

Balsz Elementary School District

Demographic and Enrollment Analysis Update

Governing Board Presentation

October 21, 2025



APPLIED ECONOMICS

Study Scope

Enrollment Trends

- Total and grade level characteristics
- Geographic distribution
- Alternative providers

Demographic Characteristics

- Population characteristics
- Household tenure and age structure
- Housing supply and occupancy rates

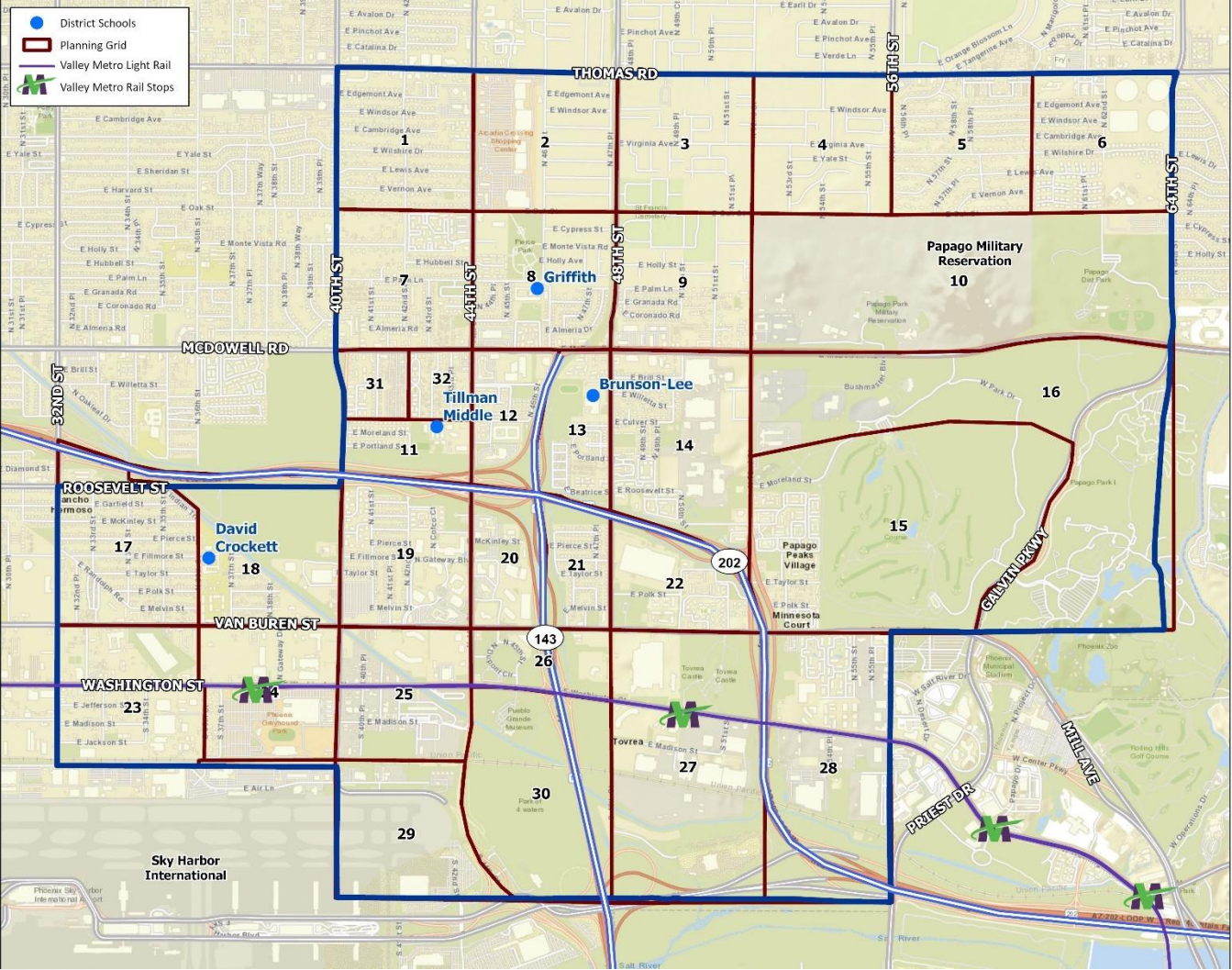
Residential Development Impacts

- Current development activity
- Housing market conditions
- Future development potential

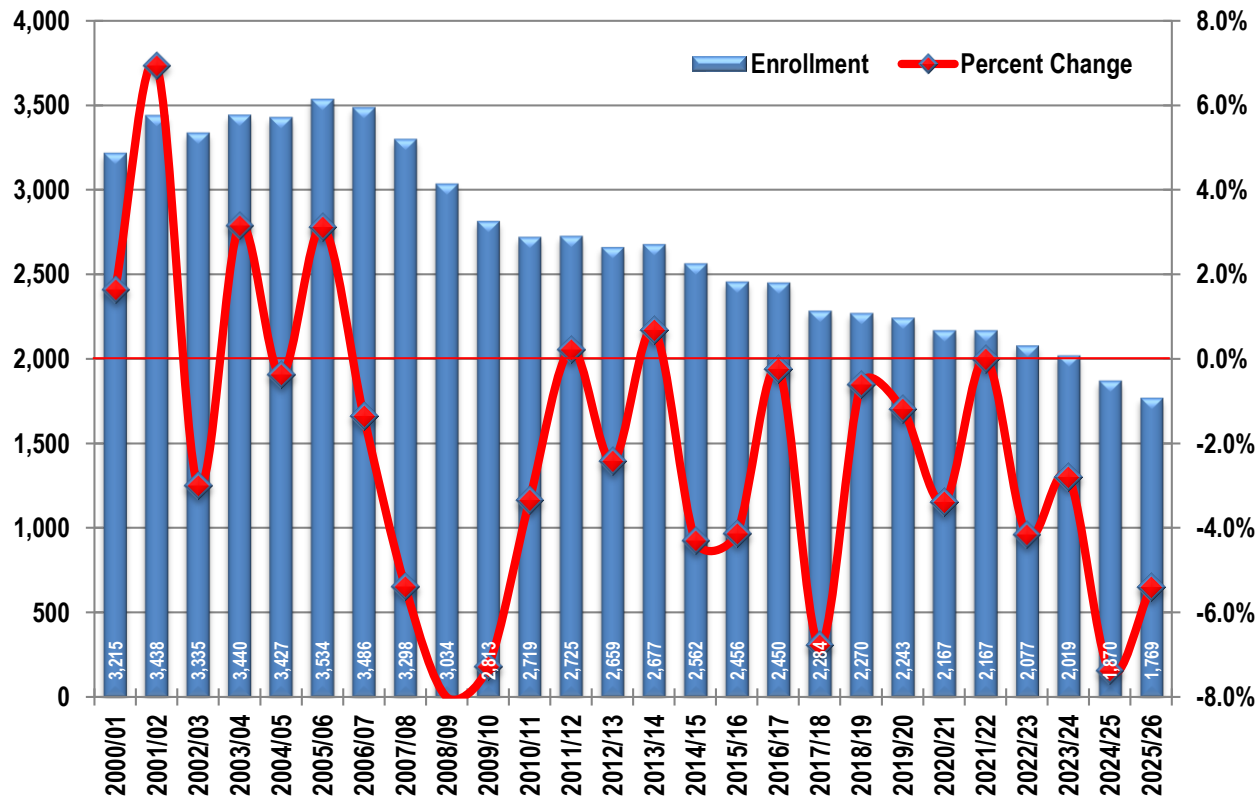
Enrollment Projections

- District
- Sub-District

Sub-District Planning “Grids”



Fall K-8 Headcount Enrollment

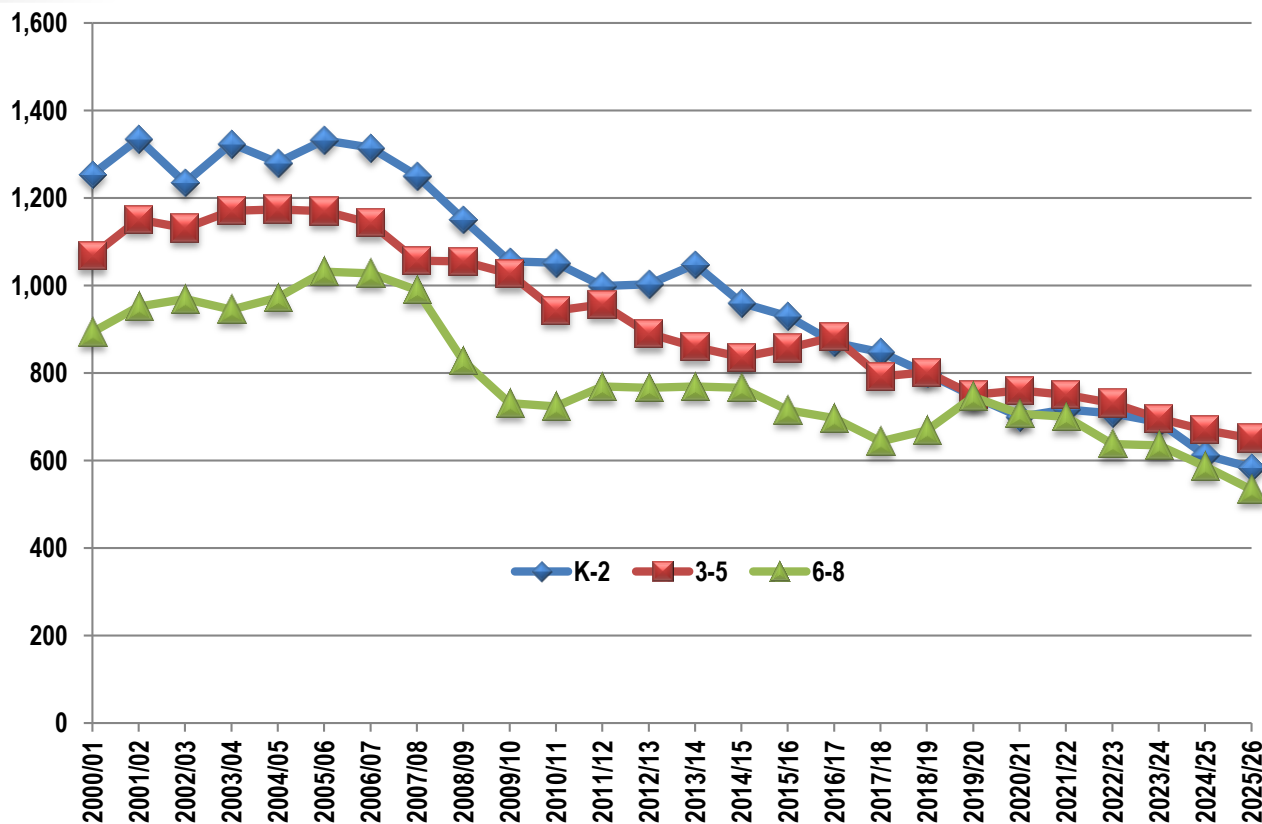


Source: Arizona Department of Education; Balsz School District.

Total enrollment has fallen steadily since 2005/06, declining by a total of 1,765 students (50%), about 1,300 of which was due to a shrinking school-age population.

Recent in-District declines are linked to expanding education alternatives, rising housing prices and limited housing choices.

Enrollment By Grade Cohort



Source: Arizona Department of Education; Balsz School District.

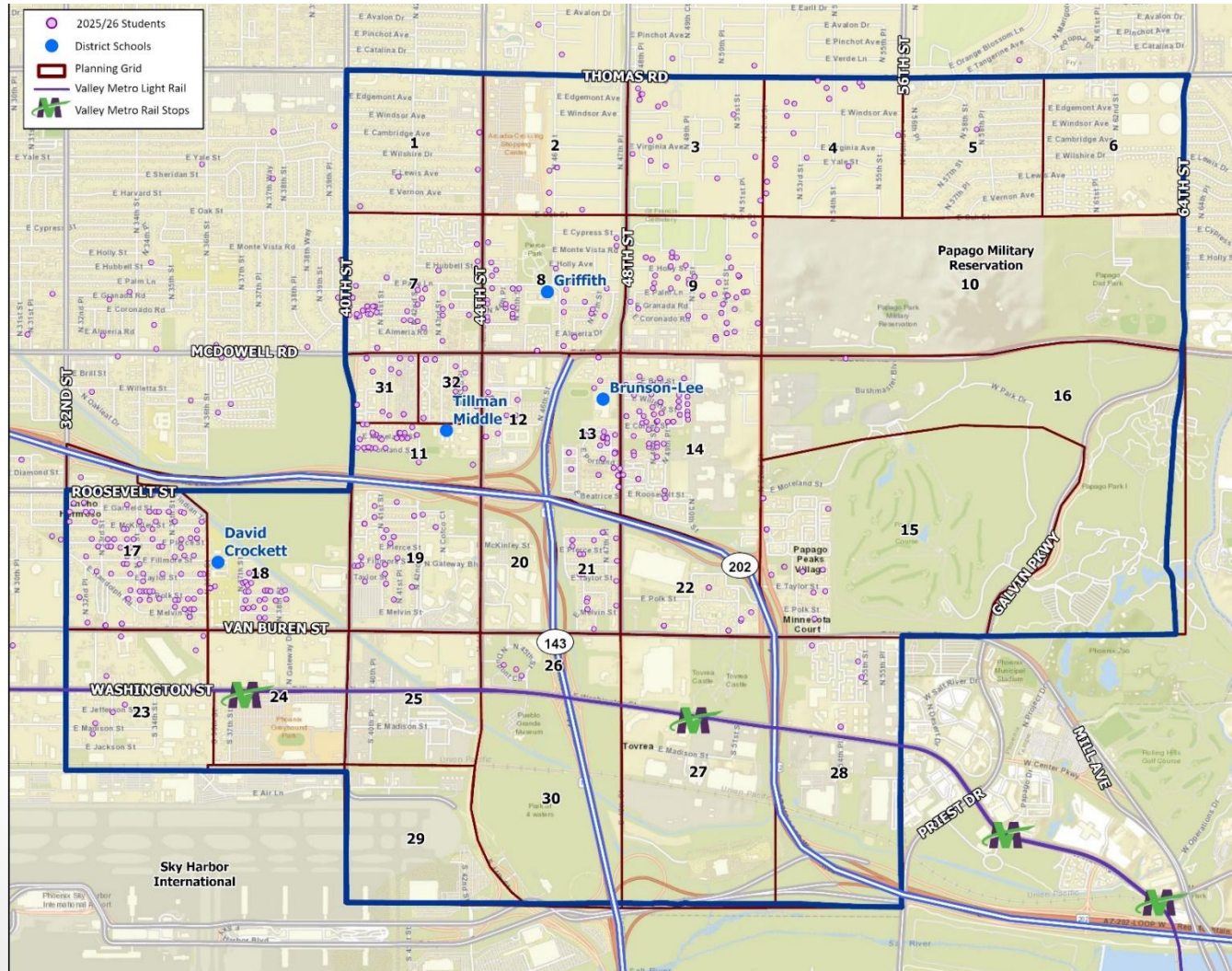
Enrollment in the K-2 cohort has been in decline since 2006/07, and the 3-5 cohorts has followed suit. However, the gap between the size of the groups has narrowed.

The 6-8 grade cohort, which has been historically smaller, experienced steeper declines during the Great Recession, but has changed very little since then.

Distribution of K-8 Students

2025/26

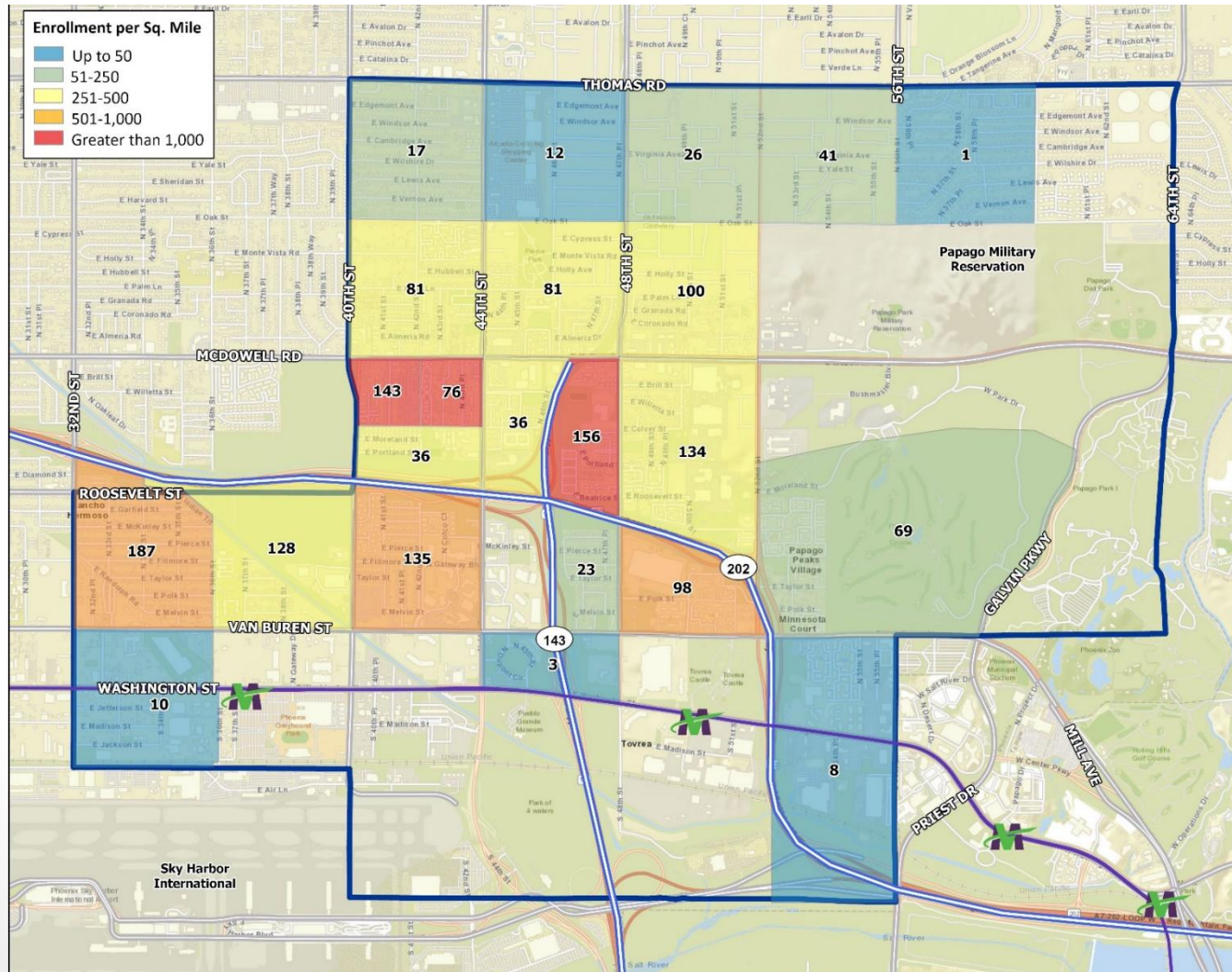
Total = 1,769 students



In-District Student Distribution

K-8 Enrollment by Grid: 2025/26

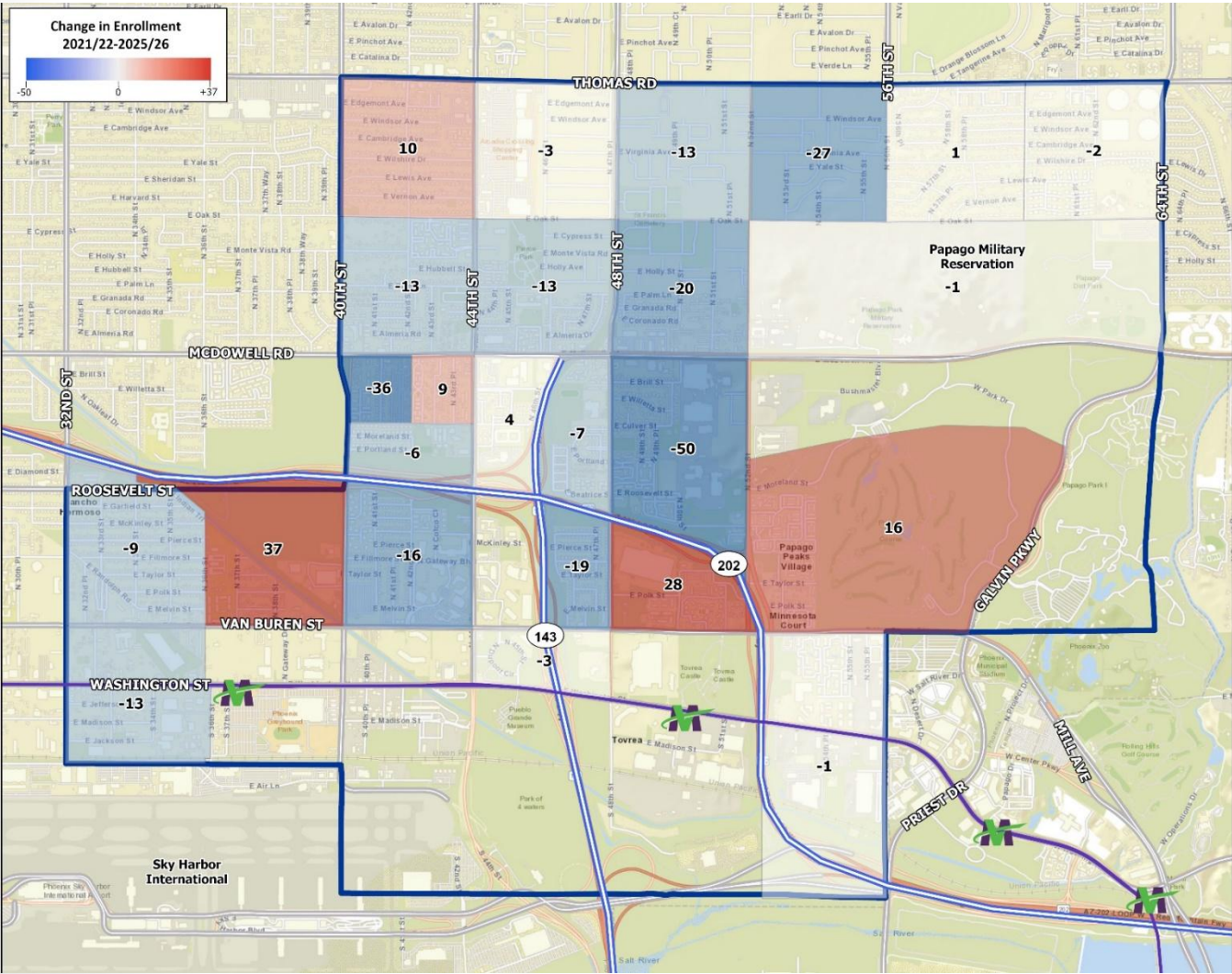
Total = 1,602 Students



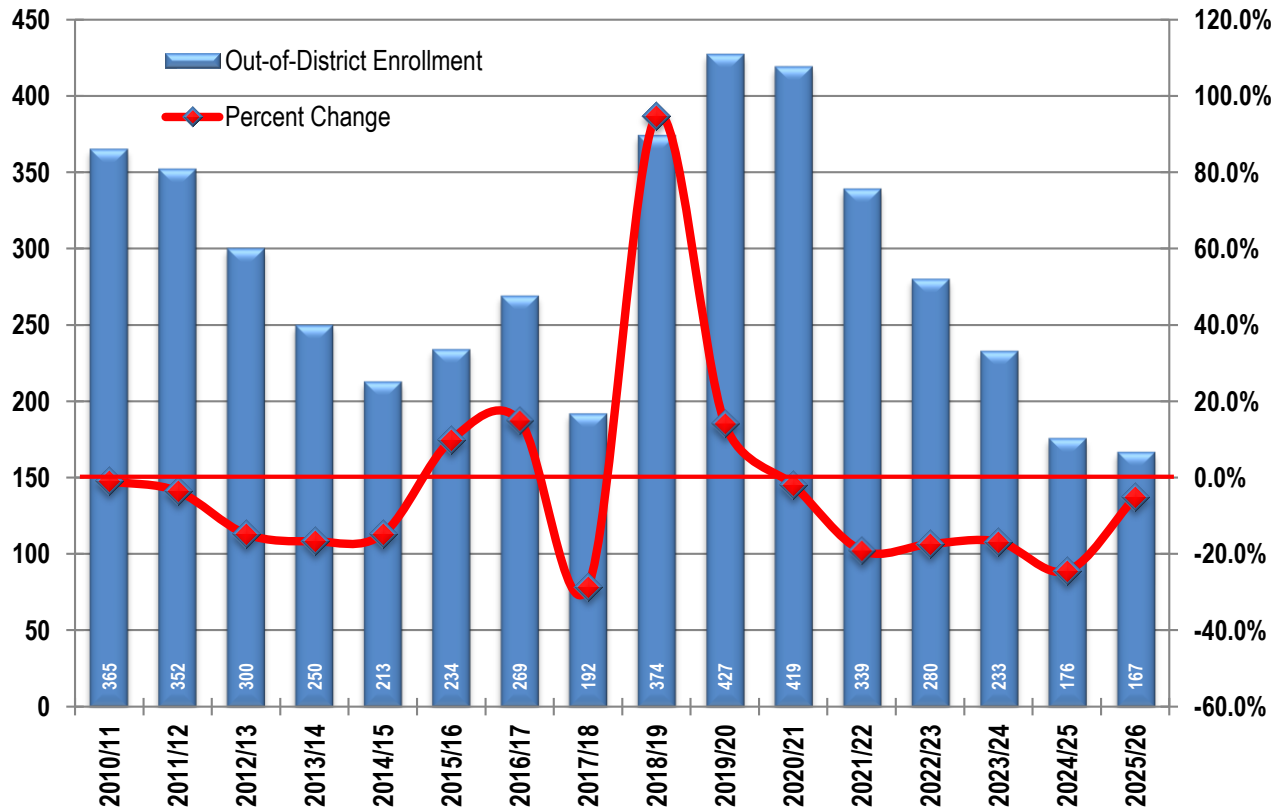
In-District Student Distribution

K-8 Enrollment Change: 2020/21-2025/26

Decline of 146 Students



Out-of-District Enrollment

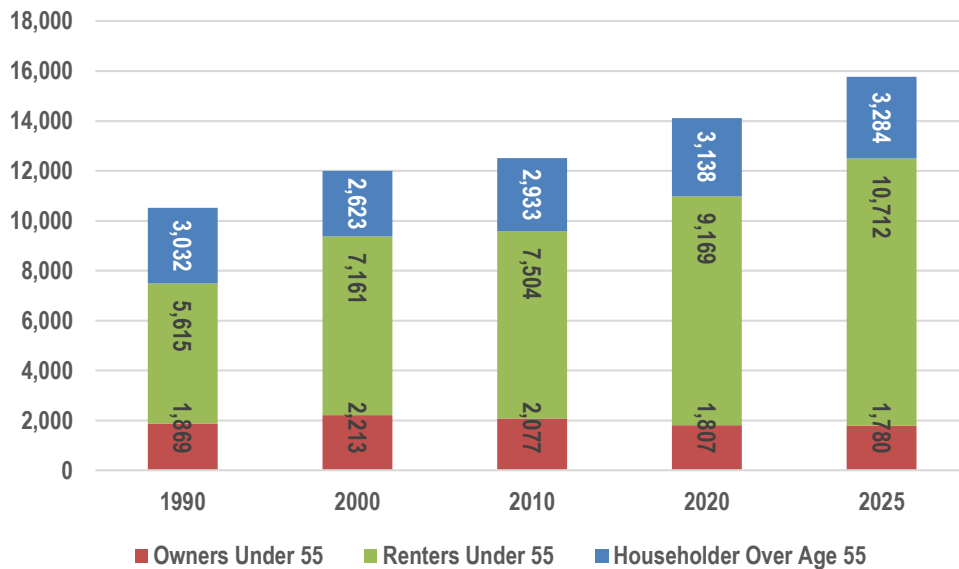
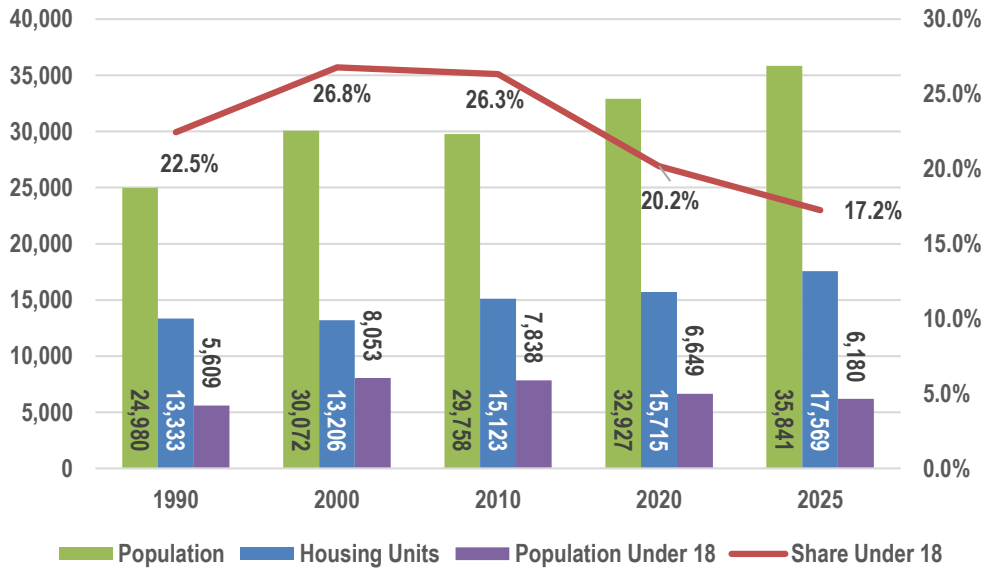


Source: Arizona Department of Education; Balsz School District.

As of 2025/26, there are 167 students from outside the District. This represents a 252-student-decline since 2020/21, far more than the 148-student loss inside the District.

Out-of-District enrollment has fluctuated much more than in most districts, but many are currently experiencing declines due to the shrinking of the school-age population nearly everywhere, and more recently fueled by ESAs.

Demographic Trends



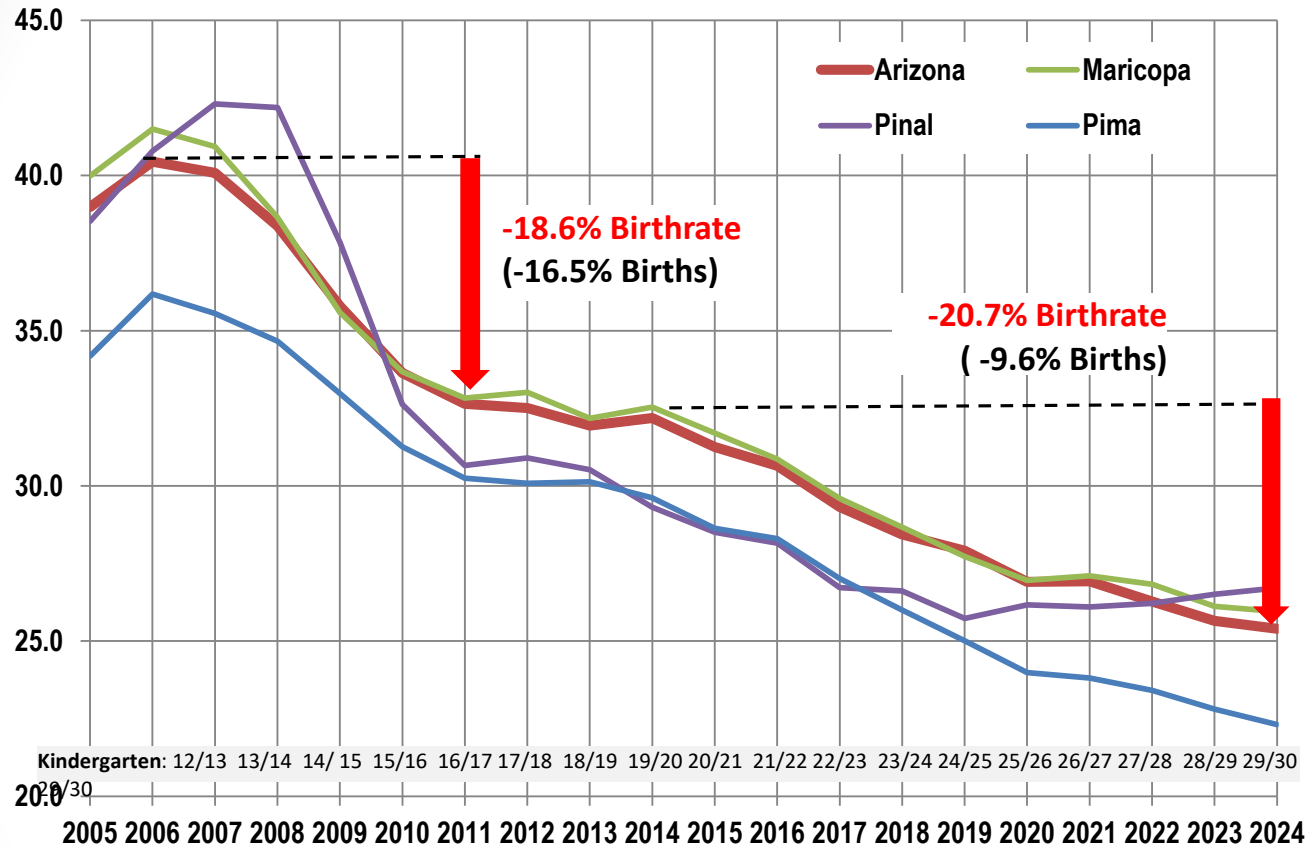
Population and housing continue to grow, but the share and number of persons under age 18 is declining.

The population under 18 is shrinking due to low birth rates and a significant shift in the age and family structure of District households.

While the number of homeowners under age 55 has been in slow decline, the quantity of renters of similar age has surged but not with families with children.

Arizona Birth Rates

Births per 1,000 people aged 15 to 45 years



Kindergarten: 12/13 13/14 14/15 15/16 16/17 17/18 18/19 19/20 20/21 21/22 22/23 23/24 24/25 25/26 26/27 27/28 28/29 29/30

2005

2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024

Sources: Arizona Department of Health Services; U.S. Census Bureau; Applied Economics, 2025.

Birth rates in Arizona plummeted by nearly 19% during the Great Recession, with a 17% decline in the total number of births in the State of Arizona from 102,700 to 85,100 births per year.

Birth rates stabilized briefly after 2011 but dropped another 21% through 2024 when there were 78,344 births statewide, which was up from 77,776 births in 2023.

Public Alternative Schools

Local Area Charter Schools

School Name	Address	Zip	Grades	Total K-8*
Career Success School - SAGE Campus	108 N 40th St	85034	K-8th	123
Great Hearts Academies - Veritas Prep	4041 E Thomas Rd	85018	6th-12th	436
Great Hearts Academies- Archway Veritas	6201 N 35th Ave	85017	K-5th	717
Hirsch Academy	3120 N 32nd St	85018	K-6th	150
Sonoran Science Academy - Phoenix	3102 N 56th St	85018	K-12th	282
Total				1,708

Source: Arizona Department of Education; Applied Economics 2025.

*2025/26 September ADM Data

Local area charter schools enroll about 1,700 students, having declined from a peak of just over 1,800 students – only about 260 reside in the District.

Top Public Alternative Providers For District Students

Providers	Type	ADM
Scottsdale Unified District	District	363
Creighton Elementary District	District	264
Daisy Education Corporation dba Sonoran Science Academy - Phoenix	Charter	121
Wilson Elementary District	District	91
Archway Classical Academy Veritas	Charter	66
ASU Preparatory Academy	Charter	32
Veritas Preparatory Academy	Charter	31
Hirsch Academy A Challenge Foundation	Charter	28
Phoenix Elementary District	District	28
Tempe School District	District	25
Madison Elementary District	District	19
Mesa Unified District	District	18
Career Success Schools	Charter	17
Isaac Elementary District	District	15
Self Development Academy-Phoenix	Charter	13

Source: Arizona Department of Education; Applied Economics 2025.

Local area charter schools serve only a small fraction of the 1,350 District students enrolled with other public providers, the largest of which are neighboring school districts.

Private School Enrollment

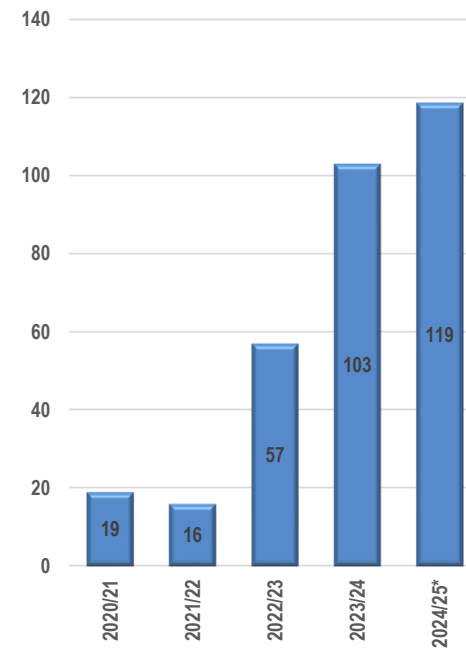
School Name	Address	Zip	Grades	Total K-8
Arcadia Montessori School	5115 E Virginia Ave	85008	K	7
New Way Academy	5048 E Oak Street	85008	1st-12th	135
St Theresa Catholic School	5001 E Thomas Rd	85018	K-8th	331
Abiding Savior School	515 E Continental Dr	85281	PK-K	10
Bella Vista College Preparatory Schhol	3250 N 40th St	85018	7th-12th	2
Christ Lutheran School	3901 E Indian School Road	85018	K-8th	492
Valiant College Preparatory School	3024 E Fillmore Street	85008	6th-12th	22
Total				999

Sources: Private School Universe Survey (PSS) 2023-24 School Year; Private School Review 2025.

There are seven private schools in and around the District that combined enroll 1,000 students, although, the number living in the District is likely a small fraction of that.

The number of students living in the District who have Enrollment Scholarship Accounts (ESAs) has surged; however, most of the early increases were students already attending a private school.

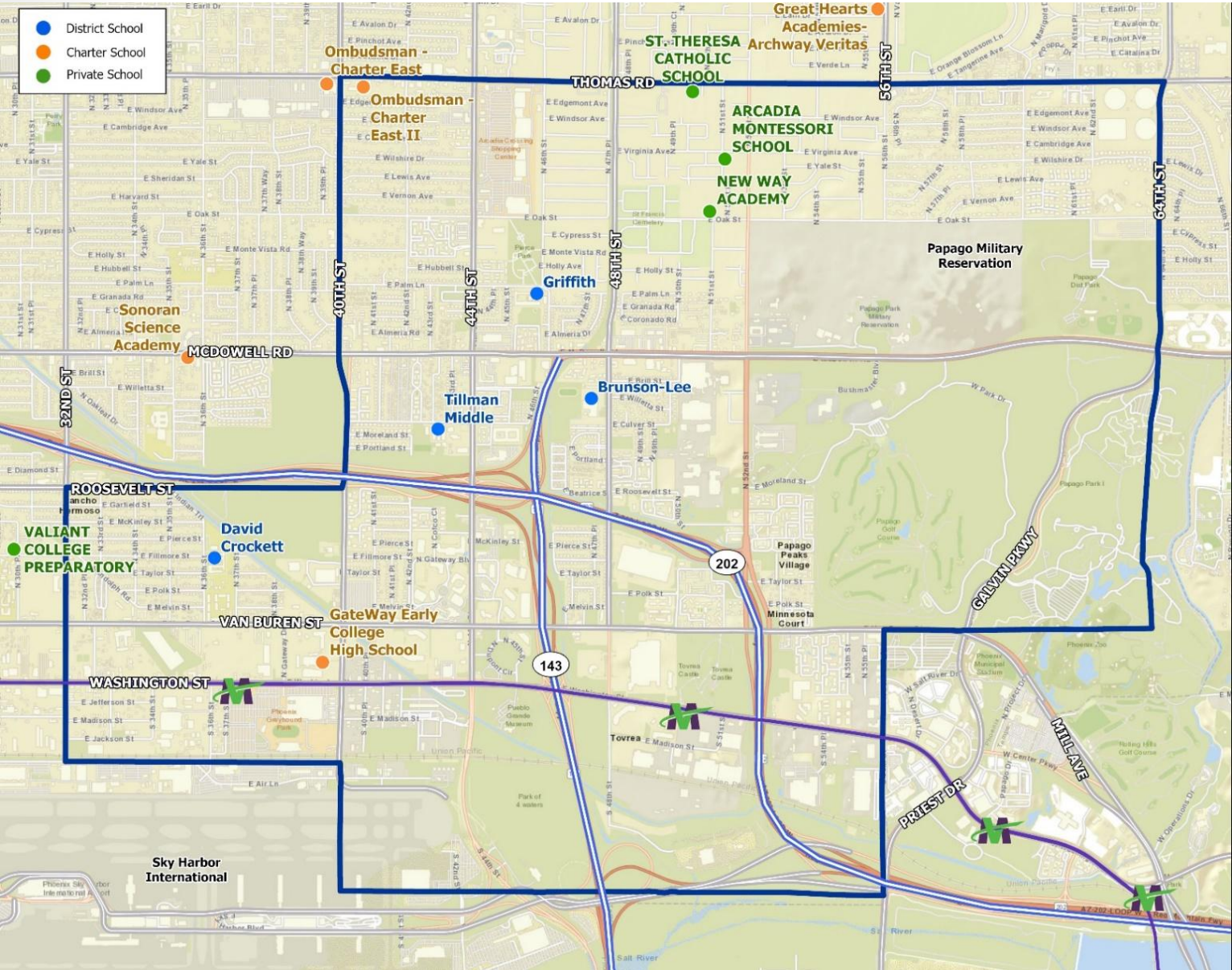
ESAs Awarded



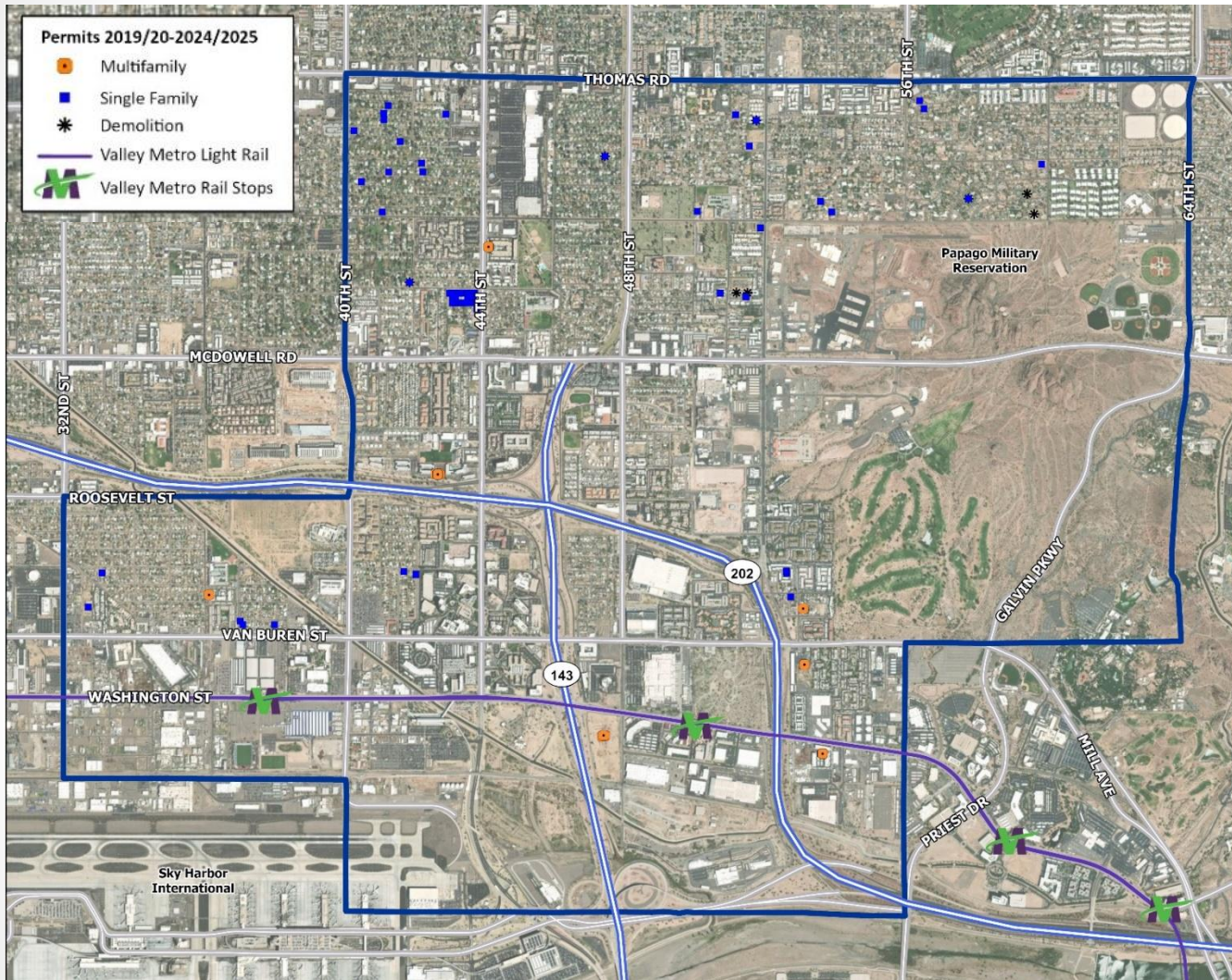
Source: Arizona Department of Education..

*Based on zip code data.

Alternative Providers



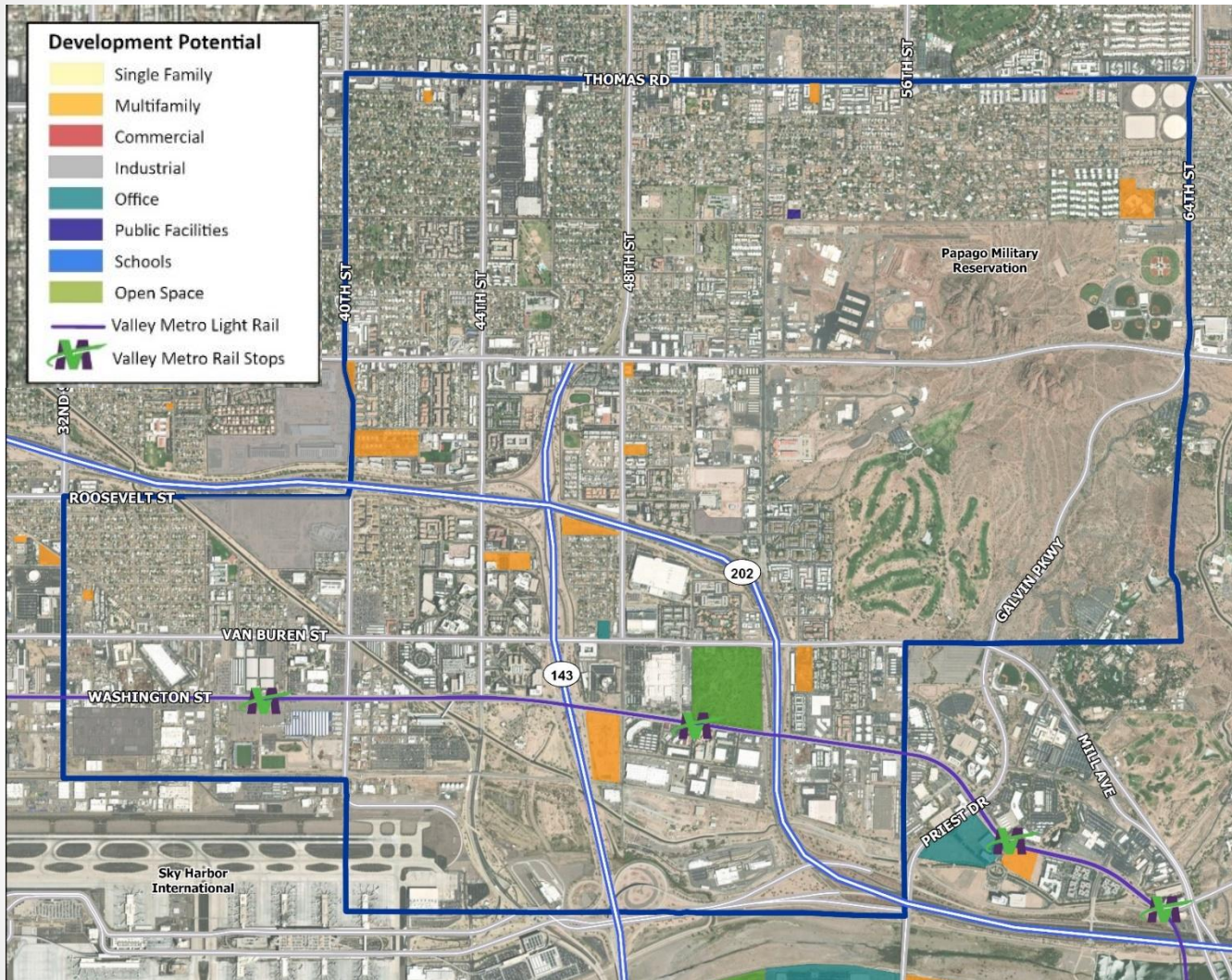
Development Activity



About 2,200 new housing units have been permitted in the past ten years, all but 184 of which were apartments.

The majority (80%) of new apartment units were in urban lifestyle projects that typically don't house many families.

Development Potential



Another 2,000 housing units are possible, nearly one-third of which would come from infill projects, so the timing is unknown.

Of the known potential nearly all are multifamily units, but include more product variety including single family build to rent.

Demographic Projections

Year	Population	Housing Units		Occupancy Rate	Vacant Units	Households		Pop/HH
		Total	Change			Total	Change	
2000/01	30,072	13,206		90.8%	1,210	11,996		2.507
2010/11	29,758	15,123	127	82.7%	2,609	12,514	67	2.378
2020/21	32,927	15,715	87	90.5%	1,601	14,114	96	2.333
2021/22	33,673	16,184	469	89.8%	1,651	14,533	419	2.317
2022/23	34,071	16,398	214	90.0%	1,640	14,758	225	2.309
2023/24	34,607	16,741	343	90.0%	1,674	15,067	309	2.297
2024/25	35,422	17,364	623	89.5%	1,823	15,541	474	2.279
2025/26	35,841	17,569	205	89.8%	1,792	15,777	236	2.272
2026/27	36,196	17,830	261	89.7%	1,836	15,994	217	2.263
2027/28	36,535	17,870	40	90.5%	1,698	16,172	179	2.259
2028/29	37,035	18,192	322	90.5%	1,728	16,464	291	2.249
2029/30	37,445	18,462	270	90.5%	1,754	16,708	244	2.241
2030/31	37,625	18,597	135	90.5%	1,767	16,830	122	2.236
2031/32	37,876	18,774	177	90.5%	1,784	16,990	160	2.229
2032/33	38,393	19,107	333	90.5%	1,815	17,292	301	2.220
2033/34	38,399	19,142	35	90.5%	1,818	17,324	32	2.217
2034/35	38,533	19,251	109	90.5%	1,829	17,422	99	2.212
2035/36	38,642	19,346	95	90.5%	1,838	17,508	86	2.207
2026/27 - 2035/36			1,777				1,731	

Source: Applied Economics, 2025.

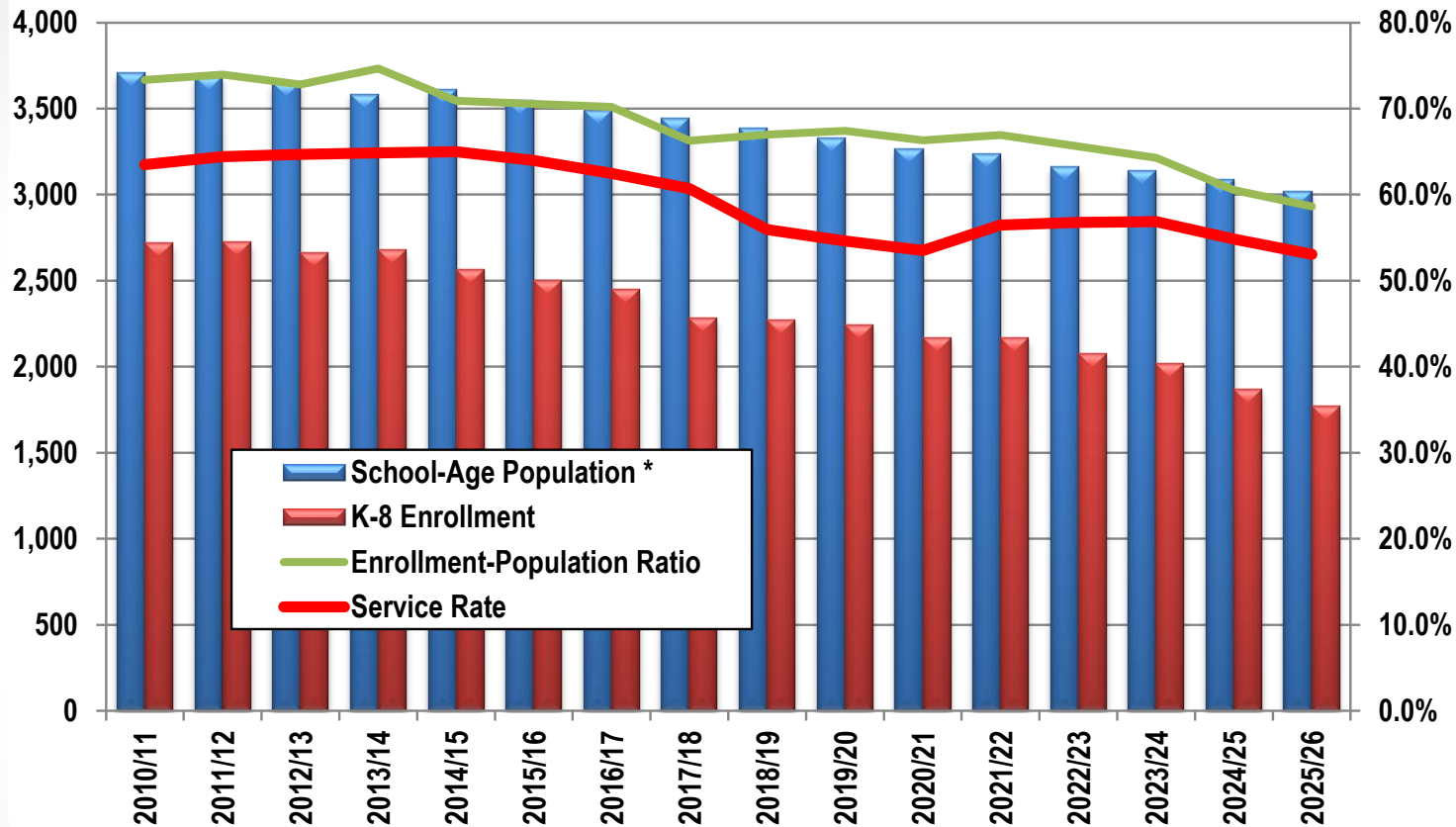
Bolding indicates historical estimates.

Housing unit additions will remain low this year and next year and then rise again, albeit temporarily.

Market and supply conditions indicate build-out of nearly all known housing potential during the projection period.

Population per household is expected to decline slightly as more apartment units are added to the housing inventory.

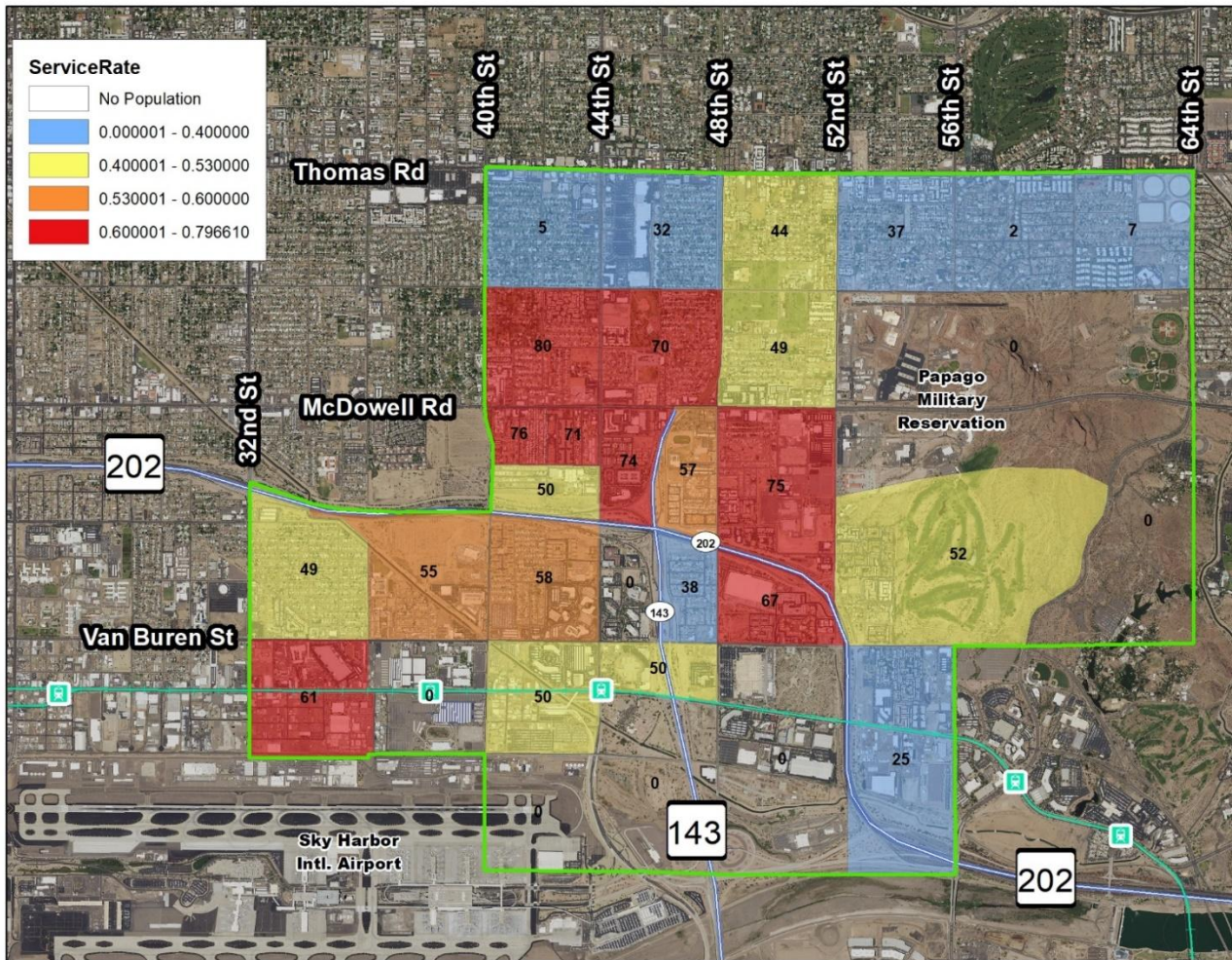
School-Age Population & Service Rate



The District's school-age population has been in decline since about 2007, and combined with lower services rates, has resulted in significant declines in enrollment.

Service rates fell through 2020/21, but stabilized during and after COVID until Empowerment Scholarship Accounts (ESAs) became universal.

Service Rate: 2020



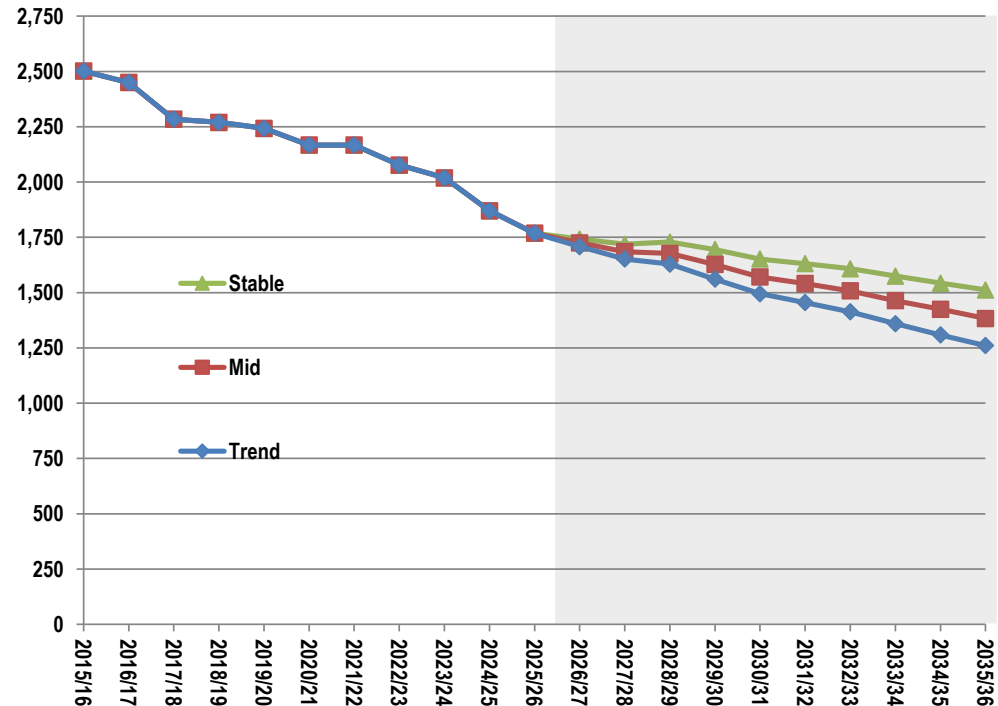
In 2020, 3,267 elementary school-age (5-13) persons lived in the District, down 441 from 2010. In all, about 54% of them attended a District school, with large variations evident within the District.

In-District Enrollment Scenarios

Fall	Service Rates			Rate Scenario Enrollment			Enrollment Change		
	Trend	Mid	Stable	Trend	Mid	Stable	Trend	Mid	Stable
2015/16	64%	64%	64%	2,502	2,502	2,502			
2016/17	62%	62%	62%	2,450	2,450	2,450	-52	-52	-52
2017/18	61%	61%	61%	2,284	2,284	2,284	-166	-166	-166
2018/19	56%	56%	56%	2,270	2,270	2,270	-14	-14	-14
2019/20	55%	55%	55%	2,243	2,243	2,243	-27	-27	-27
2020/21	53%	53%	53%	2,167	2,167	2,167	-76	-76	-76
2021/22	56%	56%	56%	2,167	2,167	2,167	0	0	0
2022/23	57%	57%	57%	2,077	2,077	2,077	-90	-90	-90
2023/24	57%	57%	57%	2,019	2,019	2,019	-58	-58	-58
2024/25	55%	55%	55%	1,870	1,870	1,870	-149	-149	-149
2025/26	53%	53%	53%	1,769	1,769	1,769	-101	-101	-101
2026/27	52%	52%	53%	1,708	1,725	1,742	-61	-44	-27
2027/28	51%	52%	53%	1,652	1,685	1,719	-56	-40	-23
2028/29	51%	52%	54%	1,629	1,677	1,729	-23	-8	10
2029/30	49%	51%	54%	1,561	1,627	1,695	-68	-50	-34
2030/31	48%	50%	53%	1,495	1,571	1,652	-66	-56	-43
2031/32	47%	50%	53%	1,455	1,541	1,631	-40	-30	-21
2032/33	46%	49%	53%	1,413	1,508	1,608	-42	-33	-23
2033/34	45%	49%	53%	1,360	1,464	1,575	-53	-44	-33
2034/35	44%	49%	53%	1,309	1,425	1,543	-51	-39	-32
2035/36	43%	48%	53%	1,261	1,383	1,512	-48	-42	-31
2026/27 - 2035/36							-508	-386	-257

Source: Applied Economics, 2025.

Bolding indicates historical data.



Source: Applied Economics, 2025.

Under the trend service rate scenario, in-District enrollment could decline by another 500 students over the next 10 years, about 250 more than if the service rate were to remain at its current level.

Attendance Area Projections

Attendance Area	Actual						Projected										2020/21-	2025/26-	2030/31-
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2025/26	2030/31	2035/36
K-5																			
Brunson-Lee Elementary	348	327	325	325	335	297	279	260	264	242	236	238	240	231	222	215	-51	-61	-21
Crockett Elementary	436	506	516	532	511	506	488	471	456	456	458	454	457	441	431	417	70	-48	-41
Griffith Elementary	369	388	407	368	321	315	300	295	290	265	270	269	269	259	250	245	-54	-45	-25
Out of District	307	246	191	159	116	117	109	102	96	103	98	98	94	96	95	93	-190	-19	-5
6-8																			
Balsz Middle School	595	607	549	561	527	484	496	503	515	515	463	440	403	396	387	373	-111	-21	-90
Out of District	112	93	89	74	60	50	53	55	57	45	45	43	45	41	40	40	-62	-5	-5
District Total	2,167	2,167	2,077	2,019	1,870	1,769	1,725	1,685	1,677	1,627	1,571	1,541	1,508	1,464	1,425	1,383	-398	-198	-188

Sources Balsz School District: Applied Economics, 2025.

Open Enrollment Impacts

School / Code	Attendance Area of Residen			Out of District	Total Attend	Total Reside	Difference	
	1	2	3					
Brunson-Lee Elementary	2	243	61	44	26	374	297	77
Crockett Elementary	3	8	401	20	36	465	506	-41
Griffith Elementary	4	46	44	252	54	396	316	80
Total		297	506	316	116	1,235	1,119	116
Attend = Reside:		81.8%	79.2%	79.7%		896	80.1%	

Sources: Balsz Elementary School District; Applied Economics, 2025.

School Projections

School	Actual						Projected										2020/21-	2025/26-	2030/31-
	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34	2034/35	2035/36	2025/26	2030/31	2035/36
K-5																			
Brunson-Lee Elementary	449	426	431	427	404	375	354	332	334	315	307	308	309	301	292	284	-74	-68	-23
Crockett Elementary	496	528	507	505	462	465	445	427	410	412	413	408	411	396	385	371	-31	-52	-43
Griffith Elementary	517	481	487	439	417	395	377	369	361	339	343	341	340	330	321	315	-122	-52	-27
Other / Online		34	14	13													0	0	0
6-8																			
Balsz Middle School	705	679	623	621	585	534	549	558	572	560	508	483	448	437	427	413	-171	-26	-95
Other / Online		19	15	14	2												0	0	0
District Total	2,167	2,167	2,077	2,019	1,870	1,769	1,725	1,685	1,677	1,627	1,571	1,541	1,508	1,464	1,425	1,383	-398	-198	-188

Sources Balsz School District: Applied Economics, 2025.

Conclusions

In-District enrollment, and the District's Service Rate appeared to be stabilizing prior to 2024/25 with about 1,800 students, with nearly all the decline resulting from fewer out-of-district students.

In 2024/25 and 2025/26 the enrollment losses have been driven by declines from both inside and outside the District, linked to declines in the school-age population and school choice.

The amount of residential development in the District has been strong, but the type of new housing and the demographic characteristics of those inhabiting them don't result in students.

Utilizing the Mid service rate assumptions, District enrollment could fall by another 400 students over the next ten years, but larger and smaller losses are possible.