Boerne ISD Demographic Study
Spring 2024
PASA'S APPROACH

- Collect Background Data
- Study Housing and Economic Data
- Study Past and Current Student Population
- Generate Projections
- Analyze Long Range Implications for Facilities
Demographic Study Components

1. Demographic Trends
2. Past and Current Students
3. Economy and Housing
4. Student Projections
Past Enrollment Change

October 27, 2023

10,910

Enrollment

Source: Texas Education Agency (TEA)
KG Enrollment vs. Births

KG Enrollment

Births

KG Enrollment Year


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

Births adjusted 5 years to align with KG Enrollment

Births by Zip Code of Birth Mother

Source: Texas Education Agency (TEA)

Source: Texas Department of Health and Human Services, Vital Statistics
Demographic Study Components

1. Demographic Trends
2. Past and Current Students
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Student Geocode

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

Maroon areas highlight new students that didn’t exist in 2021-22

2021-22 Students
2023-24 Students
Students Per Home

Single-Family: 0.47
Multi-Family: 0.27
Private and Charter Schools

Saint Peters Apostle Catholic School is planning to open a PK-5 campus in 2025-26, later expanding to PK-8. Church officials expect to pull much of its 400-600 students from Boerne ISD.

Although there are numerous charter schools in the Northwestern portion of the San Antonio area, charter schools do not significantly impact Boerne ISD in terms of resident student transfers.

Sources: TEA Transfer Reports and PASA Interviews
Demographic Study Components

1. Demographic Trends
2. Past and Current Students
3. Economy and Housing
4. Student Projections
Economic and Housing Highlights

Robust in 2020 and 2021

Cooling since 2022

30-Year Fixed Rate Mortgage Payments
Principal & Interest Only

<table>
<thead>
<tr>
<th>Home Price</th>
<th>3.00%</th>
<th>4.00%</th>
<th>5.00%</th>
<th>6.00%</th>
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<td>$843</td>
<td>$955</td>
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<td>$2,292</td>
<td>$2,577</td>
<td>$2,878</td>
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*assumes 20% down payment
Developments with Largest 10-year Single-Family Projections

- **Esperanza**: Spanning 1,600+ acres with approximately 3,400 homes at build-out, this development on TX-46 will continue to impact BISD greatly beyond the next decade. Toll Brothers is currently developing the age-restricted (55+ section) which is planned for over 500 lots.

- **Corley Farms**: Pulte and Centex are building in the initial phase west of Boerne Stage Road. The development will consist of 1,165 homes.

- **George’s Ranch**: Utilities are now being installed from CoB to the site; Phase 1 has been platted for 134 lots with Kendall Co.; Lookout Group is planning to have the first lots ready for builders in Fall 2024.

- **Ranches at Creekside**: Sitterle Homes is building here. Platting slowed in 2021 and 2022 due to engineering issues but has picked up in the last half of 2023. The pace of development will in turn increase.

- **Cordillera Ranch**: Homesite development continues in all sections of the development. The Springs, east of FM 3351, is planned for approximately 965 homesites; a new 380-acre section in PU 70 off Clubs Drive is planned for approximately 150 homes.
# Largest Single-Family Developments

## 10-Year

<table>
<thead>
<tr>
<th>Development</th>
<th>Units Projected</th>
<th>Currently Occupied</th>
<th>Status</th>
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<tr>
<td>A Esperanza</td>
<td>1,418</td>
<td>507</td>
<td>Developing</td>
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<tr>
<td>B Corley Farms</td>
<td>1,144</td>
<td>0</td>
<td>Developing</td>
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<tr>
<td>C Cordillera Ranch</td>
<td>795</td>
<td>967</td>
<td>Developing</td>
</tr>
<tr>
<td>D Ranches at Creekside</td>
<td>594</td>
<td>280</td>
<td>Developing</td>
</tr>
<tr>
<td>E Regent Park</td>
<td>490</td>
<td>412</td>
<td>Developing</td>
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<tr>
<td>F Shoreline Park</td>
<td>301</td>
<td>59</td>
<td>Developing</td>
</tr>
<tr>
<td>G George's Ranch</td>
<td>588</td>
<td>0</td>
<td>Coming Soon</td>
</tr>
<tr>
<td>H Lily Ranch</td>
<td>450</td>
<td>0</td>
<td>Coming Soon</td>
</tr>
<tr>
<td>I Fair Oaks Meadows</td>
<td>335</td>
<td>0</td>
<td>Coming Soon</td>
</tr>
</tbody>
</table>
Multi-Family and Build-to-Rent Communities

- **4,811** New multi-family units projected in ten years
- **25.3%** All new housing projected to be multi-family
- **214** Projected BTR units in first five years
- **1.6%** Of all new single-family in first five years is BTR
New Rental Communities
Short-Term Focus

<table>
<thead>
<tr>
<th>Development</th>
<th>Status</th>
<th>Units</th>
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</thead>
<tbody>
<tr>
<td>A Estraya Boerne</td>
<td>Leasing Up</td>
<td>288</td>
</tr>
<tr>
<td>B Garden Creek</td>
<td>Leasing Up</td>
<td>69</td>
</tr>
<tr>
<td>C Napa Oaks</td>
<td>Leasing Up</td>
<td>300</td>
</tr>
<tr>
<td>D Vantage at Fair Oaks</td>
<td>Leasing Up</td>
<td>288</td>
</tr>
<tr>
<td>E Bluff View</td>
<td>Under Construction</td>
<td>192</td>
</tr>
<tr>
<td>F Collection at Boerne BTR</td>
<td>Under Construction</td>
<td>214</td>
</tr>
<tr>
<td>G Botanica Fair Oaks - 55+</td>
<td>Coming Soon</td>
<td>207</td>
</tr>
<tr>
<td>H Future MF</td>
<td>Coming Soon</td>
<td>210</td>
</tr>
<tr>
<td>I Lemon Creek MF</td>
<td>Coming Soon</td>
<td>300</td>
</tr>
<tr>
<td>J Lux at Lemon Creek</td>
<td>Coming Soon</td>
<td>410</td>
</tr>
</tbody>
</table>
Projected New Housing Occupancies
Oct 2023-Oct 2033

- **Total Projected New Occupancies:** 19,042
  - **Single-Family:** 13,051 (68.5% of Total)
  - **Multi-Family:** 4,811 (25.3% of Total)
  - **Age-Restricted:** 966 (5.1% of Total)
  - **SF Build-to-Rent:** 214 (1.1% of Total)
Projected New Housing Occupancies
Oct 2023-Oct 2033

Housing Projections by Year of Occupancy

- Single-Family
- Single-Family BTR
- Multi-Family
- Manufactured Housing
- Age-Restricted
Demographic Study Components

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PASA
Birth Rates
Births continue to rise as young adult population increases due to new housing options

New Housing Construction
Drives majority of growth, adding 350-500 students per year in first two years

Private Schools
Three new private schools planned in or near BISD. All planned to enroll students in 2024 or 2025.

Incoming KG Class Size
This year’s KG class is smaller than last year’s KG; this will have a cumulative dampening effect on future enrollment

Aging of Existing Student Population
Some established neighborhoods have declining school enrollments.

Factors Impacting Future Enrollment
KG Enrollment
- Kindergarten enrollment decreased by over 9% in 2023-24.

Housing
- Mortgage rates have doubled since the last study
- Ranches at Creekside slowed due to unforeseen issues with the engineering team, Miralomas also slowed down, and Corley Farms did not start as quickly as projected

Private Schools
- Three private school expansions are expected to be completed by 2025.

Source: PASA 2022-23 Demographic Study
Every year starts with a clean slate -- not impacted by previous year’s accuracy

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

Low and High Growth Scenarios are feasible, assuming changing circumstances
Three Scenarios of Growth

**Low Growth Assumptions**
- Kindergarten enrollment reaches 1,000 by 2032
- Increasing interest rates
- Additional private/charter school expansions within the next 3-6 years

**Moderate Growth Assumptions**
- Kindergarten enrollment reaches 1,150 by 2033
- Mortgage rates stabilize
- St. Peter Catholic School opens in 2025

**High Growth Assumptions**
- Mortgage rates decline below 5% in the next 2-4 years
- No additional private/charter school expansions
- Accelerated regeneration in existing homes

<table>
<thead>
<tr>
<th>2033 Enrollment</th>
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<tbody>
<tr>
<td>16,386</td>
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<tr>
<td>17,796</td>
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<tr>
<td>19,099</td>
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</table>
Projected Growth in Elementary Students
Fall 2023 - Fall 2033
by Planning Unit

Added Students 2023 to 2033
- < -20
- -19 - -10
- -9 - 0
- 1 - 49
- 50 - 99
- 100 - 199
- > 200

Elementary School Long-Range Planning
Projected Growth in Elementary Students
Fall 2023 - Fall 2033

by Planning Unit
with Elem Attendance Zones
Projected Growth in Elementary Students
Fall 2023 - Fall 2033
by Attendance Zone
### Projected Resident EE-5th Grade Students

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<tr>
<td>Cibolo Creek</td>
<td>800</td>
<td>477</td>
<td>495</td>
<td>499</td>
<td>549</td>
<td>618</td>
<td>684</td>
<td>751</td>
<td>820</td>
<td>895</td>
<td>952</td>
<td>992</td>
<td>-40</td>
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<tr>
<td>Curington</td>
<td>700</td>
<td>602</td>
<td>603</td>
<td>584</td>
<td>607</td>
<td>588</td>
<td>611</td>
<td>639</td>
<td>664</td>
<td>688</td>
<td>704</td>
<td>717</td>
<td>36</td>
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<td>Fabra</td>
<td>800</td>
<td>697</td>
<td>695</td>
<td>700</td>
<td>758</td>
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<td>911</td>
<td>995</td>
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<td>1,180</td>
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<td>818</td>
<td>840</td>
<td>794</td>
<td>816</td>
<td>839</td>
<td>849</td>
<td>891</td>
<td>927</td>
<td>960</td>
<td>977</td>
<td>990</td>
<td>-13</td>
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<td>Herff</td>
<td>800</td>
<td>598</td>
<td>601</td>
<td>599</td>
<td>647</td>
<td>701</td>
<td>742</td>
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<td>868</td>
<td>936</td>
<td>999</td>
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<td>Kendall</td>
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<td>815</td>
<td>883</td>
<td>931</td>
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<td>1,143</td>
<td>1,203</td>
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<td>1,390</td>
<td>1,500</td>
<td>1,599</td>
<td>1,709</td>
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<td>Van Raub</td>
<td>800</td>
<td>870</td>
<td>907</td>
<td>893</td>
<td>948</td>
<td>973</td>
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<td>1,091</td>
<td>1,135</td>
<td>1,183</td>
<td>1,204</td>
<td>1,219</td>
<td>-39</td>
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<td><strong>Elem Total</strong></td>
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<td>5,370</td>
<td>5,698</td>
<td>6,032</td>
<td>6,461</td>
<td>6,884</td>
<td>7,342</td>
<td>7,698</td>
<td>8,053</td>
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</table>

**Notes:**
- Yellow highlights = resident student population exceeds 100% of capacity
- Orange highlights = resident student population exceeds 120% of capacity
Projected Growth in Middle School Students
Fall 2023 - Fall 2033

by Planning Unit with MS Attendance Zones
Projected Growth in Middle School Students
Fall 2023 - Fall 2033

by Attendance Zone
## Projected Resident 6th-8th Grade Students

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<tbody>
<tr>
<td>Boerne North</td>
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<td>796</td>
<td>819</td>
<td>902</td>
<td>911</td>
<td>984</td>
<td>1,001</td>
<td>1,031</td>
<td>1,043</td>
<td>1,102</td>
<td>1,248</td>
<td>1,372</td>
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<td>Boerne South</td>
<td>1,300</td>
<td>953</td>
<td>962</td>
<td>1,081</td>
<td>1,108</td>
<td>1,240</td>
<td>1,323</td>
<td>1,402</td>
<td>1,453</td>
<td>1,515</td>
<td>1,678</td>
<td>1,815</td>
<td>-23</td>
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<tr>
<td>Voss</td>
<td>1,200</td>
<td>780</td>
<td>760</td>
<td>794</td>
<td>779</td>
<td>823</td>
<td>829</td>
<td>862</td>
<td>909</td>
<td>952</td>
<td>1,065</td>
<td>1,153</td>
<td>-6</td>
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<td><strong>MS Total</strong></td>
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<td><strong>2,541</strong></td>
<td><strong>2,777</strong></td>
<td><strong>2,798</strong></td>
<td><strong>3,047</strong></td>
<td><strong>3,153</strong></td>
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<td><strong>3,991</strong></td>
<td><strong>4,340</strong></td>
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</table>

Yellow highlights = resident student population exceeds 100% of capacity
Orange highlights = resident student population exceeds 120% of capacity
Projected Growth in High School Students
Fall 2023 - Fall 2033

by Planning Unit with HS Attendance Zones
Projected Growth in High School Students
Fall 2023 - Fall 2033
by Attendance Zone
## Projected Resident 9th-12th Grade Students

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<tbody>
<tr>
<td>Boerne HS</td>
<td>1,900</td>
<td>1,354</td>
<td>1,378</td>
<td>1,415</td>
<td>1,460</td>
<td>1,483</td>
<td>1,590</td>
<td>1,630</td>
<td>1,704</td>
<td>1,778</td>
<td>1,804</td>
<td>1,912</td>
<td>72</td>
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<tr>
<td>Champion HS</td>
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<td>2,149</td>
<td>2,226</td>
<td>2,262</td>
<td>2,411</td>
<td>2,453</td>
<td>2,645</td>
<td>2,806</td>
<td>2,943</td>
<td>3,226</td>
<td>3,297</td>
<td>3,491</td>
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<td>HS Total</td>
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<td>3,604</td>
<td>3,677</td>
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<td>3,936</td>
<td>4,235</td>
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<td>5,101</td>
<td>5,403</td>
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</tbody>
</table>

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Questions?

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979-693-8962

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