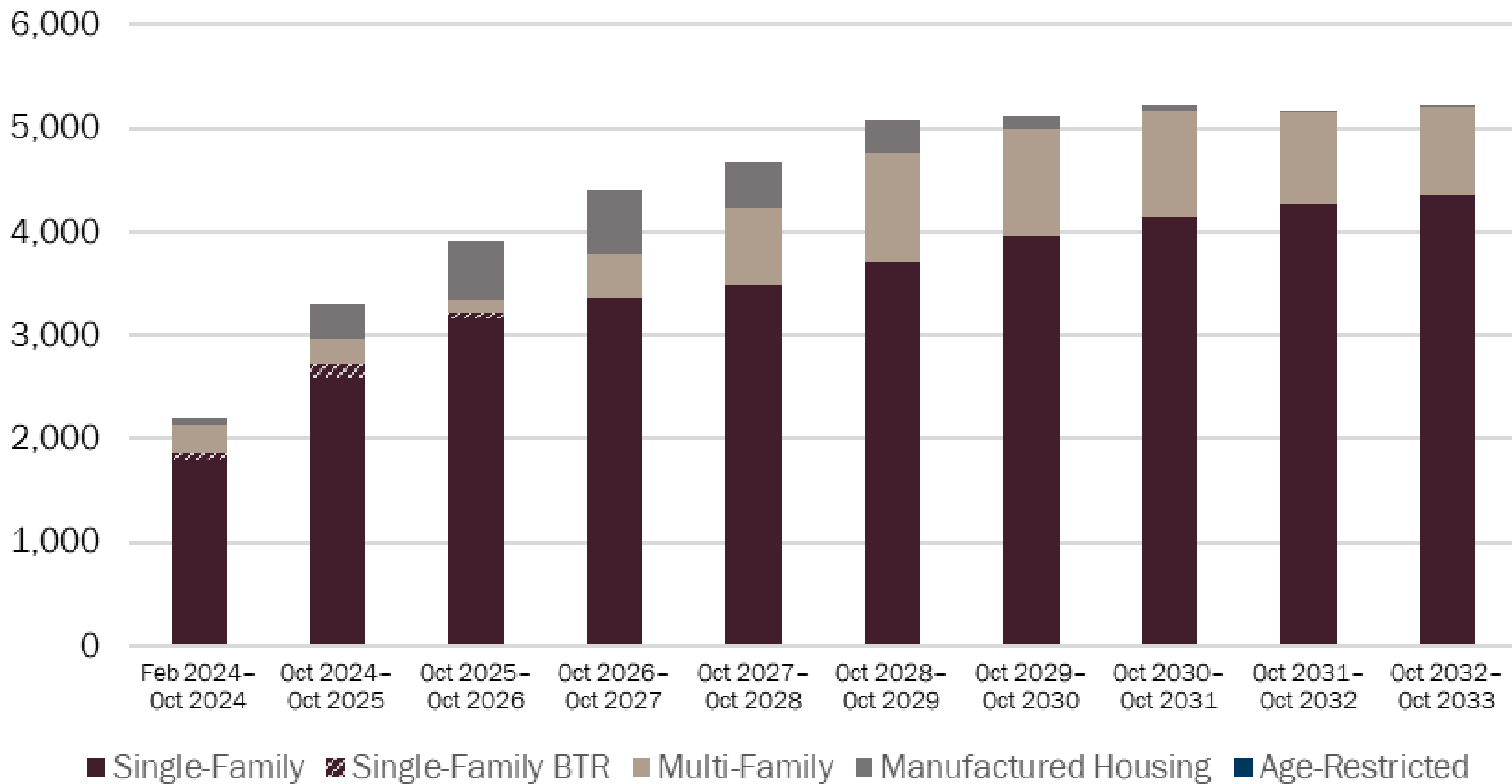
**1.6%**

of all new single-  
family in first five  
years is BTR





## Housing Projections by Year of Occupancy





# Demographic Study Components

**1**

**Demographic  
Trends**

**2**

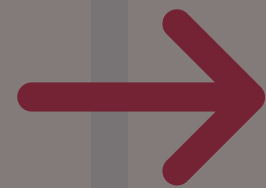
**Past and  
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Projections**



# Student Projection Factors

## Birth Rates

Births within ECISD have increased 39% in 8 years; new housing is the leading cause.

## New Housing Construction

Drives majority of growth, adding 600-1,800 students per year

## Incoming KG Class Size

Recent increases in KG pointing to growth in starter homes is starting to appear; as KG classes increase, there is a cumulative increase in all grade levels over time.

## Charter Schools

There are no new charter expansions planned that would directly impact ECISD; these must be monitored annually

## Regeneration

Regeneration of existing homes with students

## Factors Impacting Future Enrollment



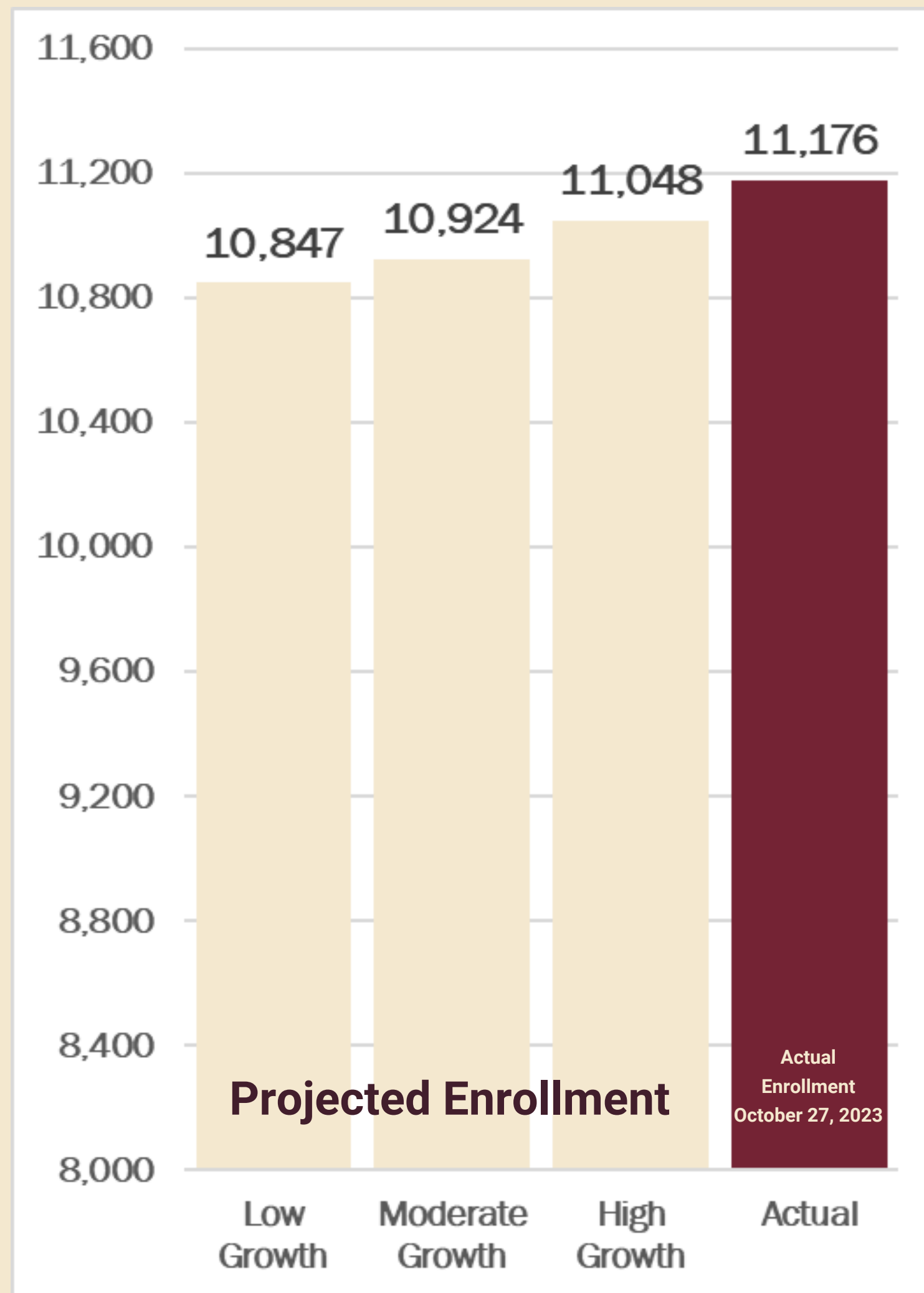
# Comparison to Projections

## What Changed?



### Enrollment

- In PK and KG, 74 students enrolled beyond what was projected last year.
- Increasing students per occupied home in many neighborhoods in the north. This is likely an effect of the construction of Honor Elementary.
- Grade 9 surge: 85 students were added beyond the projected enrollment. This could be due to charter growth in K-8. Students added between Grade 8 to Grade 9 has increased 93% in recent years compared to pre-2021 school years.
- Adjustments have been made based on these recent retention trends.



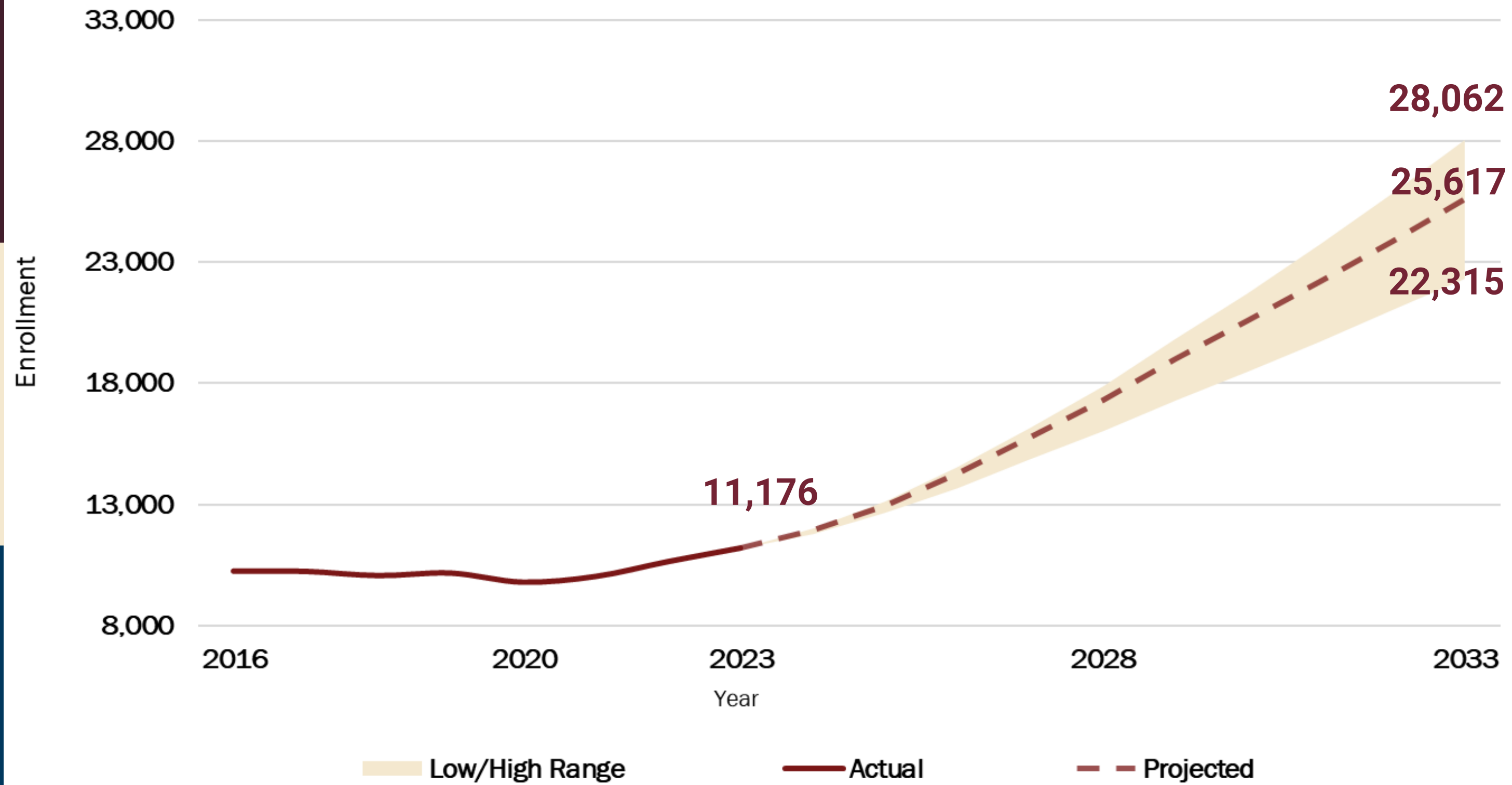
Source: PASA 2022-23 Demographic Study

# Three Scenarios of Growth

Every year starts with a clean slate -- not impacted by previous year's accuracy

Moderate Growth Scenario is "most likely" based on all the best information available at the time

Low and High Growth Scenarios are feasible, assuming changing circumstances



# Three Scenarios of Growth

**22,315**

2033 Enrollment

## Low Growth Assumptions

- Kindergarten enrollment reaches 1,300 by 2033.
- Increasing interest rates
- 2-3 additional charter schools open in or near ECISD within the next 3-5 years.

**25,617**

2033 Enrollment

## Moderate Growth Assumptions

- Kindergarten enrollment reaches 1,500 by 2033.
- Mortgage rates stabilize or drop slightly later in the year
- Annual new single-family housing occupancies reach 3,000 within 3 years.
- No major charter school expansions in the next 1-2 years.

**28,062**

2033 Enrollment

## High Growth Assumptions

- Mortgage rates decline to below 5%.
- No new charter schools open in ECISD.
- New developments marketed to second-time homebuyers increase and student densities in new homes increase over time.

# Residents Compared to Enrolled Students

## Resident Students

PASA measures students where they live

1. Geocoding by their address
2. Projecting new homes



## Enrolled Students

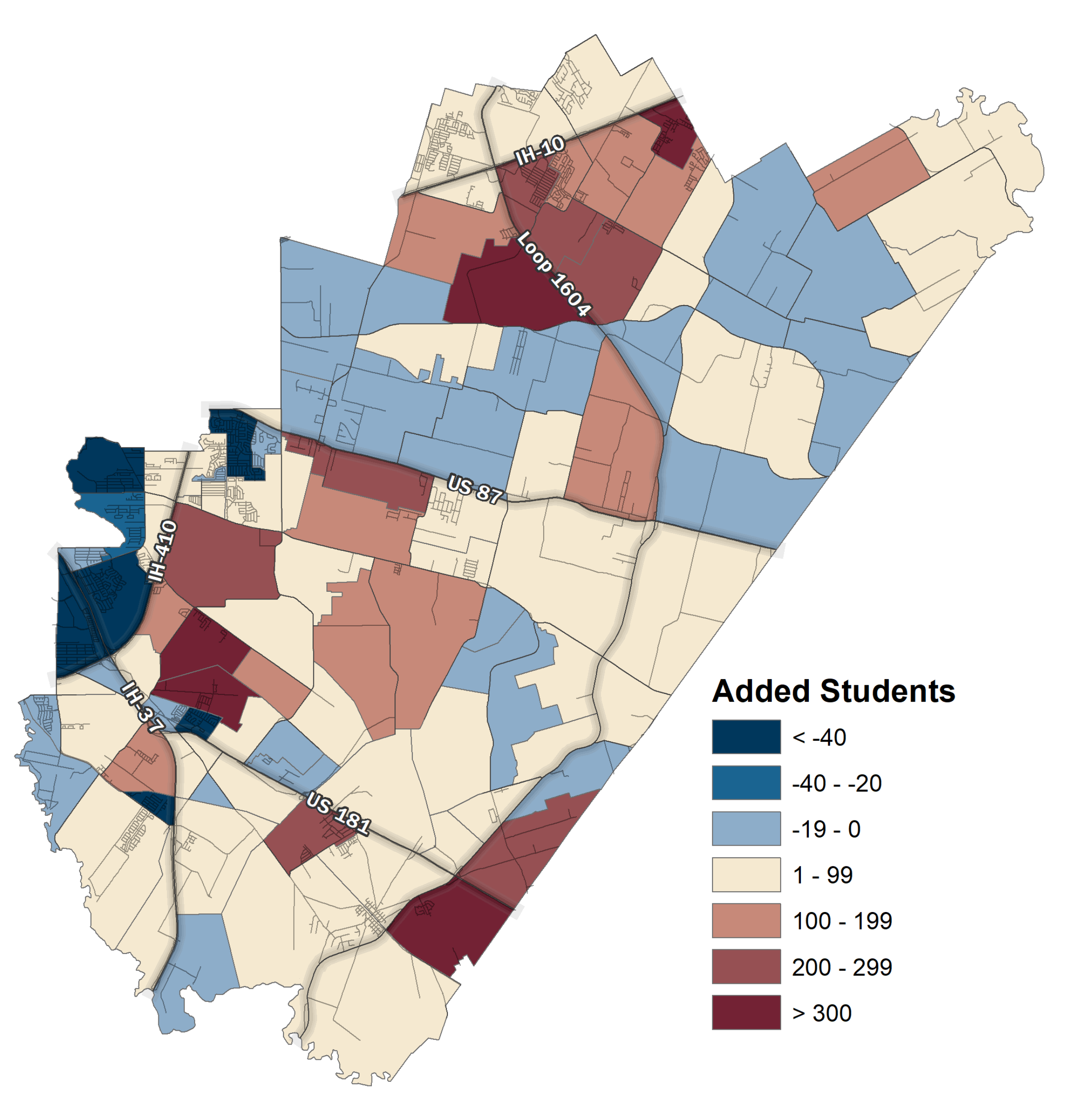
Transfers +  
Geocoded students =  
Enrolled students

Students transfer due to programs and many other reasons - attending a school other than their zoned school



# Projected Growth in Resident Elementary Students by Planning Unit

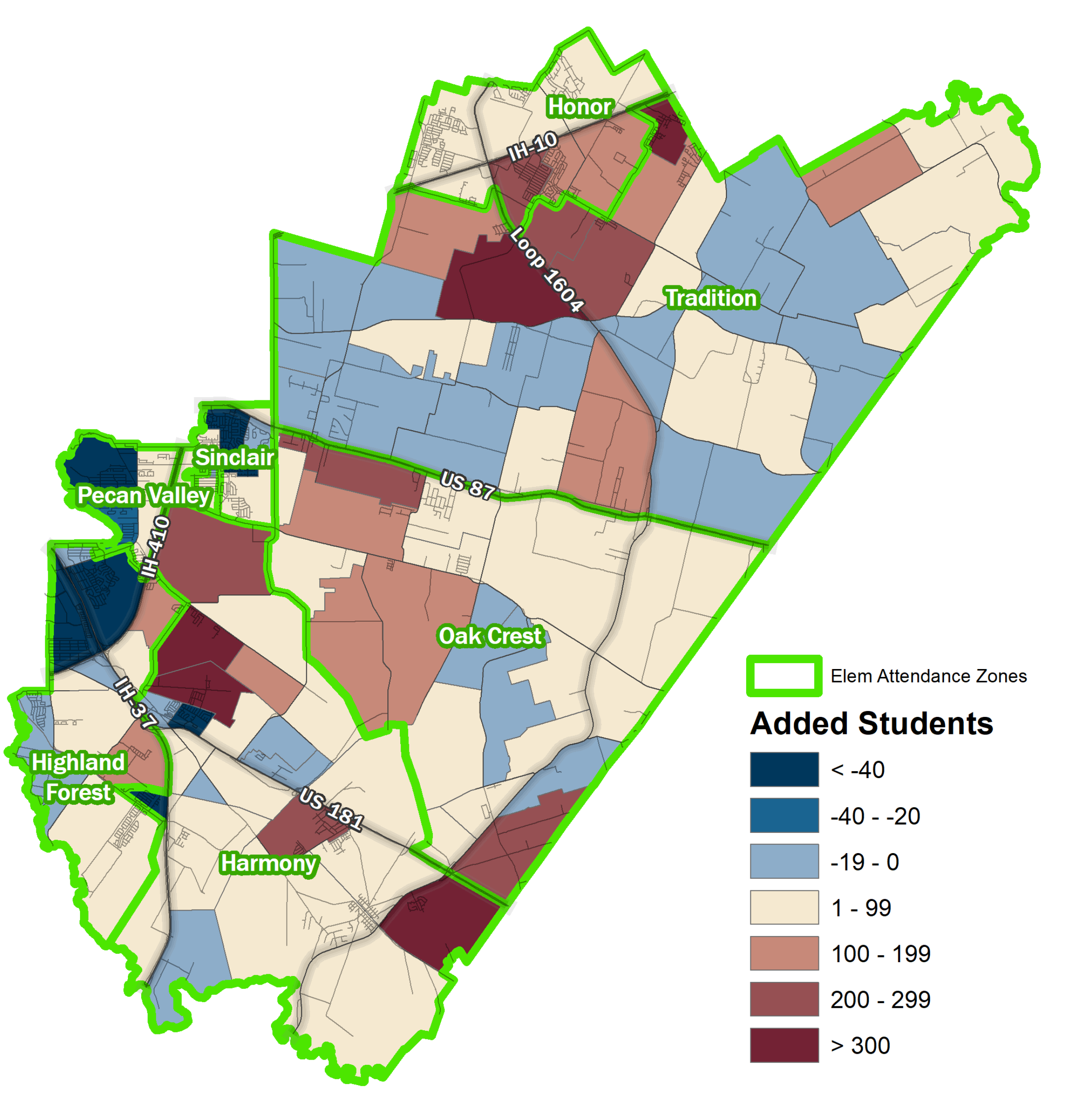
Fall 2023 through Fall 2033





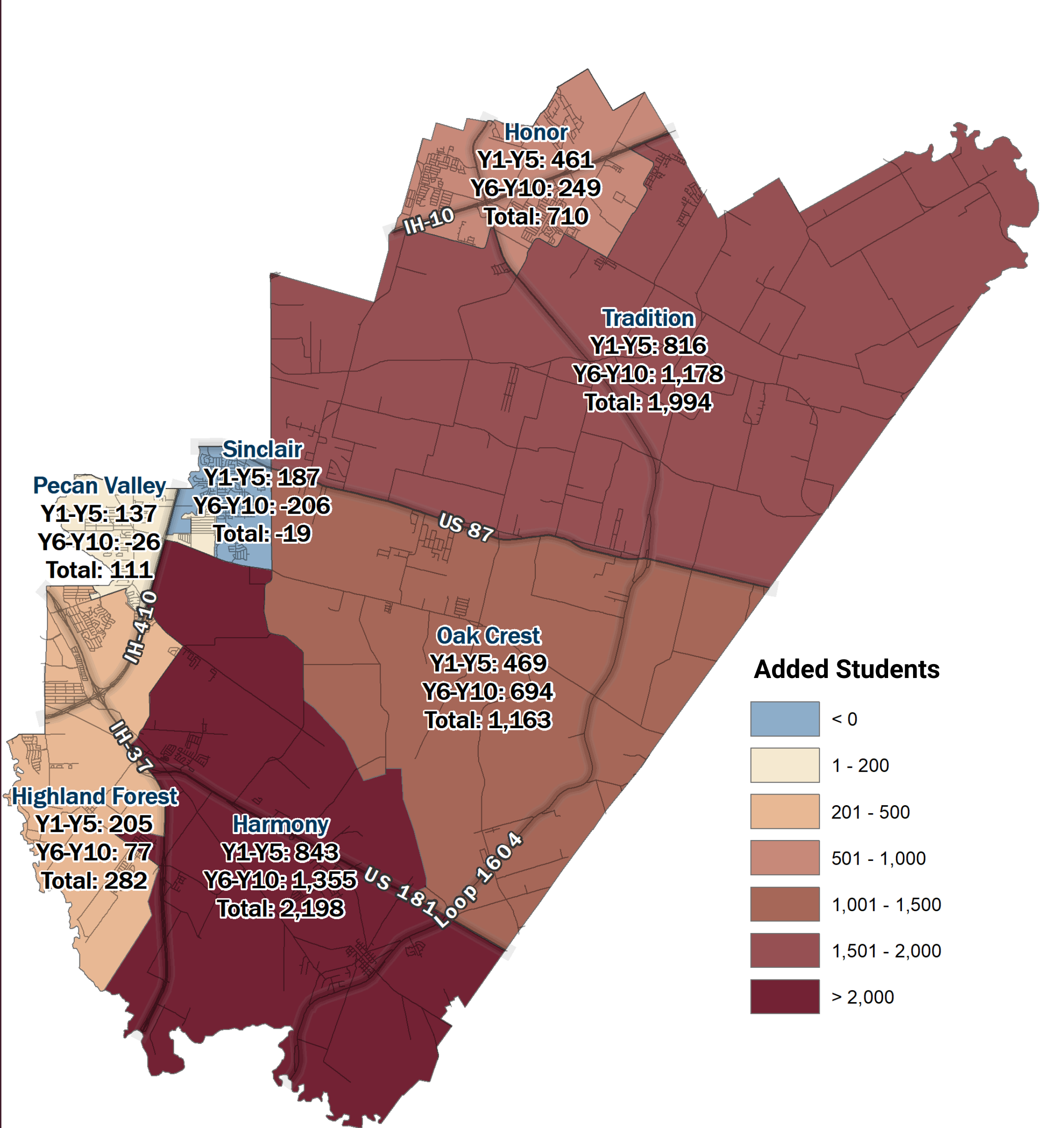
# Projected Growth in Resident Elementary Students by Planning Unit and Attendance Zone

Fall 2023 through Fall 2033



# Projected Growth in Resident Elementary Students by Attendance Zone

Fall 2023 through Fall 2033



# Elementary Long-Range Planning

	Projected <u>Enrolled</u> Students (Residents +/- Transfers)											
	Capacity	Current	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34
<b>Harmony</b>	<b>747</b>	<b>732</b>	<b>842</b>	<b>971</b>	<b>1,149</b>	<b>1,368</b>	<b>1,575</b>	<b>1,821</b>	<b>2,038</b>	<b>2,294</b>	<b>2,594</b>	<b>2,930</b>
<b>Highland Forest</b>	<b>713</b>	<b>670</b>	<b>715</b>	<b>769</b>	<b>806</b>	<b>849</b>	<b>875</b>	<b>909</b>	<b>928</b>	<b>928</b>	<b>946</b>	<b>952</b>
<b>Honor</b>	<b>901</b>	<b>636</b>	<b>742</b>	<b>849</b>	<b>963</b>	<b>1,039</b>	<b>1,097</b>	<b>1,162</b>	<b>1,210</b>	<b>1,252</b>	<b>1,303</b>	<b>1,346</b>
<b>Oak Crest</b>	<b>713</b>	<b>672</b>	<b>685</b>	<b>762</b>	<b>887</b>	<b>1,022</b>	<b>1,141</b>	<b>1,277</b>	<b>1,398</b>	<b>1,532</b>	<b>1,686</b>	<b>1,835</b>
<b>Pecan Valley</b>	<b>730</b>	<b>525</b>	<b>551</b>	<b>567</b>	<b>593</b>	<b>636</b>	<b>662</b>	<b>673</b>	<b>658</b>	<b>650</b>	<b>645</b>	<b>636</b>
<b>Salado</b>	<b>756</b>	<b>716</b>	<b>716</b>	<b>716</b>	<b>716</b>	<b>716</b>	<b>716</b>	<b>716</b>	<b>716</b>	<b>716</b>	<b>716</b>	<b>716</b>
<b>Sinclair</b>	<b>756</b>	<b>709</b>	<b>792</b>	<b>841</b>	<b>873</b>	<b>891</b>	<b>896</b>	<b>835</b>	<b>781</b>	<b>739</b>	<b>717</b>	<b>690</b>
<b>Tradition</b>	<b>901</b>	<b>504</b>	<b>587</b>	<b>724</b>	<b>895</b>	<b>1,095</b>	<b>1,320</b>	<b>1,531</b>	<b>1,756</b>	<b>2,010</b>	<b>2,255</b>	<b>2,498</b>
PreK for SA		64	64	64	64	64	64	64	64	64	64	64
<b>Elementary</b>	<b>6,217</b>	<b>5,228</b>	<b>5,694</b>	<b>6,263</b>	<b>6,946</b>	<b>7,680</b>	<b>8,346</b>	<b>8,988</b>	<b>9,549</b>	<b>10,185</b>	<b>10,926</b>	<b>11,667</b>

↑  
**ES #9**  
**South**

↑   ↑  
**ES #10** **ES #11**  
**North** **South**

↑  
**ES #12**  
**North**

↑  
**ES #13**  
**South**

## Moderate Growth Scenario

Transfers in 2023-24 are assumed to remain equivalent in future years.

Capacity = "Soft Capacity" as defined by LPA Capacity Study, April 2019

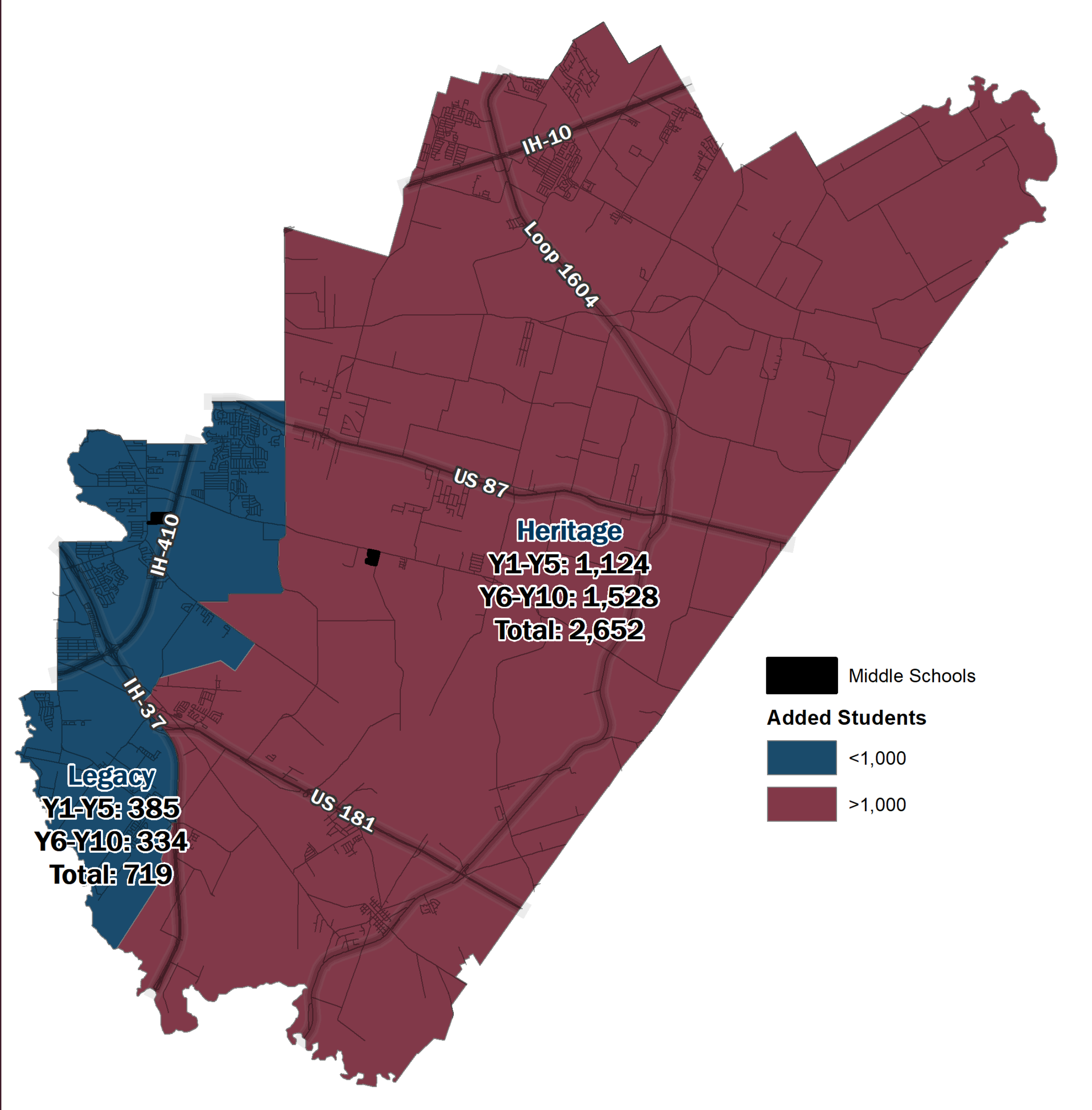
Future capacities include additions of 8 classrooms each at Highland Forest and Oak Crest in 2025-26

Yellow highlights represent the years in which projected student population exceeds 120% "soft capacity".




# Projected Growth in Resident Middle School Students by Attendance Zone

Fall 2023 through Fall 2033




# Middle School Long-Range Planning

	Projected Enrolled Students (Residents +/- Transfers)											
	Capacity	Current	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34
<b>Heritage</b>	<b>1,335</b>	<b>1,189</b>	<b>1,277</b>	<b>1,517</b>	<b>1,728</b>	<b>2,004</b>	<b>2,298</b>	<b>2,686</b>	<b>3,013</b>	<b>3,320</b>	<b>3,571</b>	<b>3,826</b>
<b>Legacy</b>	<b>1,342</b>	<b>1,112</b>	<b>1,130</b>	<b>1,196</b>	<b>1,304</b>	<b>1,394</b>	<b>1,462</b>	<b>1,603</b>	<b>1,739</b>	<b>1,839</b>	<b>1,817</b>	<b>1,796</b>
CAST Lead (8th grade)		35	45	55	65	75	85	85	85	85	85	85
Other		30	30	30	30	30	30	30	30	30	30	30
<b>Middle School</b>	<b>2,677</b>	<b>2,366</b>	<b>2,482</b>	<b>2,798</b>	<b>3,127</b>	<b>3,503</b>	<b>3,875</b>	<b>4,404</b>	<b>4,867</b>	<b>5,274</b>	<b>5,503</b>	<b>5,737</b>



**Valor MS  
North**



**MS #4  
South**

## Moderate Growth Scenario

Transfers in 2022-23 are assumed to remain equivalent in future years, except participation in CAST Lead HS is projected to increase slightly.

Capacity = "Soft Capacity" as defined by LPA Capacity Study, April 2019

Yellow highlights represent the years in which projected student population exceeds 120% "soft capacity".

# High School Long-Range Planning

	Projected Enrolled Students (Residents +/- Transfers)											
	Capacity	Current	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34
<b>East Central HS</b>	<b>3,666</b>	<b>3,263</b>	<b>3,468</b>	<b>3,603</b>	<b>3,864</b>	<b>4,198</b>	<b>4,633</b>	<b>5,142</b>	<b>5,666</b>	<b>6,246</b>	<b>6,923</b>	<b>7,676</b>
<b>CAST Lead HS</b>	<b>600</b>	<b>187</b>	<b>214</b>	<b>244</b>	<b>284</b>	<b>324</b>	<b>363</b>	<b>397</b>	<b>426</b>	<b>450</b>	<b>465</b>	<b>475</b>
Other		62	62	62	62	62	62	62	62	62	62	62
<b>High School</b>	<b>4,266</b>	<b>3,512</b>	<b>3,744</b>	<b>3,909</b>	<b>4,210</b>	<b>4,584</b>	<b>5,058</b>	<b>5,601</b>	<b>6,154</b>	<b>6,758</b>	<b>7,450</b>	<b>8,213</b>

## Moderate Growth Scenario

### CAST Lead Enrollment:

- excludes 8th grade students (8th graders enrolled in CAST are counted on Middle School page)
- estimates 9th-12th grade population assuming each incoming 9th grade class will increase in size up to a maximum of 120 students per grade.

Capacity = "Soft Capacity" as defined by LPA Capacity Study, April 2019

Yellow highlights represent the years in which projected student population exceeds 120% "soft capacity".

# Long-Range Planning Summary

	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31	2031-32	2032-33	2033-34	post-2034
<b>Elementary</b>	Honor ES	ES #9 South		ES #10 North	ES #11 South		ES #12 North		ES #13 South		
<b>Middle School</b>			Valor MS				MS #4 South				
<b>High School</b>				HS #2						HS #3 →	



# Questions?



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