



BOERNE ISD

December 2019



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WHO WE ARE



- ▶ **Large Demographic Firm Located in College Station, TX**
- ▶ **39+ Year History**
- ▶ **Clients are almost Exclusively School Districts**
- ▶ **Over 100 Years Combined Demographic Experience**

Housing Projections

- Ten-Year Projections for Single-Family and Multi-Family Developments
- Projections for Vacant Parcels

Mapping

- Aerial Imagery
- Existing and Future Residential Development
- Factors Affecting or Limiting Development

WHAT WE DO



Economic Data

- Employment Projections
- Recent Employment Trends for District

Current Students

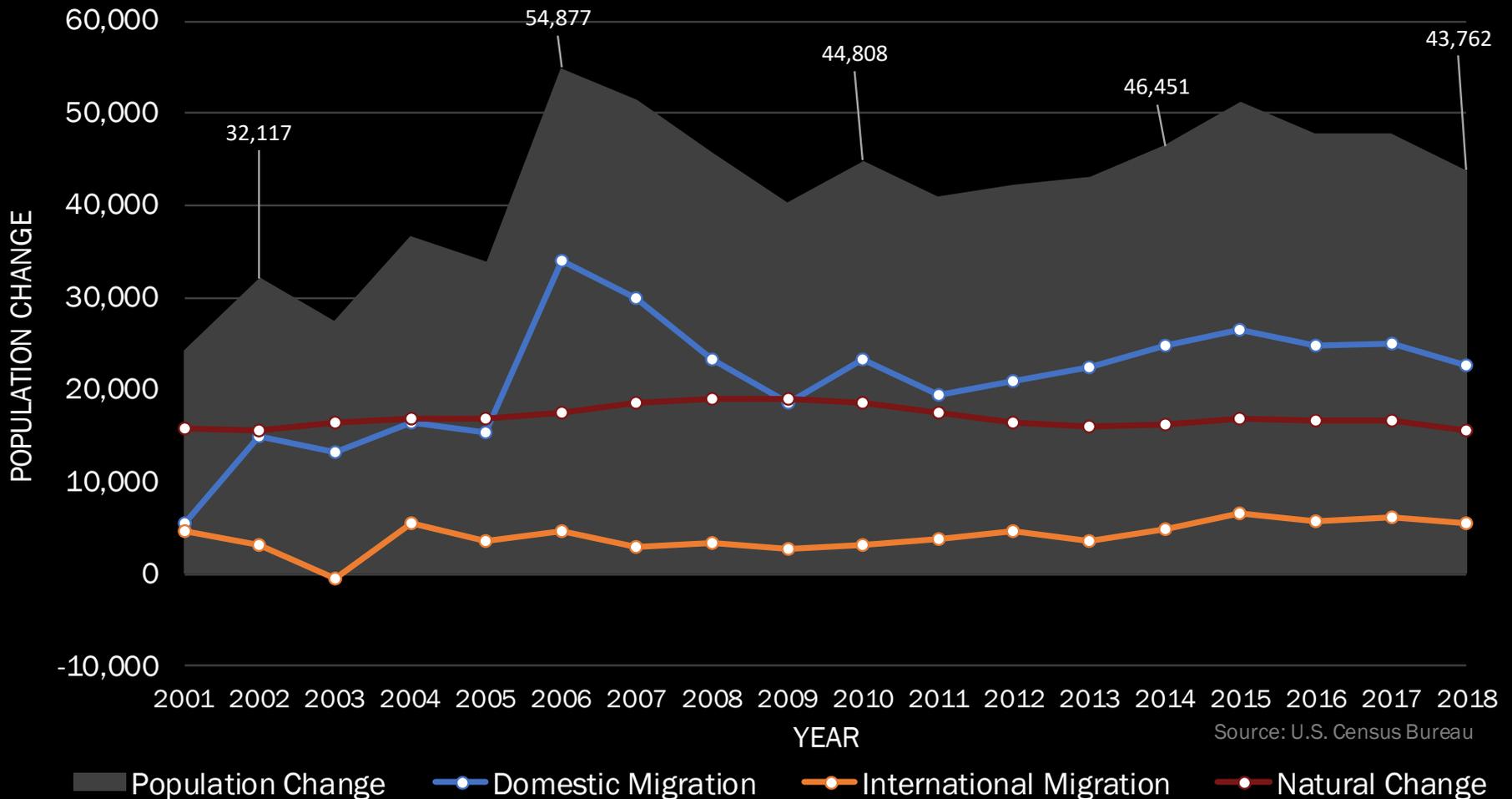
- Geocode population
- Count by grade and/or special population

Long Range Planning

- Attendance Zone Projections
- Site Selection
- Long Range Facilities Plan

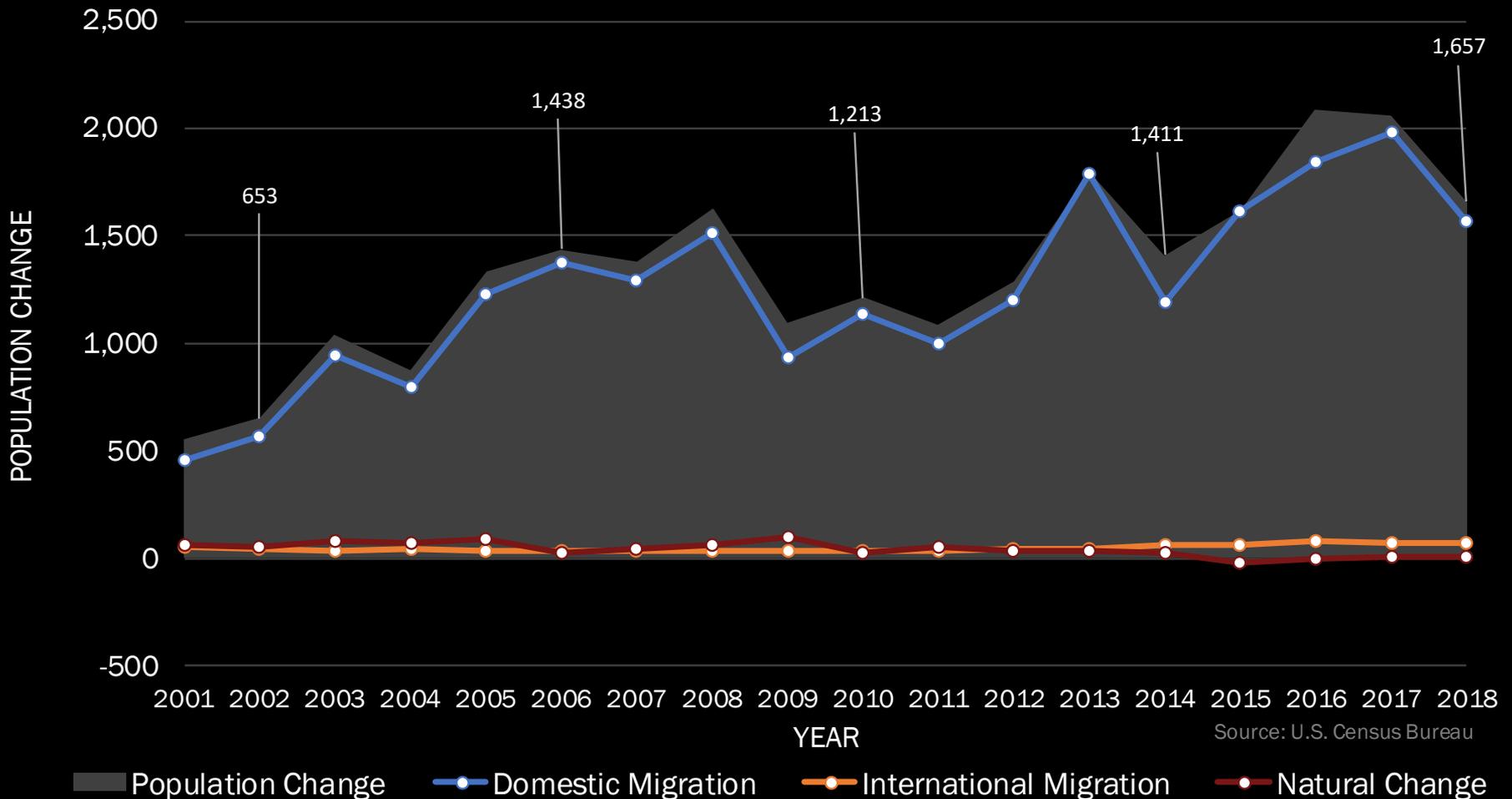
Annual Population Change

San Antonio Metro



Annual Population Change

Kendall County

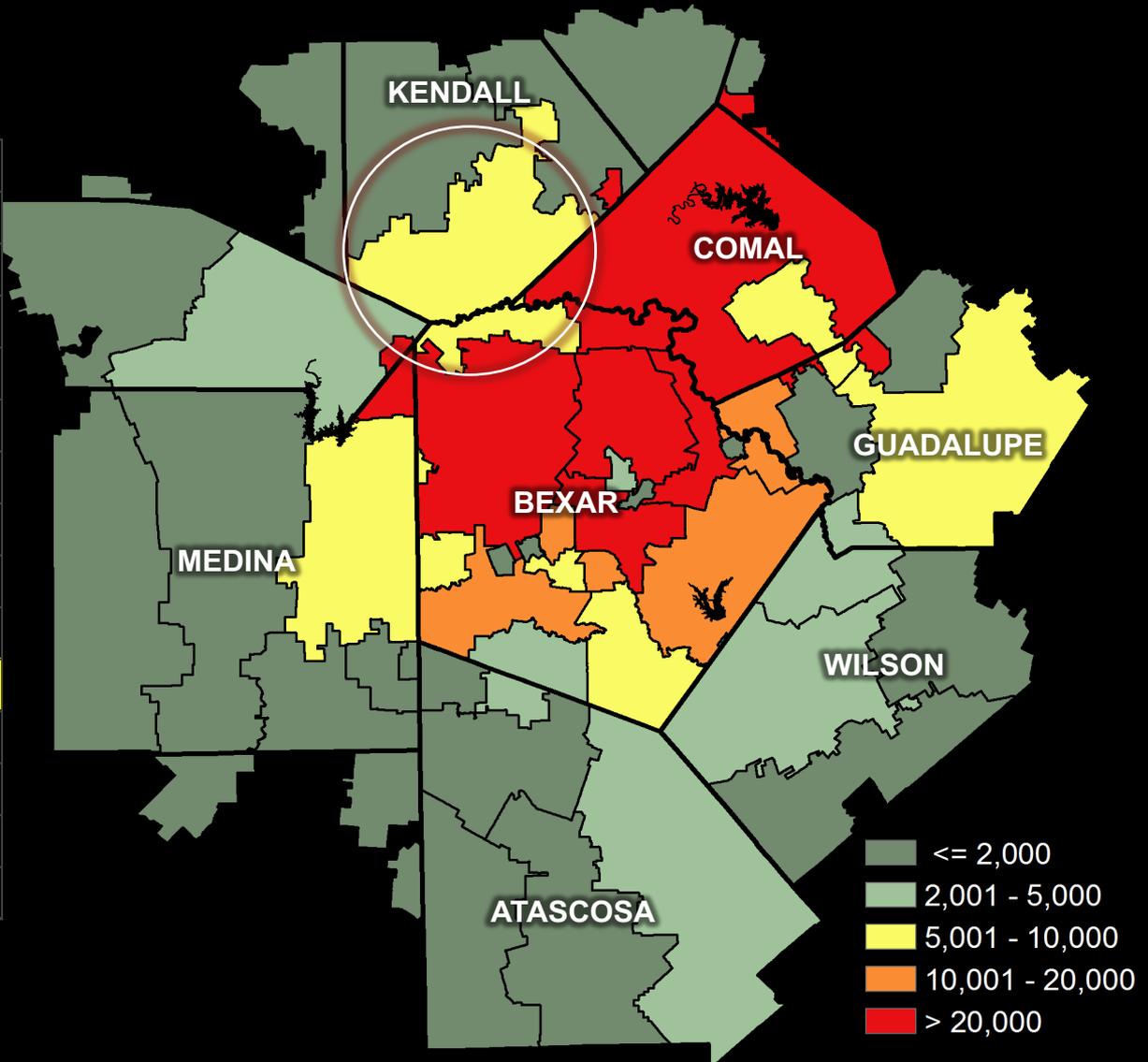


Total School District Enrollment

Fall 2018, San Antonio Metro



	School District	Enrollment
1	Northside ISD (Bexar)	106,501
2	North East ISD	65,186
3	San Antonio ISD	48,745
4	Comal ISD	23,935
5	Judson ISD	22,870
6	Schertz-Cibolo-Universal C	15,818
7	Harlandale ISD	14,086
8	Southwest ISD	13,759
9	Edgewood ISD (Bexar)	10,234
10	East Central ISD	10,041
11	Boerne ISD	9,170
12	New Braunfels ISD	9,127
13	South San Antonio ISD	8,939
14	Seguin ISD	7,366
15	Southside ISD	5,663

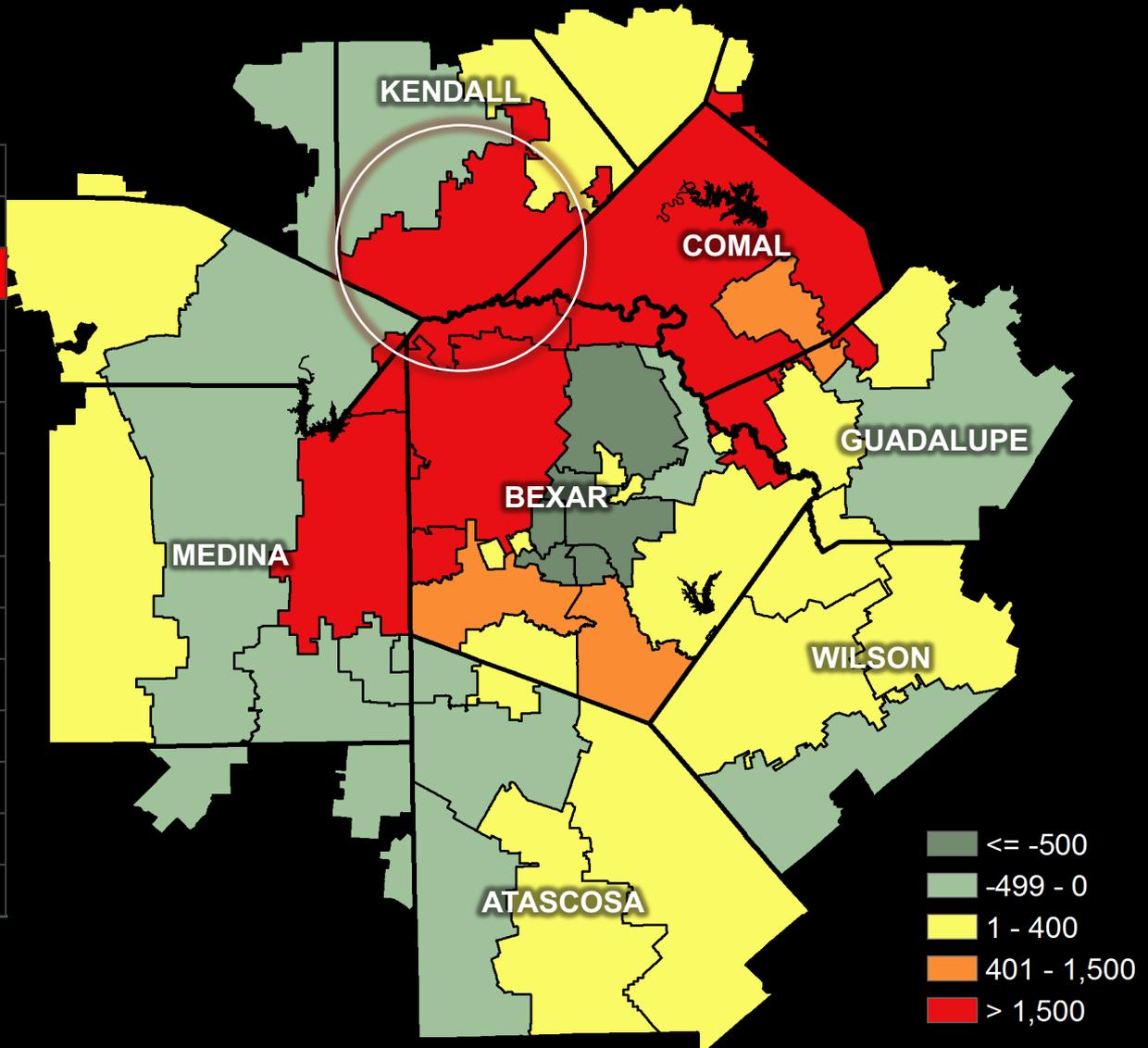


Numeric Change in Enrollment

Fall 2013 to Fall 2018, San Antonio Metro



	School District	Change
1	Comal ISD	4,435
2	Northside ISD (Bexar)	4,372
3	Boerne ISD	1,941
4	Schertz-Cibolo-Universal C	1,724
5	Medina Valley ISD	1,577
6	New Braunfels ISD	828
7	Southside ISD	510
8	Southwest ISD	440
9	East Central ISD	333
10	Randolph Field ISD	291
11	La Vernia ISD	282
12	Navarro ISD	253
13	Floresville ISD	241
14	Somerset ISD	198
15	Marion ISD	143

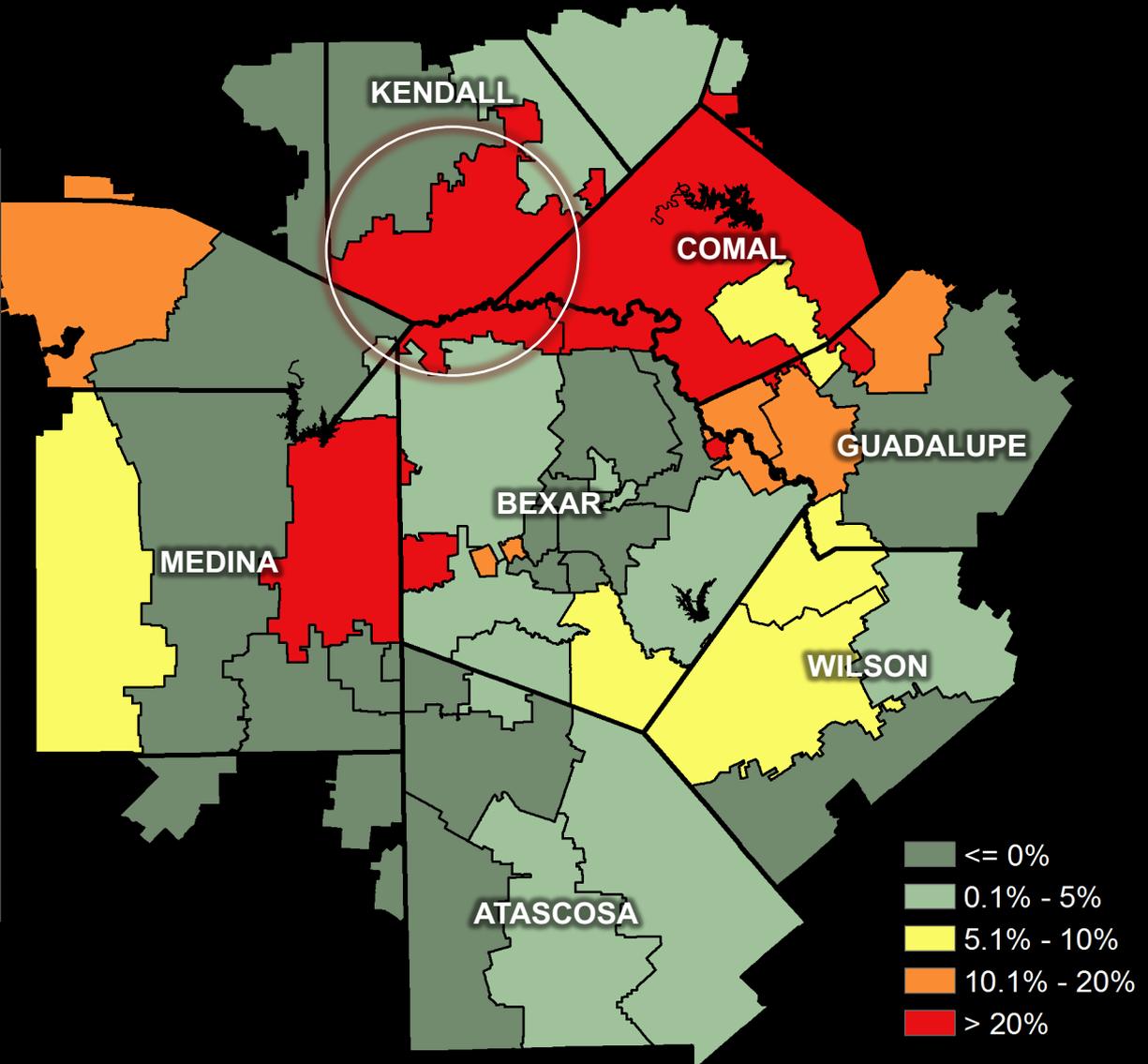


Percent Change in Enrollment

Fall 2013 to Fall 2018, San Antonio Metro



	School District	Change
1	Medina Valley ISD	40.7%
2	Boerne ISD	26.9%
3	Randolph Field ISD	24.7%
4	Comal ISD	22.7%
5	Navarro ISD	15.0%
6	Lackland ISD	14.5%
7	Medina ISD	13.3%
8	Schertz-Cibolo-Universal (C)	12.2%
9	Marion ISD	10.6%
10	New Braunfels ISD	10.0%
11	Southside ISD	9.9%
12	La Vernia ISD	9.0%
13	D'Hanis ISD	8.6%
14	Floresville ISD	6.3%
15	Somerset ISD	5.0%





THE DISTRICT

Demographic Characteristics



43.7 Median Age

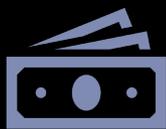
San Antonio Metro 34.9

Population
Ages 5–17



20%

San Antonio Metro 18%



Median
Household
Income

\$93,567

San Antonio Metro \$57,379

Mean Travel
Time to Work

31.4



San Antonio Metro 26.6 minutes

STAAR Passage Rate **87.9%**

State of Texas 74.3%



Bachelor's Degree

47%



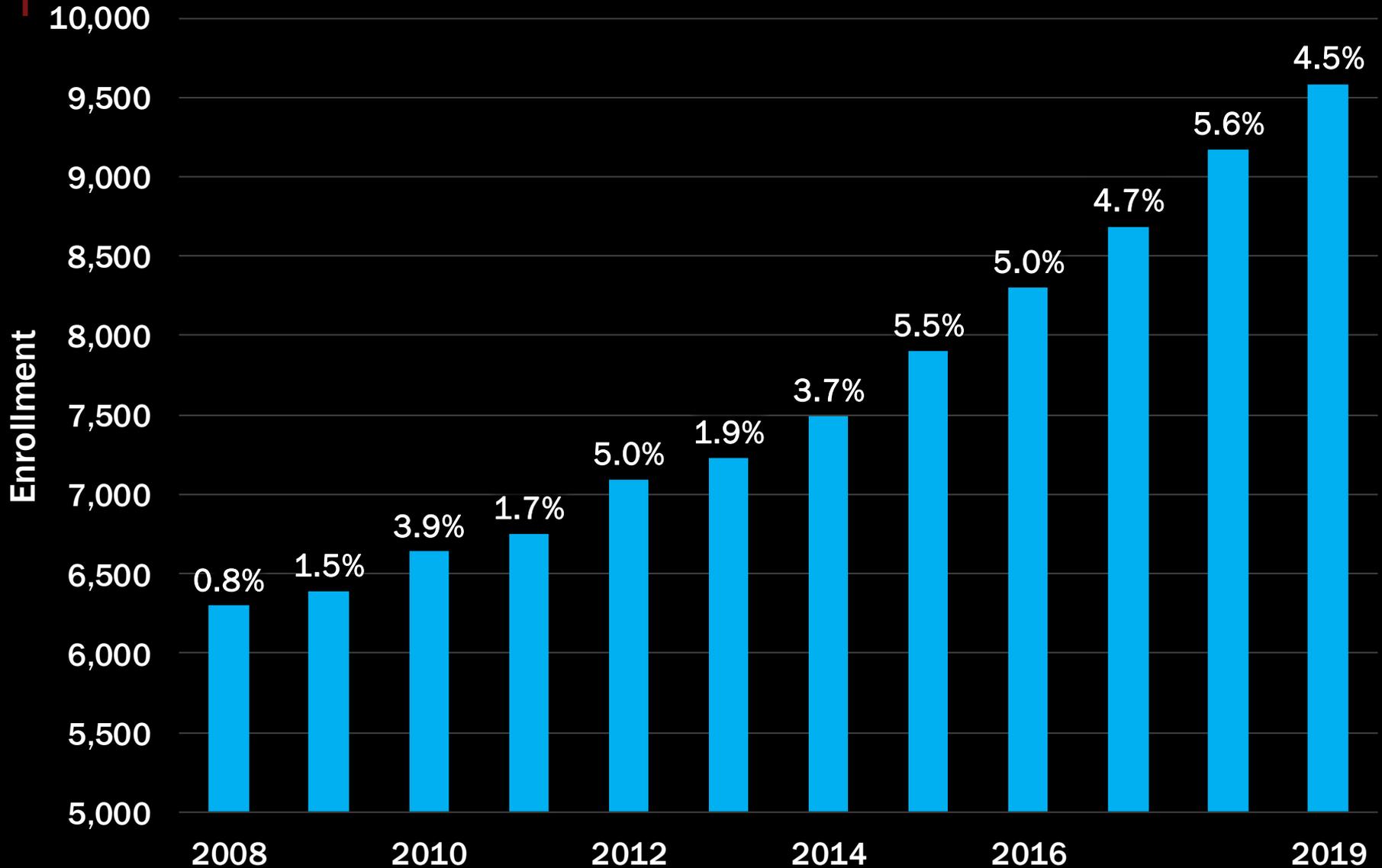
San Antonio Metro 28%

18.2% Economically Disadvantaged Student Population

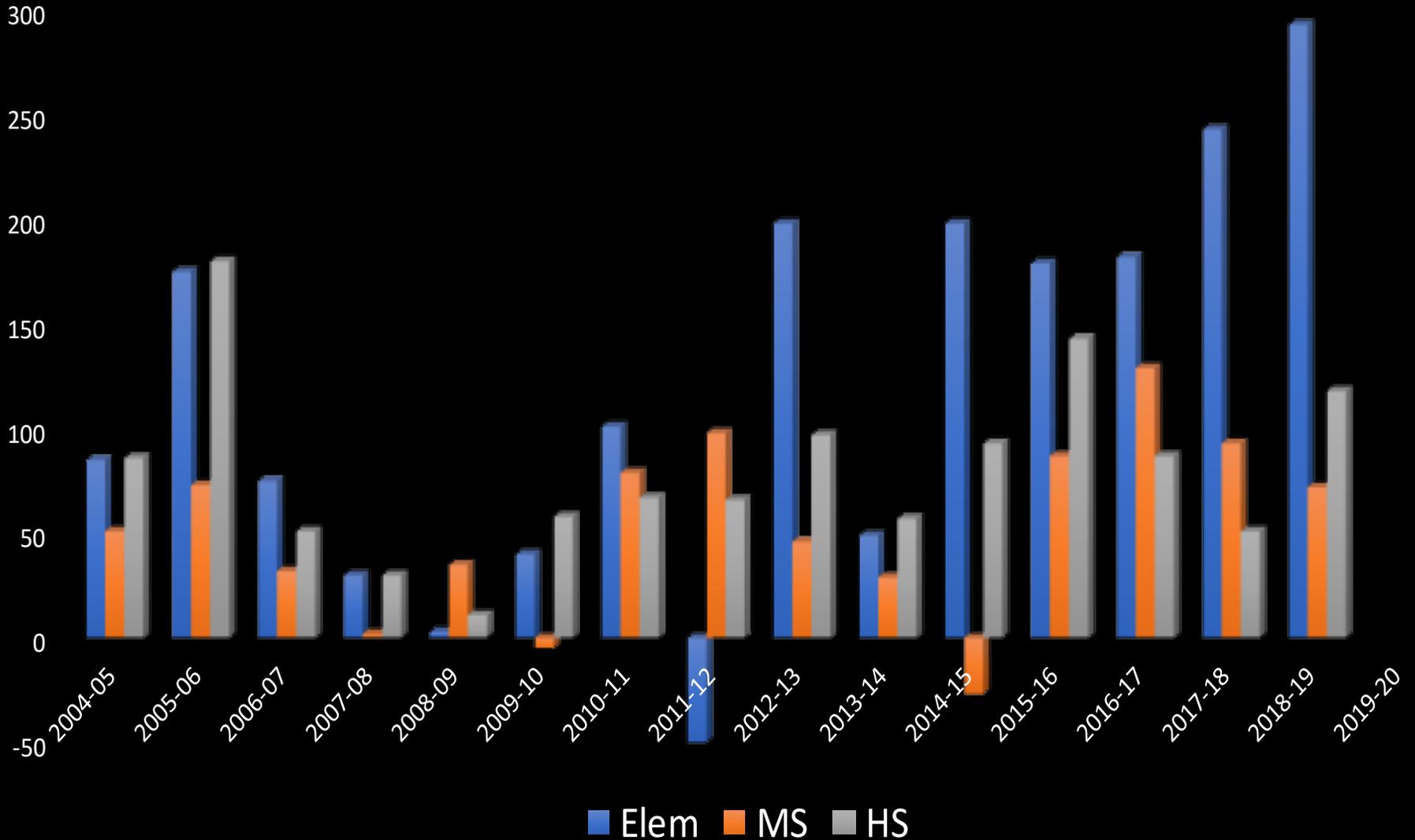
State of Texas 60.6%



Annual Growth Rates



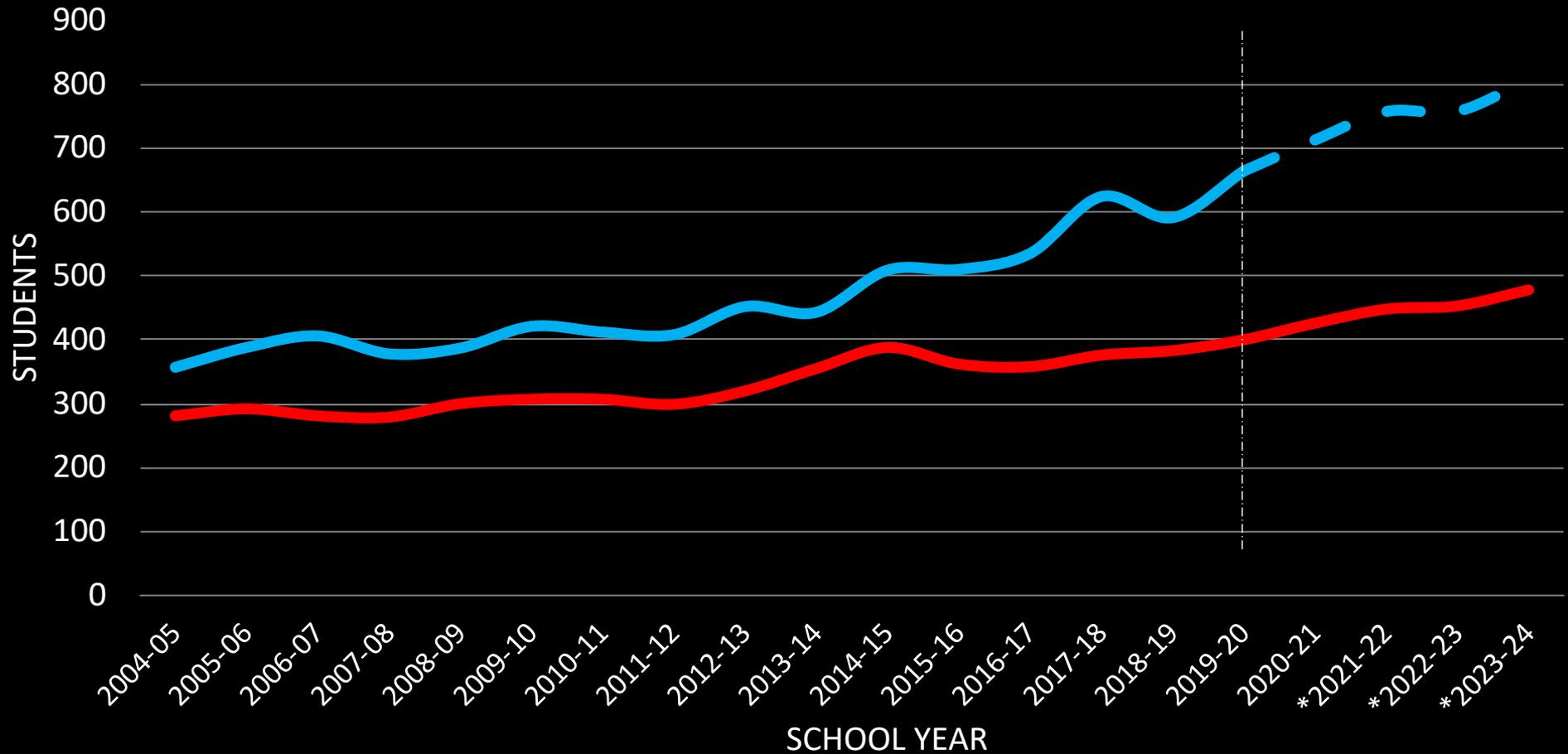
Added Students by Grade Group



Kindergarten vs. Births



Births (Adjusted Five Years) Kindergarten Enrollment

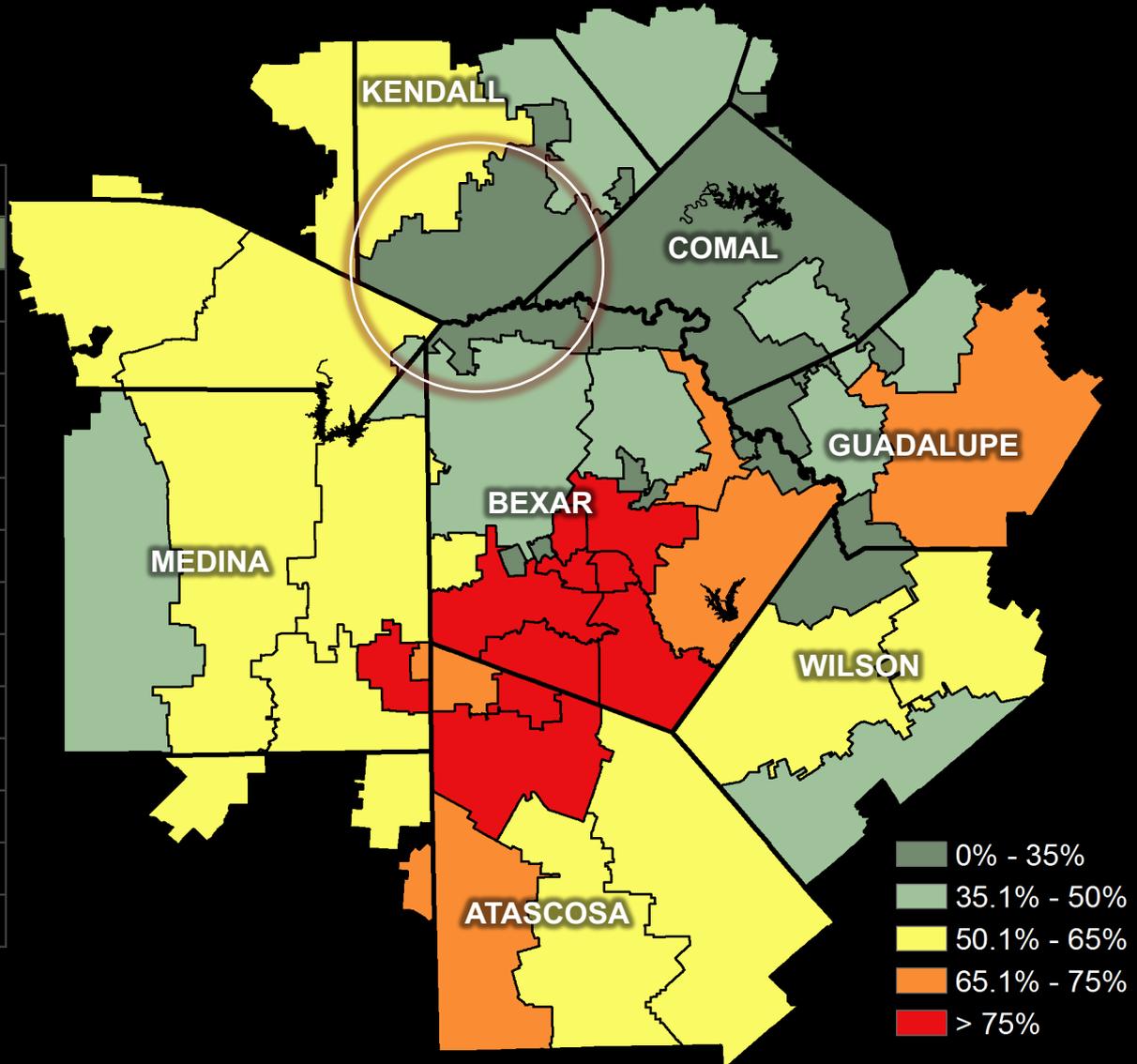


Percent Economically Disadvantaged



Fall 2018, San Antonio Metro

	School District	Econ. Dis.
1	Randolph Field ISD	7.4%
2	Boerne ISD	18.2%
3	Lackland ISD	18.3%
4	Alamo Heights ISD	19.7%
5	La Vernia ISD	26.8%
6	Fort Sam Houston ISD	27.1%
7	Comal ISD	29.6%
8	Schertz-Cibolo-Universal (C)	29.8%
9	Navarro ISD	36.1%
10	Poth ISD	36.7%
11	New Braunfels ISD	38.4%
12	D'Hanis ISD	41.6%
13	Marion ISD	43.4%
14	Blanco ISD	45.2%
15	North East ISD	48.4%



Percent Economically Disadvantaged



For 134 Districts with 8,000+ Students, 2018-19

	District Name	Students	Enrollment	Enrollment
1	CARROLL ISD	108	8,366	1.3%
2	EANES ISD	263	8,132	3.2%
3	PROSPER ISD	1,083	14,348	7.5%
4	COPPELL ISD	1,290	12,925	10.0%
5	LAKE TRAVIS ISD	1,316	10,738	12.3%
6	FRISCO ISD	7,543	60,182	12.5%
7	BOERNE ISD	1,673	9,170	18.2%
8	ALLEN ISD	4,170	21,557	19.3%
9	LEANDER ISD	8,116	40,031	20.3%
10	NORTHWEST ISD	5,027	24,141	20.8%
State of Texas:				60.6%

2018-19 STAAR Passage Rates



For 134 Districts with More than 8,000 Students

Rank	District Name	2018-19 Enrollment	STAAR Passage Rate			
			2018-19	2017-18	2016-17	2015-16
1	CARROLL ISD	8,366	97.1%	97%	97%	98%
2	EANES ISD	8,132	94.6%	95%	95%	95%
3	COPPELL ISD	12,925	92.2%	92%	91%	92%
4	ALLEN ISD	21,557	90.4%	91%	91%	92%
5	FRISCO ISD	60,182	90.2%	90%	90%	91%
6	PROSPER ISD	14,348	89.8%	91%	89%	91%
7	LAKE TRAVIS ISD	10,738	89.7%	91%	91%	93%
8	WYLIE ISD	16,527	89.6%	89%	87%	90%
9	TOMBALL ISD	16,962	89.1%	89%	88%	90%
10	BOERNE ISD	9,170	87.9%	88%	87%	88%
	State of Texas:		74.3%	73%	71%	73%

PK-12 Enrollment Share



Private and Charter School Estimates

Estimated PK-12th Grade Population Living in Boerne ISD: 2019-20

Resident Students:	10,518	
Attending B.I.S.D.	9,583	
<i>Transfers into the District</i>	<i>169</i>	
Attending and Residing in B.I.S.D.	9,414 (89.5%)	←
Attending Charter Schools ¹	135 (1.3%)	
Attending Private Schools ²	901 (8.6%)	←
Attending Nearby Districts ¹	68 (0.6%)	

¹ Sources: Texas Education Agency, Transfer Reports 2018-19; PASA surveys

² Source: PASA interviews (excludes PK enrollment)

PK-12 Enrollment Share

Selected Texas School Districts



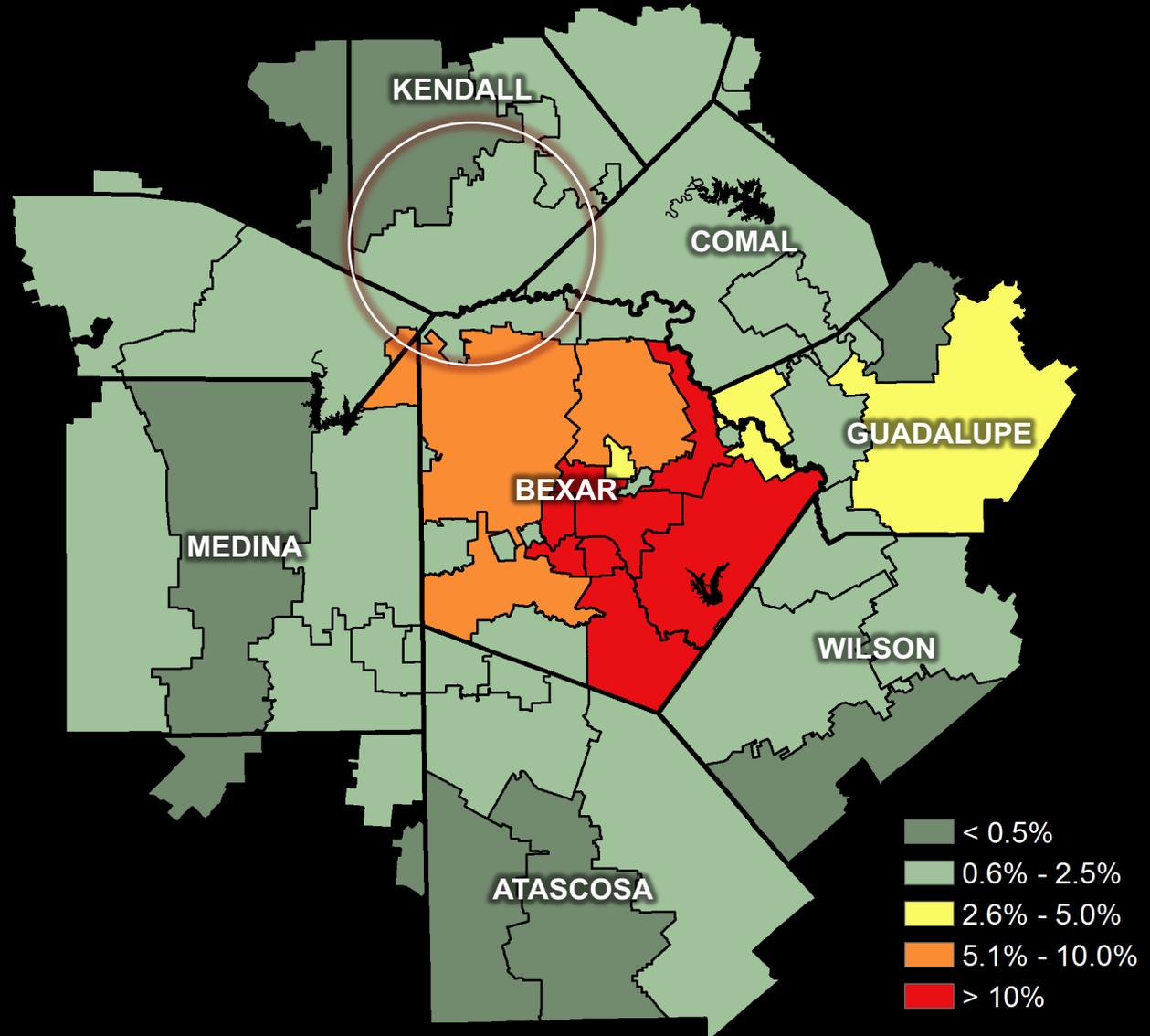
Dripping Springs I.S.D.	95.5%
Lamar C.I.S.D.	95.1%
Cypress-Fairbanks I.S.D.	94.6%
Katy I.S.D.	94.3%
Lake Travis I.S.D.	93.9%
Leander I.S.D.	93.4%
Klein I.S.D.	93.2%
Friendswood I.S.D.	92.6%
Frisco I.S.D.	92.5%
Boerne I.S.D.	89.4%
Fort Bend I.S.D.	88.3%

Percent of Students in Charters



Fall 2018, San Antonio Metro, All Public Schools

	School District	Percent
1	Edgewood ISD (Bexar)	22.5%
2	San Antonio ISD	21.4%
3	South San Antonio ISD	15.0%
4	Judson ISD	12.1%
5	East Central ISD	11.7%
6	Southside ISD	10.5%
7	Harlandale ISD	10.2%
8	North East ISD	9.8%
9	Southwest ISD	8.1%
10	Northside ISD (Bexar)	7.5%
11	Alamo Heights ISD	3.0%
12	Seguin ISD	2.8%
13	Schertz-Cibolo-Universal C	2.7%
14	Medina ISD	2.3%
15	Fort Sam Houston ISD	2.1%
20	Boerne ISD	1.5%



Private/Charter Schools

▶ Charter School Growth

- Mostly concentrated in central SA + NE/NW suburbs
- Charters enrolled 8,013 in Northside I.S.D. in 2018
 - From Fall 2016 to Fall 2018: +3,024 in N.I.S.D.
- School of Science and Technology has applied for two more additional schools in the “San Antonio Area”
- IDEA Burke open; IDEA Hidden Meadow opens in 2020
 - More campuses planned but sites unknown

▶ Cornerstone Christian’s new campus

- ▶ 8% of students in B.I.S.D.; enrollment poised to double

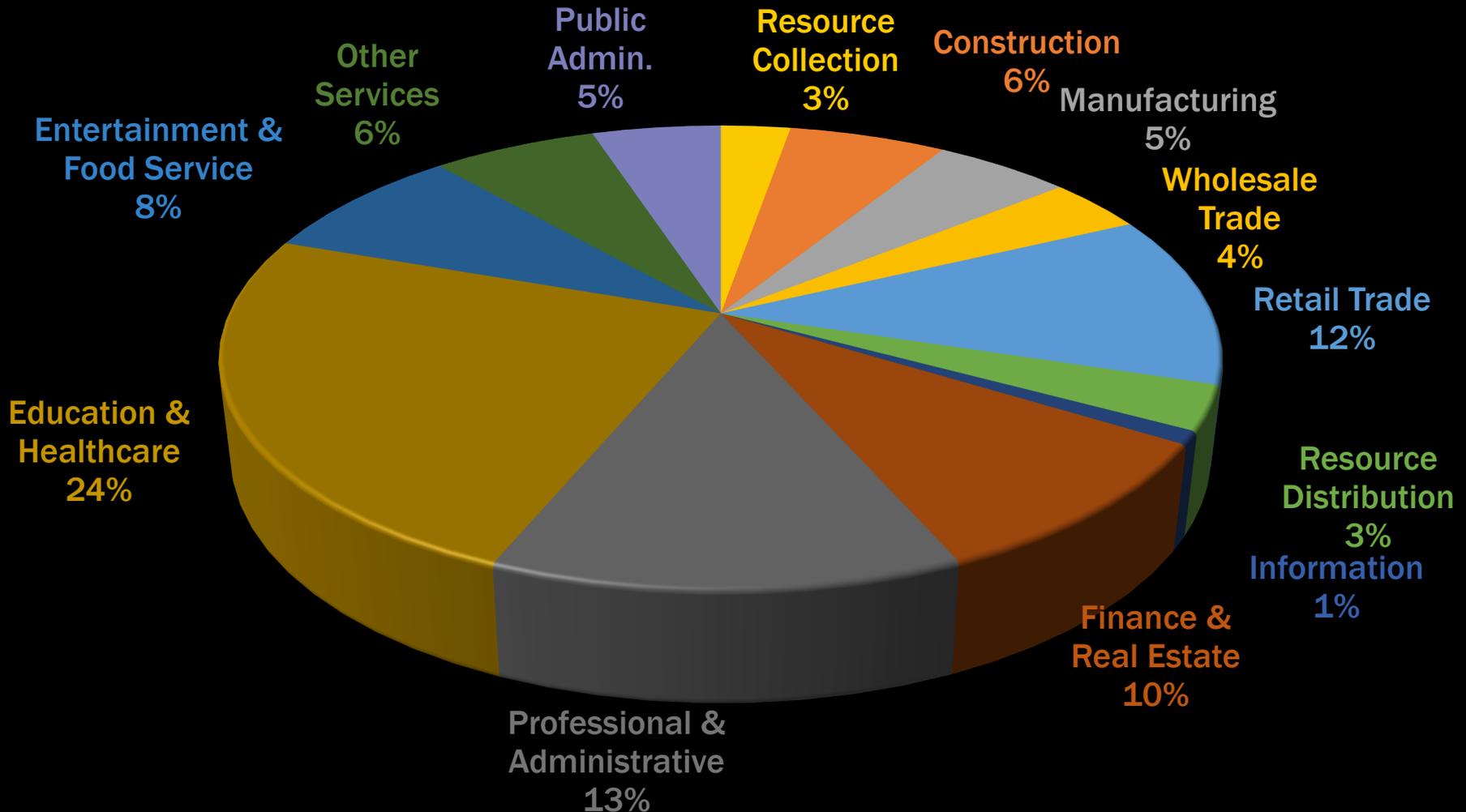




Employment by Sector

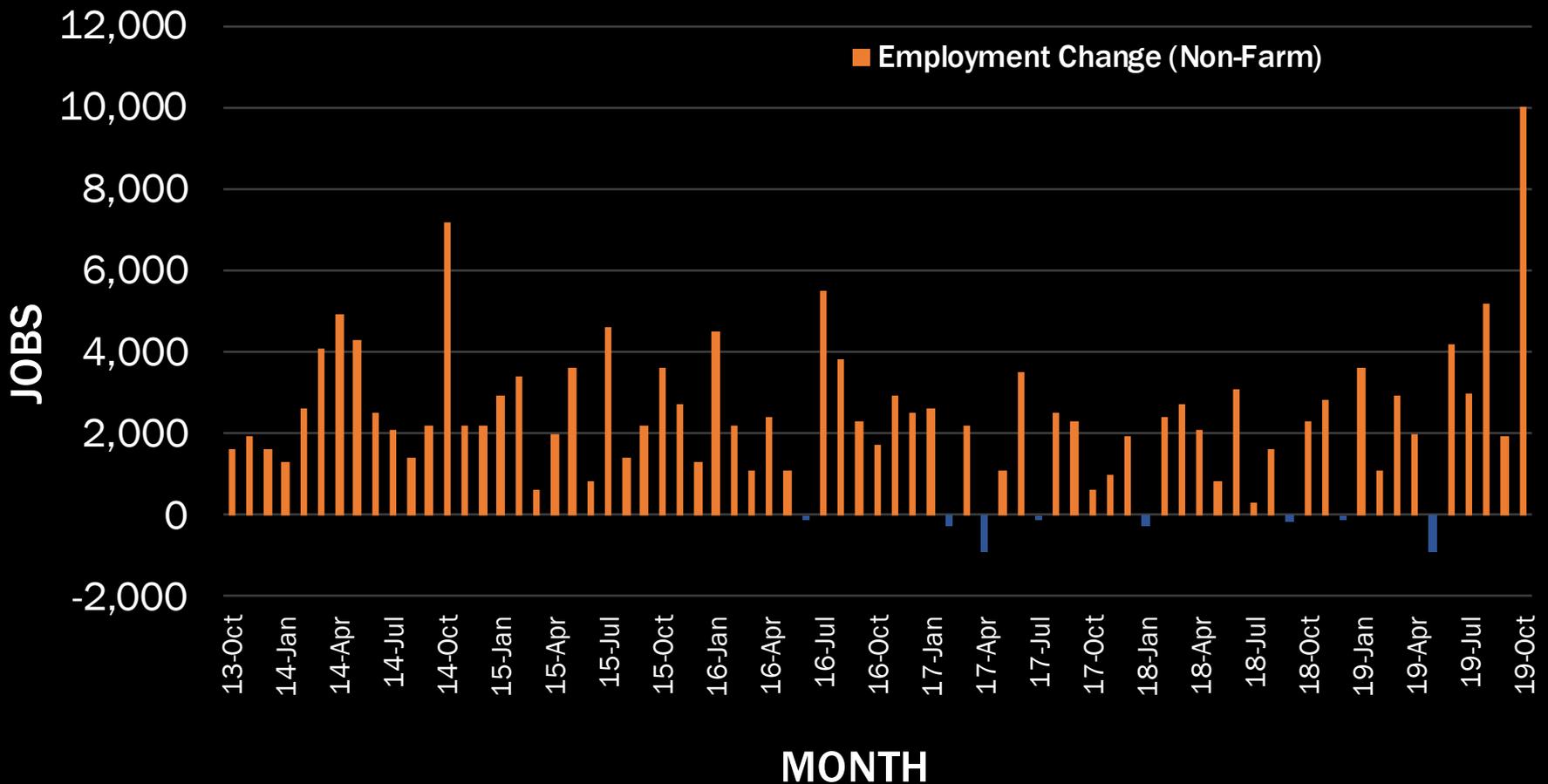


District Residents in the Workforce, 2017 Estimate



Monthly Employment Change

San Antonio Metro, Seasonally Adjusted



San Antonio Economy

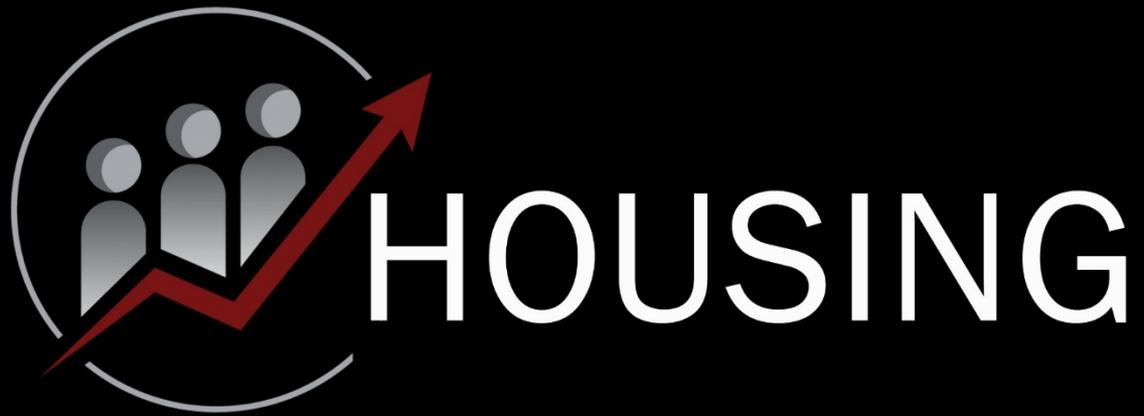
▶ Job Growth in Metro Area

- 35,700 new jobs between Oct '18 and Oct '19
- 10,000 jobs added in Oct. 2019; highest ever for any month
- 3.4% annual metro area job growth; highest in TX
- 2.9% unemployment in SA metro; 2.5% in Kendall Co.

▶ IH-10 Corridor

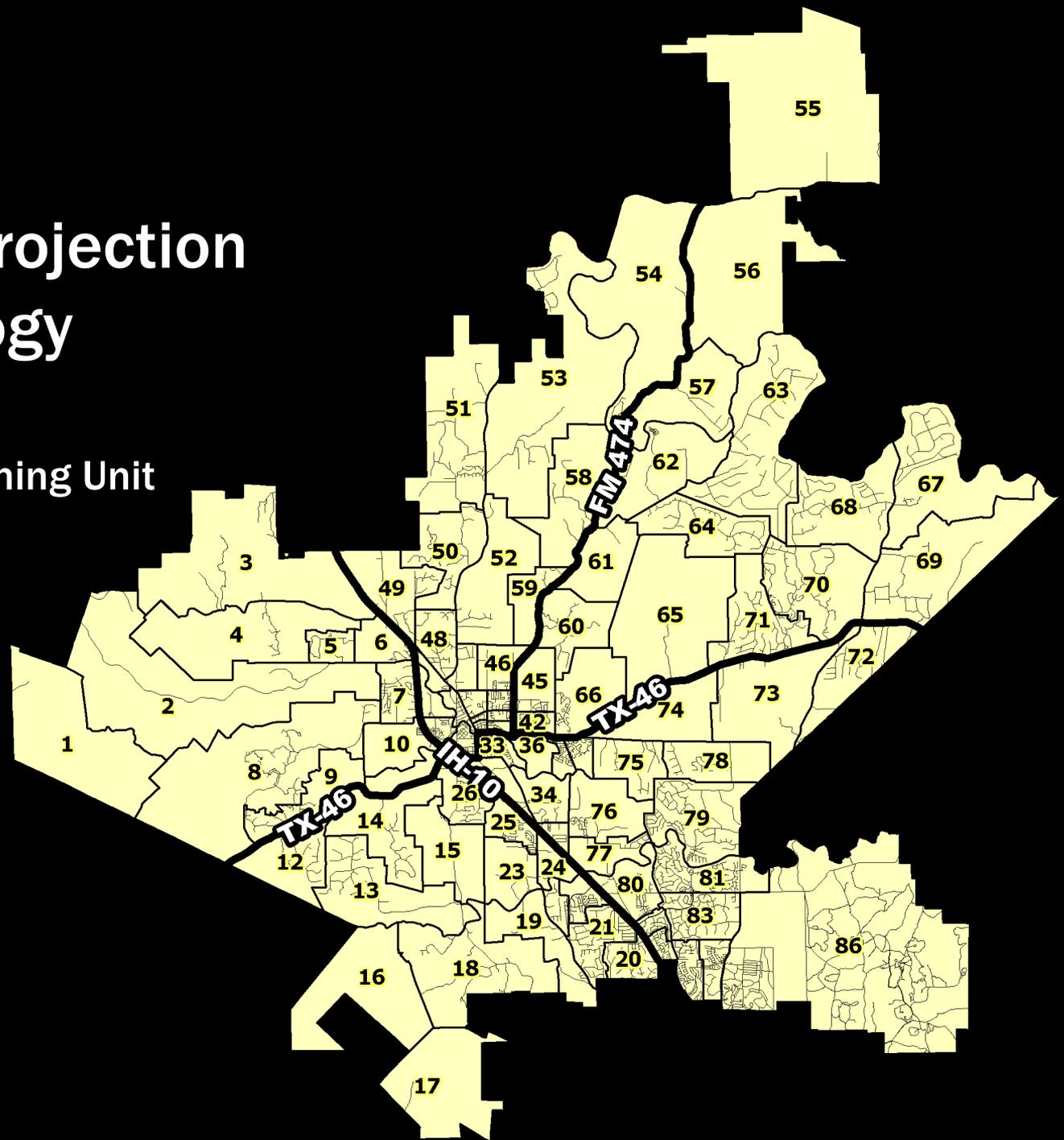
- Commercial growth expected with freeway improvements
- Office/corporate interest in tracts between FOR and 1604





Housing Projection Methodology

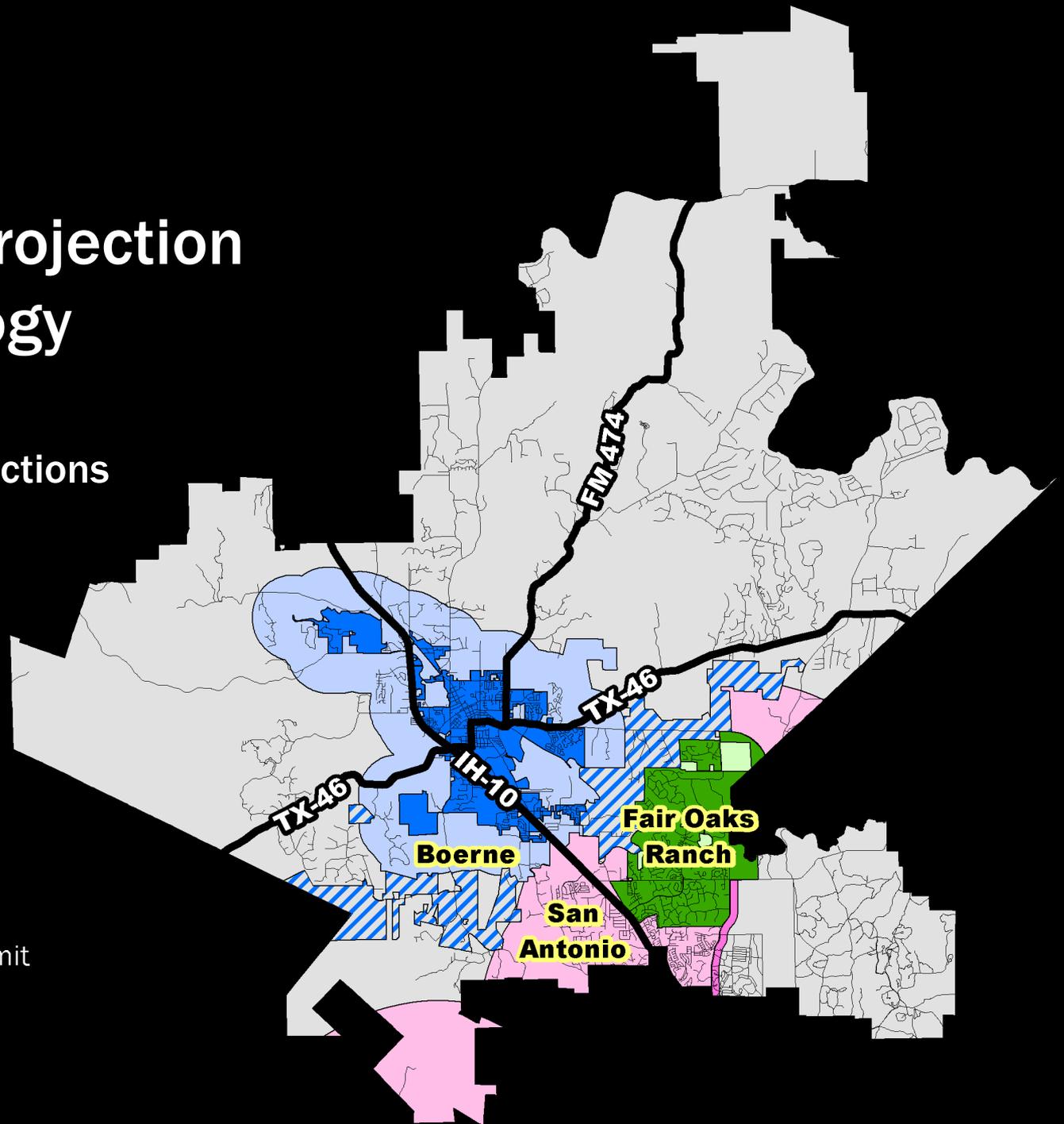
Analysis by Planning Unit



Housing Projection Methodology

Municipal Jurisdictions

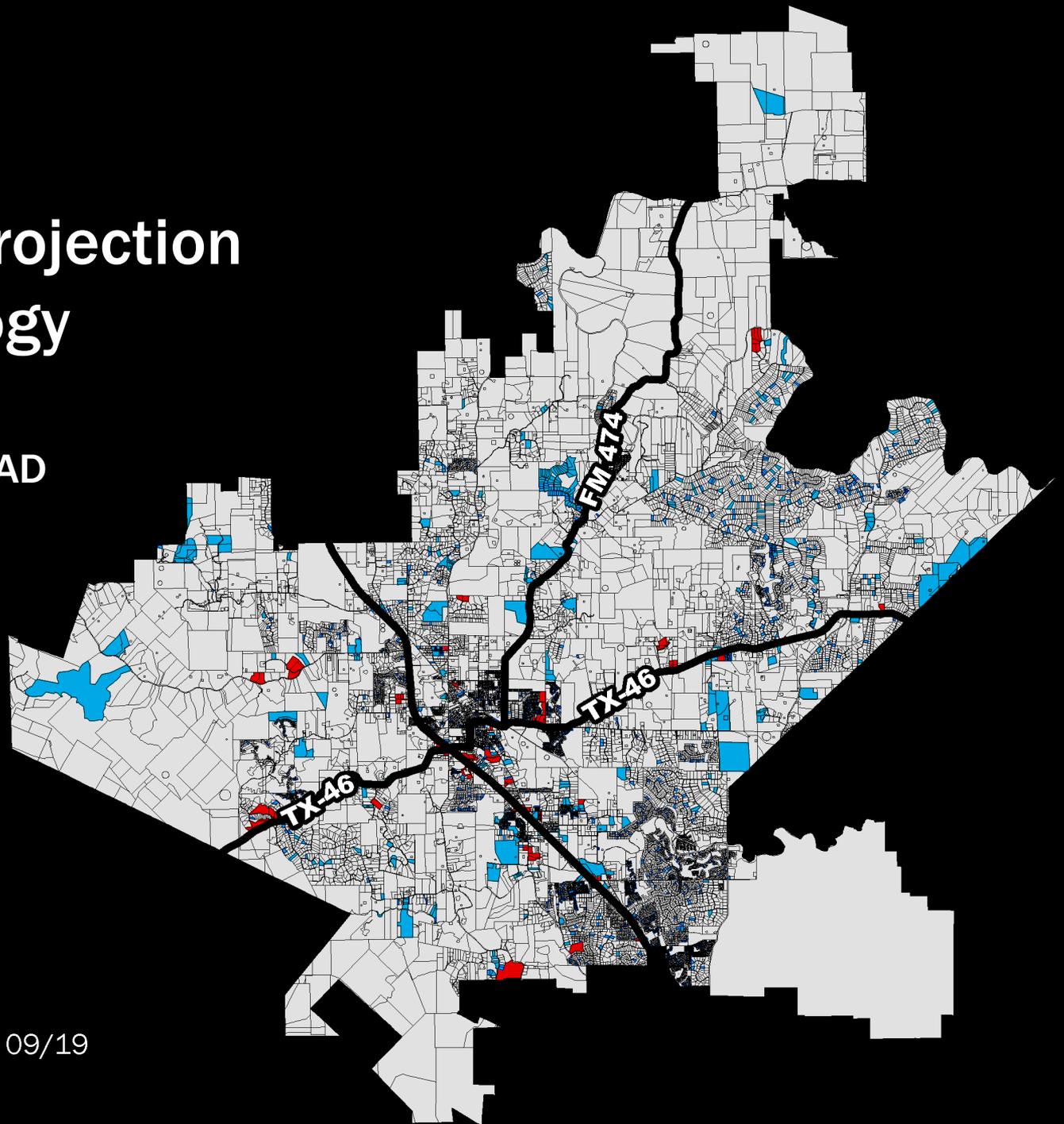
-  Boerne, City Limit
-  Boerne, ETJ
-  Boerne, Extended ETJ
-  Fair Oaks Ranch, City Limit
-  Fair Oaks Ranch, ETJ
-  San Antonio, City Limit
-  San Antonio, ETJ





Housing Projection Methodology

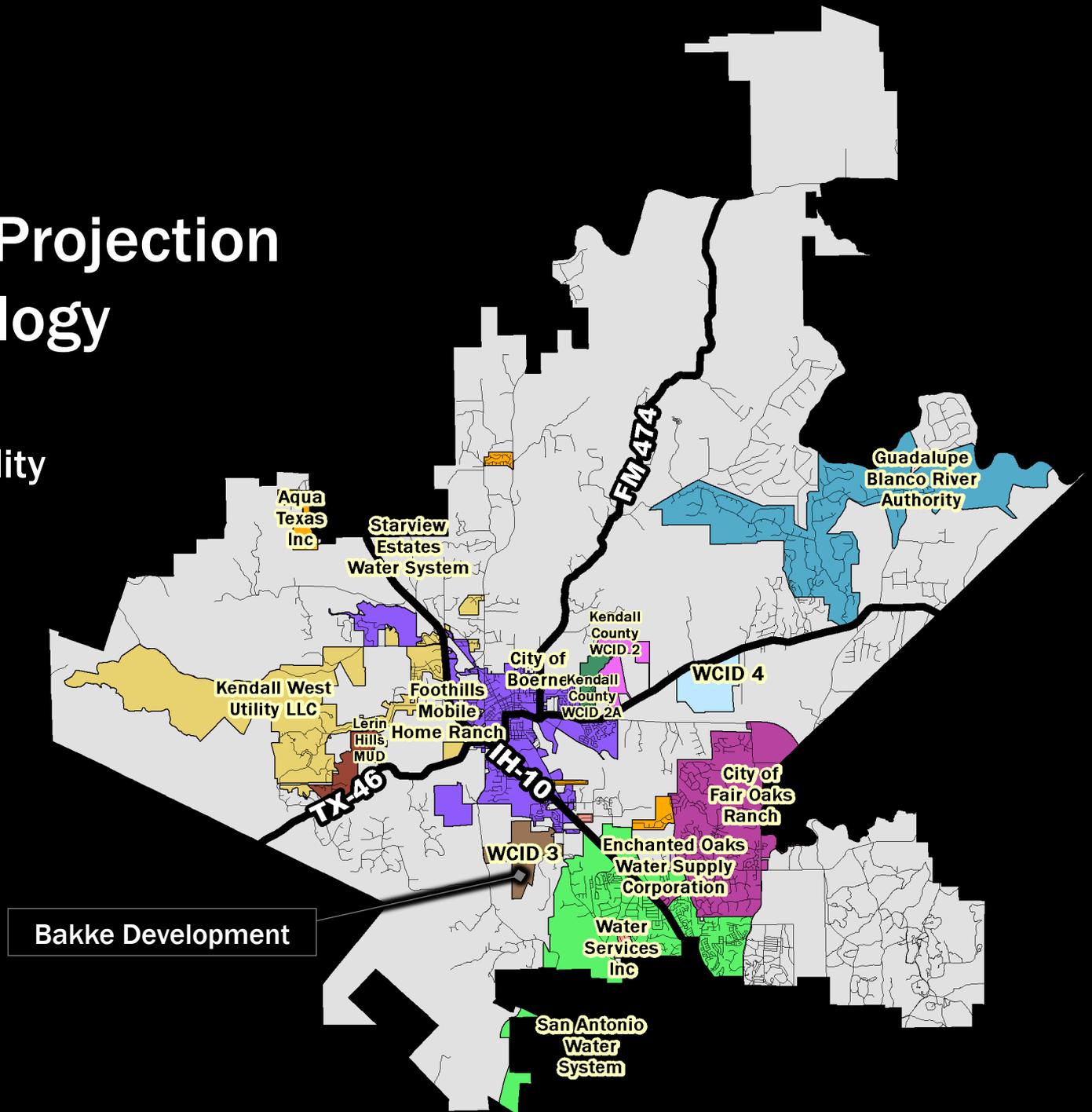
KCAD, BCAD, CCAD
Parcel Analysis



 Owner Change 09/18 to 09/19
 Parcels for Sale

Housing Projection Methodology

Utility Availability





Single-Family Housing



▶ New Single-Family Developments

▶ Esperanza

- ▶ Homes currently occupied = 151 out of 2,480
- ▶ Annual occupancies expected to reach 200 within 4–5 yrs.



▶ Cielo Ranch

- ▶ Homes currently occupied = 29 out of 600
- ▶ Quick build-out expected; 50+ homes under construction



▶ Regent Park

- ▶ Homes currently occupied = 98 out of 797

▶ Miralomas

- ▶ Homes currently occupied = 6; 25 ready or under constr.
- ▶ Phase 1 = 184 lots; Phase 2 = ~100 lots / lower price points
- ▶ Master plan being adjusted; expect 1,100-1,250 SF homes



Single-Family Housing



▶ Planned Single-Family Developments

- ▶ Bakke Development (WCID #3) – 1,200+ lots
- ▶ Shoreline Park – 350+ lots
- ▶ Lily Ranch – along Old Fred; 320+ lots
- ▶ Spencer Ranch – along TX-46 south of IH-10
- ▶ “Boerne Ranch Estates” Tract a.k.a. “The Pfeiffer Tract” a.k.a. “The Reserve” – 340 acres; up to 645 dwelling units allowed



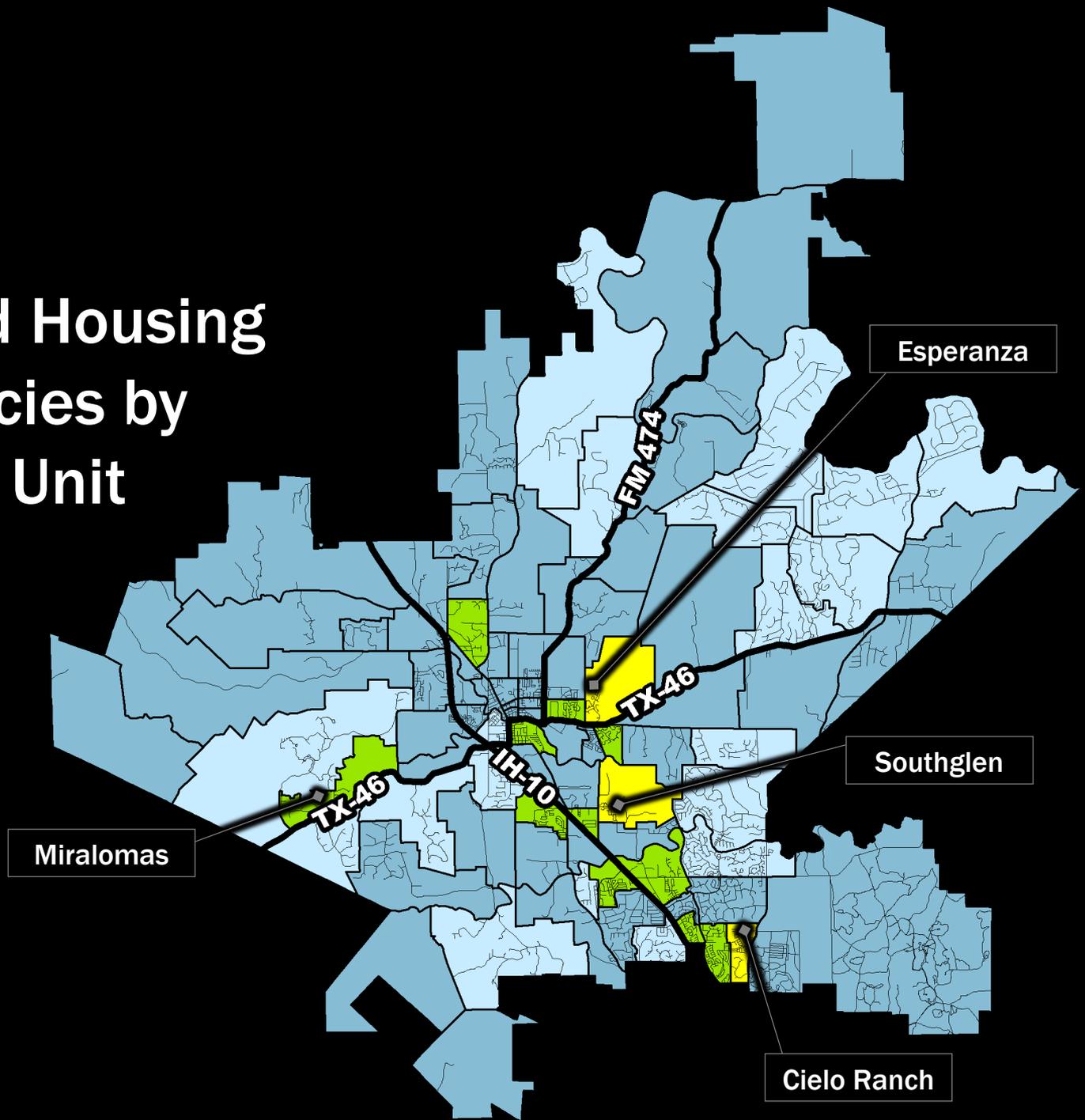
▶ Remaining Large Tracts

- ▶ Old Fredericksburg Road Corridor (Planning Unit 77)
- ▶ Planning Units 10/11 – 1,000+ acres likely to be developed between Johns Rd. and TX-46



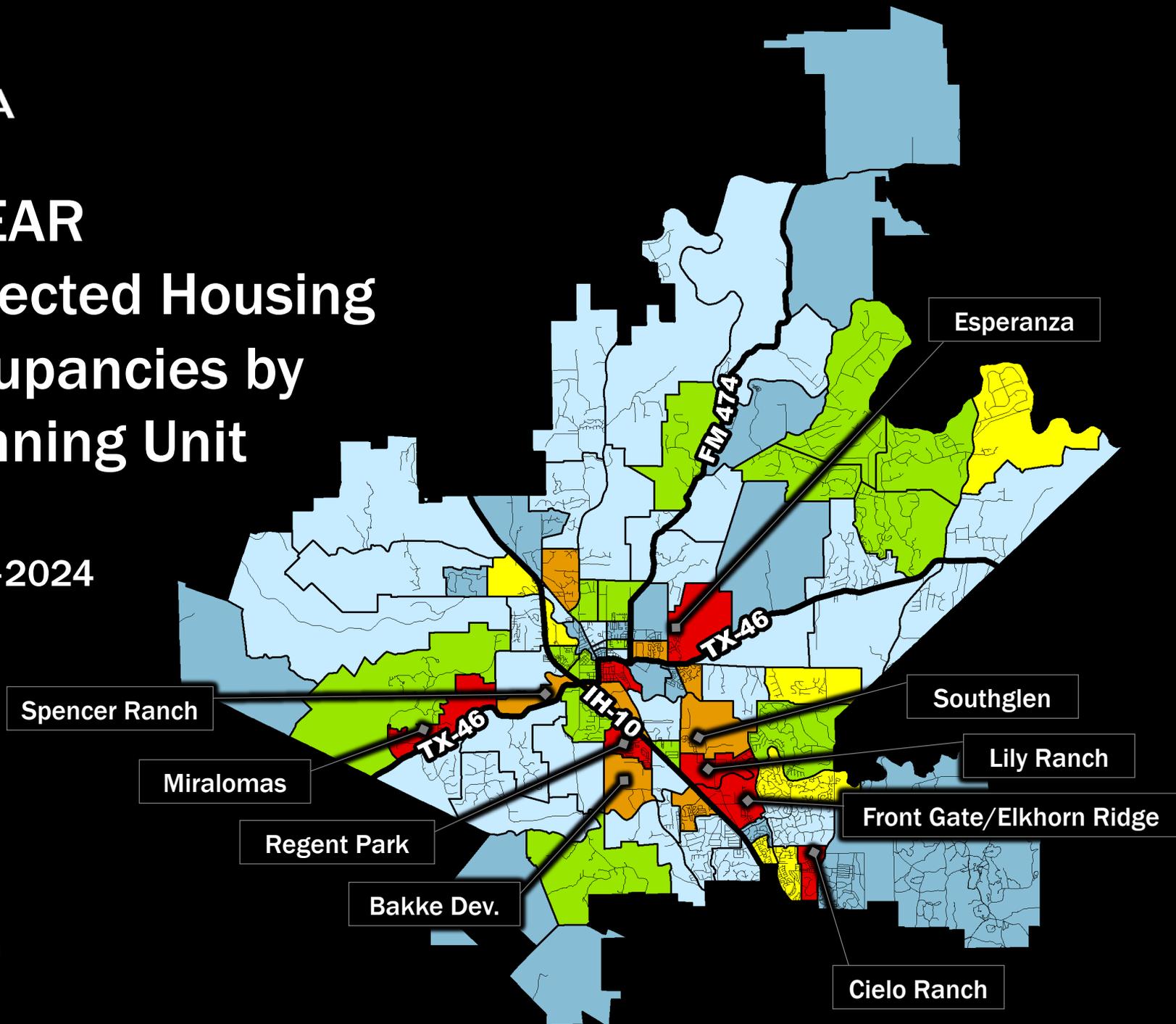
1-YEAR Projected Housing Occupancies by Planning Unit

2019-2020



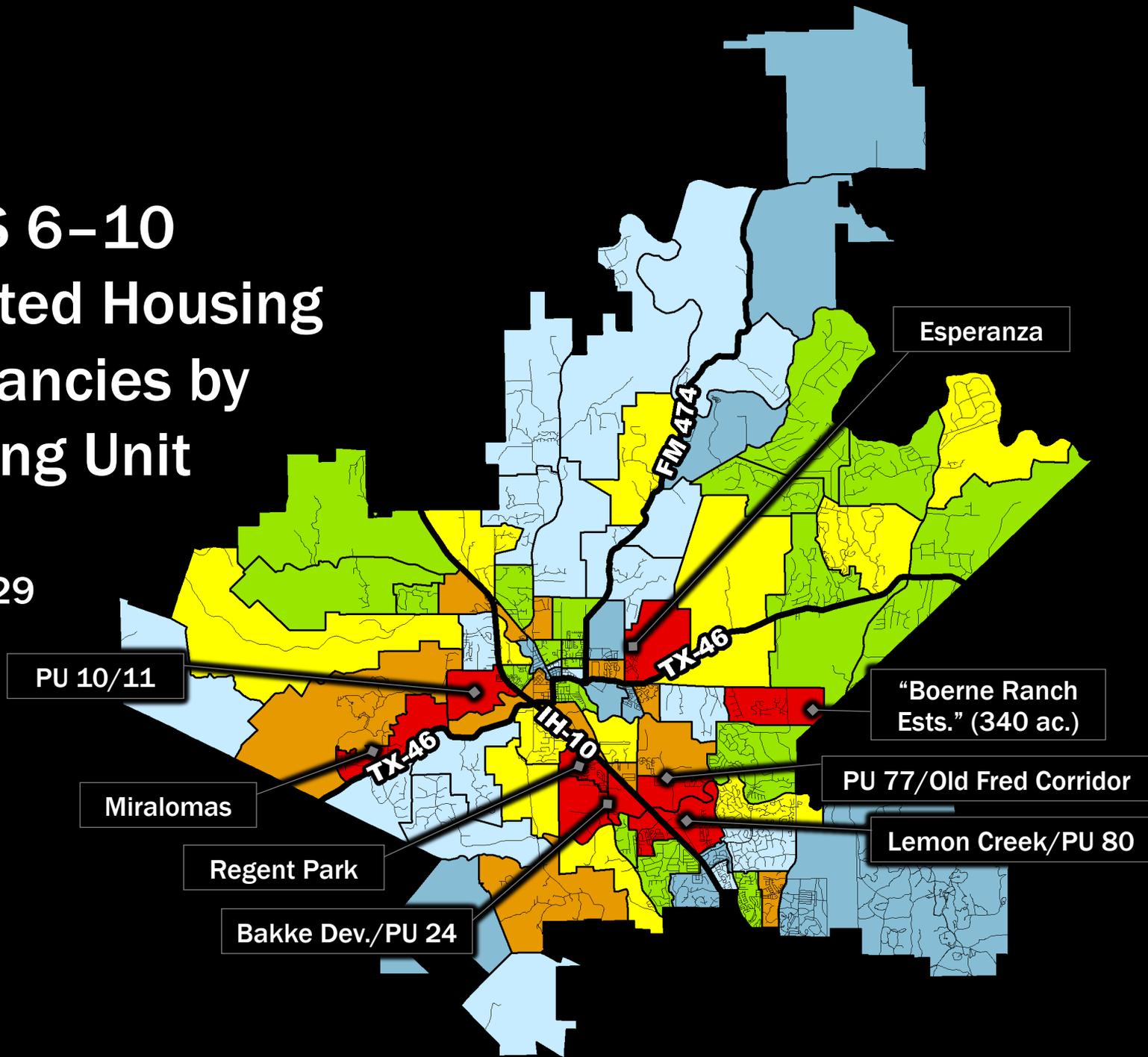
5-YEAR Projected Housing Occupancies by Planning Unit

2019-2024



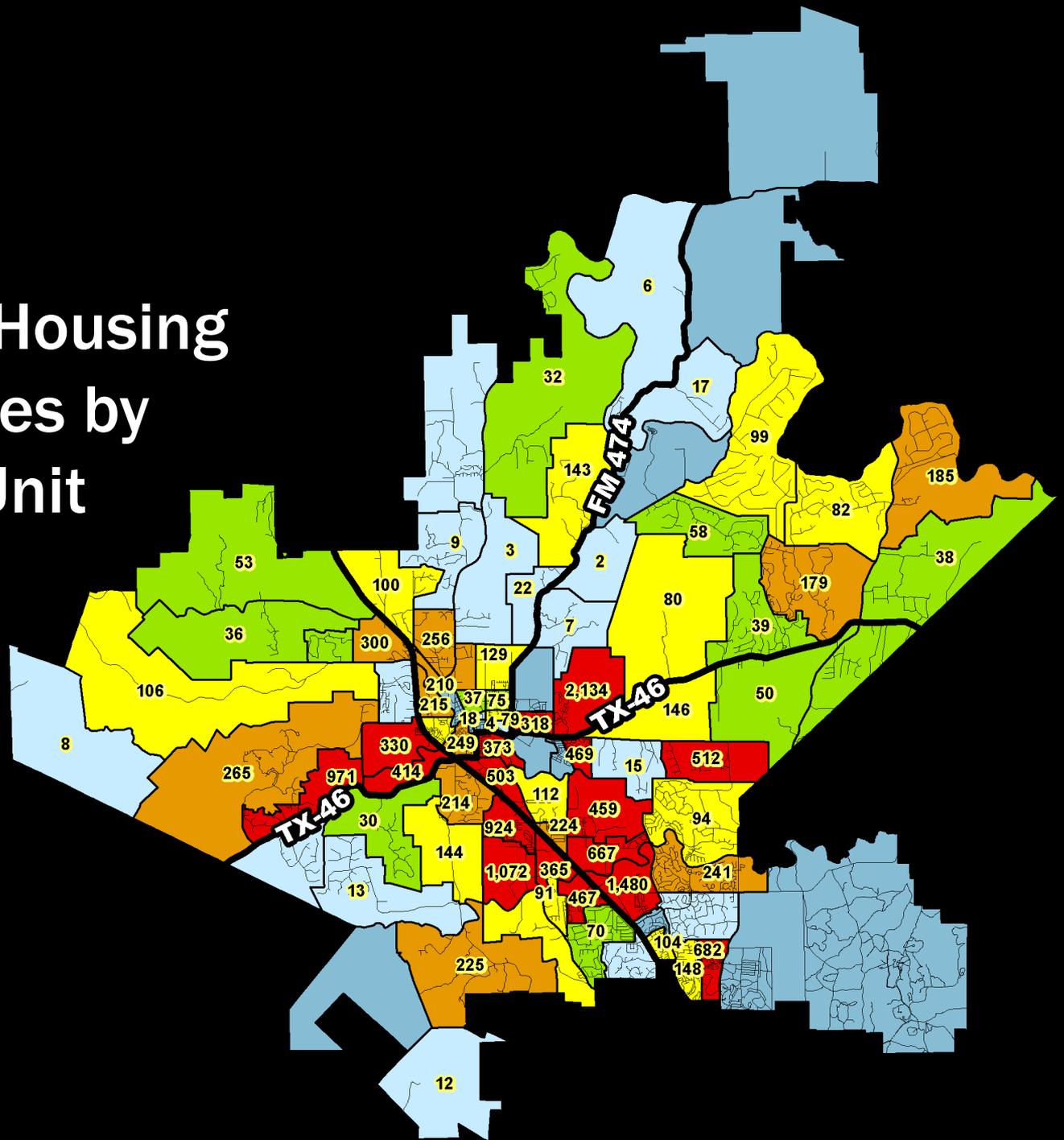
YEARS 6-10 Projected Housing Occupancies by Planning Unit

2024-2029



10-YEAR Projected Housing Occupancies by Planning Unit

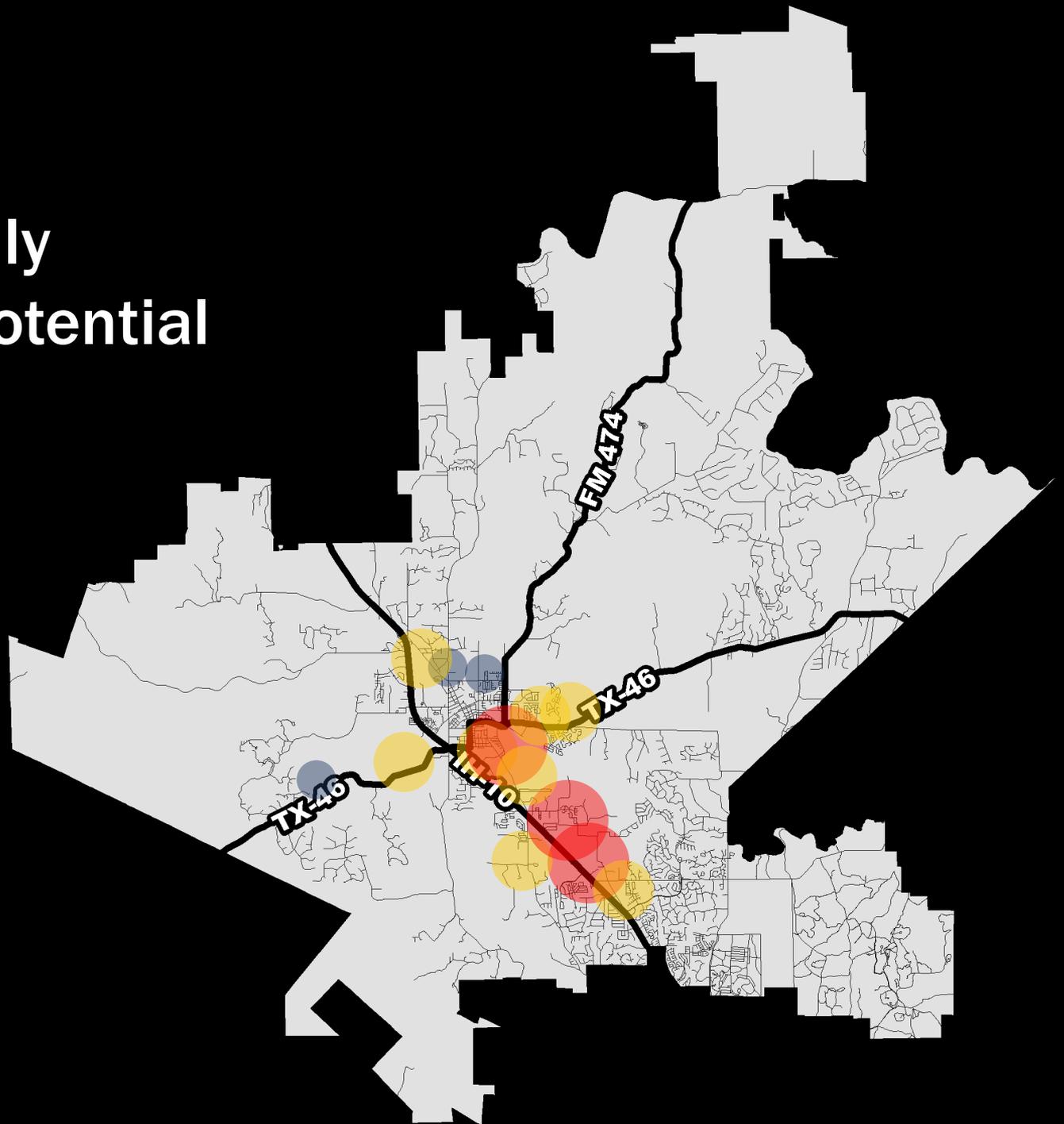
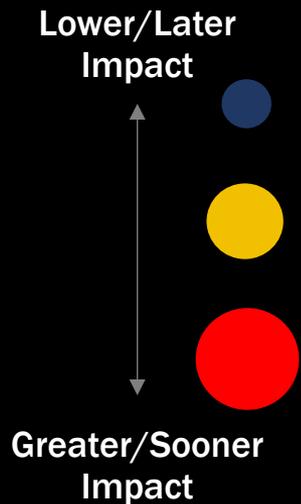
2019-2029





Multi-Family Housing Potential

2019-2029





Multi-Family Housing

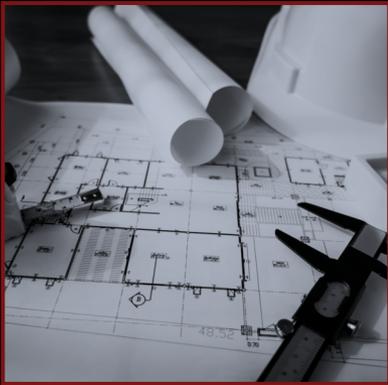


▶ Under Construction

- ▶ Abbington Ranch = 48 units (TDHCA tax credit)
- ▶ Liv at Boerne = age-restricted for seniors (N. Main/1376)
- ▶ Legacy at Cibolo = 238 units along Herff Rd.



- ▶ PASA has identified 25 additional locations of planned or potential multi-family properties that could be student-oriented

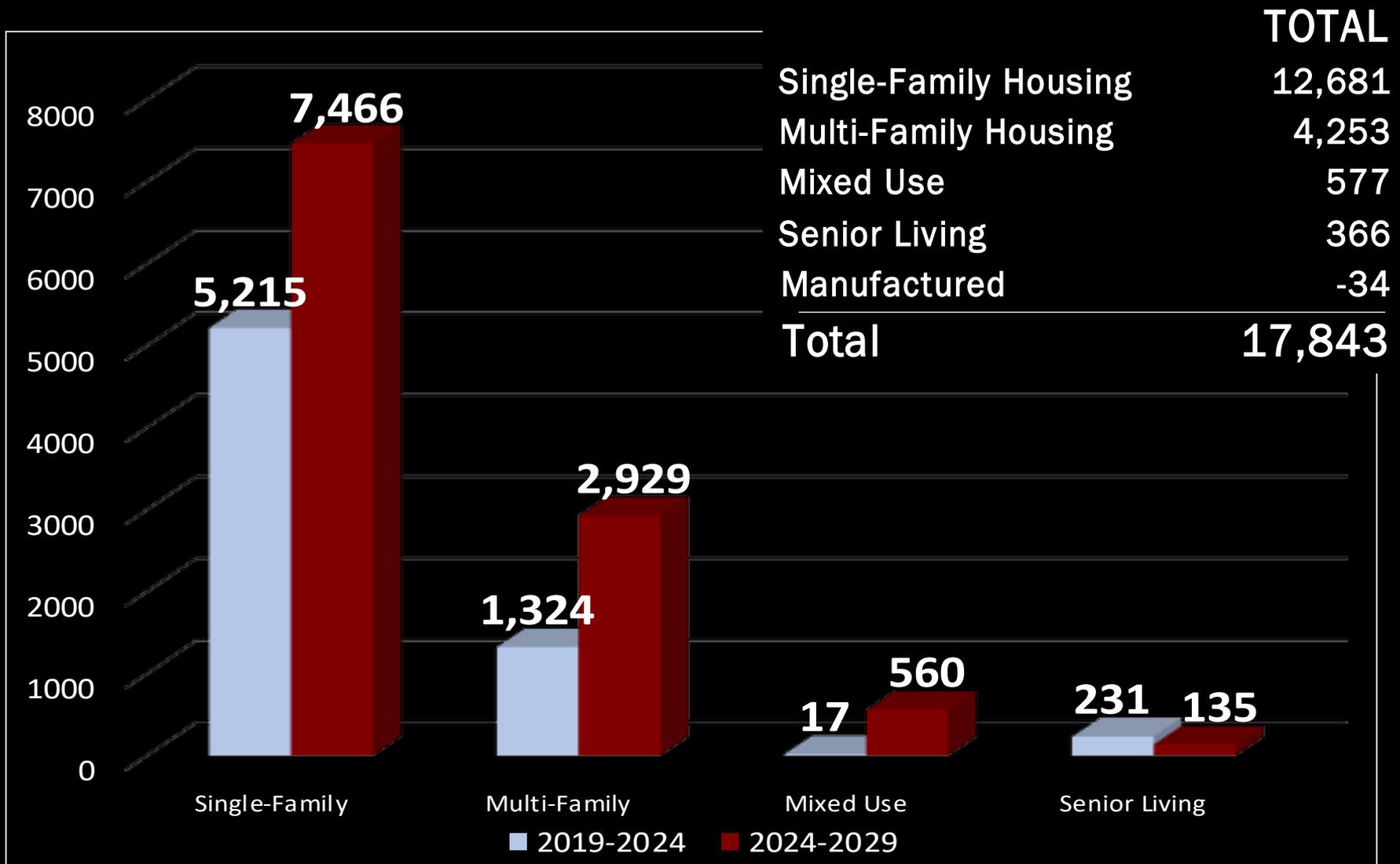


- ▶ “Lemon Creek” Mixed Use
- ▶ Commons At Menger Creek
- ▶ MF “pods” part of many master plans
 - ▶ Esperanza, Miralomas, Bakke. Dev., etc.

Projected New Housing Occupancies



2019-2029





STUDENTS
per HOME

Students per Occupied Home

Districtwide



0.50



Single-Family

0.34



Multi-Family

Students per Home by Median Value of Homes



Median Value by Neighborhood	Occupied Units	B.I.S.D. Students	Students per Home
< \$250,000	3,532	1,654	0.47
\$250-350,000	3,380	1,885	0.56
\$350-425,000	4,035	2,065	0.51
\$425-650,000	3,481	1,719	0.49
> \$650,000	1,280	547	0.43

Student Growth by Housing Type



	Resident Students in 2018	Resident Students in 2019	Added Students 2018 to 2019		Percent of Growth
			#	%	
 Subdivisions - Built-out	5,258	5,376	118	2%	29%
 Subdivisions - Actively Building	2,358	2,592	234	10%	58%
 Apartments	585	625	40	7%	10%
 THs/Condos	33	32	-1	-3%	---
 MHP	187	197	10	5%	2%



PROJECTIONS

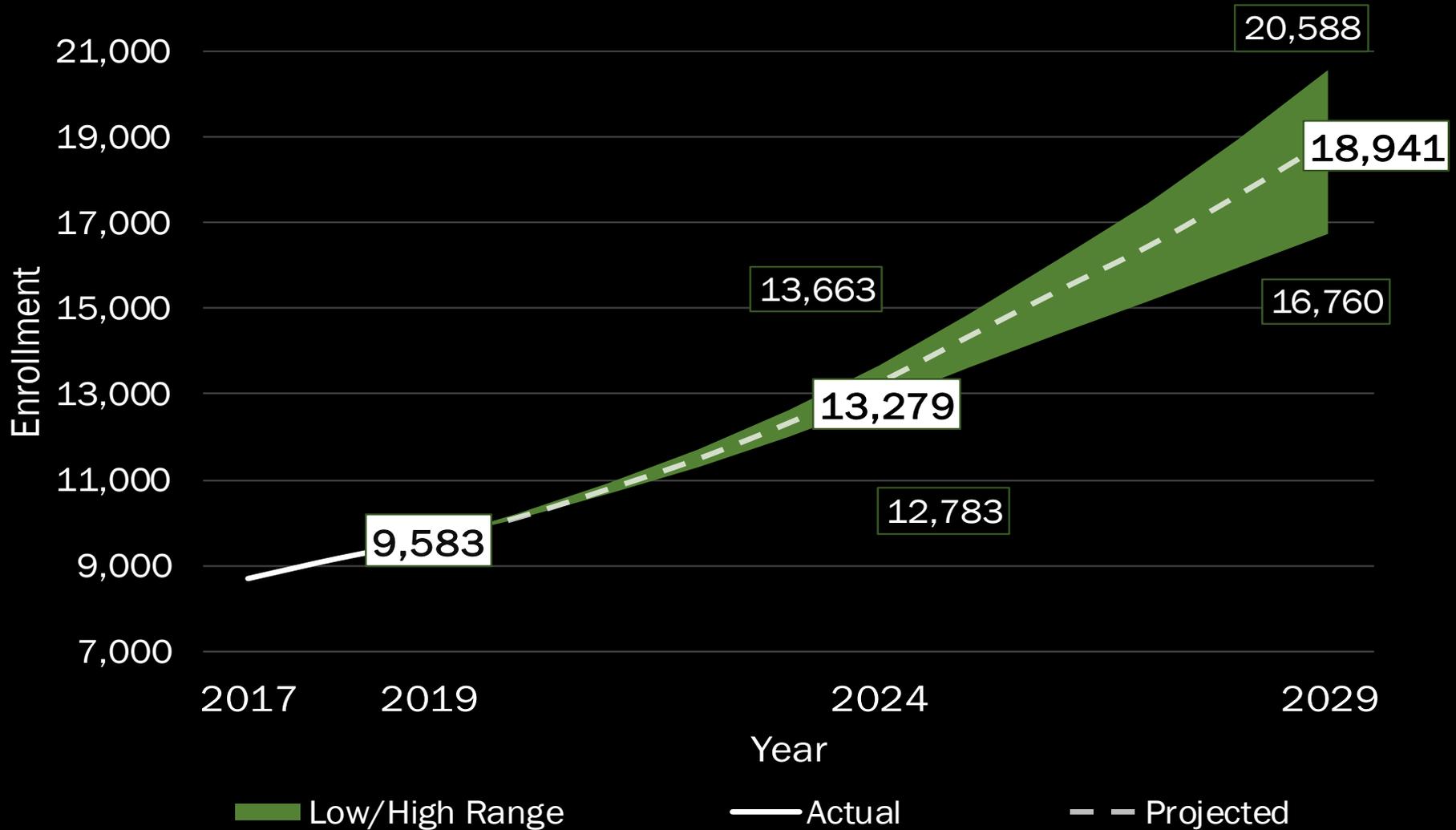
Moderate Growth Scenario



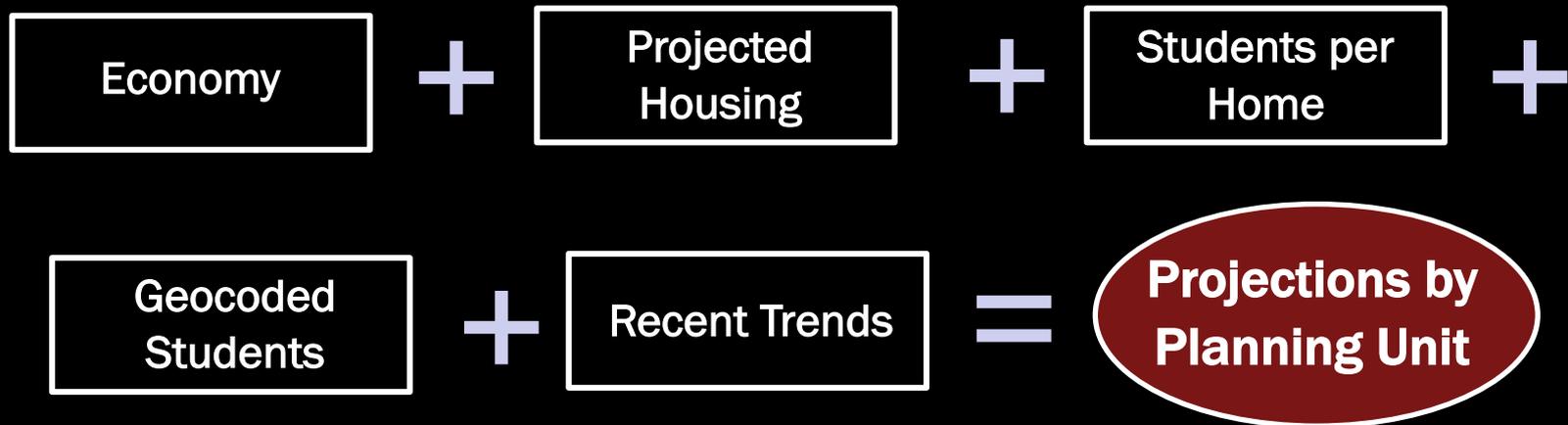
Projected Enrollment at PEIMS Snapshot Date

	2020	2021	2022	2023	2024
Enrollment	10,137	10,800	11,509	12,341	13,279
% Growth	5.78%	6.54%	6.56%	7.23%	7.6%
Growth	554	663	709	832	938
	2025	2026	2027	2028	2029
Enrollment	14,362	15,436	16,476	17,672	18,941
% Growth	8.16%	7.48%	6.74%	7.26%	7.18%
Growth	1,083	1,074	1,040	1,196	1,269

Three Scenarios of Growth



The Process



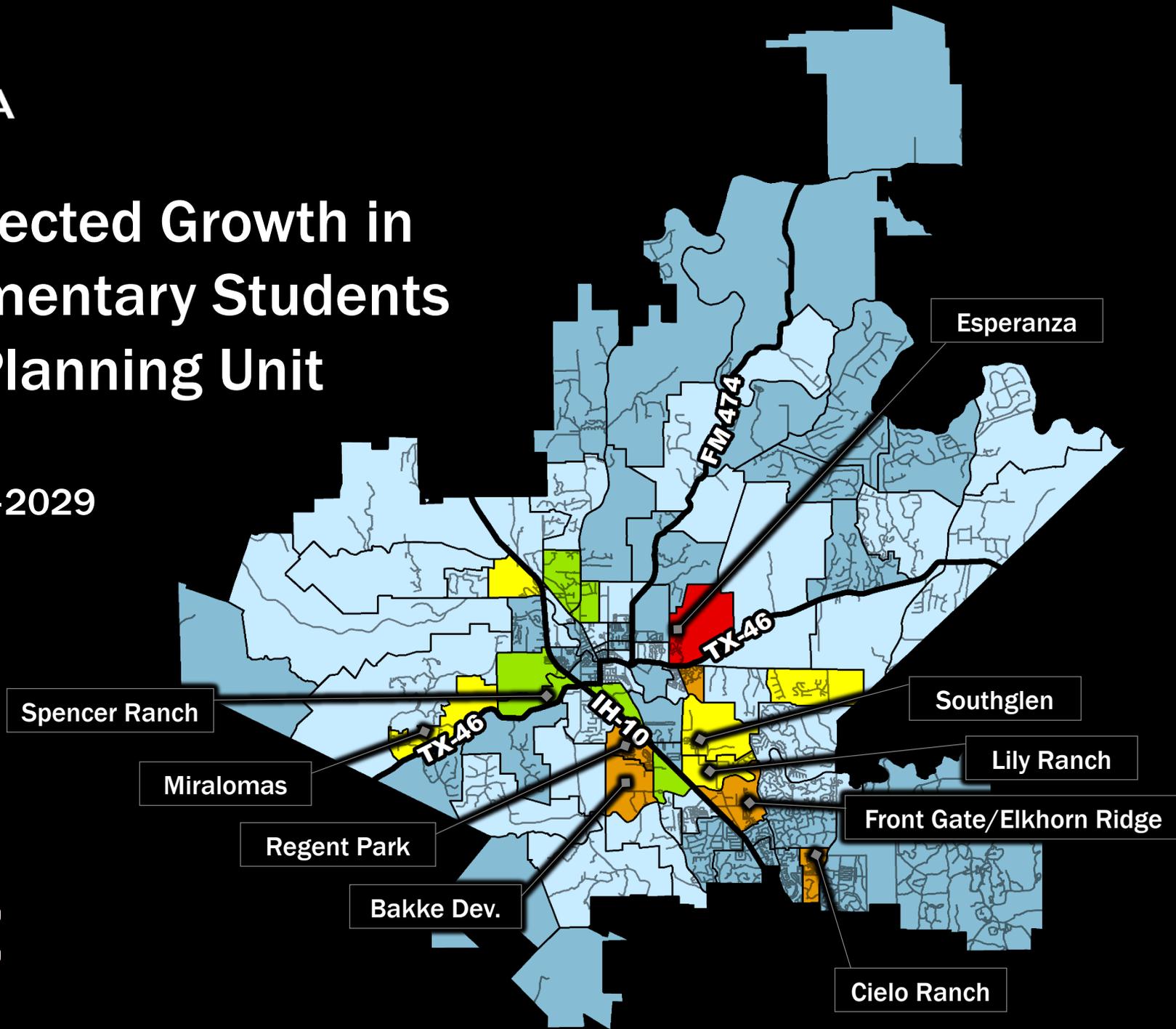
- ▶ By Grade Group, by Year
- ▶ Can be Joined into Current Attendance Zones
- ▶ Can be Joined into “Catchment Areas” for New Attendance Zone Planning



PLANNING

Projected Growth in Elementary Students by Planning Unit

2019-2029

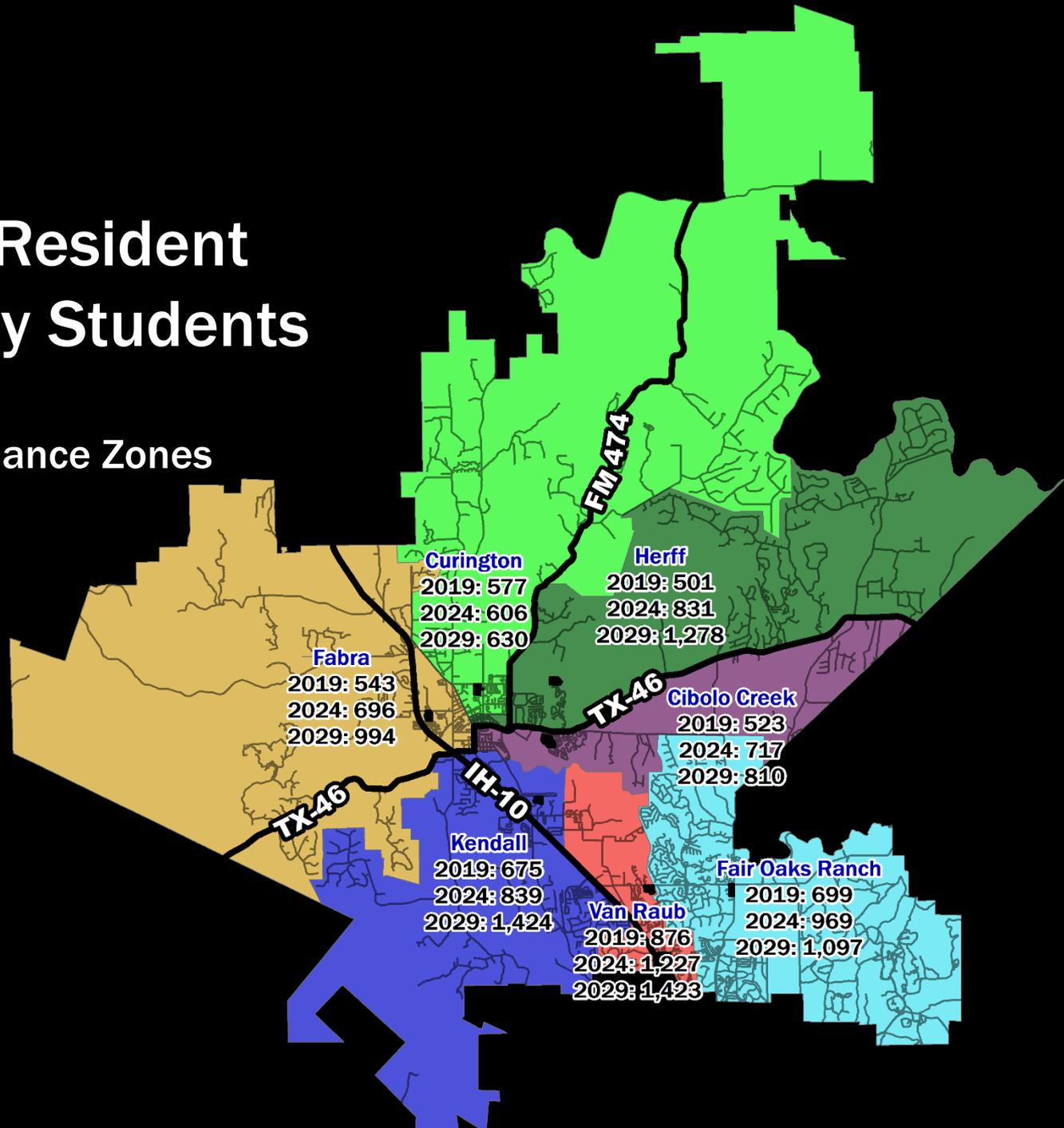




Projected Resident Elementary Students

2019-20 Attendance Zones

- Cibolo Creek
- Curington
- Fabra
- Fair Oaks Ranch
- Herff
- Kendall
- Van Raub



Elementary Long-Range Planning

Projected RESIDENT Students

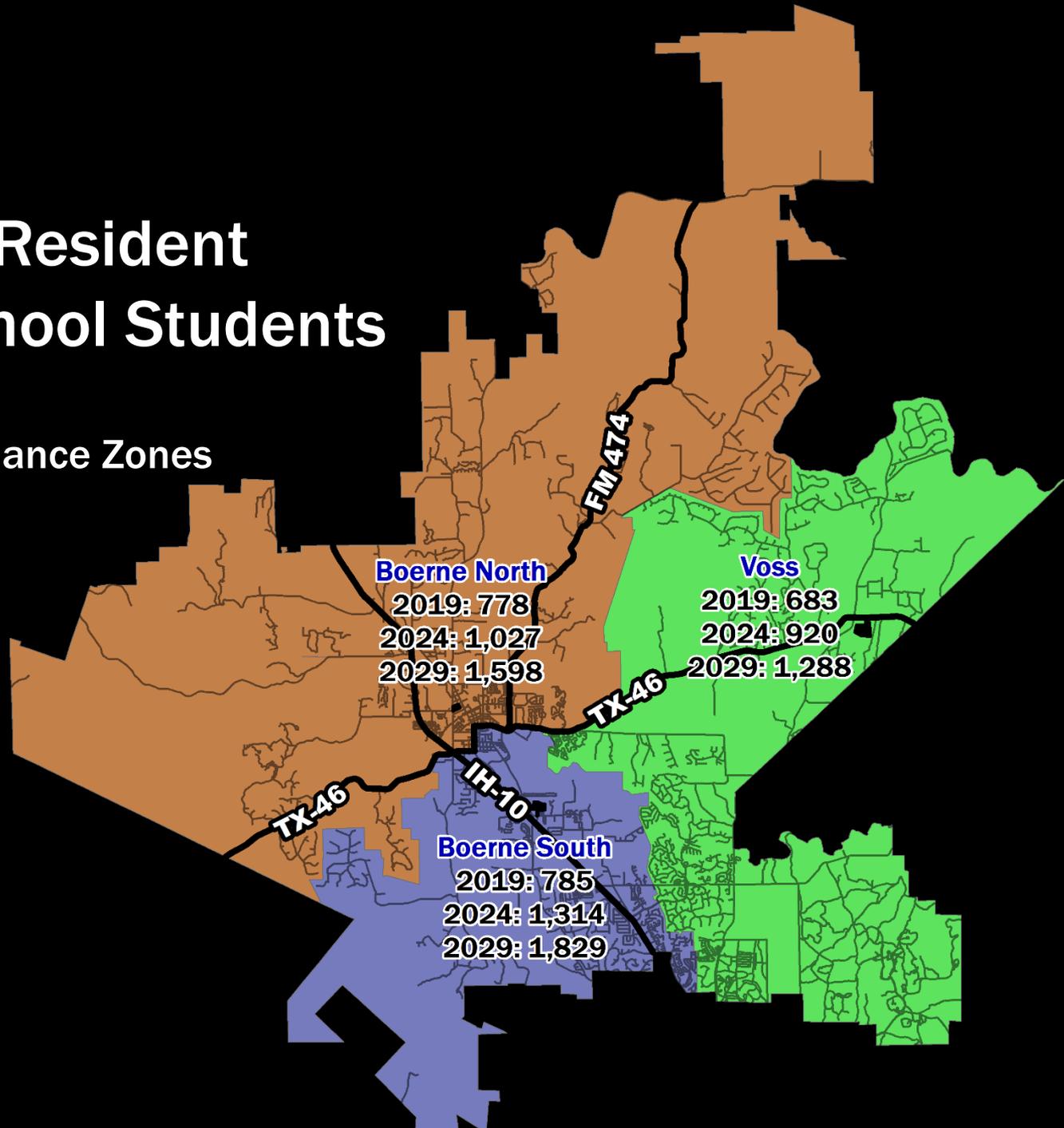
	Capacity	Current	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	Net transfers 19-20
Cibolo Creek	900	523	559	606	652	682	717	729	739	757	779	810	-44
Curington	1,000	577	571	581	579	592	606	613	619	625	628	630	66
Fabra	900	543	525	538	583	633	696	751	810	873	935	994	6
Fair Oaks Ranch	900	699	744	807	878	915	969	1,004	1,044	1,060	1,077	1,097	-10
Herff	900	501	534	609	677	759	831	903	979	1,072	1,172	1,278	-44
Kendall	1,000	675	701	720	757	768	839	931	1,025	1,147	1,290	1,424	77
Van Raub	900	876	944	1,018	1,122	1,171	1,227	1,272	1,323	1,354	1,386	1,423	-51
Elementary		4,394	4,578	4,879	5,248	5,520	5,885	6,203	6,539	6,888	7,267	7,656	0

Yellow highlights denote the year when a school is projected to exceed 120% capacity.



Projected Resident Middle School Students

2019-20 Attendance Zones



-  Boerne North
-  Boerne South
-  Voss

Middle School Long-Range Planning

Projected RESIDENT Students

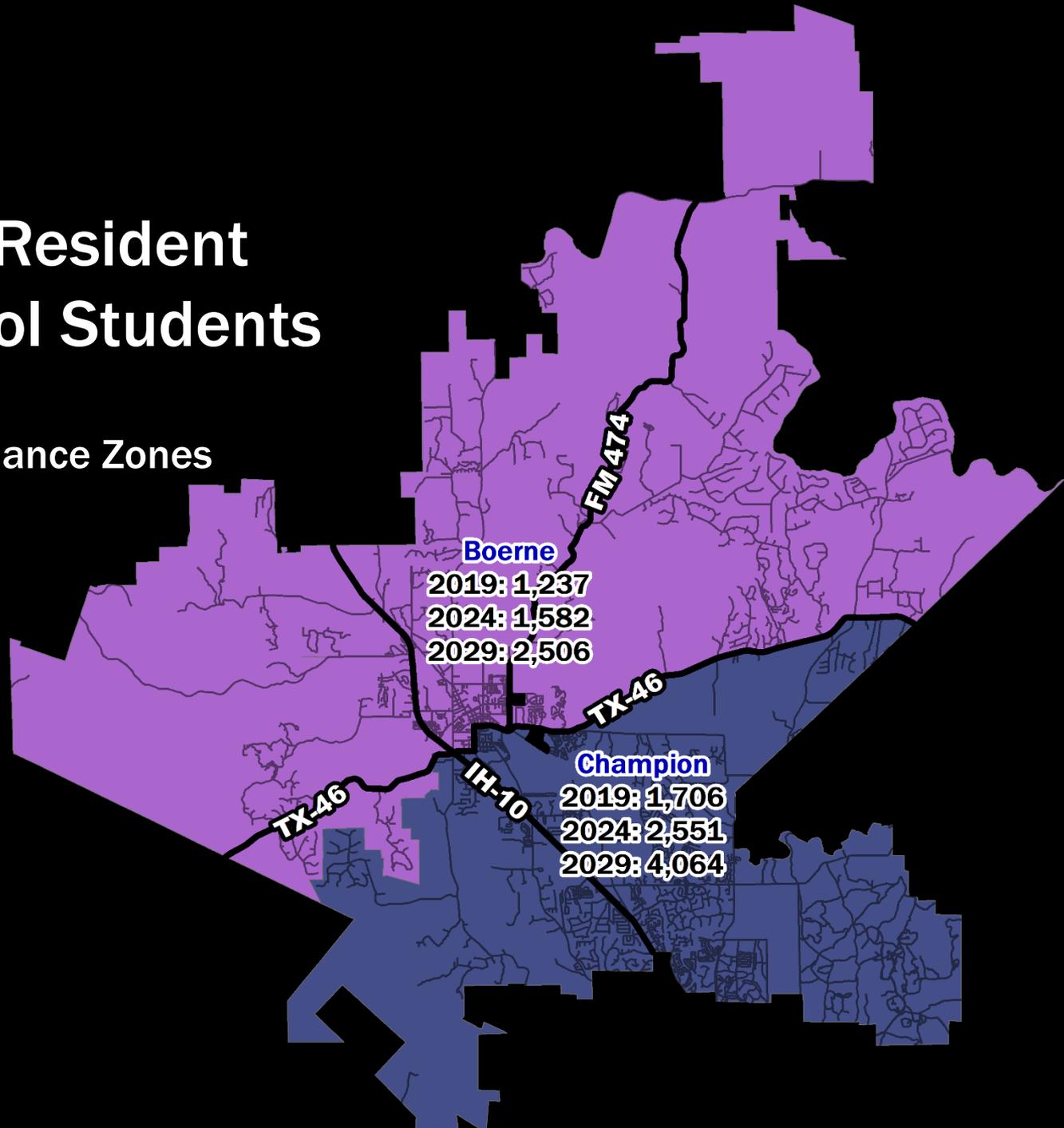
	Capacity	Current	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	Net transfers 19-20
Boerne North	1,300	778	840	866	877	914	1,027	1,173	1,290	1,406	1,500	1,598	24
Boerne South	1,500	785	868	995	1,080	1,214	1,314	1,469	1,513	1,619	1,716	1,829	100
Voss	1,200	683	722	756	789	852	920	1,034	1,098	1,188	1,228	1,288	-124
Middle School		2,246	2,430	2,617	2,746	2,980	3,261	3,676	3,901	4,213	4,444	4,715	0

Yellow highlights denote the year when a school is projected to exceed 120% capacity.



Projected Resident High School Students

2019-20 Attendance Zones



 Boerne
 Champion

High School Long-Range Planning

Projected RESIDENT Students

	Capacity	Current	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	Net transfers 19-20
Boerne HS	1,800	1,237	1,253	1,287	1,344	1,485	1,582	1,711	1,856	1,998	2,258	2,506	-64
Champion HS	2,400	1,706	1,876	2,017	2,170	2,356	2,551	2,772	3,140	3,377	3,703	4,064	64
High School		2,943	3,129	3,304	3,514	3,841	4,133	4,483	4,996	5,375	5,961	6,570	0

Yellow highlights denote the year when a school is projected to exceed 120% capacity.

Long-Range Planning Summary



- ▶ Rezoning to rebalance Elementary
- ▶ Elementary #8
 - ▶ Needed by 2022-23 without zoning
 - ▶ Hopefully postpone 2-3 years with zoning
- ▶ Additional High School space ~2026-27
- ▶ Additional Middle School space ~2029-30



QUESTIONS?



BOERNE ISD

December 2019