APPLIED ECONOMICS

SCOTTSDALE UNIFIED SCHOOL DISTRICT

DEMOGRAPHIC AND ENROLLMENT ANALYSIS

FINAL REPORT

PREPARED FOR:

SCOTTSDALE UNIFIED SCHOOL DISTRICT
7575 EAST MAIN STREET
SCOTTSDALE, AZ 85251

PREPARED BY:

APPLIED ECONOMICS LLC
11209 N. TATUM BOULEVARD, SUITE 225
PHOENIX, AZ 85028

NOVEMBER 7, 2019

TABLE OF CONTENTS

EXECUTIVE SUMMARY iii

1.0 INTRODUCTION 1

2.0 EXISTING CONDITIONS 3

2.1 CURRENT & HISTORICAL ENROLLMENT 3
2.2 DEMOGRAPHIC TRENDS 13
2.3 CHARTER AND PRIVATE SCHOOL ENROLLMENT 16

3.0 RESIDENTIAL DEVELOPMENT 20

3.1 HOUSING CONSTRUCTION 20
3.2 FUTURE DEVELOPMENT POTENTIAL 22
3.3 MARKET CONDITIONS 27

4.0 DISTRICT-LEVEL PROJECTIONS 30

4.1 POPULATION & HOUSING 30
4.2 SCHOOL-AGE POPULATION & CAPTURE RATES 32
4.3 DISTRICT ENROLLMENT 33

5.0 SUB-DISTRICT PROJECTIONS 36

5.1 ENROLLMENT TRENDS BY DISTRICT COMMUNITY 36
5.1.1 ARCADIA COMMUNITY 39
5.1.2 CHAPARRAL COMMUNITY 40
5.1.3 CHAPARRAL NORTH 41
5.1.4 CORONADO COMMUNITY 42
5.1.5 DESERT MOUNTAIN COMMUNITY 43
5.1.6 SAGUARO COMMUNITY 44
5.2 ENROLLMENT PROJECTIONS BY ATTENDANCE AREA 45
5.3 ENROLLMENT PROJECTIONS BY SCHOOL 48

APPENDIX A: COMMUNITY AREA DEMOGRAPHIC CHARACTERISTICS 53

ACKNOWLEDGEMENTS 60

EXECUTIVE SUMMARY

This report presents the key findings of the 2019/20 Demographic and Enrollment Analysis update performed for the Scottsdale Unified School District by Applied Economics. The purpose of this analysis is to identify current and historic demographic, development and enrollment trends, and to anticipate future trends to create District, Community and sub-District enrollment projections through 2029/30. The update includes new student enrollment data, along with revised residential real estate market and development information. This summary describes some of the key findings from the report.

Enrollment Trends - Enrollment in the District has declined gradually over the past decade. For the past five years, K-12 enrollment has dropped by an average of 1.2 percent per year, cumulatively resulting in a loss of nearly 1,400 students since 2014/15. Kindergarten to 12th grade enrollment peaked in 2000/01, at approximately 27,225 students, but has fallen to 22,233 students in 2019/20. These declines are linked primarily to the aging of the existing population and increasing competition from alternative providers; both of these trends will likely continue throughout the projection period. Nearly 4,700 of the District's K-12 students (about 21 percent) reside outside District boundaries. Out-of-District enrollment has grown by 15 percent since 2013/14, resulting in the addition of about 600 K-12 students, while in-District enrollment dropped by about 3,160 students (a 15 percent decline) during the same period.

Demographic Shifts - The aging of the District's population is causing a decrease in household sizes, and the nature of new housing additions is shifting more toward non-family oriented, multifamily housing. Currently, the housing stock in the District is made up of 50 percent single family units and 50 percent multifamily units. The majority of the new housing built since 2010 has been multifamily.

Historic Construction Activity - Residential development over the past ten years has resulted in about 8,700 net new housing units. There were actually more new units built, but they were partially offset by demolitions associated with redevelopment. Redevelopment of residential and commercial properties can be expected to continue as land values increase, particularly in the southern portion in the District. New housing development in the District has been highly varied, with about 17 percent of the total housing permitted in the past decade being very low-density single family and about 53 percent high-density multifamily; neither type housing tends to generate significant amounts of school age people.

Future Development Potential - The future residential potential in the District is estimated to be nearly 15,000 units. Future development is expected to be very similar to recent trends, with most single family housing located on large lots and most new residential development contained in multifamily projects. It is expected that there will be a fairly significant amount of new high-density single family located on infill parcels in the southern portion of the District; however, these parcels are not likely to be large, so the overall impact to on District enrollment could be muted. Most infill is likely to be high-density, high-amenity multifamily projects, due to high land costs, that are often marketed to young singles or couples rather than families; in the case of redevelopment, these projects could displace some older, more family-oriented housing.

Alternative Education Providers - In 2010/11 there were 7 charter schools operating within the boundaries of the District serving roughly 1,500 K-12 students. Since that time charter enrollment has increased dramatically, as 21 schools enrolled nearly 7,700 K-12 students at the beginning of the 2019/20 school year. In just the past five years, charter enrollment increased by nearly 3,500 students, largely due to the opening of two BASIS schools in 2015/16 (which opened with 900 K-12 students and now enroll more than 1,700 students) and the new Great Hearts–Archway Scottsdale campus, which opened in 2018/19 with nearly 900 K to 5th grade students. While not all of these charter school students reside in the District, there has been an enormous increase in the proliferation of charter schools in the area. There are also 26 private schools with current enrollment of nearly 4,300 K-12 students.

District Enrollment Projections - Total District enrollment is expected to decline by a total of 8 percent over the next 10 years; while there should be only slight fluctuations from one year to the next, nearly 60

percent of that loss (1,100 K-12 students) is expected to have occurred by 2024/25. The post-recession drop in K-5 will continue to impact 6th to 8th grade enrollment during the projection period, which is expected to decline by an average of 1.4 percent per year (dropping nearly 700 students by 2029/30). Slight losses are expected at the K-5 level during the first three years of the 10-year period, before stabilizing for the duration of the projection period. Enrollment in 9th to 12th grade is projected to decline by about 11 percent, or 900 students, by 2029/30 as graduating classes are succeeded by lesser numbers of students in lower grades; the strongest high school losses (1.7 percent per year on average) are expected to occur in the latter half of the projection period.

Enrollment Projections by School - Sub-District enrollment projections were also created based on the attendance at each school and the residency of the Scottsdale Unified School District student population. In order to use the projections of enrollment by attendance area (place of residence) to project enrollment by school, it is necessary to account for where students actually attend school. Only about 62 percent of the Kindergarten through 8th grade students from within the District's boundary attend the school designated for their place of residence, while about 80 percent of the 9th through 12th grade students attend the designated school for their area of residence.

Among the 24 elementary and middle schools, only seven are projected to have increases in enrollment over the next ten years, with modest growth ranging from 3 to 55 students each. The most growth is expected at Pima Elementary School with 55 new students, followed by Yavapai Elementary with 47 additional students. Total losses at the remaining schools range from 192 students at Copper Ridge to 18 students at Kiva Elementary School. Enrollment at both Hopi Elementary and Cocopah Middle School is expected to decline by more than 100 students over the next ten years.

At the high school level, only Saguaro is expected to experience a slight enrollment increase (34 students) over the ten-year period; each of the remaining high schools are projected to experience small to moderate losses in enrollment over the projection period. Chaparral currently has the largest enrollment with 2,347 students, followed by Desert Mountain with 2,058 students. Both of these schools are expected to decline in enrollment over the next ten years, with Desert Mountain losing 521 students and Chaparral losing 178 students. Chaparral is still expected to be the largest high school at the end of the projection period, with enrollment of 2,169 students, but Arcadia will be the second largest with 1,805 students in 2029/30. Coronado will continue to be the smallest of the five high schools and is expected to lose 185 students over the next ten years.

1.0 INTRODUCTION

This report presents the key findings of the 2019/20 Demographic and Enrollment Analysis update performed for the Scottsdale Unified School District (SUSD or District) by Applied Economics. The purpose of this analysis is to identify current and historic demographic, development and enrollment trends, and to anticipate future trends to create District, Community and sub-District enrollment projections through 2029/30. The District-level projections incorporate long-term demographic and housing trends for SUSD and projected trends for the region to create a top-down analysis of population and enrollment.

The District is comprised of two geographic areas that can best be described as the southwest and northeast sections. The southwestern section is bounded by 40th Street to the west, Thomas Road to the southwest, McKellips Road to the southeast, the Loop 101 Freeway to the east, and Cactus Road to the north. The northeastern section is bordered by Pinnacle Peak Road to the north, the Loop 101 freeway/Pima Road to the west, generally 136th Street to the east, and the Salt River Pima-Maricopa Indian Community south of Shea Boulevard. **Map 1** shows the District boundary, the 6 high school "communities" (attendance areas), and the 343 study grids.

This report is divided into four sections: Existing Conditions, Residential Development, District-level Projections, and Sub-District projections.

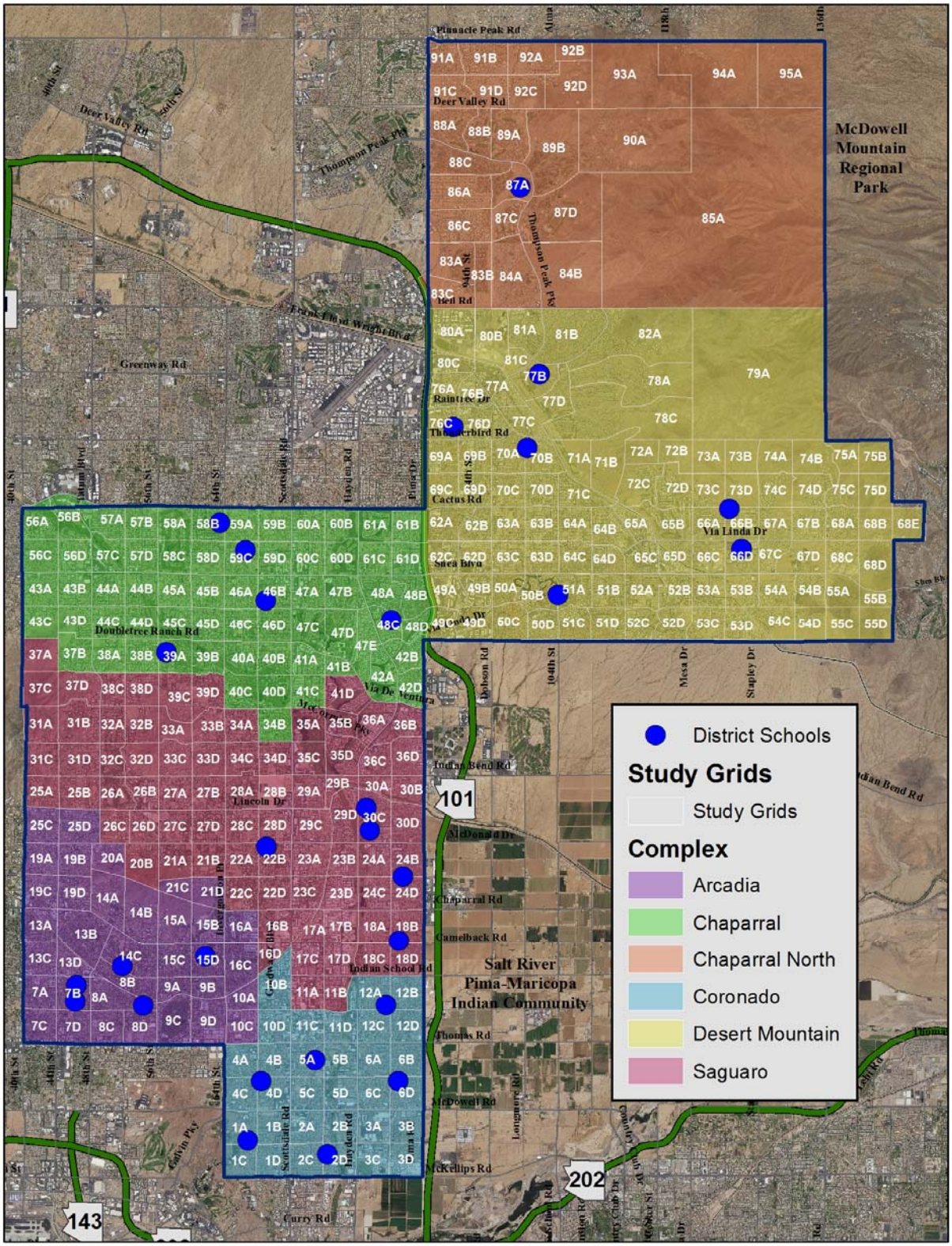
- Section 2.0, Existing Conditions, provides a historical context for interpreting enrollment trends and a detailed review of the distribution by grade and geography. Census data for 2000 and 2010 are compared with 2019 estimates to identify trends in population and housing characteristics that impact District enrollment. Finally, charter and private school enrollment data is presented for those providers operating within SUSD boundaries to help explain recent District enrollment changes as compared to changes in the school-age population.

- Section 3.0, Residential Development, presents information on current construction activity, housing vacancy rates and the potential future supply of new housing units. It provides estimates for the timing of housing construction based on current construction activity, regional growth forecasts, and the ownership and zoning status of land available for future residential development. Future new housing potential is categorized by unit type and density, as well as the timing of known housing projects within the District. These projections are instrumental in predicting the future level and distribution of enrollment within the District.

- Section 4.0, District Projections are created by analyzing past demographic and housing market trends and extending them based on expected housing unit additions and the associated change in school-age population. Enrollment projections are also impacted by the assumptions about the share of District population that will choose to attend District schools. In total, these projections take into account local and regional socioeconomic trends.

- Section 5.0, Sub-District Projections, details enrollment projections by attendance area and school. District-level student generation rates are combined with expected housing additions, demographic trends and capture rates at the study area level to estimate future enrollment by place of residence. This study area data is aggregated to form projections by attendance area. The relationship between the number of students that reside within an attendance area and enrollment illustrates the impact of student movement, including students from outside the District. This relationship is applied to attendance area projections to forecast enrollment by school.

MAP 1
DISTRICT LOCATION AND GRID GEOGRAPHY



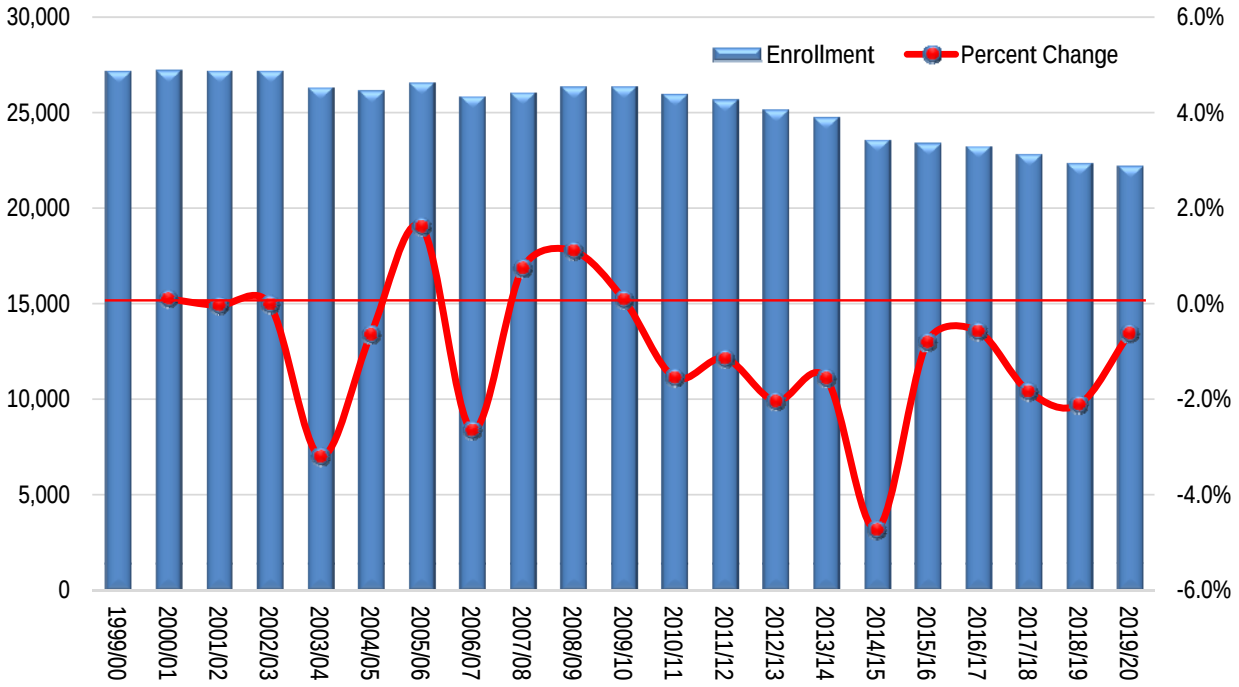
2.0 EXISTING CONDITIONS

2.1 CURRENT & HISTORICAL ENROLLMENT

Enrollment in the District has declined gradually over the past decade. For the past five years, Kindergarten to 12th grade (K-12) enrollment has dropped by an average of 1.2 percent per year, cumulatively resulting in a loss of nearly 1,400 students since 2014/15. These declines are linked primarily to the aging of the existing population and increasing competition from alternative providers; both of these trends will likely continue throughout the projection period. As shown in **Figure 1**, K-12 enrollment peaked in 2000/01, at approximately 27,225 students, but has fallen to 22,233 students in 2019/20, despite the facts that housing units have continued to be added and the District continues to attract a significant number of students from outside of the District.

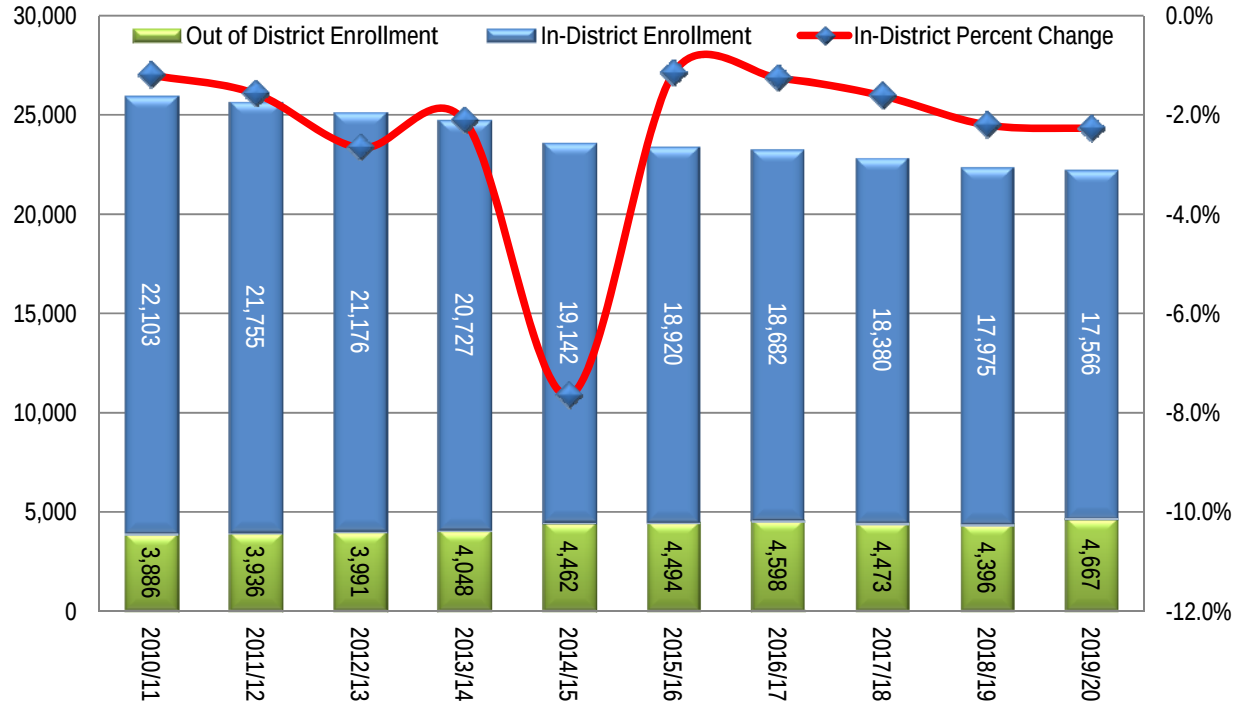
Out-of-District enrollment is a significant factor for the District. In all, nearly 4,700 of the District's K-12 students (about 21 percent) reside outside District boundaries, which is relatively high compared to most metro area districts (**Figure 2**). Out-of-District enrollment has grown by 15 percent since 2013/14, resulting in the addition of about 600 K-12 students, while in-District enrollment dropped by about 3,160 students (a 15 percent decline) during the same period.

FIGURE 1
ENROLLMENT AND ENROLLMENT CHANGE: 1999/00 – 2019/20



Sources: Arizona Department of Education; Scottsdale Unified School District.

FIGURE 2
ENROLLMENT BY SOURCE AND ENROLLMENT CHANGE: 2010/11 – 2019/2020



Source: Scottsdale Unified School District.

In order to get a more detailed understanding of the sub-District trends that are impacting enrollment, similar information on enrollment change for each Community Complex is depicted in **Figures 3A through 3F**. A Community represents a high school attendance area and all of the elementary and middle schools that are within that attendance area.

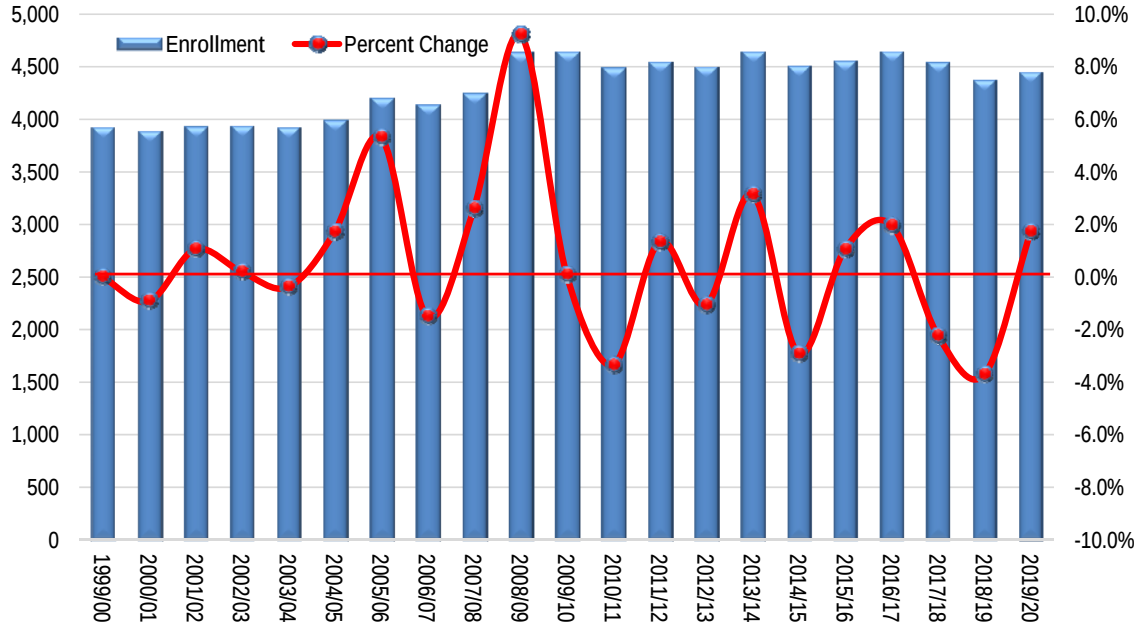
There are currently 4,444 K-12 students in Arcadia Community schools. Enrollment in this community has been quite stable with an average decline of only 0.4 percent per year since 2009/10, including five years with modest increases in enrollment. By comparison, District K-12 enrollment has declined by an average of 1.7 percent per year over the past ten years. The most significant losses in the Arcadia Community schools have been at the Kindergarten to 5th grade (K-5) level (about 2 percent per year since 2009/10).

The Chaparral Community with 4,932 K-12 students in its schools is the only community that has shown a net increase over the past ten years, growing at an average rate of 0.6 percent per year. Although there were overall declines in four of the last ten years, growth in high school enrollment of about one percent per year on average offset a slight average annual loss in 6th to 8th grade (6-8) grade level enrollment.

The Chaparral North Community represents the northeastern part of the Chaparral High School attendance area and includes only 641 Kindergarten to 8th grade (K-8) students. Enrollment in the schools in this community has declined by an average of six percent per year. Since 2009/10, K-8 enrollment has declined every year except one (2011/12) and losses in the past three years have increased sharply (down 12 to 15 percent). Recent enrollment declines at the K-5 level are likely due to the fact that Great Hearts moved its Archway Scottsdale campus into this community (at 94th Street, south of Bell Road) and opened the 2018/19 school year with nearly 900 K-5 students; in 2019/20 the school enrolled more than 1,000 K-5 students.

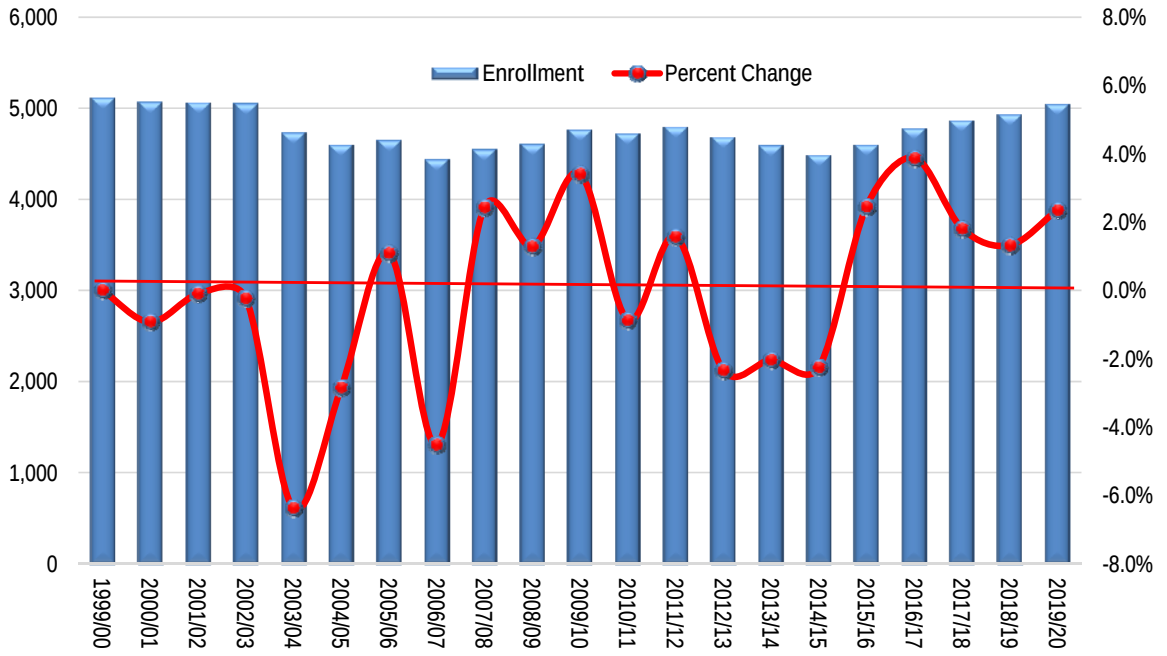
Enrollment in Coronado Community schools has declined significantly in the past ten years, at an average annual rate of -3.9 percent, making it the smallest K-12 community with only 2,820 students in 2019/20. These losses have occurred across all of the grade levels, but have been slightly larger in the 6-8 cohort.

FIGURE 3A
ENROLLMENT AND ENROLLMENT CHANGE: 1999/00 – 2019/20
ARCADIA COMMUNITY



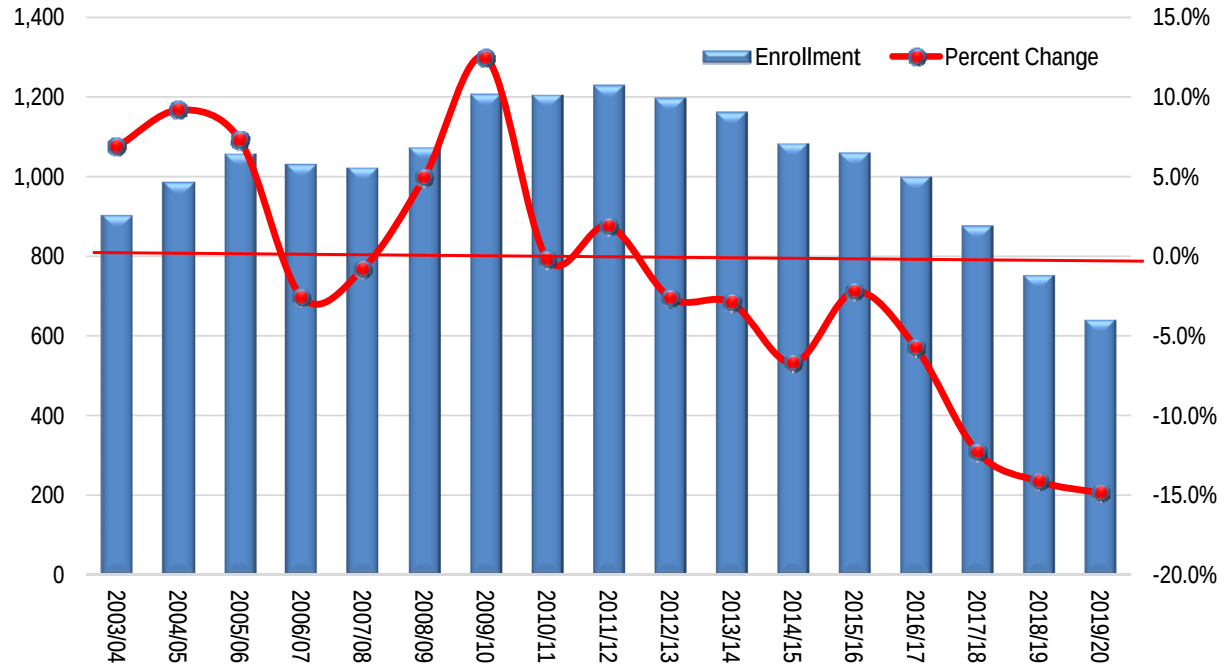
Source: Scottsdale Unified School District.

FIGURE 3B
ENROLLMENT AND ENROLLMENT CHANGE: 1999/00 – 2019/20
CHAPPARAL (SOUTH) COMMUNITY



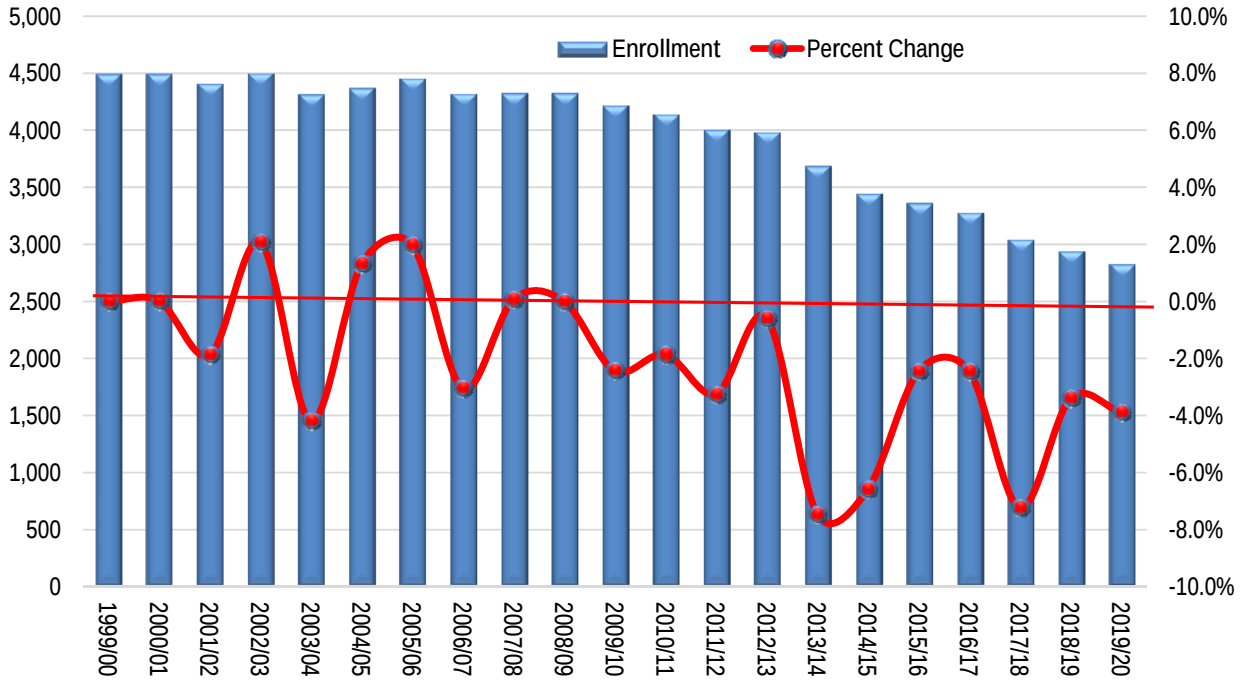
Source: Scottsdale Unified School District.

FIGURE 3C
ENROLLMENT AND ENROLLMENT CHANGE: 1999/00 – 2019/20
CHAPPARAL NORTH COMMUNITY



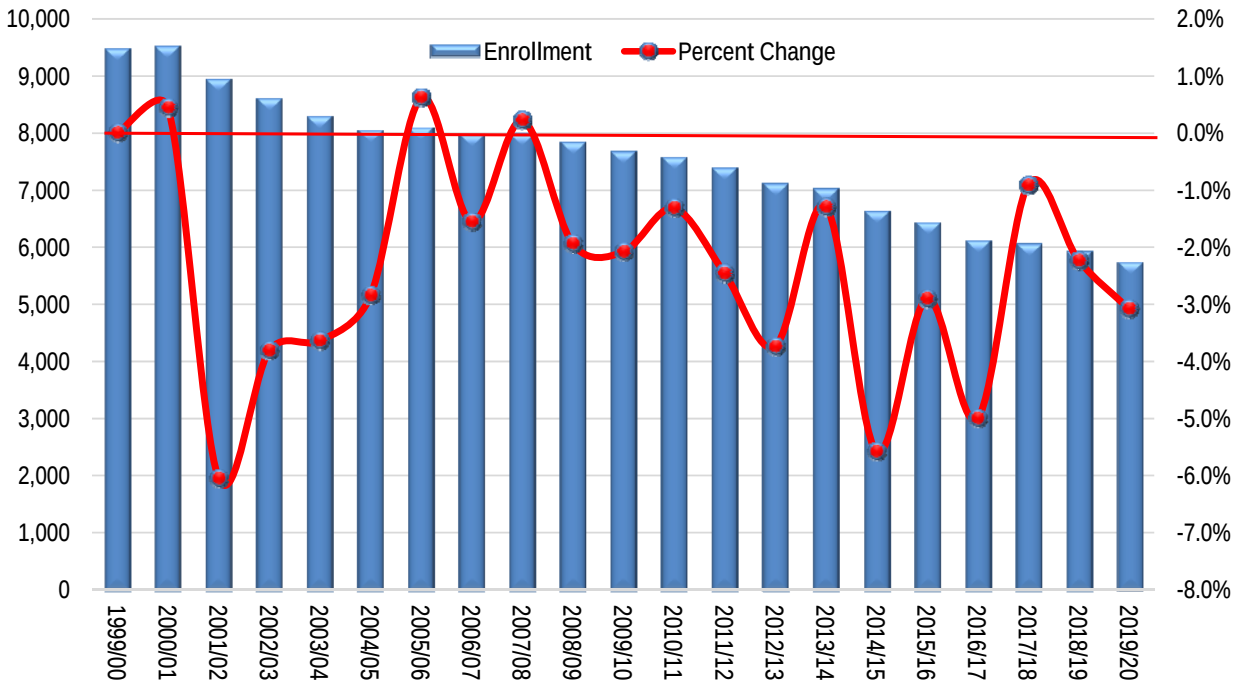
Source: Scottsdale Unified School District.

FIGURE 3D
ENROLLMENT AND ENROLLMENT CHANGE: 1999/2000 – 2018/2019
CORONADO COMMUNITY



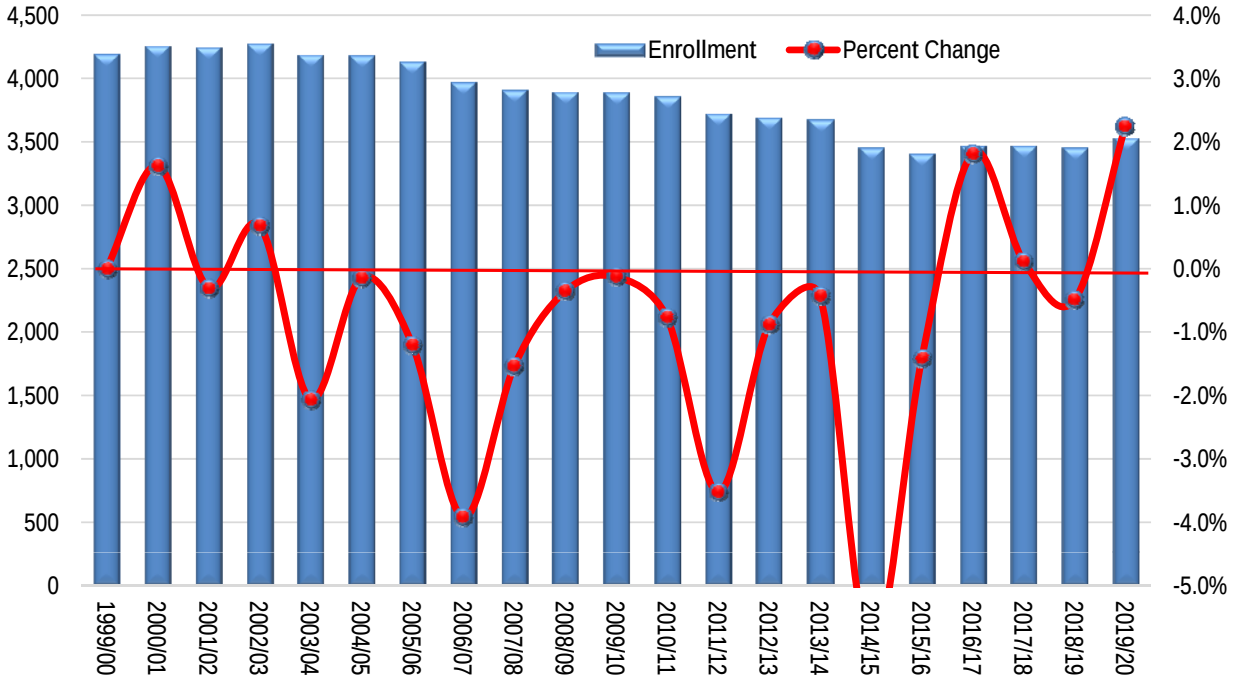
Source: Scottsdale Unified School District.

FIGURE 3E
ENROLLMENT AND ENROLLMENT CHANGE: 1999/00 – 2019/20
DESERT MOUNTAIN COMMUNITY



Source: Scottsdale Unified School District.

FIGURE 3F
ENROLLMENT AND ENROLLMENT CHANGE: 1999/00 – 2019/20
SAGUARO COMMUNITY



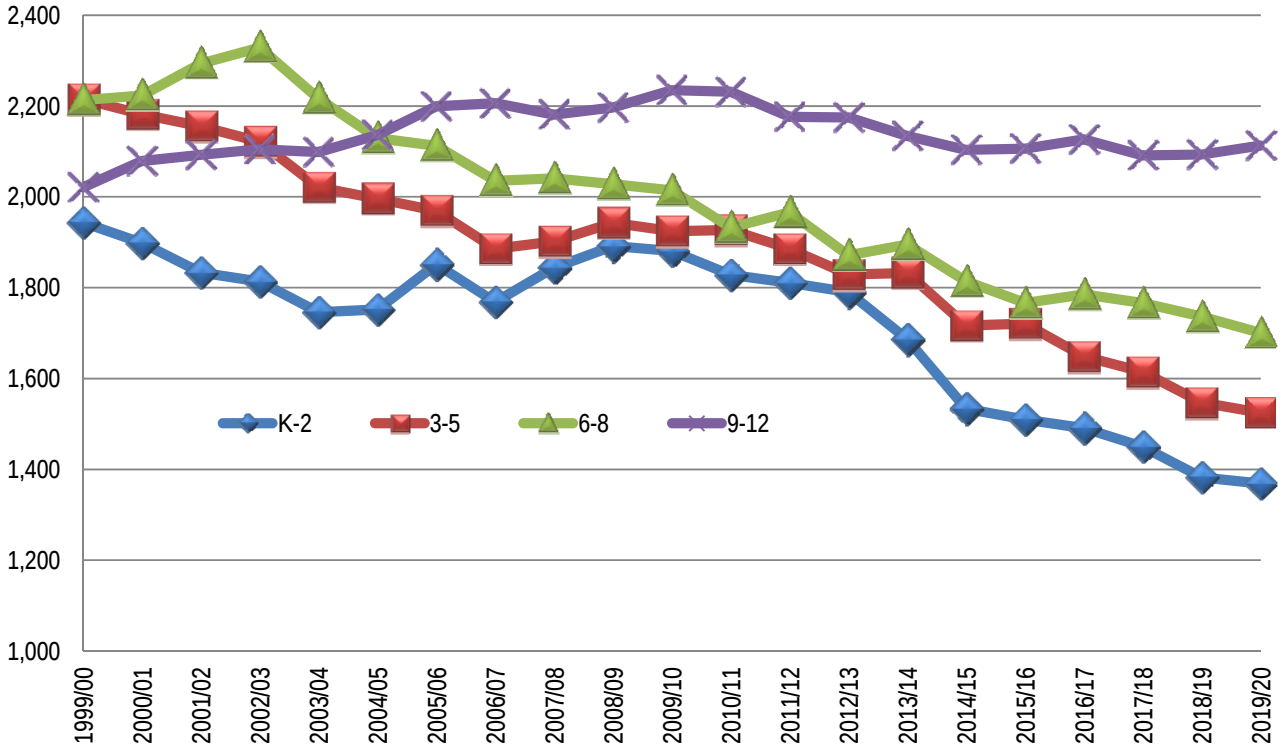
Source: Scottsdale Unified School District.

At 5,752 K-12 students in 2019/20, enrollment in Desert Mountain schools is significantly larger than the other communities, but enrollment has been steadily decreasing (2.8 percent per year on average) and is down from 7,685 students in 2009/10. Although there have been declines at all grade levels, losses in the K-5 cohort account for about 60 percent of the decrease over the past ten years. This trend reflects the aging of the households in the community and the fact that parents of younger students are more likely to choose charter schools or other alternative providers than older students.

The Saguaro Community currently has 3,527 K-12 students in its schools, which represents a 2.3 percent increase over 2018/19; while it is one of the smaller communities, enrollment has been relatively stable, declining at only 0.9 percent per year on average. About half of the decline in enrollment over the past ten years occurred in a single year (2014/15). Similar to other communities, the most significant losses have been at the K-5 level, with enrollment at the 6-8 grade level remaining relatively unchanged over the past ten years.

The breakdown of enrollment by grade cohort provides insights into past and current enrollment characteristics, and highlights structural trends that will continue to shape enrollment in the coming years. To facilitate the comparison of the cohorts, average enrollment per grade is calculated for each of the four grade levels. **Figure 4** displays the average enrollment of students by grade level in District schools since 1999/00. Currently, average enrollment in the 9th to 12th grade (9-12) cohort is by far the largest, which is indicative of a mature, move-up community; with approximately 2,100 students per grade in 2019/20, average high school grade level enrollment has remained relatively unchanged since 2014/15.

FIGURE 4
AVERAGE ENROLLMENT PER GRADE BY LEVEL: 1999/2000 – 2019/2020



Sources: Arizona Department of Education; Scottsdale Unified School District.

Average enrollment in the 6-8 cohort is the second largest with 1,700 students per grade, or about 400 fewer students per grade than in the 9-12 cohort. While average grade level enrollment in this cohort has

generally declined (dropping an average of 1.3 percent per year since 2014/15), it has consistently remained larger than the two younger grade cohorts, which is again reflective of the move-up nature of much of the housing market in the District.

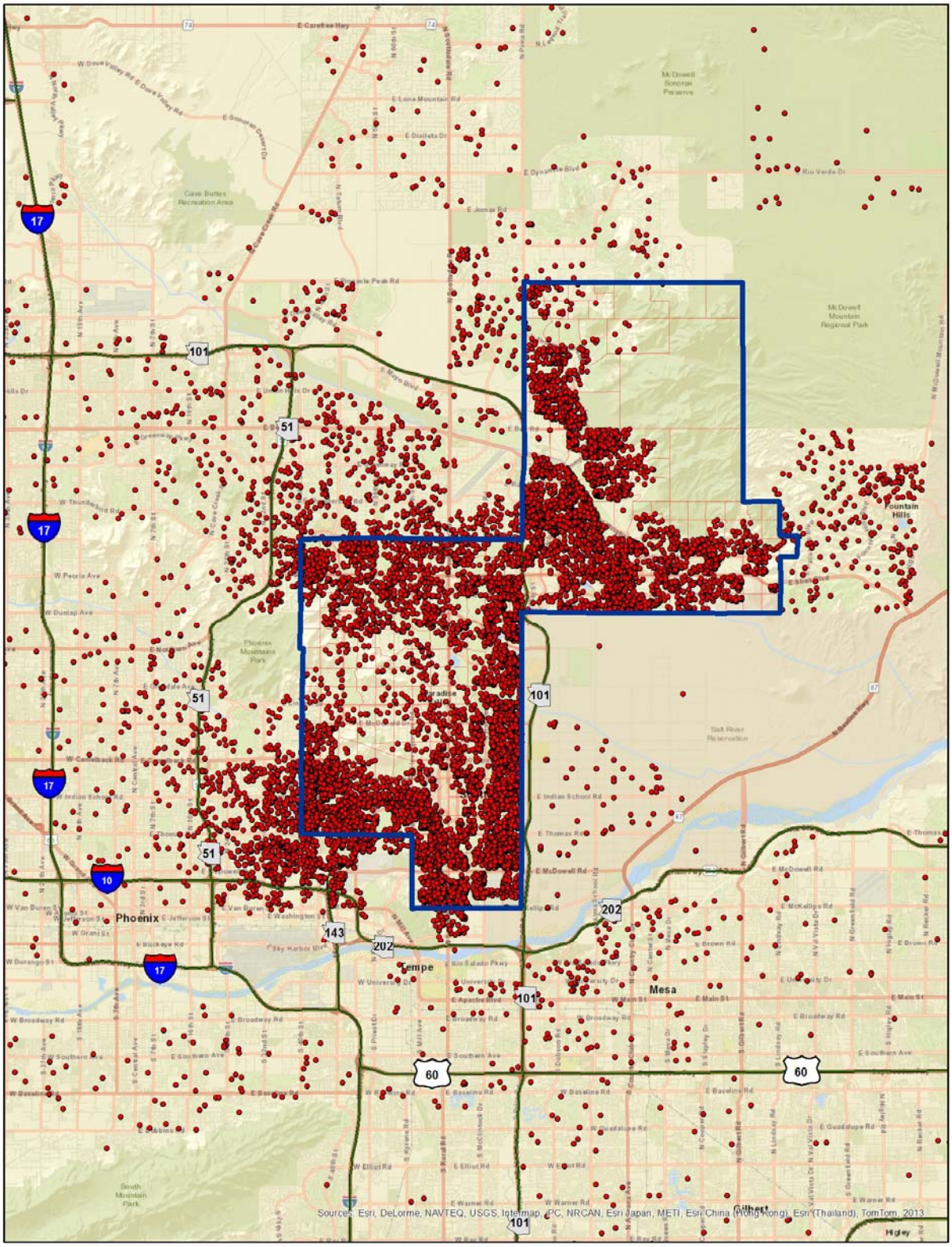
The 3rd to 5th grade (3-5) cohort has an average of 1,525 students per grade, nearly 160 students per grade more than the Kindergarten to 2nd grade (K-2) cohort, which is the smallest at 1,369 students per grade. The K-2 and 3-5 cohorts have both experienced somewhat larger enrollment declines recently (averaging about two percent per year since 2014/15), likely due to increasing home prices in much of the District and increased competition from charter schools.

While the size of an incoming Kindergarten class certainly plays a major role in determining enrollment in each successive grade level, a myriad of other factors, including increased charter school competition, special program additions or closures within the District or in neighboring Districts, and the overall economic climate ultimately affect enrollment, to a greater extent in some cohorts than others.

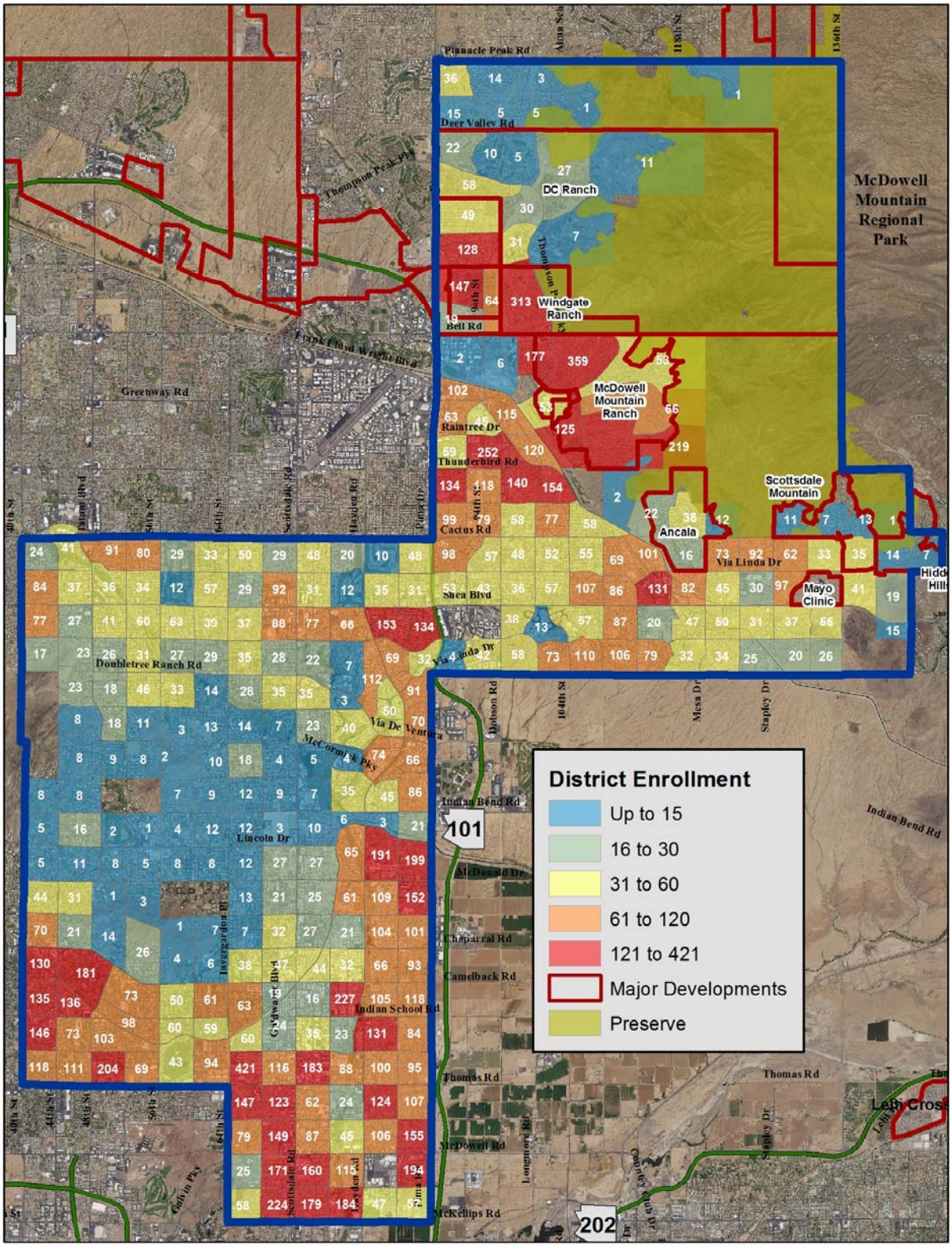
In addition to looking at enrollment by grade, it is also useful to analyze the geographic distribution of students. **Map 2** shows the current point location of students attending District schools including students residing within the District and those living in surrounding out-of-District areas. The majority of the student population lives in the central and southern portions of the District, with a significant number of students living just south and west of the District boundaries. There are also notable concentrations of out-of-District students north of Cactus Road and in Fountain Hills. **Map 3** shows the number of current resident students tallied by planning grid inside the District.

Tracking the location of District students can also be used to analyze changes in the distribution of enrollment over time. **Map 4** shows the change in K-12 enrollment by study grid over the past five years. The map shows widespread losses in enrollment, with the largest declines occurring in the northeastern and far southern portions of the District. Other than a significant increase in the Windgate Ranch area, the other areas of increase were small and scattered.

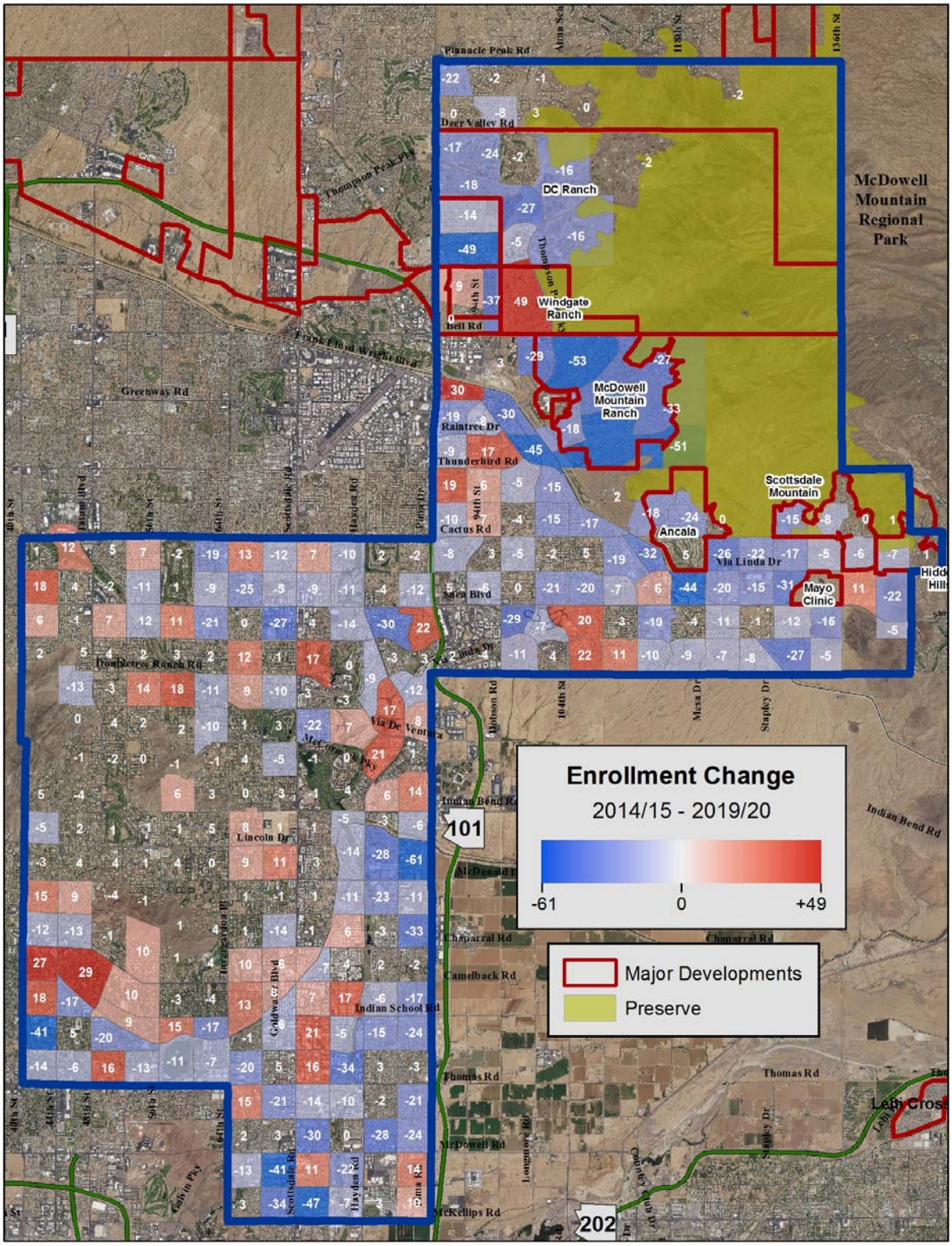
MAP 2
2019/20 STUDENT DISTRIBUTION



MAP 3
2019/20 ENROLLMENT



MAP 4
ENROLLMENT CHANGE: 2014/15 – 2019/20



2.2 DEMOGRAPHIC TRENDS

Table 1 displays Census data for key population and housing characteristics within the District for 2000 and 2010, along with Applied Economics' estimates for 2019. The 2019 estimates employ data from the American Community Survey, and as well as several other public and private data sources. Changes in the District's population, with regard to age and ethnicity, housing growth and types of housing development help explain recent demographic trends. Unlike many parts of the Valley, the District experienced little increase in population from 2000 to 2010, growing by only 0.34 percent over ten years. There was modest growth in the Desert Mountain Community and significant growth in the Chaparral North Community, but population declined in the remainder of the District. Since 2010, population growth has been slightly faster, increasing by a little less than 1.0 percent per year, on average.

The racial and ethnic composition of the District population has changed little since 2010, with a small decline in the white share of population and slight increases in the Hispanic share of the population. This represents a continuation of shifts that also occurred between 2000 and 2010.

The demographic data indicates a general aging of the population since 2010, which directly impacts District enrollment. Despite a regional decline in birth rates during and after the recession, the population under 5 years of age in the District increased by about five percent between 2010 and 2019. However, the population aged 5 to 13 years, generally comprising Kindergarten through 8th graders, increased only slightly (0.7 percent) since 2010, and the high school age population (14 to 17 years) decreased by 3.2 percent over the past nine years.

The population in the 25 to 44 age group, typically considered prime child-bearing years, has grown by nine percent since 2010, exceeding the growth rates for school-aged children. Surprisingly, growth in the 25 to 44 age group also exceeded growth in the 45 to 64 year old cohort from 2010 to 2019. However, the rate of growth in the 65 years and older category (15.3 percent) was the highest and twice that of the overall population. Increases in the population aged 45 and older accounted for 64 percent of the District's population growth since 2010.

There were about 11,100 new housing units added between 2000 and 2010, resulting in an annual growth rate of about 1.0 percent. Since 2010, about 8,200 new units have been added to the inventory, representing an average annual growth rate of 0.7 percent. Single family units comprise only about 24 percent of total additions since 2010, even though 50 percent of the inventory is single family. In the southern part of the District, much of the multifamily growth has been infill or redevelopment. Occupancy levels dropped from 89 percent to 85 percent between 2000 and 2010 as a result of the recession, but they are now up to 87 percent.

Household size has declined from 2.24 in 2000 to 2.10 in 2019. This trend can be attributed to the increase in multifamily units and the overall aging of the existing District population, which is evident in the fact that 47 percent of householders in the District are 55 years of age or older (up from 40% in 2000). Since 2010, the share of householders under 45 years of age grew slightly faster than the population overall (a little over nine percent), but the share of householders over 54 years of age grew much faster (approximately 13 percent on average versus 7.7 percent).

TABLE 1
POPULATION AND HOUSING TRENDS

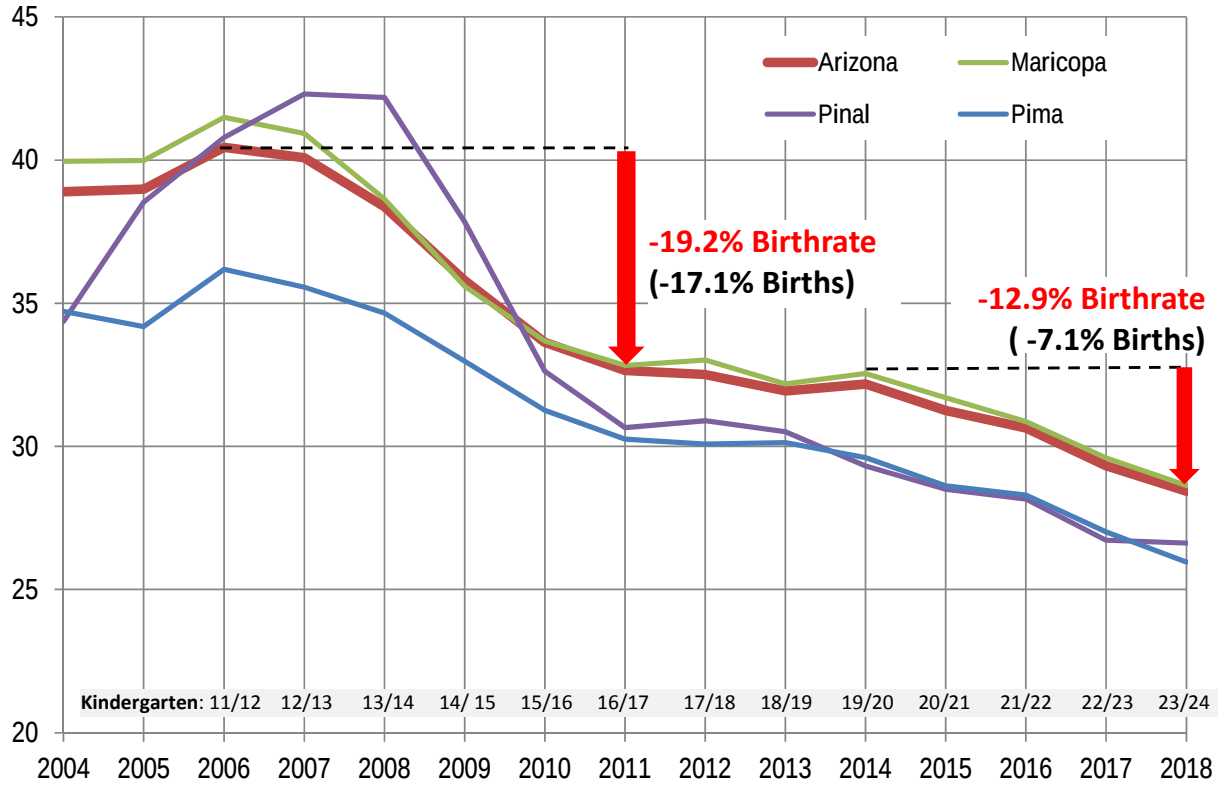
	2000 Census		2010 Census		2019 Estimate		Change (2010-2019)	
	Total	Percent	Total	Percent	Total	Percent	Total	Percent
Population								
Total	220,068	100.0%	220,818	100.0%	237,899	100.0%	17,082	7.7%
By Race & Ethnicity:								
White	194,761	88.5%	185,636	84.1%	195,618	82.2%	9,982	5.4%
African American	2,548	1.2%	3,782	1.7%	3,853	1.6%	71	1.9%
Native American	1,371	0.6%	1,728	0.8%	3,032	1.3%	1,304	75.4%
Asian	5,034	2.3%	7,598	3.4%	9,420	4.0%	1,822	24.0%
Hispanic	16,104	7.3%	21,798	9.9%	25,551	10.7%	3,753	17.2%
Other	250	0.1%	275	0.1%	425	0.2%	150	54.7%
By Age:								
Under 5	10,955	5.0%	9,597	4.3%	10,090	4.2%	493	5.1%
5 to 13	23,100	10.5%	20,732	9.4%	20,871	8.8%	140	0.7%
14 to 17	10,095	4.6%	10,353	4.7%	10,025	4.2%	-328	-3.2%
18 to 24	15,198	6.9%	16,422	7.4%	17,137	7.2%	715	4.4%
25 to 44	67,196	30.5%	56,533	25.6%	61,641	25.9%	5,108	9.0%
45 to 64	56,571	25.7%	65,532	29.7%	70,097	29.5%	4,565	7.0%
65 and up	36,954	16.8%	41,649	18.9%	48,037	20.2%	6,388	15.3%
Housing Units								
Total	110,533	100.0%	121,622	100.0%	129,823	100.0%	8,201	6.7%
Occupied	98,031	88.7%	102,742	84.5%	113,453	87.4%	10,711	10.4%
Owner	66,690	60.3%	67,941	55.9%	73,053	56.3%	5,112	7.5%
Renter	31,341	28.4%	34,801	28.6%	41,002	31.6%	6,202	17.8%
Vacant	12,502	11.3%	18,880	15.5%	16,370	12.6%	-2,510	-13.3%
By Unit Type:								
Single Family	59,744	54.1%	63,492	52.2%	65,451	50.4%	1,959	3.1%
Multifamily	50,790	46.0%	58,130	47.8%	64,372	49.6%	6,242	10.7%
Households								
Total	98,031		102,742		113,453		10,711	10.4%
By Age:								
Under 34	19,979	20.4%	19,160	18.6%	20,966	18.5%	1,806	9.4%
35 to 44	20,242	20.6%	16,217	15.8%	17,713	15.6%	1,497	9.2%
45 to 54	19,011	19.4%	20,552	20.0%	21,618	19.1%	1,066	5.2%
55 to 64	14,767	15.1%	18,844	18.3%	21,041	18.5%	2,197	11.7%
65 and up	24,032	24.5%	27,969	27.2%	32,115	28.3%	4,146	14.8%
Population Per	2.24		2.15		2.10		-0.05	-2.4%

Sources: U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2019; Applied Economics, 2019.

Another major factor affecting enrollment in schools is the recent decline in the birth rate, both regionally and nationally. As shown in **Figure 4**, the birthrate (births per 1,000 for the population aged 15 to 45) in Arizona declined by 19.2 percent between 2006 and 2011 due to the recession. Between 2011 and 2014 the rate was fairly stable, but since then the rate has been declining again falling by another 12.9 percent in four years, which brings the total compound rate reduction to 29.7 percent since 2006.

Despite the continued decline in the birth rate, the total number of births has declined less since 2014 because the population aged 15 to 45 has been increasing faster. The impact of the declining birth rate on Kindergarten enrollment is delayed five years. Statewide the birthrate declined by about 19 percent between 2006 and 2011, which then impacted kindergarten enrollment between 2012/13 and 2016/17. The latest drop in the birthrate may impact the size of the incoming kindergarten class in 2020/21 and will continue to affect incoming classes through at least 2023/24. However, due to the overall increase in population, the total number of Kindergarten students should remain nearly unchanged declining by about 7.1 percent statewide. Between this factor and the push by charter schools to attract Kindergarteners, nearly all school Districts in the Phoenix Metropolitan Area experienced declines in Kindergarten enrollment over the past several years, and these declines are likely to continue for a few more years.

FIGURE 4
BIRTHRATES IN ARIZONA AND SELECTED COUNTIES: 2004 – 2018



Sources: Arizona Department of Health Services; Applied Economics, 2019.

2.3 CHARTER AND PRIVATE SCHOOL ENROLLMENT

Public school districts face increasing competition for students from charter and private schools, as well as from neighboring public school districts through open enrollment policies. Charter schools report enrollment to the state, as do district schools, but due to a one-year lag in the headcount enrollment data being released by the Arizona Department of Education, charter enrollment from the 2017/18 school year is the most recent available. However, 40th day Average Daily Membership (ADM) data is available for 2018/19 and 2019/20, while the figures differ from headcount data by a small margin, the relationship between the two figures by school and grade is consistent enough to derive headcount estimates for charter schools with a high degree of accuracy. Private schools do not have to report to the state so enrollment data is more difficult to find. However, enrollment tends to be more stable at private schools, with much less volatility than at charter institutions.

In 2010/11 there were 7 charter schools operating within the boundaries of the District serving roughly 1,500 K-12 students. Since that time charter enrollment has increased dramatically, as 21 schools enrolled nearly 7,700 K-12 students at the beginning of the 2019/20 school year. In just the past five years, charter enrollment increased by nearly 3,500 K-12 students, largely due to the opening of two BASIS schools in 2015/16 (which opened with 900 K-12 students and now enroll more than 1,700 students) and the new Great Hearts–Archway Scottsdale campus, which opened in 2018/19 with nearly 900 K to 5th grade students. While not all of these charter school students reside in the District, there has been an enormous increase in the proliferation of charter schools in the area. These charter schools are listed on **Table 2,** and are shown on **Map 5**.

TABLE 2
ENROLLMENT IN LOCAL CHARTER SCHOOLS

School Name	Address	City	Zip	Total K-12*
Accelerated Learning Center	4105 E. Shea Boulevard	Phoenix	85028	181
BASIS Scottsdale	10400 N.128th Street	Scottsdale	85259	1,122
BASIS Scottsdale Primary	11440 N. 136th Street	Scottsdale	85259	597
Great Hearts Academies - Archway Cicero	7205 N. Pima Road	Scottsdale	85258	537
Great Hearts Academies - Archway Scottsdale	16648 N 94th St	Scottsdale	85255	1,006
Great Hearts Academies - Archway Veritas	3102 N. 56th Street	Phoenix	85018	718
Great Hearts Academies - Cicero Prep	7205 N. Pima Road	Scottsdale	85258	465
Great Hearts Academies - Scottsdale Prep	16537/16576 N. 92nd Street	Scottsdale	85260	853
Great Hearts Academies - Veritas Prep	3102 N. 56th Street	Phoenix	85018	796
Hirsch Academy: A Challenge Foundation Academy	6535 E. Osborn Road	Scottsdale	85251	63
Integrity Education Centre	515 E. Continental Drive	Tempe	85281	29
Mission Montessori Academy at St. Anthony	12990 E. Shea Boulevard	Scottsdale	85259	14
Mission Montessori Academy at St. Apkar	8849 E. Cholla Street	Scottsdale	85260	14
Mission Montessori Academy at St. George	4530 E. Gold Dust Avenue	Phoenix	85028	38
Mission Montessori Academy del Jardin	11050 N. 96th Street	Scottsdale	85260	102
Mission Montessori Academy del Norte	9575 E. Larkspur St.	Scottsdale	85260	80
Montessori Academy	6050 N. Invergordon Road	Paradise Valley	85253	140
Noah Webster Schools - Pima	5399 N. Pima Road	Scottsdale	85250	495
Ombudsman - Charter East	3943 E. Thomas Road	Phoenix	85018	106
Ombudsman - Charter East II	4041 E. Thomas Road	Phoenix	85018	192
Scottsdale Country Day School	10460 N. 56th Street	Scottsdale	85253	147
Total Charter				7,695

Source: Arizona Department of Education; Applied Economics 2019.
* Estimated based on 40th-day 2019-20 ADM data.

MAP 5
LOCAL CHARTER SCHOOLS

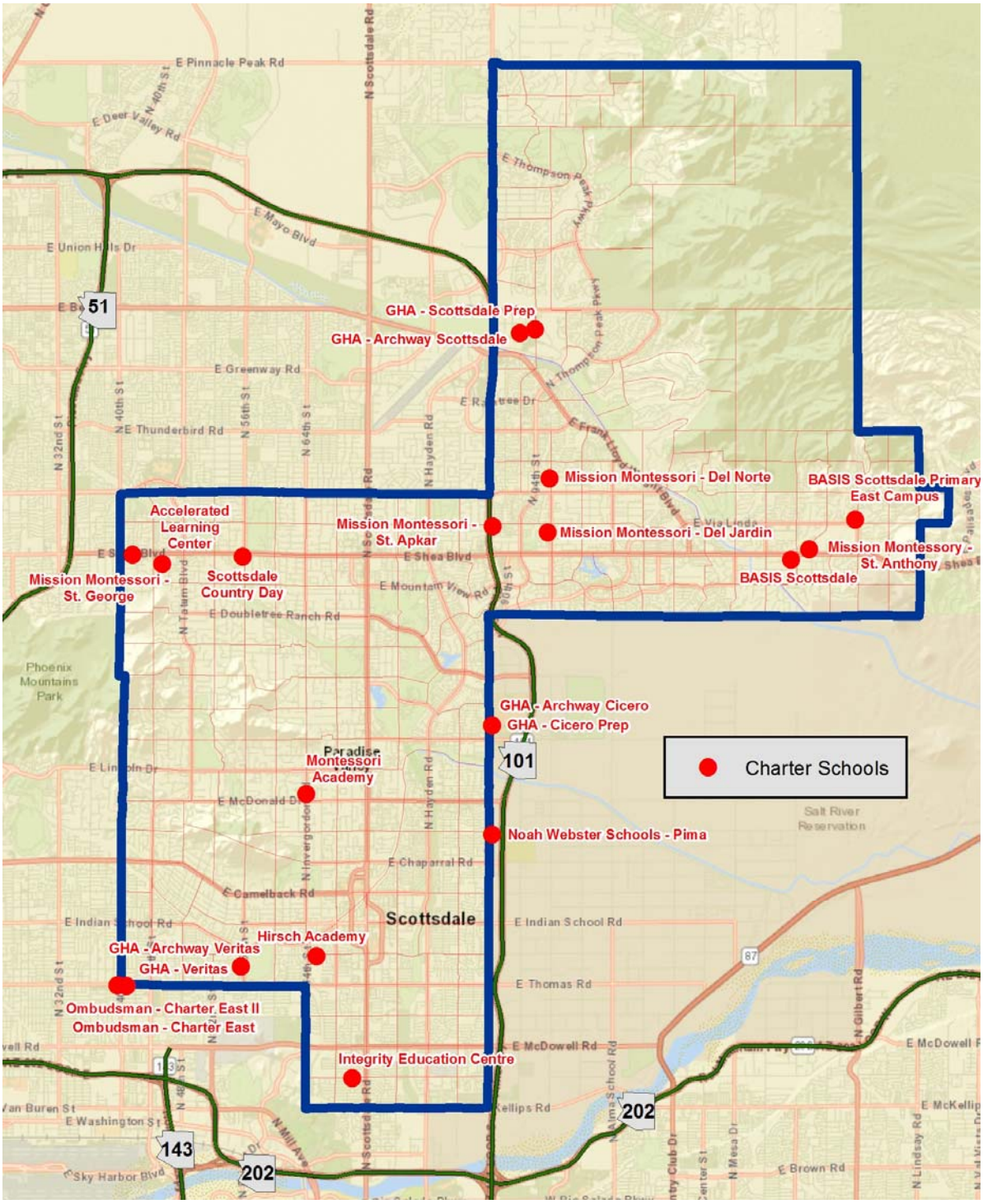


Table 3 shows enrollment by grade in charter schools over the past ten years. Total charter enrollment since 2010/11 has grown by about 6,200 students, which represents an increase of 425 percent.

TABLE 3
ENROLLMENT IN LOCAL CHARTER SCHOOLS BY GRADE

School Year	# of Schools	KG	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total K-12	Annual Change
2010-11	7	25	20	24	25	25	21	182	198	182	170	154	192	245	1,463	
2011-12	9	142	147	147	142	130	255	213	200	199	183	199	190	272	2,419	956
2012-13	9	144	144	140	146	132	257	321	249	257	183	197	231	314	2,715	296
2013-14	15	236	230	216	210	182	308	328	332	252	204	213	208	339	3,258	543
2014-15	18	356	339	324	333	299	393	404	379	313	188	262	259	355	4,203	945
2015-16	20	425	427	380	357	362	479	560	513	499	306	322	369	460	5,458	1,255
2016-17	20	499	503	515	481	503	626	617	511	502	333	350	322	490	6,252	794
2017-18	21	500	548	541	528	494	619	630	569	501	373	362	374	462	6,501	249
2018-19*	22	698	683	705	711	696	680	672	609	554	392	380	393	512	7,685	1,184
2019-20*	21	644	667	659	678	646	740	702	637	591	407	404	403	517	7,695	10

Source: Arizona Department of Education; Applied Economics 2019.

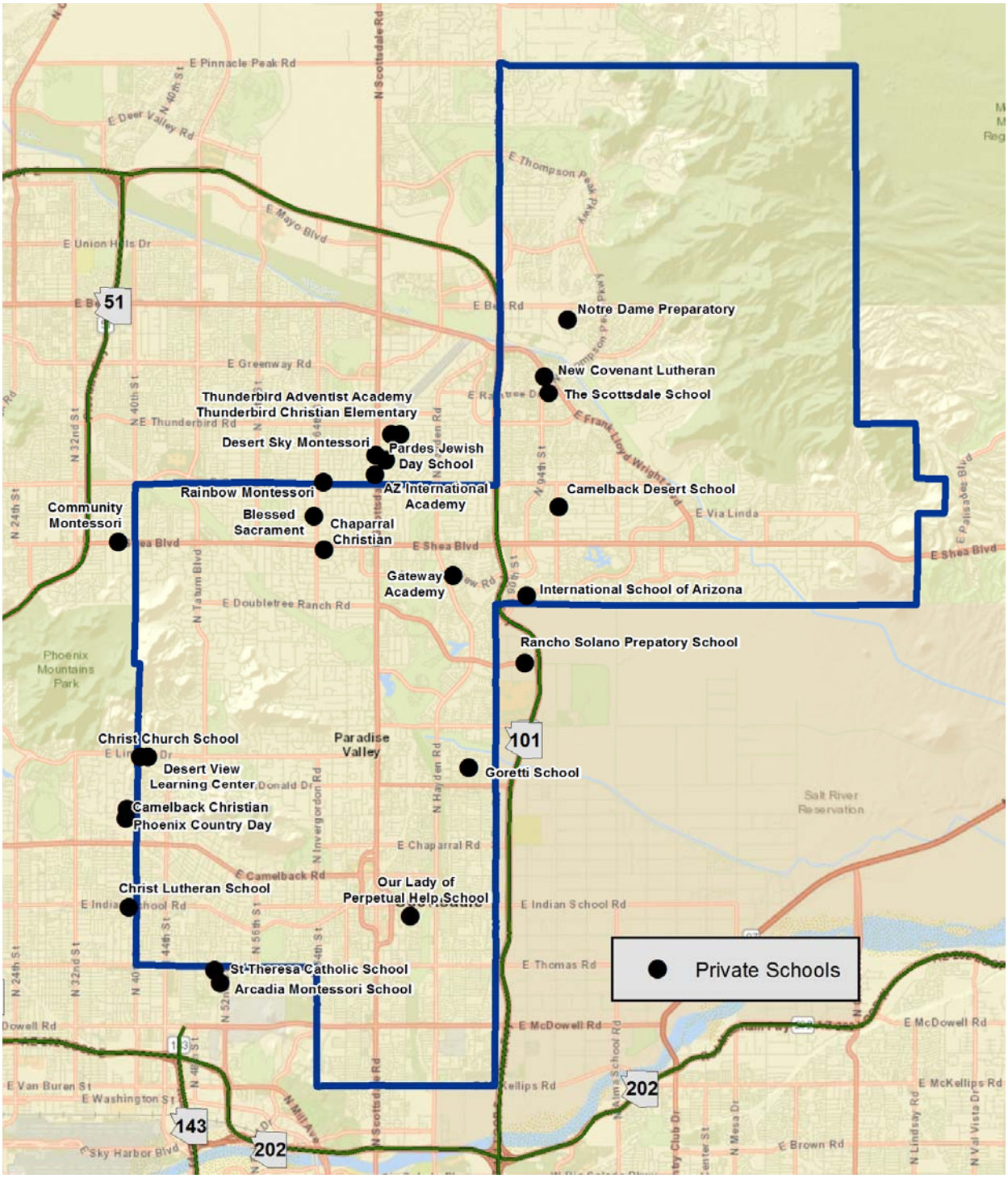
There are also 26 private schools with current enrollment of nearly 4,300 students, up from 16 schools just six years ago (**Table 4 and Map 6**).

TABLE 4
ENROLLMENT IN LOCAL PRIVATE SCHOOLS

School Name	Address	City	Zip	Total K-12*
Arcadia Montessori School	5115 E. Virginia Avenue	Phoenix	85008	14
Arizona International Academy	12430 N. Scottsdale Road	Scottsdale	85254	14
Blessed Sacrament Preschool & Kindergarten	11300 N. 64th Street	Scottsdale	85254	22
Camelback Christian School	3900 E. Stanford Drive	Paradise Valley	85253	11
Camelback Desert School	9606 E. Kalil Drive	Scottsdale	85260	14
Chaparral Christian Preschool & Kindergarten	6451 E. Shea Boulevard	Scottsdale	85254	19
Christ Church School	4015 E. Lincoln Drive	Paradise Valley	85253	33
Christ Lutheran School	3901 E. Indian School Road	Phoenix	85018	449
Community Montessori School	3737 E. Shea Boulevard	Phoenix	85028	6
Desert Sky Montessori	12850 N. Scottsdale Road	Scottsdale	85254	8
Desert View Learning Center	4027 E. Lincoln Drive	Paradise Valley	85253	102
Gateway Academy	3939 E. Shea Bloulevard	Phoenix	85028	94
International School of Arizona	9522 E. San Salvador Drive	Scottsdale	85258	203
New Covenant Lutheran Church Children's Ministry	15152 N. Frank Lloyd Wright Boulevard	Scottsdale	85260	21
Notre Dame Preparatory	9701 E. Bell Road	Scottsdale	85260	925
Our Lady of Perpetual Help School	3801 N. Miller Road	Scottsdale	85251	394
Pardes Jewish Day School	12753 N. Scottsdale Road	Scottsdale	85254	283
Phoenix Country Day School	3901 E. Stanford Drive	Paradise Valley	85253	717
Rainbow Montessori School - Cactus	6520 E. Cactus Road	Scottsdale	85254	5
Rainbow Montessori School - Voltaire	6402 E. Voltaire Avenue	Scottsdale	85254	4
Rancho Solano Preparatory School	9180 E. Via De Ventura	Scottsdale	85258	249
St. Maria Goretti Preschool and Kindergarten	6261 N. Granite Reef Road	Scottsdale	85250	21
St. Theresa Catholic School	5001 E. Thomas Road	Phoenix	85018	368
The Scottsdale School	14684 N. Frank Lloyd Wright Boulevard	Scottsdale	85260	34
Thunderbird Adventist Academy	7410 E. Sutton Drive	Scottsdale	85260	132
Thunderbird Christian Elementary School	7440 E. Sutton Drive	Scottsdale	85260	104
Total Private				4,246

Source: NCES Private School Universe Survey, 2017-18 school year data;
PrivateSchoolReview.com, 2019; Applied Economics 2019.

MAP 6
LOCAL PRIVATE SCHOOLS



3.0 RESIDENTIAL DEVELOPMENT

3.1 HOUSING CONSTRUCTION

Residential development over the past ten years has resulted in nearly 8,700 net new housing units, as shown in **Table 5** below. New construction has actually been higher, but there have also been numerous residential demolitions in recent years, so in many cases the new homes merely replaced older ones. In other cases, single family units have been removed and replaced by a different number or type of units. Redevelopment of residential or commercial properties is expected to continue as vacant land becomes scarcer, particularly in the southern portion in the District.

The residential building permits shown below are grouped into housing categories that reflect correlations between the types of housing and the age structure of the households likely to occupy them. Group quarter facilities, such as nursing homes or dormitories, are not included.

New housing development in the District is highly varied, with about 17 percent of the total housing permitted in the past decade being very low-density single family and about 53 percent high-density multifamily. Nearly 53 percent of the single family units permitted were for half-acre or larger lots. Multifamily development has been varied in the District, but densities have generally averaged about 35 to 40 units-per-acre, although some projects had considerably higher levels of development intensity.

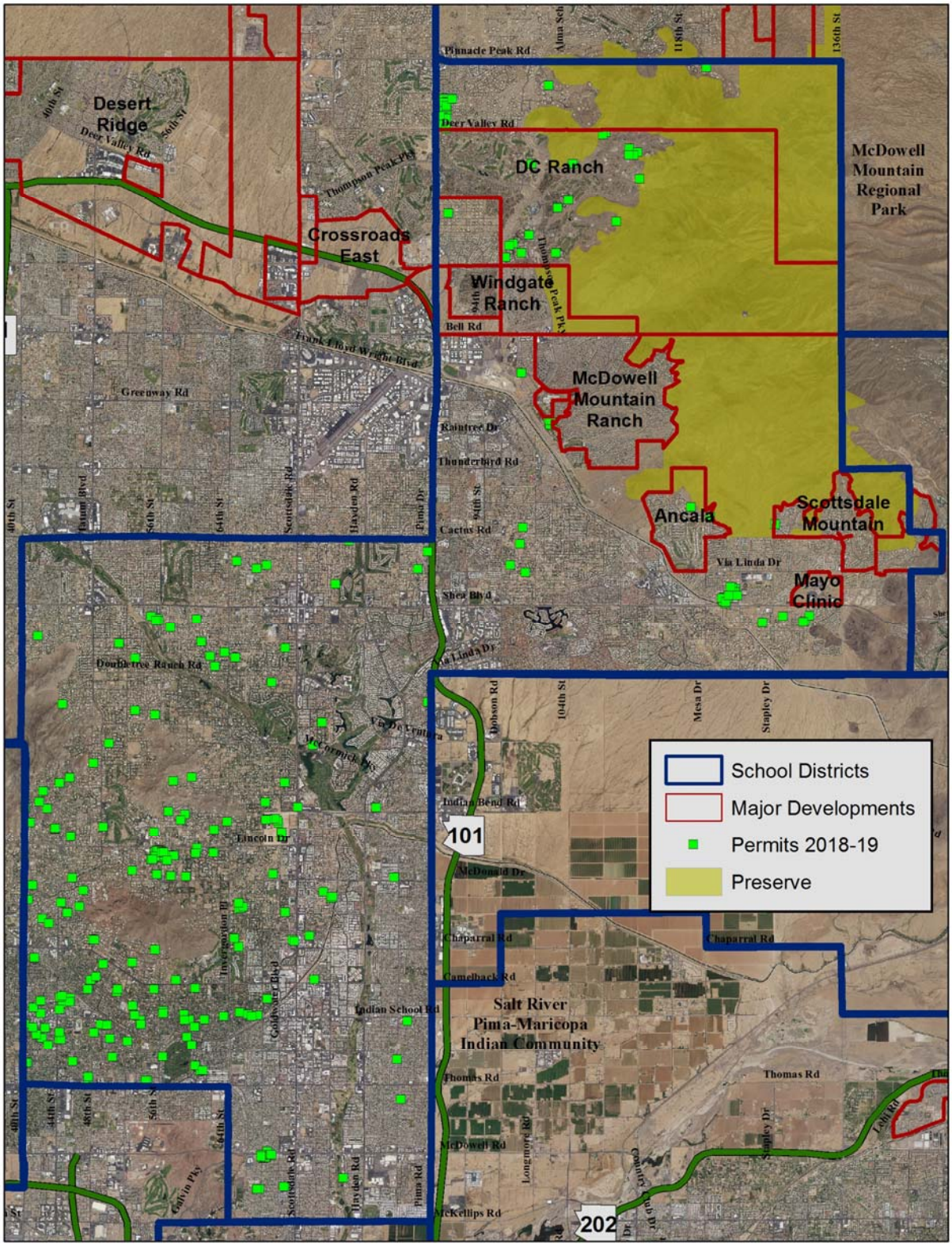
TABLE 5
HOUSING PERMITS

Housing Type	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	Total
Single Family 2 du/ac or less	56	56	103	152	129	148	179	58	146	215	1,242
Single Family 2.01 - 3.5 du/ac	22	25	32	39	34	49	34	40	34	26	335
Single Family 3.51 - 4.5 du/ac	5	17	18	29	26	16	75	21	86	69	362
Single Family 4.51 - 6 du/ac	-	-	-	-	-	-	-	-	-	-	-
Single Family 6.01du/ac & Over	-	-	-	-	-	-	-	5	47	32	84
Single Family Attached	-	-	-	-	12	8	-	-	-	-	20
Manufactured Housing	-	-	-	-	-	-	-	-	-	-	-
Total Single Family	83	98	153	220	201	221	288	124	313	342	2,043
Multifamily, Low Density	17	43	-	15	46	199	32	51	67	152	622
Multifamily, Standard Courtyard	10	-	-	-	369	612	26	(10)	574	-	1,581
Multifamily, Urban/Lifestyle	-	82	274	523	1,525	418	69	17	82	277	3,267
High-rise, Intensive	-	-	203	-	402	-	-	-	356	185	1,146
Total Multifamily	27	125	477	538	2,342	1,229	127	58	1,079	614	6,616
Total	110	223	630	758	2,543	1,450	415	182	1,392	956	8,659

Sources: Maricopa Association of Governments; Construction Monitor; Maricopa County Assessor; Applied Economics, 2019.

Recent development activity in the District is illustrated on **Map 7**. Most new construction is expected on individual lots or small infill parcels, rather than in major subdivisions, which resulted in the highly dispersed activity for 2018/19.

MAP 7
RESIDENTIAL PERMITTING



3.2 FUTURE DEVELOPMENT POTENTIAL

The future residential potential in the District is estimated to be nearly 15,000 units. This includes defined projects as well as initial estimates of future redevelopment potential. **Table 6** shows estimated unit counts by type of product and the estimated time period that construction could begin on lots within projects, since developments generally under construction over a number of years; it is also possible that some projects will not begin at all. The Infill category includes small custom projects that are likely to be under development intermittently over a number of years, as well as smaller building sites; examples of this type of development include most of Paradise Valley and the Shea Boulevard corridor near the Mayo Clinic. Potential redevelopment is also included within this estimate category. Both the unit potential on this table and the timing estimates will change as new information is acquired.

Future development is expected to be very similar to recent trends, with most single family housing located on large lots and most new residential development contained in multifamily projects. It is expected that there will be a fairly significant amount of new high-density single family located on infill parcels in the southern portion of the District; however, these parcels are not likely to be large, so the overall impact to the District could be muted. Most infill is likely to be high-density, high-amenity multifamily projects, due to high land costs, that are often marketed to young singles or couples rather than families; in the case of redevelopment, these projects could displace some older, more family-oriented housing.

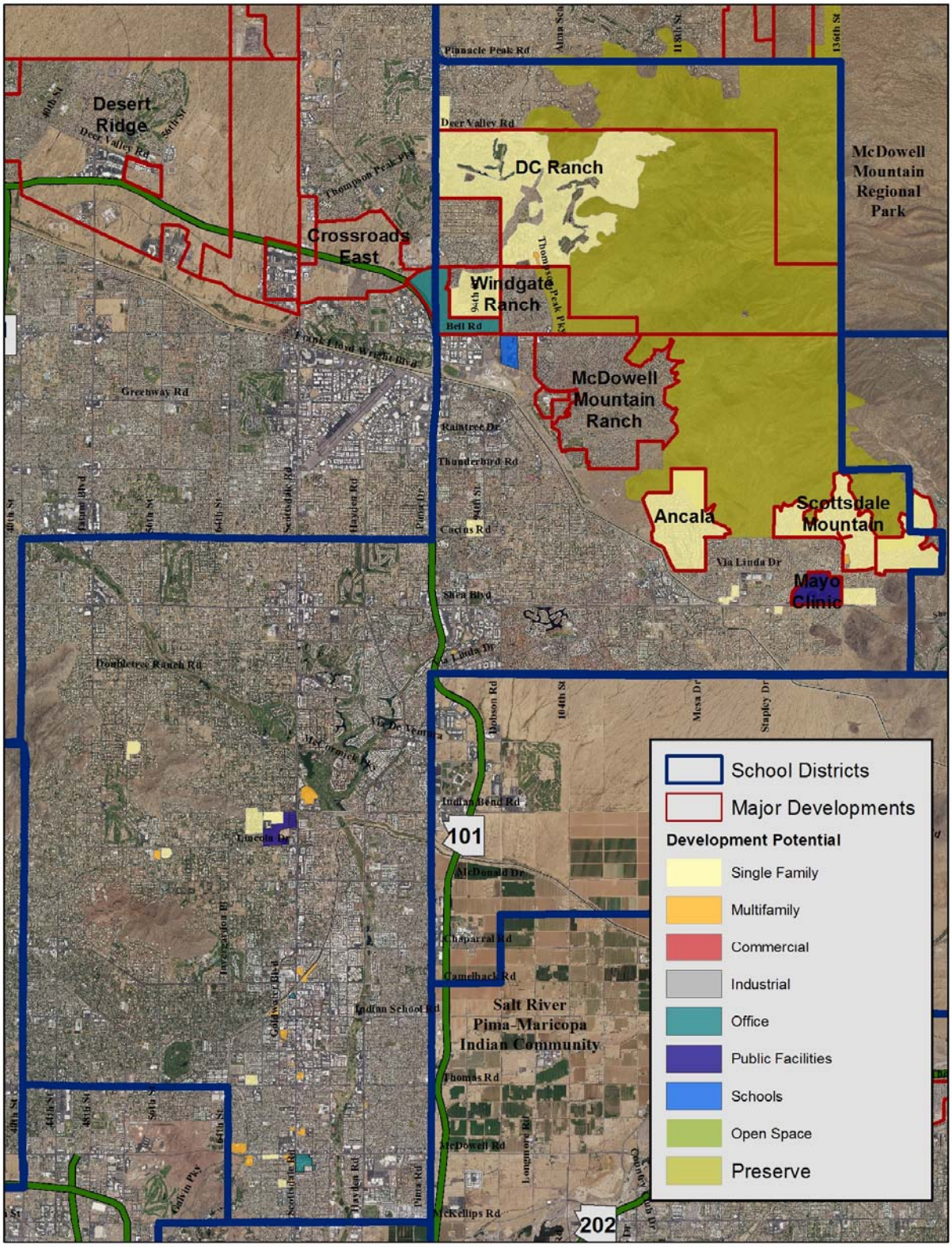
TABLE 6
POTENTIAL NEW HOUSING BY DEVELOPMENT TIMELINE

	Active		Vacant Land				
Housing Type	Projects	Infill	1 Year	2-3 Years	3-5 Years	5-10 Years	Total
Single Family 2 du/ac or less	35	2,410	-	10	24	-	2,479
Single Family 2.01 - 3.5 du/ac	194	-	40	45	-	-	279
Single Family 3.51 - 4.5 du/ac	-	1,290	-	-	-	-	1,290
Single Family 4.51 - 6 du/ac	-	-	-	-	-	-	-
Single Family 6.01du/ac & Over	78	499	-	-	-	90	667
Single Family Attached	-	-	-	-	-	-	-
Manufactured Housing	-	-	-	-	-	-	-
Total Single Family	307	4,199	40	55	24	90	4,715
Multifamily, Low Density	69	665	-	-	81	-	815
Multifamily, Standard Courtyard	-	1,445	-	31	-	-	1,476
Multifamily, Urban/Lifestyle	-	2,499	1,602	1,742	535	40	6,418
High-rise, Intensive	-	-	-	645	489	405	1,539
Total Multifamily	69	4,609	1,602	2,418	1,105	445	10,248
Total	376	8,808	1,642	2,473	1,129	535	14,963

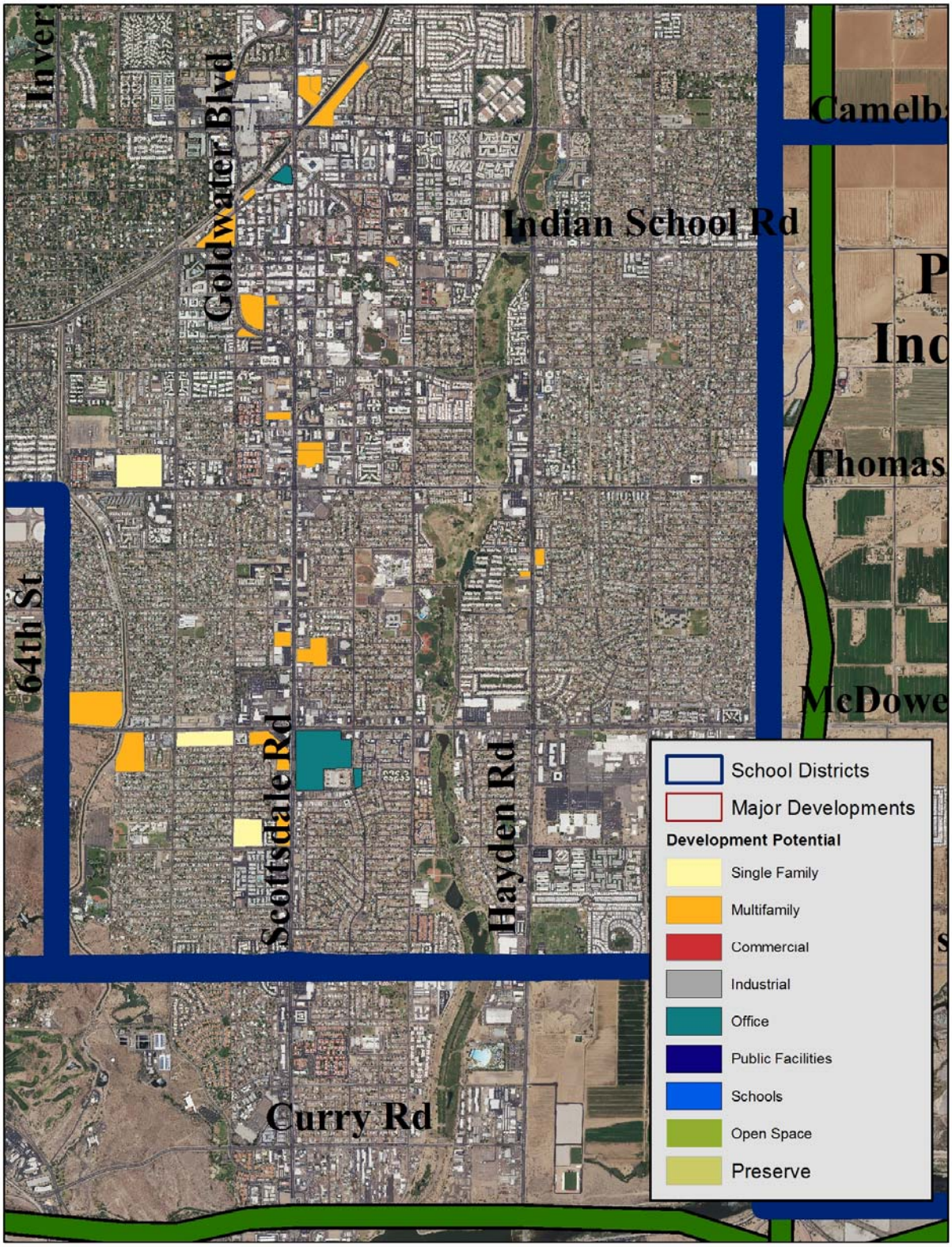
Sources: City of Scottsdale; Applied Economics, 2019.

Maps 8 and 9 show currently active and future development areas by land use and the estimated timing to begin development, as presented on the table above. The maps cover the entire district, including the downtown area which has much smaller development parcels and higher growth potential.

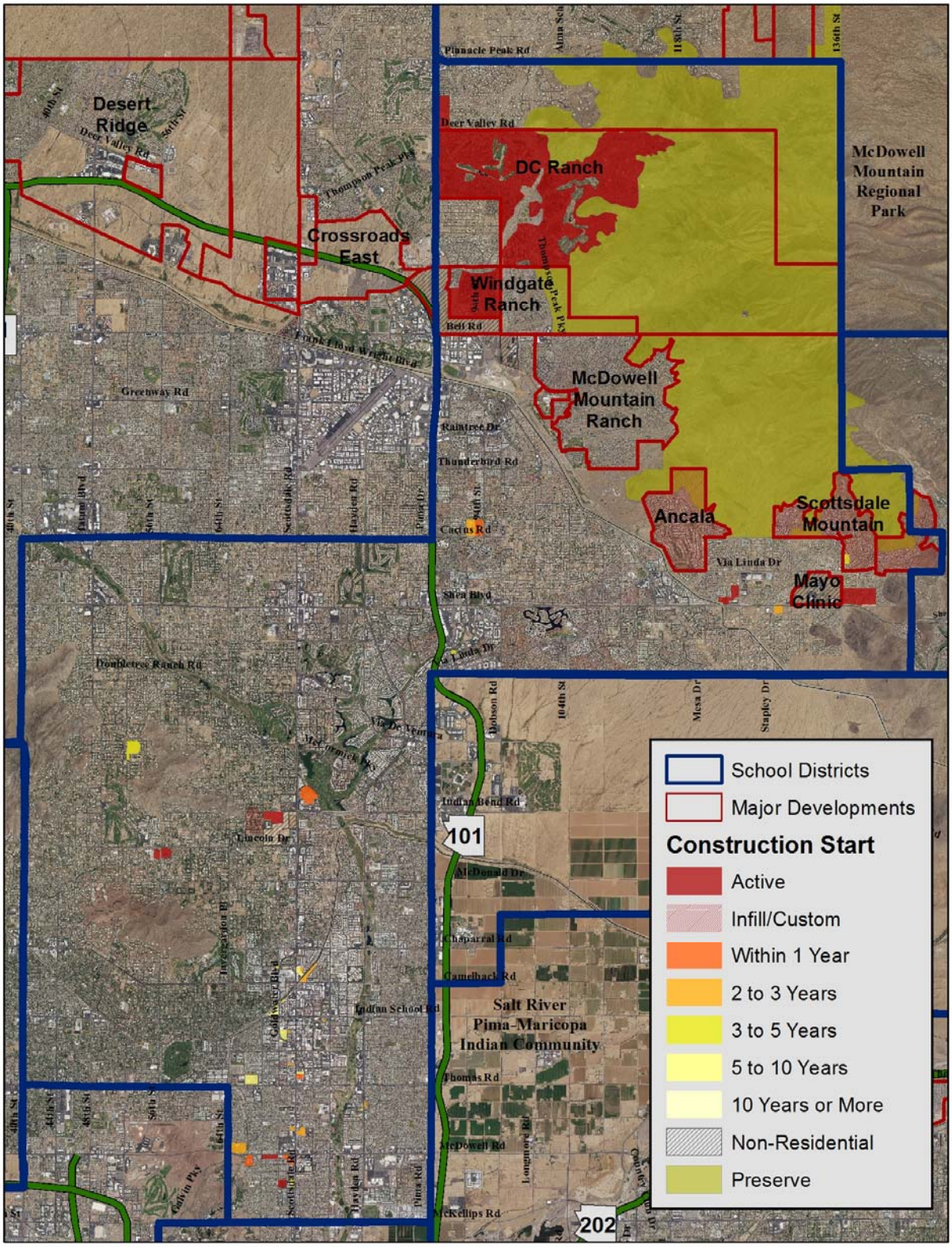
MAP 8A
FUTURE LAND USE



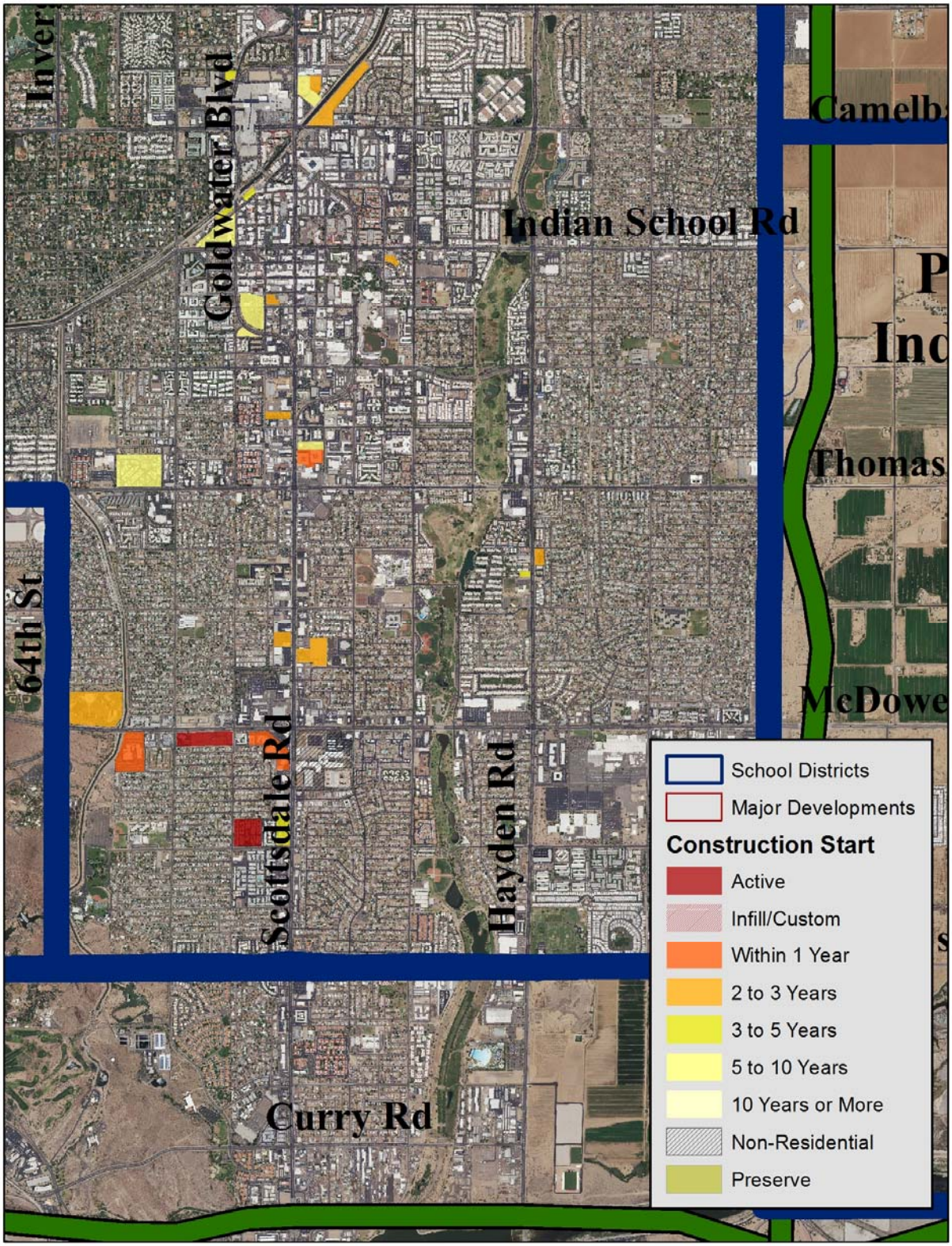
MAP 8B
FUTURE LAND USE – DOWNTOWN AREA



MAP 9A
DEVELOPMENT TIMING



MAP 9B
DEVELOPMENT TIMING – DOWNTOWN AREA



3.3 MARKET CONDITIONS

The U.S. economy has continued to grow over the past year, although growth in 2019 is expected to be slower than 2018. Bureau of Labor Statistics data for May 2019 shows an unemployment rate of 3.6 percent, which is generally considered to be full employment. Average hourly earnings have gone up every month. Although a report by U.S. Bank notes that economic data has generally softened, a recession is unlikely in the near-term. Capital Group also expects growth into 2020, but warns that "economic headwinds" are strengthening. Overall, expectations are for continued economic growth through 2019 with some economic indicators pointing toward slowing later in the year, although there are some trade and policy factors that could alter these conditions.

The state of Arizona continues to grow, with a population gain of 122,770 persons between July 2017 and July 2018. The Phoenix metropolitan region was the leading growth area of the state, accounting for 66 percent of the state population growth in 2018 and growing an average of 78,360 persons annually over the past five years. The City of Phoenix remains the fifth most-populous city and is currently the fastest growing city in the nation based on recent Census data. According to a Forbes article from May 2019, this growth is attributed to a "business-friendly environment, plentiful job opportunities and affordable cost of living".

The strength of the metro region is also apparent in data from the Bureau of Labor Statistics. Total nonfarm employment increased by 25,900 persons between January and May 2019, which is actually 4,000 more workers than the State of Arizona gained for the same period (due to losses in some counties). Construction employment increased due to high levels of growth and business expansion, and there have also been significant increases in manufacturing, professional and business services, education and health services. Since the last recession there has been a shift in industry employment. The workforce in bioscience has increased by over 100,000 people since 2007 and jobs have been added in advanced manufacturing, technology, and healthcare. These industries tend to be higher paying and more recession-resistant and now make up a large part of the metro area workforce. Income growth in Arizona was 5.5 percent in the first quarter of 2019, versus 3.4 percent nationally, which can largely be attributed to the growth in those industry sectors.

Marketbeat reports by Cushman & Wakefield show positive market indicators in both the local office and industrial sectors. The office vacancy rate fell to 15.4 percent in the first quarter of 2019, the lowest rate since mid-2008. Net absorption was 269,000 square feet for the quarter, led by high occupancy growth in the Tempe North and Price Corridor submarkets. The industrial market vacancy rate fell to 7.0 percent in the first quarter 2019 on 1.7 million square feet net absorption. The largest gains were in the Southwest Phoenix, West Central Phoenix, and Glendale submarkets, all with over 500,000 square feet net absorption in 2019. A total of 52 percent of new industrial construction is distribution space in those same submarkets.

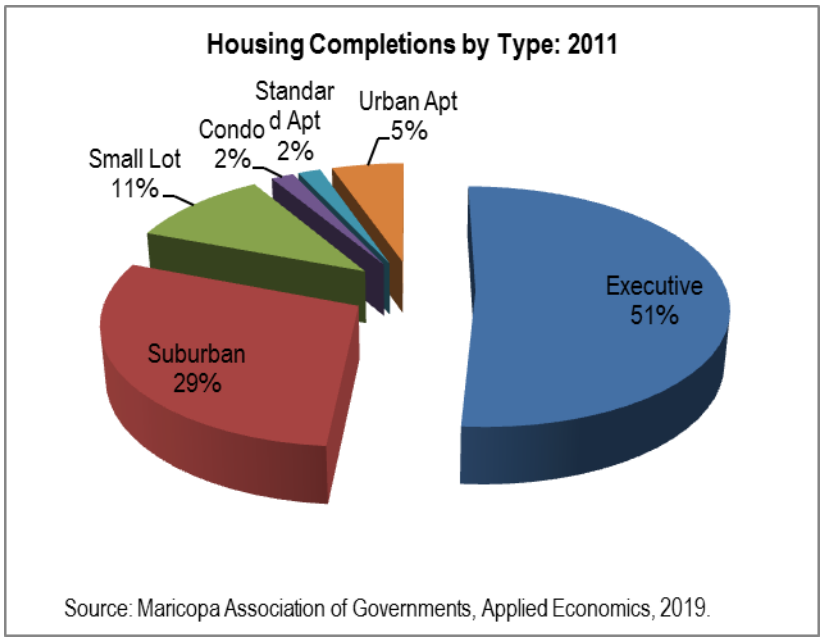
Housing prices in the Phoenix metro region compare favorably to other markets that are in competition for young, tech employees that now make up a significant part of the economy. While Seattle, Austin, and San Jose have much stronger tech growth, they also have significantly higher housing costs. Data from the National Association of Realtors provides a comparison. In the first quarter of 2019 the median sales price of existing single family houses in the U.S. was $254,800 versus $384,300 in the Western region. The Seattle median price was $497,000, or 129 percent of the Western region price. At $303,400 Austin was just 79 percent of the Western region median. San Jose was 317 percent above the Western region price with a median of $1,220,000. The Phoenix median price of $276,400 is only 72 percent of the

Western region and 108 percent of the U.S. median, which is a favorable position for people considering a move within the west or nationally.

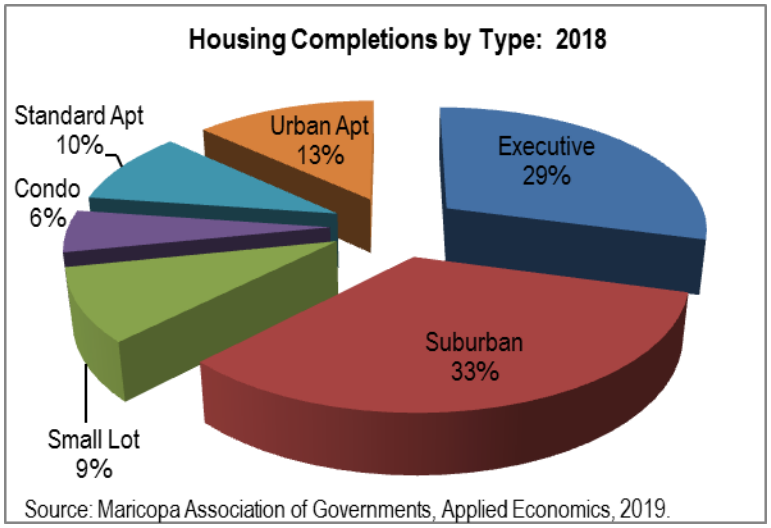
Phoenix has favorable housing prices compared to most competitive areas and it also has increasing valuations, a consideration for younger buyers expecting to build equity for the future. Between the first quarter of 2018 and 2019 the median home price in Phoenix increased by 5.9 percent, which is favorable compared to 3.5 percent for the Western region and 3.9 percent nationally. Changes in median prices last year in competitive metro areas range from 2.6 percent in Seattle, 2.4 in Austin, 1.4 in Dallas, and -11.1 percent in San Jose.

The recent recession distorted the local housing market in several ways. Because of financial limitations the local housing market shifted both geographically and in type. Entry-level markets were especially impacted with housing starts in some areas of the metro region seriously curtailed. The housing market has largely recovered with strong new construction activity taking place throughout the metro region, although activity in parts of Pinal County continues to be limited.

The impacts on housing diversity can be seen in the charts to the right, which show residential completion data for Maricopa County. In 2011, low-density executive housing accounted for about half of all residential completions in developments. This segment includes developments with fewer than 3.5 lots-per-acre and is typically a move-up market. In contrast, typical suburban housing only accounted for 29 percent of completions. This is the inverse of a normal market and a reflection of the distorted economic and lending conditions that existed during the recession.



By 2018 there were two notable market shifts. The single family market recovered as suburban densities increased and low-density properties accounted for a smaller proportion of new construction. The other significant change is the shift in metro area multifamily housing that has occurred as the market has recovered from the recession. New growth has been concentrated in high-amenity, high-rent properties that are generally located in urban centers or along major transportation corridors.



The metro housing market experienced reduced demand in late 2018 and early 2019, but new home sales increased by 16 percent in June 2019. This was especially notable since early summer is generally a time when demand goes down. While this trend may be short-lived, it is indicative of the vigorous job market in Phoenix, strong net in-migration, and stabilized mortgage rates.

The Phoenix metro housing market is expected to remain strong. A 2018 survey from Bank of America found that of millennial respondents (aged 23 to 40 years old), 72 percent listed owning a home as a top priority. A survey of millennials by the National Association of Home Builders found that over 60 percent list "a better home" and household formation as reasons for moving. A Meyers Research survey notes top factors for moving include job opportunities, affordability, and lifestyle. While "lifestyle" is a rather vague measure, the employment market locally and housing affordability compared to other western metro areas are key advantages for metro Phoenix.

Looking ahead in the near-term stable growth levels are anticipated, although some shifts in the geographic location and type of new housing construction are expected due to market corrections that followed the recession and changes brought about by a younger generation of buyers. Other developments and trends of note include the following:

- The Southeast Valley has experienced very strong growth levels in recent years and the supply of vacant land is dwindling. The annexation of 4,140 acres of State Trust Land in Pinal County into the Town of Queen Creek is an indication of continued future growth in the area.
- The opening of the Loop 202 through Laveen and around South Mountain is expected in late 2019 or very early 2020. This will facilitate commuting between the West and East Valley as well as support new employment centers. As an example, Trammel Crow announced plans for a 700,000 square foot commerce park on the Gila River Indian Community to open in late 2020. More such projects are expected.
- The improved freeway accessibility and new employment opportunities should both create demand for residential development in the West Valley.
- The opening of the Lucid Motors plant in Casa Grande and Nikola Motors in Coolidge will have a major impact on housing development in Pinal County, which was devastated by the recession in 2007.
- High-density, single family rentals are a growing housing trend and appear, at least to a degree, to be taking the place of traditional apartment complexes, while the construction of high-rent, high-amenity apartments continues to be strong.
- The trend of rezoning smaller commercial acreages to high-density single family uses is expected to continue. Many of these corner sites were zoned decades ago; meanwhile both commercial and residential markets have changed over time.
- Infill development can be expected to continue as a popular housing option for buyers trading larger suburban homes for proximity to urban centers and amenities.
- Builders will continue to modify housing plans and construction practices to reach more buyers, especially at lower price points.

Overall, residential growth in the Phoenix metro region is expected to remain strong. While the economy is expected to slow in the next year, a major recession is not likely unless there is a significant disruptive action. The Phoenix metro area should be less susceptible to negative impacts due to the structural changes in the local economy and more measured increases in construction activity and housing prices that have occurred during the prolonged recovery period. Residential growth is expected to be more diverse, although some parts of the region still lack sufficient diversity to provide an adequate buffer against future market downturns.

4.0 DISTRICT-LEVEL PROJECTIONS

Enrollment, demographic and development information are integrated in order to project changes in District-level enrollment by grade over the next ten years. The level of projected change is based on housing growth, occupancy rates, and per household student-age population generation and capture rates. Due to the pronounced demographic and development differences that exist among the different areas of the District, the District-level projections are derived from the projections by Community that are discussed in Section 5.0 of this report. These projections account for local and regional socioeconomic trends.

4.1 POPULATION AND HOUSING

The long-term population and housing projections for the District, shown in **Table 7,** are based on trends in housing construction, occupancy, ownership and economic growth indicators. Currently, the District contains approximately 113,450 households (occupied housing units) with a population per household of about 2.10 persons. District population and households are expected to increase modestly throughout the projection period as new housing supply enters the market and redevelopment continues. Population per household is expected to decline slowly, reaching 2.05 persons per household by 2029/30. Occupancy rates, which have recovered from a low of 84.5 percent during the recession to a current level of 87.4 percent, are projected to increase slightly, reaching 88.3 percent by the end of the period.

About 10,300 new housing units are projected over the next ten years, resulting in a population increase of about 15,350 persons in 10,280 new households. However, the population per household is expected to remain low since a significant share of the total development potential is projected to be in the form of multifamily units. The decline in school-age population in existing housing units combined with declining capture rates will likely be large enough to offset all of the enrollment growth that would otherwise be associated with the creation of over 10,200 new households.

TABLE 7
PROJECTED POPULATION AND HOUSING

Year	Population	Total Units	New Units	Occupancy Rate	Households Total	Households Change	Pop/HH
2000/01	220,068	110,533		88.7%	98,031		2.245
2001/02	223,229	111,978	1,445	89.2%	99,834	1,803	2.236
2002/03	226,455	113,441	1,462	89.6%	101,667	1,832	2.227
2003/04	229,543	114,891	1,451	90.1%	103,502	1,836	2.218
2004/05	232,575	116,329	1,438	90.6%	105,341	1,839	2.208
2005/06	236,260	118,037	1,707	91.0%	107,419	2,078	2.199
2006/07	235,504	119,263	1,227	90.1%	107,489	70	2.191
2007/08	233,836	120,319	1,056	89.1%	107,158	-331	2.182
2008/09	229,265	120,975	656	87.3%	105,563	-1,595	2.172
2009/10	224,712	121,366	391	85.7%	103,968	-1,595	2.161
2010/11	220,818	121,621	255	84.5%	102,742	-1,226	2.149
2011/12	222,627	121,843	223	85.2%	103,798	1,056	2.145
2012/13	225,554	122,474	630	86.3%	105,660	1,862	2.135
2013/14	224,890	123,231	758	86.0%	105,941	281	2.123
2014/15	230,698	125,786	2,555	86.9%	109,337	3,397	2.110
2015/16	233,193	127,245	1,458	87.3%	111,081	1,744	2.099
2016/17	236,669	127,659	414	88.3%	112,780	1,699	2.099
2017/18	235,644	127,841	182	87.9%	112,369	-411	2.097
2018/19	236,932	129,052	1,211	87.6%	113,018	650	2.096
2019/20	237,899	129,823	771	87.4%	113,453	435	2.097
2020/21	238,018	130,477	654	87.2%	113,782	329	2.092
2021/22	239,177	131,797	1,319	87.0%	114,696	914	2.085
2022/23	241,275	133,597	1,801	86.8%	116,026	1,329	2.080
2023/24	242,694	134,956	1,359	86.7%	116,963	938	2.075
2024/25	244,937	136,108	1,152	87.0%	118,390	1,427	2.069
2025/26	247,093	137,102	994	87.3%	119,704	1,313	2.064
2026/27	248,999	137,947	845	87.6%	120,893	1,189	2.060
2027/28	250,861	138,757	810	88.0%	122,058	1,165	2.055
2028/29	252,640	139,524	767	88.3%	123,193	1,135	2.051
2029/30	253,251	140,093	569	88.3%	123,735	542	2.047
2020/21-2029/30			10,270			10,282	

Source: Applied Economics, 2019.
*Bolding Indicates Actuals

4.2 SCHOOL-AGE POPULATION AND CAPTURE RATES

In addition to the volume and market orientation of new housing, trends in per-household student generation and capture rates (enrollment-population ratio), shown in **Table 8,** are key factors used in determining future enrollment levels. The first element, student generation, refers to the expected size of the school-age population, or the number of persons 5 to 17 years old, per household. The average number of school-age persons per household has decreased from 0.337 in 2000/01, which was already low compared to most metropolitan Phoenix suburbs, to just 0.269 in 2019/20; the District is expected to experience continued declines in student generation rates, down to 0.240 by 2029/30. It should be noted that these rates vary significantly within the District.

TABLE 8
PROJECTED ENROLLMENT AND ENROLLMENT GROWTH RATE

		School-Age Population *		K-12 Enrollment		Net	Enrollment -
Year	Households	Total	Per Household	Total	Per Household	Difference	Population Ratio
2000/01	98,031	33,063	0.337	27,225	0.278	5,838	0.823
2001/02	99,834	33,254	0.333	27,214	0.273	6,040	0.818
2002/03	101,667	33,434	0.329	27,211	0.268	6,223	0.814
2003/04	103,502	33,610	0.325	26,342	0.255	7,268	0.784
2004/05	105,341	33,771	0.321	26,173	0.248	7,598	0.775
2005/06	107,419	34,005	0.317	26,595	0.248	7,410	0.782
2006/07	107,489	33,662	0.313	25,892	0.241	7,771	0.769
2007/08	107,158	33,229	0.310	26,083	0.243	7,146	0.785
2008/09	105,563	32,436	0.307	26,372	0.250	6,064	0.813
2009/10	103,968	31,643	0.304	26,396	0.254	5,247	0.834
2010/11	102,742	30,606	0.298	25,989	0.253	4,617	0.849
2011/12	103,798	30,615	0.295	25,691	0.248	4,924	0.839
2012/13	105,660	30,770	0.291	25,167	0.238	5,603	0.818
2013/14	105,941	30,006	0.283	24,775	0.234	5,231	0.826
2014/15	109,337	30,995	0.283	23,604	0.216	7,391	0.762
2015/16	111,081	31,059	0.280	23,414	0.211	7,645	0.754
2016/17	112,780	31,190	0.277	23,280	0.206	7,910	0.746
2017/18	112,369	30,707	0.273	22,853	0.203	7,854	0.744
2018/19	113,018	30,513	0.270	22,371	0.198	8,142	0.733
2019/20	113,453	30,462	0.268	22,233	0.196	8,229	0.730
2020/21	113,782	30,222	0.266	21,906	0.193	8,316	0.725
2021/22	114,696	29,999	0.262	21,605	0.188	8,394	0.720
2022/23	116,026	29,937	0.258	21,498	0.185	8,440	0.718
2023/24	116,963	29,915	0.256	21,272	0.182	8,642	0.711
2024/25	118,390	29,867	0.252	21,136	0.179	8,732	0.708
2025/26	119,704	29,842	0.249	20,994	0.175	8,848	0.704
2026/27	120,893	29,802	0.247	20,791	0.172	9,011	0.698
2027/28	122,058	29,763	0.244	20,668	0.169	9,095	0.694
2028/29	123,193	29,744	0.241	20,600	0.167	9,143	0.693
2029/30	123,735	29,671	0.240	20,390	0.165	9,280	0.687

Source: Applied Economics, 2019.

* Population age 5 through 17, corresponds with Kindergarten through 12th grade.

Bolding indicates historical data.

In 1990/91 the District's enrollment to population ratio was 0.879, meaning that nearly 88 percent of the school-age population of the District attended District schools. That capture rate was very typical for a mature area that also included a variety of private and parochial schools. Since that time, increasing open enrollment and the proliferation of public charter schools has significantly impacted the in-District capture rates for public school districts in Arizona. While open enrollment causes a shifting of students between districts, with gains and losses offsetting each other to varying degrees, charter schools only subtract from district enrollment. The overall capture rate in Scottsdale fell to 0.823 by 2000/01, dropping further to 0.769 by 2006/07, but rebounding back to 0.849 by 2010/11. Since that time the capture rate again declined to 0.730 in 2019/20, consistent with the opening of a significant number of new charter schools in or near District boundaries.

Because of the increasing number of educational alternatives and open enrollment policies, it is necessary to apply this capture rate, or enrollment to population ratio, to the school-age population in order to project District enrollment. While households may be generating an average of 0.268 school-age persons, this does not necessarily equate to an equivalent amount of enrollment. Please note that in this analysis the capture rate is based on the *net difference* between the school-age population and District enrollment. This includes the loss of in-District students to other providers, and the addition of students from outside the District.

This year the District enrolled 4,667 students from outside the District's boundaries, meaning that only 17,566 of the District's 30,462 school-age children attend District schools. This would imply an in-District capture rate of just 58 percent of the resident school-age population. With out-of-District students included, the net capture rate rises to 73 percent with a net loss of 8,229 students. The level of out-of-District enrollment is assumed to remain fairly stable.

4.3 DISTRICT ENROLLMENT

Based on the projected change in the school-age population and trends in the District's capture rate, in-District K-12 enrollment is projected to steadily decline throughout the projection period. The effects of new home construction within the District on enrollment over the next ten years are expected to be largely offset by the aging of the population in existing housing units and a slow decline in capture rates. As a result, total K-12 enrollment is projected to decline by about 1,800 students over the next ten years, dropping to 20,390 by 2029/30. **Table 9** provides more detail on District enrollment history and projections by grade level.

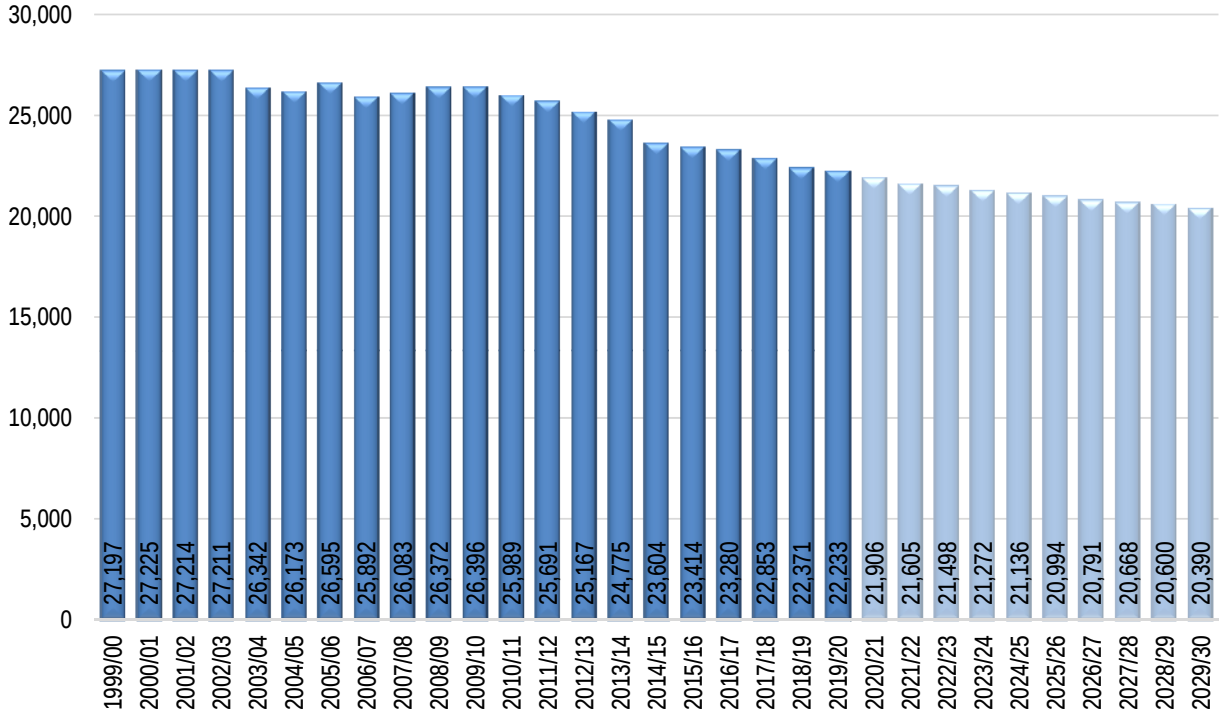
Total District enrollment is expected to decline by a total of 8 percent over the next 10 years; while there should be only slight fluctuations from one year to the next, nearly 60 percent of that loss (1,100 K-12 students) is expected to have occurred by 2024/25 (**Figure 5**). The post-recession drop in K-5 enrollment will continue to impact 6-8 enrollment during the projection period, which is expected to decline by an average of 1.4 percent per year (dropping nearly 700 students by 2029/30). Slight losses are expected at the K-5 level during the first three years of the 10-year period, before stabilizing for the duration of the projection period. Enrollment in the 9-12 cohort is projected to decline by about 11 percent, or 900 students, by 2029/30 as graduating classes are succeeded by lesser numbers of students in lower grades; the strongest high school losses (1.7 percent per year on average) are expected to occur in the latter half of the projection period.

TABLE 9
PROJECTED ENROLLMENT BY LEVEL

	Enrollment by Level				K-12 Total			Share by Level		
Fall	K-5	6-8	K-8	9-12	Enrollment	Change	% Change	K-5	6-8	9-12
2000/01	12,239	6,670	18,909	8,316	27,225			45.0%	24.5%	30.5%
2001/02	11,666	6,552	18,218	8,370	26,588	-637	-2.3%	43.9%	24.6%	31.5%
2002/03	11,804	6,987	18,791	8,420	27,211	623	2.3%	43.4%	25.7%	30.9%
2003/04	11,300	6,649	17,949	8,393	26,342	-869	-3.2%	42.9%	25.2%	31.9%
2004/05	11,243	6,387	17,630	8,543	26,173	-169	-0.6%	43.0%	24.4%	32.6%
2005/06	11,462	6,337	17,799	8,796	26,595	422	1.6%	43.1%	23.8%	33.1%
2006/07	10,962	6,105	17,067	8,804	25,871	-724	-2.7%	42.4%	23.6%	34.0%
2007/08	11,237	6,122	17,359	8,680	26,039	168	0.7%	43.2%	23.5%	33.3%
2008/09	11,502	6,083	17,585	8,787	26,372	333	1.3%	43.6%	23.1%	33.3%
2009/10	11,414	6,042	17,456	8,940	26,396	24	0.1%	43.2%	22.9%	33.9%
2010/11	11,266	5,798	17,064	8,925	25,989	-407	-1.5%	43.3%	22.3%	34.3%
2011/12	11,088	5,898	16,986	8,705	25,691	-298	-1.1%	43.2%	23.0%	33.9%
2012/13	10,856	5,613	16,469	8,698	25,167	-524	-2.0%	43.1%	22.3%	34.6%
2013/14	10,555	5,684	16,239	8,536	24,775	-392	-1.6%	42.6%	22.9%	34.5%
2014/15	9,749	5,442	15,191	8,413	23,604	-1,171	-4.7%	41.3%	23.1%	35.6%
2015/16	9,690	5,299	14,989	8,425	23,414	-190	-0.8%	41.4%	22.6%	36.0%
2016/17	9,417	5,356	14,773	8,507	23,280	-134	-0.6%	40.5%	23.0%	36.5%
2017/18	9,192	5,298	14,490	8,363	22,853	-427	-1.8%	40.2%	23.2%	36.6%
2018/19	8,788	5,210	13,998	8,373	22,371	-482	-2.1%	39.3%	23.3%	37.4%
2019/20	8,681	5,101	13,782	8,451	22,233	-138	-0.6%	39.0%	22.9%	38.0%
2020/21	8,506	5,010	13,516	8,390	21,906	-327	-1.5%	38.8%	22.9%	38.3%
2021/22	8,433	4,829	13,262	8,343	21,605	-301	-1.4%	39.0%	22.4%	38.6%
2022/23	8,355	4,747	13,102	8,396	21,498	-107	-0.5%	38.9%	22.1%	39.1%
2023/24	8,397	4,573	12,970	8,302	21,272	-225	-1.0%	39.5%	21.5%	39.0%
2024/25	8,402	4,510	12,912	8,224	21,136	-137	-0.6%	39.8%	21.3%	38.9%
2025/26	8,412	4,408	12,820	8,174	20,994	-142	-0.7%	40.1%	21.0%	38.9%
2026/27	8,416	4,458	12,874	7,917	20,791	-203	-1.0%	40.5%	21.4%	38.1%
2027/28	8,417	4,455	12,872	7,796	20,668	-123	-0.6%	40.7%	21.6%	37.7%
2028/29	8,423	4,456	12,879	7,721	20,600	-68	-0.3%	40.9%	21.6%	37.5%
2029/30	8,402	4,443	12,845	7,545	20,390	-210	-1.0%	41.2%	21.8%	37.0%

Source: Applied Economics, 2019.
Bolding indicates actuals.

FIGURE 5
ACTUAL AND PROJECTED K-12 ENROLLMENT



Sources: Scottsdale Unified School District Applied Economics, 2019

5.0 SUB-DISTRICT PROJECTIONS

The purpose of this section is to provide sub-District enrollment projections based on the attendance at each school and the residency of the SUSD student population, which forms the basis of the grid-level projections. Accordingly, the section begins with projections by community based on the school of attendance. These projections form the basis for the District enrollment projections and provide baseline information for comparing enrollment by school with enrollment by attendance area.

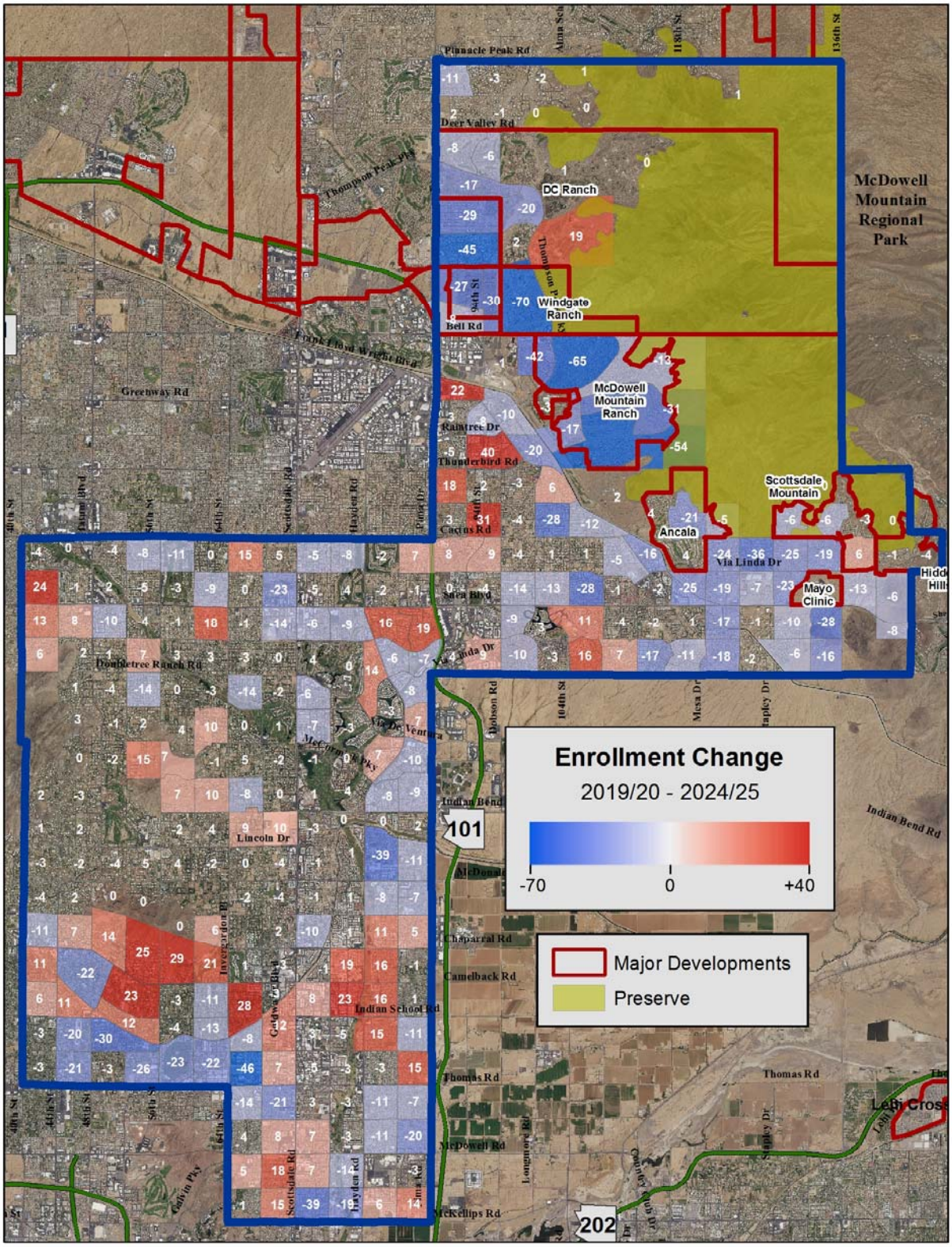
The sub-District analysis aggregates grid-level enrollment by attendance area, which is most closely linked to the characteristics of the population in specific parts of the District. These projections are used in conjunction with the analysis of residence versus enrollment in the final part of the section to project the level of enrollment by school over the next ten years.

The grid-level projections are illustrated by **Maps 10 and 11**, which show the projected change in enrollment by grid for the 2019/20 to 2024/25 and 2024/25 to 2029/30 time periods, respectively. The maps generally show large areas with declines; however, some regeneration is expected over the next five years, particularly in the southern portion of the District, which will likely continue into the second half of the projection period.

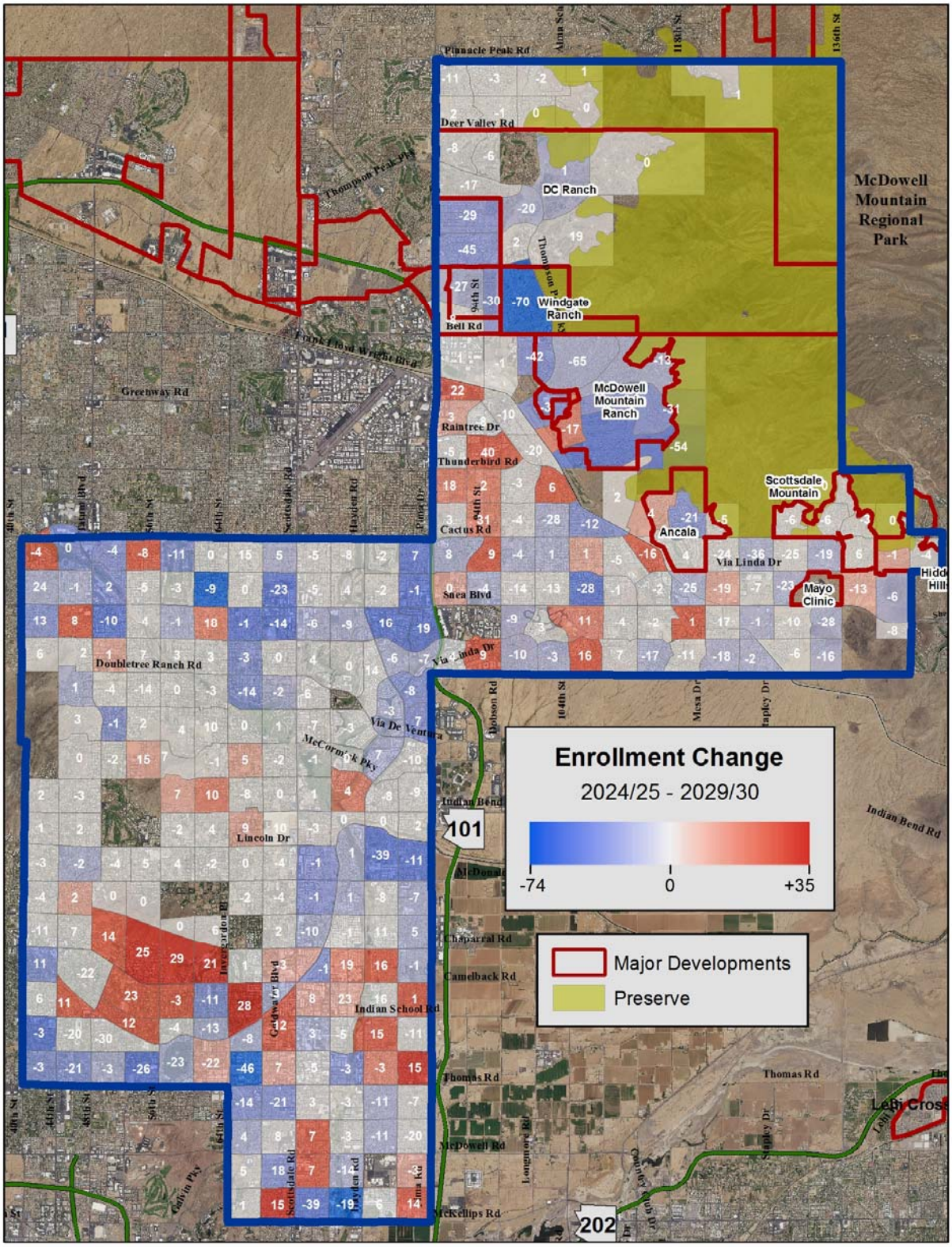
5.1 ENROLLMENT TRENDS BY DISTRICT COMMUNITY

Each of the District's communities have notable differences in demographic and household characteristics that can be expected to cause variations in enrollment in the future, but that are masked when examining the District-level information. In some communities there are short-term factors affecting enrollment, while longer-term trends are present in others. The following projections are based on community attendance. The relationship between attendance and residence is altered by open enrollment and other factors, as will be discussed later in this section. Tables containing detailed demographic information by community are included in **Appendix A** of this report.

MAP 10
CHANGE IN ENROLLMENT: 2019/20 – 2024/25



MAP 11
CHANGE IN ENROLLMENT: 2024/25 – 2029/30



5.1.1 ARCADIA COMMUNITY

As shown on **Table 10**, enrollment in the Arcadia Community schools fluctuated within a fairly narrow margin of plus or minus 160 students from 2009/10 through 2016/17; peak enrollment of about 4,600 students occurred four times during this period, most recently in 2016/17. Since 2016/17, K-12 enrollment in this community has declined by 200 students, or roughly four percent, although it did increase by 1.7 percent in 2019/20. This is an older, well-established area, so large changes in enrollment would not normally be expected. Total population in this region grew by four percent since 2010, but the population aged 5 to 13 years declined by 6.4 percent. Therefore, despite the attractiveness of this community to students from outside the District, the resident population continues to age and enrollment is projected to decline by about 1.0 percent per year, dropping to 4,068 K-12 students by 2029/30.

TABLE 10
ARCADIA COMMUNITY ENROLLMENT: 2000/01-2029/30 *

		Enrollment by Level				K-12 Total		
Fall	PS	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2000/01	0	1,716	963	2,679	1,204	3,883		
2001/02	0	1,686	985	2,671	1,253	3,924	41	1.1%
2002/03	17	1,678	1,013	2,691	1,241	3,932	8	0.2%
2003/04	56	1,725	963	2,688	1,229	3,917	-15	-0.4%
2004/05	16	1,795	909	2,704	1,280	3,984	67	1.7%
2005/06	47	1,953	867	2,820	1,376	4,196	212	5.3%
2006/07	40	1,839	890	2,729	1,404	4,133	-63	-1.5%
2007/08	58	1,879	944	2,823	1,417	4,240	107	2.6%
2008/09	52	2,010	1,041	3,051	1,581	4,632	392	9.2%
2009/10	51	1,941	1,034	2,975	1,662	4,637	5	0.1%
2010/11	57	1,865	904	2,769	1,713	4,482	-155	-3.3%
2011/12	49	1,869	987	2,856	1,686	4,542	60	1.3%
2012/13	49	1,877	908	2,785	1,709	4,494	-48	-1.1%
2013/14	44	1,926	967	2,893	1,743	4,636	142	3.2%
2014/15	32	1,814	954	2,768	1,733	4,501	-135	-2.9%
2015/16	66	1,856	941	2,797	1,752	4,549	48	1.1%
2016/17	18	1,856	1,049	2,905	1,734	4,639	90	2.0%
2017/18	11	1,745	1,064	2,809	1,727	4,536	-103	-2.2%
2018/19	66	1,606	1,026	2,632	1,736	4,368	-168	-3.7%
2019/20	55	1,552	1,031	2,583	1,861	4,444	76	1.7%
2020/21	54	1,514	984	2,498	1,846	4,344	-100	-2.3%
2021/22	53	1,456	1,015	2,471	1,816	4,287	-57	-1.3%
2022/23	52	1,410	979	2,389	1,855	4,244	-43	-1.0%
2023/24	52	1,409	987	2,396	1,809	4,205	-39	-0.9%
2024/25	52	1,370	980	2,350	1,846	4,196	-9	-0.2%
2025/26	52	1,374	955	2,329	1,846	4,175	-21	-0.5%
2026/27	52	1,373	968	2,341	1,815	4,156	-19	-0.5%
2027/28	52	1,373	936	2,309	1,853	4,162	6	0.1%
2028/29	51	1,369	957	2,326	1,786	4,112	-50	-1.2%
2029/30	50	1,356	950	2,306	1,762	4,068	-44	-1.1%

Source: Applied Economics, 2019.

Bolding indicates actuals.

* Projection assumes out of district enrollment is not artifically capped.

5.1.2 CHAPARRAL COMMUNITY

The Chaparral Community have experienced an average increase in enrollment of about two percent per year since 2015/16, following three previous years of declines**,** and currently totals more than 5,000 K-12 students (**Table 11)**. While not nearly as established as the Arcadia Community, this area is gentrifying. Since 2010, the population in this community has grown by an estimated 1,349 people (4.0 percent), although the school-age population (ages 5 to 17 years) declined slightly (83 students or 1.6 percent); at the same time, the population over 64 years of age increased by 25 percent, or more than 1,800 persons. Despite these demographic shifts, enrollment in this community has been relatively stable due to household turnover and growth in out of district enrollment. Enrollment is projected to decrease to about 4,700 K-12 students by 2029/30, which represents a loss of about 360 students over the 10-year period; most of this decrease will occur during the second half of the projection period.

TABLE 11
CHAPARRAL COMMUNITY ENROLLMENT: 2000/01-2029/30

		Enrollment by Level				K-12 Total		
Fall	PS	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2000/01	0	1,968	1,214	3,182	1,889	5,071		
2001/02	0	1,967	1,252	3,219	1,847	5,066	-5	-0.1%
2002/03	20	1,944	1,243	3,187	1,868	5,055	-11	-0.2%
2003/04	19	1,828	1,112	2,940	1,793	4,733	-322	-6.4%
2004/05	24	1,736	1,070	2,806	1,793	4,599	-134	-2.8%
2005/06	26	1,752	1,049	2,801	1,849	4,650	51	1.1%
2006/07	18	1,618	997	2,615	1,825	4,440	-210	-4.5%
2007/08	43	1,635	987	2,622	1,927	4,549	109	2.5%
2008/09	81	1,609	974	2,583	2,025	4,608	59	1.3%
2009/10	122	1,731	927	2,658	2,108	4,766	158	3.4%
2010/11	108	1,736	873	2,609	2,116	4,725	-41	-0.9%
2011/12	129	1,722	890	2,612	2,188	4,800	75	1.6%
2012/13	129	1,677	906	2,583	2,105	4,688	-112	-2.3%
2013/14	123	1,624	892	2,516	2,077	4,593	-95	-2.0%
2014/15	109	1,530	897	2,427	2,063	4,490	-103	-2.2%
2015/16	82	1,629	886	2,515	2,086	4,601	111	2.5%
2016/17	17	1,633	928	2,561	2,219	4,780	179	3.9%
2017/18	11	1,717	907	2,624	2,243	4,867	87	1.8%
2018/19	123	1,733	895	2,628	2,304	4,932	65	1.3%
2019/20	110	1,798	904	2,702	2,347	5,049	117	2.4%
2020/21	110	1,744	947	2,691	2,366	5,057	8	0.2%
2021/22	109	1,726	932	2,658	2,375	5,033	-24	-0.5%
2022/23	109	1,675	955	2,630	2,406	5,036	3	0.1%
2023/24	108	1,678	876	2,554	2,449	5,003	-33	-0.7%
2024/25	107	1,639	870	2,509	2,450	4,959	-44	-0.9%
2025/26	106	1,643	819	2,462	2,466	4,928	-31	-0.6%
2026/27	105	1,626	827	2,453	2,428	4,881	-47	-1.0%
2027/28	103	1,614	801	2,415	2,386	4,801	-80	-1.6%
2028/29	102	1,603	803	2,406	2,353	4,759	-42	-0.9%
2029/30	100	1,589	792	2,381	2,305	4,686	-73	-1.5%

Source: Applied Economics, 2019.
Bolding indicates actuals.

5.1.3 CHAPARRAL NORTH

The Chaparral North (community part) area schools generally experienced increased K-8 enrollment through 2011/12, as shown on **Table 12;** at the time, this was the District's primary area for new single family housing construction. From 2010 to 2019, this community saw strong population increases in every age group except the school-age group (persons aged 5 to 13 years), which declined by 5.8 percent. The largest increases by householder age were for households aged 55 to 64 years (59.2 percent), which are generally outside the range of households with school-age children. The second largest increase was for householders aged 45 to 54 years (52.2 percent), who are more likely to have middle school and high school age children. Despite population growth in the Chaparral North community, enrollment in its schools has been declining since 2012/13, and at an increasing rate, with losses of more than 100 students per year for the past three years (representing annual declines of 12 to 15 percent per year) that were fueled by growth in charter and private schools. With future construction in this area waning, enrollment declines are expected to continue and will be particularly strong during the first half of the projection period. The projections show a total loss of 171 students during the first five-year period and another 21 students by 2029/30, resulting in K-8 enrollment of just 449 students at the end of the projection period.

TABLE 12
CHAPARRAL NORTH COMMUNITY ENROLLMENT: 2003/04 - 2029/30

		Enrollment by Level		K-8 Total		
Fall	PS	K-5	6-8	Enrollment	Change	% Change
2003/04	0	375	529	904	58	6.9%
2004/05	0	440	547	987	83	9.2%
2005/06	0	515	544	1,059	72	7.3%
2006/07	0	558	474	1,032	-27	-2.5%
2007/08	56	622	402	1,024	-8	-0.8%
2008/09	106	730	345	1,075	51	5.0%
2009/10	126	824	385	1,209	134	12.5%
2010/11	86	839	368	1,207	-2	-0.2%
2011/12	91	797	433	1,230	23	1.9%
2012/13	91	750	448	1,198	-32	-2.6%
2013/14	22	702	461	1,163	-35	-2.9%
2014/15	31	634	451	1,085	-78	-6.7%
2015/16	68	622	439	1,061	-24	-2.2%
2016/17	12	551	449	1,000	-61	-5.7%
2017/18	11	477	400	877	-123	-12.3%
2018/19	34	379	374	753	-124	-14.1%
2019/20	33	339	302	641	-112	-14.9%
2020/21	31	308	285	593	-48	-7.5%
2021/22	29	293	254	547	-46	-7.8%
2022/23	28	285	234	519	-28	-5.1%
2023/24	26	275	212	487	-32	-6.2%
2024/25	25	275	195	470	-17	-3.5%
2025/26	24	281	176	457	-13	-2.8%
2026/27	24	286	168	454	-3	-0.7%
2027/28	24	291	154	445	-9	-2.0%
2028/29	24	295	154	449	4	0.9%
2029/30	24	298	151	449	0	0.0%

Source: Applied Economics, 2019.
Bolding indicates actuals.

5.1.4 CORONADO COMMUNITY

The Coronado Community is older than all but the Arcadia Community, with a diversifying population and declining enrollment, as shown in **Table 13**. Recent additions to the housing supply have nearly all been high-end multifamily, contributing to the decline in the number of students per household. Despite the increase in multifamily housing, the school-age population within the community is actually expected to increase by about 700 students over the next ten years. However, due to declining capture rates, the growth in the school-age population will not translate into enrollment increases at District schools. In fact, enrollment losses are expected to peak in the middle of the projection period (2023/24 to 2026/27), at roughly two percent per year, before slight increases occur in each of the last three years of the projection period. Overall, losses in the Coronado Community are projected at 192 students, resulting in K-12 enrollment of 2,628 students by 2029/30.

TABLE 13
CORONADO COMMUNITY ENROLLMENT: 2000/01-2029/30

		Enrollment by Level				K-12 Total		
Fall	PS	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2000/01	0	2,225	996	3,221	1,268	4,489		
2001/02	0	2,129	1,041	3,170	1,235	4,405	-84	-1.9%
2002/03	18	2,129	1,082	3,211	1,286	4,497	92	2.1%
2003/04	45	1,942	1,088	3,030	1,278	4,308	-189	-4.2%
2004/05	44	2,039	1,000	3,039	1,326	4,365	57	1.3%
2005/06	154	2,026	1,052	3,078	1,374	4,452	87	2.0%
2006/07	113	1,943	912	2,855	1,461	4,316	-136	-3.1%
2007/08	137	2,012	913	2,925	1,394	4,319	3	0.1%
2008/09	155	2,053	888	2,941	1,378	4,319	0	0.0%
2009/10	184	1,918	892	2,810	1,404	4,214	-105	-2.4%
2010/11	221	1,922	849	2,771	1,365	4,136	-78	-1.9%
2011/12	222	1,953	807	2,760	1,242	4,002	-134	-3.2%
2012/13	222	1,961	760	2,721	1,258	3,979	-23	-0.6%
2013/14	186	1,869	737	2,606	1,076	3,682	-297	-7.5%
2014/15	166	1,720	678	2,398	1,042	3,440	-242	-6.6%
2015/16	150	1,673	645	2,318	1,038	3,356	-84	-2.4%
2016/17	39	1,623	579	2,202	1,072	3,274	-82	-2.4%
2017/18	25	1,526	563	2,089	948	3,037	-237	-7.2%
2018/19	198	1,459	533	1,992	942	2,934	-103	-3.4%
2019/20	161	1,398	520	1,918	902	2,820	-114	-3.9%
2020/21	159	1,394	456	1,850	931	2,781	-39	-1.4%
2021/22	159	1,406	380	1,786	991	2,777	-4	-0.1%
2022/23	160	1,424	334	1,758	1,042	2,800	23	0.8%
2023/24	157	1,454	323	1,777	979	2,756	-44	-1.6%
2024/25	154	1,479	327	1,806	894	2,700	-56	-2.0%
2025/26	150	1,485	340	1,825	811	2,636	-64	-2.4%
2026/27	146	1,501	366	1,867	705	2,572	-64	-2.4%
2027/28	148	1,516	383	1,899	702	2,601	29	1.1%
2028/29	149	1,529	378	1,907	719	2,626	25	1.0%
2029/30	149	1,541	388	1,929	699	2,628	2	0.1%

Source: Applied Economics, 2019.
Bolding indicates actuals.

5.1.5 DESERT MOUNTAIN COMMUNITY

The total population in the Desert Mountain Community grew by just 1.1 percent, or 711 persons, between 2010 and 2019. This growth was almost entirely fueled by a large increase in persons aged 45 years and older, which was offset by losses in both of the school-age cohorts (four to six percent) and a significant loss (19.1 percent) in the Under 5 age group. These shifts are reflected in the area's declining enrollment over the past ten years, as shown on **Table 14**. Given the market orientation of much of the housing in this community, it is not surprising that the number of householders aged 44 years and younger also declined, while the largest growth since 2010 has been in households aged 65 years and older (12.7 percent). As a result, this is one of the few parts of the District where the school-age population is projected to decline sharply, with estimated losses of nearly 900 persons (9.4 percent) over the next ten years. Like North Chaparral, declines in the school-age population will also likely be exaggerated by continued competition from charter and private schools in the area. Overall, this community is projected to experience a net loss of 665 students (11.6 percent) by 2029/30, resulting in total enrollment of 5,087 K-12 students.

TABLE 14
DESERT MOUNTAIN COMMUNITY ENROLLMENT: 2000/01-2029/30

		Enrollment by Level				K-12 Total		
Fall	PS	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2000/01	0	4,588	2,546	7,134	2,393	9,527		
2001/02	0	4,218	2,275	6,493	2,458	8,951	-576	-6.0%
2002/03	34	4,134	2,102	6,236	2,374	8,610	-341	-3.8%
2003/04	53	3,865	2,016	5,881	2,416	8,297	-313	-3.6%
2004/05	79	3,713	1,943	5,656	2,405	8,061	-236	-2.8%
2005/06	81	3,719	1,943	5,662	2,449	8,111	50	0.6%
2006/07	64	3,546	1,959	5,505	2,480	7,985	-126	-1.6%
2007/08	141	3,580	1,990	5,570	2,433	8,003	18	0.2%
2008/09	214	3,543	1,973	5,516	2,332	7,848	-155	-1.9%
2009/10	151	3,397	1,928	5,325	2,360	7,685	-163	-2.1%
2010/11	201	3,350	1,899	5,249	2,335	7,584	-101	-1.3%
2011/12	190	3,189	1,918	5,107	2,291	7,398	-186	-2.5%
2012/13	190	3,060	1,771	4,831	2,291	7,122	-276	-3.7%
2013/14	178	2,966	1,790	4,756	2,275	7,031	-91	-1.3%
2014/15	174	2,737	1,650	4,387	2,252	6,639	-392	-5.6%
2015/16	140	2,590	1,605	4,195	2,252	6,447	-192	-2.9%
2016/17	25	2,397	1,537	3,934	2,191	6,125	-322	-5.0%
2017/18	28	2,396	1,511	3,907	2,163	6,070	-55	-0.9%
2018/19	168	2,315	1,489	3,804	2,131	5,935	-135	-2.2%
2019/20	201	2,254	1,440	3,694	2,058	5,752	-183	-3.1%
2020/21	195	2,198	1,397	3,595	1,974	5,569	-183	-3.2%
2021/22	189	2,195	1,323	3,518	1,876	5,394	-175	-3.1%
2022/23	185	2,206	1,282	3,488	1,784	5,272	-122	-2.3%
2023/24	182	2,226	1,234	3,460	1,732	5,192	-80	-1.5%
2024/25	182	2,271	1,219	3,490	1,707	5,197	5	0.1%
2025/26	181	2,286	1,198	3,484	1,698	5,182	-15	-0.3%
2026/27	179	2,296	1,215	3,511	1,618	5,129	-53	-1.0%
2027/28	178	2,299	1,232	3,531	1,574	5,105	-24	-0.5%
2028/29	178	2,311	1,245	3,556	1,562	5,118	13	0.3%
2029/30	177	2,313	1,246	3,559	1,528	5,087	-31	-0.6%

Source: Applied Economics, 2019.
Bolding indicates actuals.

5.1.6 SAGUARO COMMUNITY

As shown on **Table 15**, enrollment in Saguaro Community schools has been on the decline for most of the past 20 years, with significant losses in 2014/15 when several new charter schools opened in the attendance area. Between 2010 and 2019, the overall population in the Saguaro Community grew by a healthy 14.8 percent and population increased in all of the age groups, albeit significantly less for the school-age (5 to 17 year olds) population than for the other age groups. Households in the 35 to 44 age group grew by 16.1 percent during this period and the under 34 household cohort grew by 29.7 percent. Despite these fairly strong demographic trends, projected increases in the school-age population are expected to be nominal over the next ten years, increasing by just 32 children. With a relatively stable capture rate during the projection period, enrollment in the Saguaro Community is expected to change very little over the next 10 years, losing just 55 students by 2029/30 for enrollment totaling 3,472 K-12 students.

TABLE 15
SAGUARO COMMUNITY ENROLLMENT: 2000/01-2029/30

		Enrollment by Level				K-12 Total		
Fall	PS	K-5	6-8	K-8	9-12	Enrollment	Change	% Change
2000/01	0	1,742	951	2,693	1,562	4,255		
2001/02	0	1,666	999	2,665	1,577	4,242	-13	-0.3%
2002/03	11	1,604	1,016	2,620	1,651	4,271	29	0.7%
2003/04	17	1,565	941	2,506	1,677	4,183	-88	-2.1%
2004/05	20	1,520	918	2,438	1,739	4,177	-6	-0.1%
2005/06	33	1,497	882	2,379	1,748	4,127	-50	-1.2%
2006/07	28	1,458	873	2,331	1,634	3,965	-162	-3.9%
2007/08	40	1,509	886	2,395	1,509	3,904	-61	-1.5%
2008/09	49	1,557	862	2,419	1,471	3,890	-14	-0.4%
2009/10	63	1,603	876	2,479	1,406	3,885	-5	-0.1%
2010/11	76	1,554	905	2,459	1,396	3,855	-30	-0.8%
2011/12	89	1,558	863	2,421	1,298	3,719	-136	-3.5%
2012/13	89	1,531	820	2,351	1,335	3,686	-33	-0.9%
2013/14	104	1,468	837	2,305	1,365	3,670	-16	-0.4%
2014/15	138	1,314	812	2,126	1,323	3,449	-221	-6.0%
2015/16	103	1,320	783	2,103	1,297	3,400	-49	-1.4%
2016/17	23	1,357	814	2,171	1,291	3,462	62	1.8%
2017/18	20	1,331	853	2,184	1,282	3,466	4	0.1%
2018/19	101	1,296	893	2,189	1,260	3,449	-17	-0.5%
2019/20	168	1,340	904	2,244	1,283	3,527	78	2.3%
2020/21	170	1,348	941	2,289	1,273	3,562	35	1.0%
2021/22	170	1,356	926	2,282	1,285	3,567	5	0.1%
2022/23	173	1,355	963	2,318	1,309	3,627	60	1.7%
2023/24	173	1,355	941	2,296	1,333	3,629	2	0.1%
2024/25	172	1,368	919	2,287	1,327	3,614	-15	-0.4%
2025/26	172	1,343	920	2,263	1,353	3,616	2	0.1%
2026/27	171	1,334	914	2,248	1,351	3,599	-17	-0.5%
2027/28	169	1,324	949	2,273	1,281	3,554	-45	-1.3%
2028/29	168	1,316	919	2,235	1,301	3,536	-18	-0.5%
2029/30	165	1,305	916	2,221	1,251	3,472	-64	-1.8%

Source: Applied Economics, 2019.
Bolding indicates actuals.

5.2 ENROLLMENT PROJECTIONS BY ATTENDANCE AREA

Table 16 displays the projected enrollment by attendance area for 2020/21 through 2029/30 based on the current student data and the demographic trends. This table is based solely on the attendance area designated for District students' place of residence, regardless of which school they actually attend. The data provides a direct link to the demographic analysis and is used to predict enrollment by school in Section 5.3. It includes a designation for out-of-District students, and excludes schools that do not have specific attendance areas, such as Echo Canyon, Cheyenne Traditional, and Pueblo Elementary School.

Among elementary (K-5th grade) schools, the Yavapai and Redfield attendance areas are projected to have the largest number of students by 2029/30, with 773 and 918 students respectively. Yavapai is expected to be stable over the next few years before increasing in the latter half of the projection period, while Redfield is projected to increase steadily during the 10-year period. The largest gain is expected in the Pima Elementary attendance area, which is projected to add 83 students by 2029/30. The Sequoya, Cherokee, and Desert Canyon attendance areas are currently the smallest, with fewer than 350 students each, and all three schools are expected to be among the smallest at the end of the projection period. The Sequoya and Cherokee attendance areas expected to continue to decline over the next ten years, losing roughly 70 students each, but the largest losses over the 10-year period are expected in the Cochise (-111 students) and Copper Ridge (-217 students) attendance areas; as a result, the Cochise attendance area will also have fewer than 350 students by 2029/30. Overall, eight of the 16 elementary school attendance areas are projected to decline in enrollment by 2028/29.

The Desert Canyon (675 students), Mohave (632 students) and Ingleside Middle School (580 students) attendance areas are projected to have the largest number of 6-8 students by the end of the projection period, although only the Mohave attendance areas is projected to gain students over the next ten years. The Cocopah attendance area, which is currently the second largest, is projected to lose 135 students by 2029/30; at just 460 students, it will be the smallest middle school attendance area at the end of the projection period, although the Mountainside attendance area is expected to be only slightly larger with 466 students.

Among high schools, the Desert Mountain High School attendance area is currently the largest with 2,060 students, but it is expected to lose nearly 600 students over the next decade for a total resident enrollment of about 1,473 students. Chaparral High School is currently the second largest high school attendance area at 1,463 students, including the students in the Chaparral North attendance area, but is projected to lose 210 students over the next ten years. The Saguaro, Coronado and Arcadia attendance areas each currently have about 1,000 students and are projected to remain at about that level at the end of the projection period. The number of 9-12 students from outside the District is projected to remain virtually unchanged, increasing from 1,954 in 2019/20 to around 1,973 students by 2029/30.

TABLE 16
STUDENT GENERATION BY ATTENDANCE AREA: 2013/14-2029/30

Attendance Area	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
Ingleside Middle School	649	596	591	656	651	630	612	585	600	588	609	595	580	576	567	583	580
Hopi Elementary School	619	522	516	538	538	562	570	598	597	597	598	599	611	618	625	629	633
Tavan Elementary School	768	638	654	617	593	532	484	459	430	427	416	407	409	410	414	416	411
Echo Canyon K-8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Cocopah Middle School	704	704	660	704	662	627	595	622	596	619	542	539	489	496	470	472	460
Cherokee Elementary School	369	320	307	322	320	338	348	324	323	303	308	299	296	290	285	280	274
Cochise Elementary School	466	424	442	396	413	410	416	383	364	363	358	340	337	329	321	314	305
Sequoya Elementary School	348	326	336	334	339	334	311	293	281	261	254	250	252	248	245	243	240
Copper Ridge School	886	841	887	840	809	709	620	572	536	505	470	442	431	418	418	412	403
Hohokam Traditional School	436	373	350	379	359	367	0	0	0	0	0	0	0	0	0	0	0
Pima Elementary School	469	417	396	402	392	371	387	411	429	450	458	458	459	462	466	468	470
Tonalea K-8	1,339	1,199	1,175	1,143	1,159	1,165	1,120	1,039	959	918	921	936	946	975	998	998	1,009
Yavapai Elementary School	466	439	432	414	406	409	721	719	722	710	725	742	745	751	760	768	773
Desert Canyon Middle School	881	776	788	762	751	708	712	706	694	661	630	638	643	668	675	671	675
Desert Canyon Elementary School	627	513	471	441	425	380	330	312	307	312	323	319	322	324	325	327	327
Redfield Elementary School	943	878	837	816	845	853	842	846	865	872	886	901	901	906	912	917	918
Cheyenne Traditional School	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Mountainside Middle School	798	722	670	654	610	610	558	538	501	495	490	475	462	441	455	465	466
Anasazi Elementary School	630	581	559	489	479	414	433	425	416	411	406	415	424	427	430	435	437
Laguna Elementary School	547	507	479	419	397	407	407	389	391	396	389	399	406	410	414	419	422
Mohave Middle School	598	575	566	565	556	568	585	642	645	682	660	637	637	630	666	637	632
Kiva Elementary School	468	377	376	382	402	388	386	383	389	382	375	378	372	367	363	358	352
Navajo Elementary School	745	710	698	693	647	613	632	609	611	602	601	621	605	602	600	597	592
Pueblo Elementary School	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Out of District	2,483	2,753	2,802	2,808	2,737	2,603	2,713	2,661	2,606	2,548	2,553	2,521	2,492	2,526	2,463	2,472	2,466
Total	16,239	15,191	14,992	14,774	14,490	13,998	13,782	13,516	13,262	13,102	12,970	12,912	12,820	12,874	12,872	12,879	12,845

Source: Scottsdale Unified School District, Applied Economics, 2019.

TABLE 16 (Continued)
STUDENT GENERATION BY ATTENDANCE AREA: 2013/14-2029/30

Attendance Area	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
Arcadia High School	1,022	984	1,013	1,026	1,068	1,032	1,051	1,056	1,013	1,034	992	1,023	1,029	1,024	1,063	1,016	1,007
Chaparral High School	1,532	1,414	1,422	1,469	1,456	1,535	1,463	1,488	1,517	1,536	1,638	1,610	1,589	1,518	1,417	1,341	1,253
Coronado High School	1,171	1,158	1,170	1,160	1,089	1,043	1,020	1,072	1,147	1,204	1,133	1,054	978	890	896	929	921
Desert Mountain High	2,240	2,205	2,190	2,133	2,110	2,087	2,060	1,937	1,811	1,726	1,638	1,601	1,582	1,528	1,488	1,493	1,473
Saguaro High School	1,006	943	938	929	904	883	903	855	841	846	880	905	959	977	911	952	918
Out of District	1,565	1,709	1,692	1,790	1,736	1,793	1,954	1,983	2,014	2,049	2,022	2,031	2,036	1,981	2,021	1,990	1,973
Total	8,536	8,413	8,425	8,507	8,363	8,373	8,451	8,390	8,343	8,396	8,302	8,224	8,174	7,917	7,796	7,721	7,545

Source: Scottsdale Unified School District, Applied Economics, 2019.

5.3 ENROLLMENT PROJECTIONS BY SCHOOL

In order to use the projections of enrollment by attendance area (place of residence) to project enrollment by school, it is necessary to understand the relationship between student place of residence and school of attendance. This is accomplished by analyzing the relationship between the two measurements based on current student information. **Table 17** and **Table 18** display the 9th through 12th grade and Kindergarten through 8th grade distributions of enrollment by school, versus enrollment by attendance area. This provides an informative view of the flow of District students between schools and from outside the District. It also provides insight into the success of each school in retaining students within their own attendance area and attracting students from outside their attendance area. In terms of school of attendance, these tables include schools that do not have a specific geography or attendance area, such as Echo Canyon, Pueblo and Cheyenne Traditional School, just as they also include students from outside the District.

In the tables below, the shaded numbers reflect students whose residence area and school of attendance are the same. The columns at the right break out the number of students from outside the District, total school enrollment, the number who reside within the District, and the net difference between the number of students attending a school and those residing within the attendance area. For example, at Arcadia High School there are 940 students enrolled who also live in the Arcadia attendance area. There are 18 students at Arcadia who reside in the Chaparral (2000) attendance area, 104 from Coronado, and so on. There are 750 students from outside the District who attend Arcadia, resulting in total enrollment of 1,861 students. The Arcadia attendance area contains 1,052 students, although 20 attend Chaparral, 54 are at Coronado, and so forth. Arcadia has a net gain of 809 students from outside the attendance area since the enrollment is 1,861 but there are only 1,052 students residing in that attendance area; the school captures 89 percent of the District students living within its attendance area.

Overall, only 62 percent of the K-8 students from within the District attend the school designated for their place of residence, while 80 percent of the 9-12 students attend the designated school for their area of residence. It is logical that high school students would exhibit a higher rate than the K-8 students because of the larger size of the attendance areas, however, it is important to note that the Coronado (59 percent) and Saguaro (76 percent) attendance areas capture a much lower share of their resident students than do the other three high schools.

TABLE 17
SCHOOL ENROLLMENT BY ATTENDANCE AREA (9th-12th GRADE)

		School Attendance Area of Residence						Outside	Total	Total	
School Attended		1000	2000	3000	4000	5000	6000	District	Attend	Reside	Difference
Arcadia High School	1000	940	18	3	104	11	35	750	1,861	1,052	809
Chaparral High School	2000	20	991	312	21	290	148	565	2,347	1,475	872
Coronado High School	4000	54	3	1	600	1	16	227	902	1,024	-122
Desert Mountain High	5000		29	45	8	1,710	15	251	2,058	2,075	-17
Saguaro High School	6000	37	56	5	287	48	689	161	1,283	905	378
Other/On-line		1	8	4	4	15	2	26	60	0	60
Total		1,052	1,105	370	1,024	2,075	905	1,980	8,511	6,531	1,980
Total Attending School for Residence Area										5,242	
Percent Attending School of Residence Area		89%	90%	84%	59%	82%	76%			80%	

Source: Scottsdale Unified School District, Applied Economics, 2019.
Note: School Attendance Area of Residence "3000" is the Chaparral North attendance area.

TABLE 18
SCHOOL ENROLLMENT BY ATTENDANCE AREA (K-8th GRADE)

School Attended / School ID		School Attendance Area of Residence																					Outside District	Total Attend	Total Reside	Diff.
		100	101	102	200	201	202	203	301	401	402	403	404	500	501	502	600	601	602	700	701	702				
Ingleside Middle School	100	493			1							34					1			13			308	850	612	238
Hopi Elementary School	101		510	69		2		1		1	5	11	1		1			1			2	8	92	704	570	134
Tavan Elementary School	102		7	251						3	2	16	4			2		2				2	339	628	484	144
Echo Canyon K-8	103	56	11	40	2					12	11	60	19	1						12	1	8	168	401	0	401
Cocopah Middle School	200	6			547				4			9		45			14			65			214	904	595	309
Cherokee Elementary School	201		10	4		317	21	46		1	6	1				14		1	4		68	7	181	681	348	333
Cochise Elementary School	202		2	2		9	349	13	3	6	1	2	3		8	71		13	27		47	16	58	630	416	214
Sequoya Elementary School	203		2	1		6	2	241	1	2					2	7			6		8	7	202	487	311	176
Copper Ridge School	301				6		1		462					32	13	11	4	1	1	3			107	641	620	21
Hohokam Traditional School	401																						0	0	338	-338
Pima Elementary School	402		4	10						64	193	41	34						3		3	37	55	444	387	57
Tonalea K-8	403	28		33	1		2			26	31	567	63							7		5	135	898	1120	-222
Hohokam-Yavapai	499			6				1		156	39	43	221									20	90	576	383	193
Desert Canyon Middle School	500				10				17					421			20			7			40	515	712	-197
Desert Canyon Elementary Sch	501			1			1	1	14		3				235	111		9	4		4	4	67	454	330	124
Redfield Elementary School	502		1	2		3	8	4	15	1	2				9	325		22	16		5	2	58	473	842	-369
Cheyenne Traditional School	503	1	1		14	1	9	2	98			2		155	57	230	81	79	68	1	3	4	104	910	0	910
Mountainside Middle School	600				4				1			1		49			435			4			98	592	558	34
Anasazi Elementary School	601								1						2	16		243	44			1	84	391	433	-42
Laguna Elementary School	602					1	8						2		3	43		48	227		1	3	23	359	407	-48
Mohave Middle School	700	28			10				3			274		9			3			473			104	904	585	319
Kiva Elementary School	701		14	38		7	6	1		15	22	26	8			4		8	2		187	116	78	532	386	146
Navajo Elementary School	702		3	12		1				18	28	18	11								1	211	42	345	632	-287
Pueblo Elementary School	703		5	15		1	9	1	1	33	44	15	17			8		6	5		56	181	66	463	0	463
Total		612	570	484	595	348	416	311	620	338	387	1,120	383	712	330	842	558	433	407	585	386	632	2,713	13,782	11,069	2,713
Total Attending School of Residence Area																									6,908	
Percent Attending School of Residence Area		81%	89%	52%	92%	91%	84%	77%	75%	0%	50%	51%	58%	59%	71%	39%	78%	56%	56%	81%	48%	33%			62%	

Source: Scottsdale Unified School District, Applied Economics, 2019

The difference between each school's enrollment and the number of students that reside within the attendance area provides an estimate of the net impact of in and out-migration on enrollment. Since Cheyenne Traditional, Echo Canyon and Pueblo Elementary do not have defined attendance areas, their net difference is 100 percent of enrollment. Students at Hohokam Elementary have been temporarily relocated to Yavapai Elementary while the campus undergoes renovation; therefore, their net difference is 100 percent of the resident population. With more than 300 students each, Cherokee Elementary and Mohave Middle School had the largest net additions among K-8 schools with defined attendance areas. The K-8 schools with the highest net losses in enrollment include Redfield Elementary (-369 students), Navajo Elementary (-287 students) and Tonalea K-8 (-222 students).

All of the high schools except Coronado (-122 students) and Desert Mountain (-17 students) currently have a net in-migration of students. Arcadia (809 students) and Chaparral (872 students) have the greatest net additions; both schools attract a large number of students from outside of the District and capture roughly 90 percent of the students that reside in their respective attendance areas. While Desert Mountain benefited from the addition of 251 out-of-District students, the school only captured 82 percent of the students that reside within is attendance area which, for the first time, resulted in a net out-migration of students. At just 59 percent, Coronado High School captured the smallest share of its resident student population; although the school attracted 227 additional students from outside of the District it was not enough to offset the loss from within its attendance area.

Table 19 shows the projected enrollment by school for 2020/21 through 2029/30. These projections were derived by combing the attendance area projections with data on the number of intra-district transfers and the number of students from outside the District at each school. Among the 24 elementary and middle schools, only seven are projected to have increases in enrollment over the next ten years, with modest growth ranging from 3 to 55 students each. The most growth is expected at Pima Elementary School with 55 new students, followed by Yavapai Elementary with 47 additional students. Total losses at the remaining schools range from 192 students at Copper Ridge to 18 students at Kiva Elementary School. Enrollment at both Hopi Elementary and Cocopah Middle School is expected to decline by more than 100 students over the next ten years.

At the high school level, none of the schools are expected to experience enrollment increases over the next ten years, although the losses at both Saguaro (-32 students) and Chaparral (-42 students) during this period will be quite small; the largest losses during the projection period are expected at Desert Mountain (-530 students) and Coronado (-203 students). Chaparral currently has the largest enrollment, with 2,347 students, followed by Desert Mountain at 2,058 students. Chaparral is still expected to be the largest high school at the end of the projection period, with enrollment of 2,305 students, but Arcadia will be the second largest with 1,762 students in 2029/30. Coronado will continue to be the smallest of the five high schools with enrollment of just 699 students in 2029/30.

TABLE 19
PROJECTED ELEMENTARY ENROLLMENT BY SCHOOL: 2013/14-2029/30

School Attended / School ID	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
Ingleside Middle School	739	772	756	861	891	847	850	818	848	833	850	831	812	802	793	808	805
Hopi Elementary School	900	839	848	873	827	750	704	670	633	594	574	569	571	571	572	572	570
Tavan Elementary School	729	702	721	699	685	639	628	614	593	583	585	563	561	561	563	562	553
Echo Canyon K-8	501	455	472	472	406	393	401	396	397	379	387	387	385	407	381	384	378
Cocopah Middle School	884	897	886	928	907	894	904	947	932	955	876	870	819	827	801	803	792
Cherokee Elementary School	527	484	534	590	633	667	681	655	650	635	639	619	618	612	608	603	597
Cochise Elementary School	596	579	613	562	577	575	630	611	610	610	614	611	609	601	593	587	580
Sequoya Elementary School	501	467	482	481	507	490	487	478	466	430	425	409	416	413	413	413	412
Copper Ridge School	1,163	1,085	1,061	1,000	877	753	641	593	547	519	487	470	457	454	445	449	449
Hohokam Traditional School	428	409	427	436	483	433	0	0	0	0	0	0	0	0	0	0	0
Pima Elementary School	607	565	528	503	452	431	444	449	466	479	493	498	498	499	500	499	499
Tonalea K-8	404	338	335	914	859	861	898	824	753	710	711	721	736	768	790	791	807
Supai Middle School	724	678	645	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Yavapai Elementary School	430	408	383	349	295	266	576	577	567	569	573	587	591	600	609	617	623
Desert Canyon Middle School	599	566	563	530	561	513	515	494	462	432	404	416	424	453	464	463	470
Desert Canyon Elementary School	510	501	472	457	474	462	454	442	460	474	485	495	496	496	491	488	483
Redfield Elementary School	558	484	438	419	452	471	473	453	437	443	459	464	465	470	475	481	483
Cheyenne Traditional School	1,044	976	984	921	937	931	910	905	897	886	868	865	855	870	866	873	873
Mountainside Middle School	815	764	689	690	639	651	592	563	527	526	526	512	501	482	497	510	511
Anasazi Elementary School	635	567	573	495	473	378	391	384	382	376	373	387	383	376	372	370	368
Laguna Elementary School	572	529	476	422	371	394	359	354	353	351	345	351	360	364	366	371	371
Mohave Middle School	834	812	783	814	853	892	904	941	926	963	941	919	920	914	949	919	916
Kiva Elementary School	521	460	478	467	453	474	532	546	547	545	555	560	538	531	524	519	514
Navajo Elementary School	418	363	346	385	375	342	345	323	319	306	309	311	313	317	322	325	325
Pueblo Elementary School	529	491	496	505	503	478	463	479	490	504	491	497	492	486	478	472	466
Other	71	0	16	16	12	13	0	0	0	0	0	0	0	0	0	0	0
Total	16,239	15,191	15,005	14,789	14,502	13,998	13,782	13,516	13,262	13,102	12,970	12,912	12,820	12,874	12,872	12,879	12,845

Source: Scottsdale Unified School District, Applied Economics, 2019.

TABLE 19 (Continued)
PROJECTED SECONDARY ENROLLMENT BY SCHOOL: 2013/14-2029/30

School	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
Arcadia High School	1,743	1,733	1,752	1,734	1,727	1,733	1,861	1,846	1,816	1,855	1,809	1,846	1,846	1,815	1,853	1,786	1,762
Chaparral High School	2,077	2,063	2,086	2,219	2,243	2,301	2,347	2,366	2,375	2,406	2,449	2,450	2,466	2,428	2,386	2,353	2,305
Coronado High School	1,076	1,042	1,038	1,072	948	942	902	931	991	1,042	979	894	811	705	702	719	699
Desert Mountain High	2,275	2,252	2,252	2,191	2,163	2,138	2,058	1,974	1,876	1,784	1,732	1,707	1,698	1,618	1,574	1,562	1,528
Saguaro High School	1,365	1,323	1,297	1,291	1,282	1,259	1,283	1,273	1,285	1,309	1,333	1,327	1,353	1,351	1,281	1,301	1,251
Total	8,536	8,413	8,425	8,507	8,363	8,373	8,451	8,390	8,343	8,396	8,302	8,224	8,174	7,917	7,796	7,721	7,545

Source: Scottsdale Unified School District, Applied Economics, 2019.

APPENDIX A
COMMUNITY DEMOGRAPHIC CHARACTERISTICS

TABLE A-1
POPULATION AND HOUSING TRENDS
ARCADIA COMMUNITY

	2000 Census		2010 Census		2019 Estimate		Change (2010-2019)	
	Total	Percent	Total	Percent	Total	Percent	Total	Percent
Population								
Total	30,418	100.0%	29,244	100.0%	30,445	100.0%	1,201	4.1%
By Race & Ethnicity:								
White	25,163	82.7%	23,217	79.4%	23,687	77.8%	470	2.0%
African American	468	1.5%	639	2.2%	565	1.9%	-74	-11.5%
Native American	322	1.1%	253	0.9%	527	1.7%	274	108.2%
Asian	559	1.8%	666	2.3%	832	2.7%	166	24.9%
Hispanic	3,883	12.8%	4,431	15.2%	4,788	15.7%	357	8.1%
Other	23	0.1%	39	0.1%	46	0.2%	7	18.8%
By Age:								
Under 5	1,656	5.4%	1,666	5.7%	1,647	5.4%	-18	-1.1%
5 to 13	3,350	11.0%	3,318	11.3%	3,109	10.2%	-209	-6.3%
14 to 17	1,469	4.8%	1,481	5.1%	1,481	4.9%	-1	-0.1%
18 to 24	2,211	7.3%	2,039	7.0%	2,101	6.9%	63	3.1%
25 to 44	9,345	30.7%	7,576	25.9%	8,045	26.4%	469	6.2%
45 to 64	7,275	23.9%	8,516	29.1%	8,866	29.1%	350	4.1%
65 and up	5,113	16.8%	4,648	15.9%	5,196	17.1%	548	11.8%
Housing Units								
Total	14,943	100.0%	15,418	100.0%	16,113	100.0%	695	4.5%
Occupied	13,489	90.3%	13,072	84.8%	13,632	88.4%	560	4.3%
Owner	8,718	58.3%	8,251	53.5%	8,364	51.9%	113	1.4%
Renter	4,771	31.9%	4,820	31.3%	5,881	36.5%	1,061	22.0%
Vacant	1,454	9.7%	2,347	15.2%	2,481	16.1%	135	5.7%
For Seasonal Use			601	3.9%	640	4.0%	40	6.6%
By Unit Type:								
Single Family	8,387	56.1%	8,577	55.6%	8,984	55.8%	407	4.7%
Multifamily	6,556	43.9%	6,841	44.4%	7,129	44.2%	288	4.2%
Households								
Total	13,489	100.0%	13,072	100.0%	13,632	100.0%	560	4.3%
By Age:								
Under 34	2,730	20.2%	2,332	17.8%	2,359	17.3%	27	1.2%
35 to 44	2,902	21.5%	2,294	17.6%	2,321	17.0%	27	1.2%
45 to 54	2,645	19.6%	2,864	21.9%	2,688	19.7%	-176	-6.1%
55 to 64	1,811	13.4%	2,382	18.2%	2,733	20.0%	350	14.7%
65 and up	3,400	25.2%	3,199	24.5%	3,531	25.9%	332	10.4%
Population Per	2.26		2.24		2.23		0.00	-0.2%

Sources: U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2019; Applied Economics, 2019.

TABLE A-2
POPULATION AND HOUSING TRENDS
CHAPARRAL COMMUNITY

	2000 Census		2010 Census		2019 Estimate		Change (2010-2019)	
	Total	Percent	Total	Percent	Total	Percent	Total	Percent
Population								
Total	34,972	100.0%	33,582	100.0%	34,876	100.0%	1,294	3.9%
By Race & Ethnicity:								
White	32,356	92.5%	30,469	90.7%	31,532	90.4%	1,063	3.5%
African American	337	1.0%	410	1.2%	345	1.0%	-65	-15.9%
Native American	174	0.5%	90	0.3%	159	0.5%	69	76.5%
Asian	873	2.5%	1,026	3.1%	1,395	4.0%	370	36.0%
Hispanic	1,204	3.4%	1,545	4.6%	1,380	4.0%	-165	-10.7%
Other	28	0.1%	42	0.1%	64	0.2%	22	52.4%
By Age:								
Under 5	1,453	4.2%	1,161	3.5%	1,350	3.9%	189	16.3%
5 to 13	4,089	11.7%	3,314	9.9%	3,270	9.4%	-44	-1.3%
14 to 17	2,107	6.0%	1,953	5.8%	1,907	5.5%	-46	-2.4%
18 to 24	1,916	5.5%	1,958	5.8%	2,135	6.1%	177	9.0%
25 to 44	8,686	24.8%	6,525	19.4%	5,760	16.5%	-765	-11.7%
45 to 64	11,163	31.9%	11,351	33.8%	11,317	32.4%	-34	-0.3%
65 and up	5,558	15.9%	7,320	21.8%	9,137	26.2%	1,817	24.8%
Housing Units								
Total	16,750	100.0%	17,879	100.0%	18,058	100.0%	179	1.0%
Occupied	14,703	87.8%	14,883	83.9%	15,675	86.8%	792	5.3%
Owner	11,231	67.1%	11,321	70.1%	12,539	69.4%	1,218	10.8%
Renter	3,472	20.7%	3,562	13.8%	3,136	17.4%	-426	-12.0%
Vacant	2,047	12.2%	2,996	16.1%	2,384	13.2%	-612	-20.4%
By Unit Type:								
Single Family	10,499	62.7%	10,800	60.4%	10,970	60.7%	169	1.6%
Multifamily	6,251	37.3%	7,078	39.6%	7,089	39.3%	10	0.1%
Households								
Total	14,703	100.0%	14,883	100.0%	15,675	100.0%	792	5.3%
By Age:								
Under 34	1,908	13.0%	1,680	11.3%	1,681	10.7%	1	0.1%
35 to 44	2,773	18.9%	2,011	13.5%	2,012	12.8%	1	0.1%
45 to 54	3,627	24.7%	3,275	22.0%	3,070	19.6%	-205	-6.3%
55 to 64	2,832	19.3%	3,297	22.2%	3,542	22.6%	245	7.4%
65 and up	3,561	24.2%	4,620	31.0%	5,370	34.3%	750	16.2%
Population Per	2.38		2.26		2.22		-0.03	-1.4%

Sources: U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2019; Applied Economics, 2019.

TABLE A-3
POPULATION AND HOUSING TRENDS
CHAPARRAL NORTH COMMUNITY

	2000 Census		2010 Census		2019 Estimate		Change (2010-2019)	
	Total	Percent	Total	Percent	Total	Percent	Total	Percent
Population								
Total	3,573	100.0%	9,027	100.0%	11,444	100.0%	2,417	26.8%
By Race & Ethnicity:								
White	3,365	94.2%	8,116	89.9%	10,135	88.6%	2,019	24.9%
African American	49	1.4%	74	0.8%	132	1.2%	57	77.5%
Native American	0	0.0%	25	0.3%	35	0.3%	10	39.5%
Asian	53	1.5%	399	4.4%	638	5.6%	238	59.7%
Hispanic	105	2.9%	398	4.4%	429	3.7%	31	7.8%
Other	1	0.0%	14	0.2%	75	0.7%	61	438.3%
By Age:								
Under 5	202	5.7%	654	7.2%	771	6.7%	117	17.9%
5 to 13	336	9.4%	1,339	14.8%	1,273	11.1%	-66	-4.9%
14 to 17	132	3.7%	478	5.3%	624	5.5%	146	30.6%
18 to 24	68	1.9%	321	3.6%	415	3.6%	94	29.3%
25 to 44	825	23.1%	2,275	25.2%	2,509	21.9%	234	10.3%
45 to 64	1,488	41.6%	2,783	30.8%	3,881	33.9%	1,098	39.5%
65 and up	522	14.6%	1,177	13.0%	1,970	17.2%	793	67.4%
Housing Units								
Total	1,776	100.0%	4,277	100.0%	5,421	100.0%	1,144	26.7%
Occupied	1,486	83.7%	3,470	81.1%	4,857	89.6%	1,387	40.0%
Owner	1,428	80.4%	2,873	67.2%	3,496	64.5%	623	21.7%
Renter	58	3.3%	597	14.0%	1,361	25.1%	764	128.0%
Vacant	290	16.3%	807	18.9%	564	10.4%	-243	-30.1%
For Seasonal Use			497	11.6%	643	11.9%	146	29.3%
By Unit Type:								
Single Family	1,665	93.8%	3,098	72.4%	3,856	71.1%	758	24.5%
Multifamily	112	6.3%	1,179	27.6%	1,565	28.9%	386	32.7%
Households								
Total	1,486	100.0%	3,470	100.0%	4,857	100.0%	1,387	40.0%
By Age:								
Under 34	99	6.7%	337	9.7%	377	7.8%	40	12.0%
35 to 44	276	18.5%	824	23.7%	1,015	20.9%	191	23.2%
45 to 54	386	26.0%	866	25.0%	1,333	27.5%	467	54.0%
55 to 64	395	26.6%	719	20.7%	1,157	23.8%	438	61.0%
65 and up	331	22.3%	724	20.9%	974	20.1%	250	34.5%
Population Per	2.40		2.60		2.36		-0.25	-9.4%

Sources: U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2019; Applied Economics, 2019.

TABLE A-4
POPULATION AND HOUSING TRENDS
CORONADO COMMUNITY

	2000 Census		2010 Census		2019 Estimate		Change (2000-2019)	
	Total	Percent	Total	Percent	Total	Percent	Total	Percent
Population								
Total	42,402	100.0%	41,610	100.0%	48,599	116.8%	6,989	16.8%
By Race & Ethnicity:								
White	34,559	81.5%	30,106	72.4%	33,404	68.7%	3,299	11.0%
African American	781	1.8%	1,055	2.5%	1,257	2.6%	202	19.1%
Native American	387	0.9%	841	2.0%	1,473	3.0%	632	75.2%
Asian	939	2.2%	1,044	2.5%	1,463	3.0%	419	40.2%
Hispanic	5,663	13.4%	8,502	20.4%	10,922	22.5%	2,421	28.5%
Other	72	0.2%	63	0.2%	79	0.2%	16	25.7%
By Age:								
Under 5	2,258	5.3%	2,004	4.8%	2,481	5.1%	477	23.8%
5 to 13	3,897	9.2%	3,307	7.9%	4,056	8.3%	749	22.6%
14 to 17	1,729	4.1%	1,603	3.9%	1,311	2.7%	-292	-18.2%
18 to 24	4,027	9.5%	4,739	11.4%	4,428	9.1%	-311	-6.6%
25 to 44	15,122	35.7%	13,401	32.2%	17,843	36.7%	4,442	33.1%
45 to 64	8,170	19.3%	9,714	23.3%	11,119	22.9%	1,405	14.5%
65 and up	7,199	17.0%	6,842	16.4%	7,362	15.1%	520	7.6%
Housing Units								
Total	20,565	100.0%	22,585	100.0%	25,883	100.0%	3,298	14.6%
Occupied	19,015	92.5%	19,593	86.8%	22,554	99.9%	2,961	15.1%
Owner	11,573	56.3%	10,931	48.4%	12,277	47.4%	1,346	12.3%
Renter	7,442	36.2%	8,662	38.4%	10,277	45.5%	1,615	18.7%
Vacant	1,550	7.5%	2,992	13.2%	3,329	14.7%	337	11.3%
For Seasonal Use			798	3.5%	924	3.6%	126	15.7%
By Unit Type:								
Single Family	10,640	51.7%	10,658	47.2%	10,810	41.8%	152	1.4%
Multifamily	9,925	48.3%	11,927	52.8%	15,073	58.2%	3,146	26.4%
Households								
Total	19,015	92.5%	19,593	87.2%	22,554	87.2%	2,961	15.1%
By Age:								
Under 34	5,438	28.6%	5,668	28.9%	6,394	28.3%	726	12.8%
35 to 44	4,082	21.5%	3,162	16.1%	4,222	18.7%	1,060	33.5%
45 to 54	2,595	13.6%	3,244	16.6%	3,548	15.7%	304	9.4%
55 to 64	2,272	11.9%	2,747	14.0%	3,067	13.6%	320	11.7%
65 and up	4,628	24.3%	4,774	24.4%	5,325	23.6%	551	11.5%
Population Per	2.23		2.12		2.15		0.03	1.5%

Sources: U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2019; Applied Economics, 2019.

TABLE A-5
POPULATION AND HOUSING TRENDS
DESERT MOUNTAIN COMMUNITY

	2000 Census		2010 Census		2019 Estimate		Change (2010-2019)	
	Total	Percent	Total	Percent	Total	Percent	Total	Percent
Population								
Total	62,227	100.0%	64,889	100.0%	65,610	100.0%	721	1.1%
By Race & Ethnicity:								
White	57,413	92.3%	56,770	87.5%	57,229	87.2%	458	0.8%
African American	501	0.8%	954	1.5%	772	1.2%	-182	-19.1%
Native American	231	0.4%	217	0.3%	197	0.3%	-20	-9.0%
Asian	1,788	2.9%	3,331	5.1%	3,199	4.9%	-131	-3.9%
Hispanic	2,222	3.6%	3,541	5.5%	4,117	6.3%	576	16.3%
Other	71	0.1%	76	0.1%	95	0.1%	19	25.3%
By Age:								
Under 5	3,555	5.7%	2,698	4.2%	2,182	3.3%	-516	-19.1%
5 to 13	8,011	12.9%	6,594	10.2%	6,201	9.5%	-393	-6.0%
14 to 17	2,918	4.7%	3,356	5.2%	3,224	4.9%	-132	-3.9%
18 to 24	3,621	5.8%	4,135	6.4%	4,474	6.8%	339	8.2%
25 to 44	20,421	32.8%	15,728	24.2%	14,471	22.1%	-1,257	-8.0%
45 to 64	16,401	26.4%	21,294	32.8%	22,392	34.1%	1,098	5.2%
65 and up	7,300	11.7%	11,084	17.1%	12,666	19.3%	1,582	14.3%
Housing Units								
Total	29,691	100.0%	34,331	100.0%	34,635	100.9%	304	0.9%
Occupied	26,202	88.2%	29,660	86.4%	30,811	89.7%	1,151	3.9%
Owner	17,930	60.4%	19,809	57.7%	19,685	56.8%	-124	-0.6%
Renter	8,272	27.9%	9,851	28.7%	11,126	32.4%	1,275	12.9%
Vacant	3,489	11.8%	4,671	13.6%	3,824	11.1%	-847	-18.1%
For Seasonal Use			2,412	7.0%	2,482	7.2%	70	2.9%
By Unit Type:								
Single Family	17,327	58.4%	18,905	55.1%	19,157	55.8%	252	1.3%
Multifamily	12,364	41.6%	15,426	44.9%	15,478	45.1%	52	0.3%
Households								
Total	26,202	100.0%	29,660	100.0%	30,811	100.0%	1,151	3.9%
By Age:								
Under 34	5,551	21.2%	4,649	15.7%	4,346	14.1%	-303	-6.5%
35 to 44	6,456	24.6%	5,065	17.1%	4,841	15.7%	-224	-4.4%
45 to 54	5,947	22.7%	6,765	22.8%	6,992	22.7%	227	3.4%
55 to 64	3,866	14.8%	5,935	20.0%	6,474	21.0%	539	9.1%
65 and up	4,382	16.7%	7,246	24.4%	8,158	26.5%	912	12.6%
Population Per	2.37		2.19		2.13		-0.06	-2.7%

Sources: U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2019; Applied Economics, 2019.

TABLE A-6
POPULATION AND HOUSING TRENDS
SAGUARO COMMUNITY

	2000 Census		2010 Census		2019 Estimate		Change (2010-2019)	
	Total	Percent	Total	Percent	Total	Percent	Total	Percent
Population								
Total	46,476	100.0%	42,466	100.0%	48,798	114.9%	6,332	14.9%
By Race & Ethnicity:								
White	41,904	90.2%	36,958	87.0%	40,940	83.9%	3,982	10.8%
African American	411	0.9%	650	1.5%	829	1.7%	179	27.6%
Native American	257	0.6%	302	0.7%	693	1.4%	392	129.8%
Asian	821	1.8%	1,133	2.7%	1,953	4.0%	820	72.4%
Hispanic	3,027	6.5%	3,382	8.0%	4,313	8.8%	932	27.6%
Other	55	0.1%	42	0.1%	70	0.1%	28	66.8%
By Age:								
Under 5	1,831	3.9%	1,414	3.3%	1,755	3.6%	341	24.1%
5 to 13	3,417	7.4%	2,860	6.7%	3,122	6.4%	262	9.2%
14 to 17	1,740	3.7%	1,481	3.5%	1,532	3.1%	51	3.4%
18 to 24	3,355	7.2%	3,230	7.6%	3,749	7.7%	519	16.1%
25 to 44	12,797	27.5%	11,028	26.0%	13,687	28.0%	2,658	24.1%
45 to 64	12,074	26.0%	11,874	28.0%	12,962	26.6%	1,088	9.2%
65 and up	11,262	24.2%	10,578	24.9%	11,991	24.6%	1,413	13.4%
Housing Units								
Total	26,808	100.0%	27,132	100.0%	30,342	100.0%	3,210	11.8%
Occupied	23,136	86.3%	22,064	81.3%	26,033	85.8%	3,969	18.0%
Owner	15,810	59.0%	14,756	54.4%	16,997	56.0%	2,241	15.2%
Renter	7,326	27.3%	7,308	26.9%	9,036	33.3%	1,728	23.6%
Vacant	3,672	13.7%	5,068	18.7%	4,309	14.2%	-759	-15.0%
For Seasonal Use			2,502	9.2%	2,854	9.4%	352	14.1%
By Unit Type:								
Single Family	11,226	41.9%	11,453	42.2%	11,673	43.0%	219	1.9%
Multifamily	15,582	58.1%	15,679	57.8%	18,669	68.8%	2,990	19.1%
Households								
Total	23,136	86.3%	22,064	81.9%	26,033	81.9%	3,969	18.0%
By Age:								
Under 34	4,253	18.4%	4,495	20.4%	5,833	22.4%	1,339	29.8%
35 to 44	3,753	16.2%	2,861	13.0%	3,325	12.8%	464	16.2%
45 to 54	3,810	16.5%	3,539	16.0%	4,008	15.4%	469	13.3%
55 to 64	3,590	15.5%	3,764	17.1%	4,086	15.7%	322	8.5%
65 and up	7,730	33.4%	7,406	33.6%	8,780	33.7%	1,375	18.6%
Population Per	2.01		1.92		1.87		-0.05	-2.6%

Sources: U.S. Bureau of the Census, 2000 and 2010; American Community Survey, 2019; Applied Economics, 2019.

ACKNOWLEDGEMENTS

We would like to acknowledge the people and sources that have provided information for this study.

Sharon Bennett
Community Development Lead Clerk
Town of Paradise Valley

Taylor Reynolds
Project Coordination Liason
City of Scottsdale

Adam Yaron
Planner
City of Scottsdale

Arizona Builder's Exchange
AZBEX Newsletter

Builder
Pulse Newsletter

Kasten Long Commercial Group
Kasten Long Commercial Group

Maricopa Association of Governments
Information Services

Maricopa County Assessor's Office
Maricopa County, AZ

Rose Law Group
Rose Law Group Reporter