



BRYAN ISD

May 2019

2018-19 Demographic Update

▶ Housing Projections

- ▶ Survey of real estate experts and local planners, etc.
- ▶ Projections for every active & planned subdivision & apt.
- ▶ Last demographic study for Bryan ISD was in 2015



▶ Enrollment Projections

- ▶ Current BISD student trends
- ▶ Charter/Private School survey and analysis
- ▶ Allows for Long-Range Plan for future sites and potential opening dates



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WHO WE ARE



- ▶ **Large Demographic Firm Located in College Station, TX**
- ▶ **39+ Year History**
- ▶ **Clients Are Exclusively School Districts**
- ▶ **Staff Has Strong Specializations – Demographic, GIS, Urban and Land Planning, Statistical, Educational**

Housing Projections

- Ten-Year Projections for Single-Family and Multi-Family Developments
- Projections for Yet-To-Develop Parcels

Mapping

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

WHAT WE DO



Economic Data

- Employment Projections
- Recent Employment Trends by Economic Sector Locally

Current Students

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

Long Range Planning

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



Reasons for Student Growth in B.I.S.D.



- **Competitive advantage of B.I.S.D.**
 - C.S.I.S.D. is fast building-out, particularly East of R.R. (& W. of R.R. has R.R. crossings to contend with)
 - C.S.I.S.D. will have no new homes <\$250,000, except few in Southern Pointe

- **Opportunity Zones = newly 25% of the District –**
 - Zones will spawn economic, housing, and student growth

- **City of Bryan now has largest no. of new homes likely ever platted**
 - PASA projects 6,388 new single-family homes in the next 10 yrs.

- **Affordability of new homes in B.I.S.D.**
 - Interviews w/largest developers: most dev's = minimum prices <\$200,000



Reasons for Student Growth in B.I.S.D.



- **Apartment units**
 - Current apartments have more B.I.S.D. students, especially in older units - ratio of B.I.S.D. students per unit has increased
 - Can expect 2,633 more units within 10 years, using conservative estimates based on individual parcels likely to develop

- **Ratio of students per home and per apartment will likely increase**
 - Ratio of 0.52 (in 2012) vs. 0.46 (in 2019) in single-family houses yields 800 more students – with no new homes

- **PreK – newly discounted for full day**
 - Possible no charge for full day, dependent on Legislature

- **Program impacts on future enrollment**
 - Includes choice programs such as dual language



Reasons for Student Losses in B.I.S.D.



- **Charter schools may add ~300 B.I.S.D. students every 2-4 years**
 - No imminent charter school planned, but ~585 students attend charters
- **Largest no. of new homes ever, but fewer students are moving in**
 - PASA projects varying ratios per new home, based on neighborhood, but ratios are low overall (low growth scenario and high growth scenario also)
 - These ratios will change as fewer baby boomers buy homes within 10 yrs.
- **Baby boomers & TAMU students are “taking away” many homes**
 - Higher ratios of students/home in west part of B.I.S.D. & lower in east
- **Competitive advantage of C.S.I.S.D.**
 - C.S.I.S.D. is fast building-out, but has ~8 new subdivisions now available

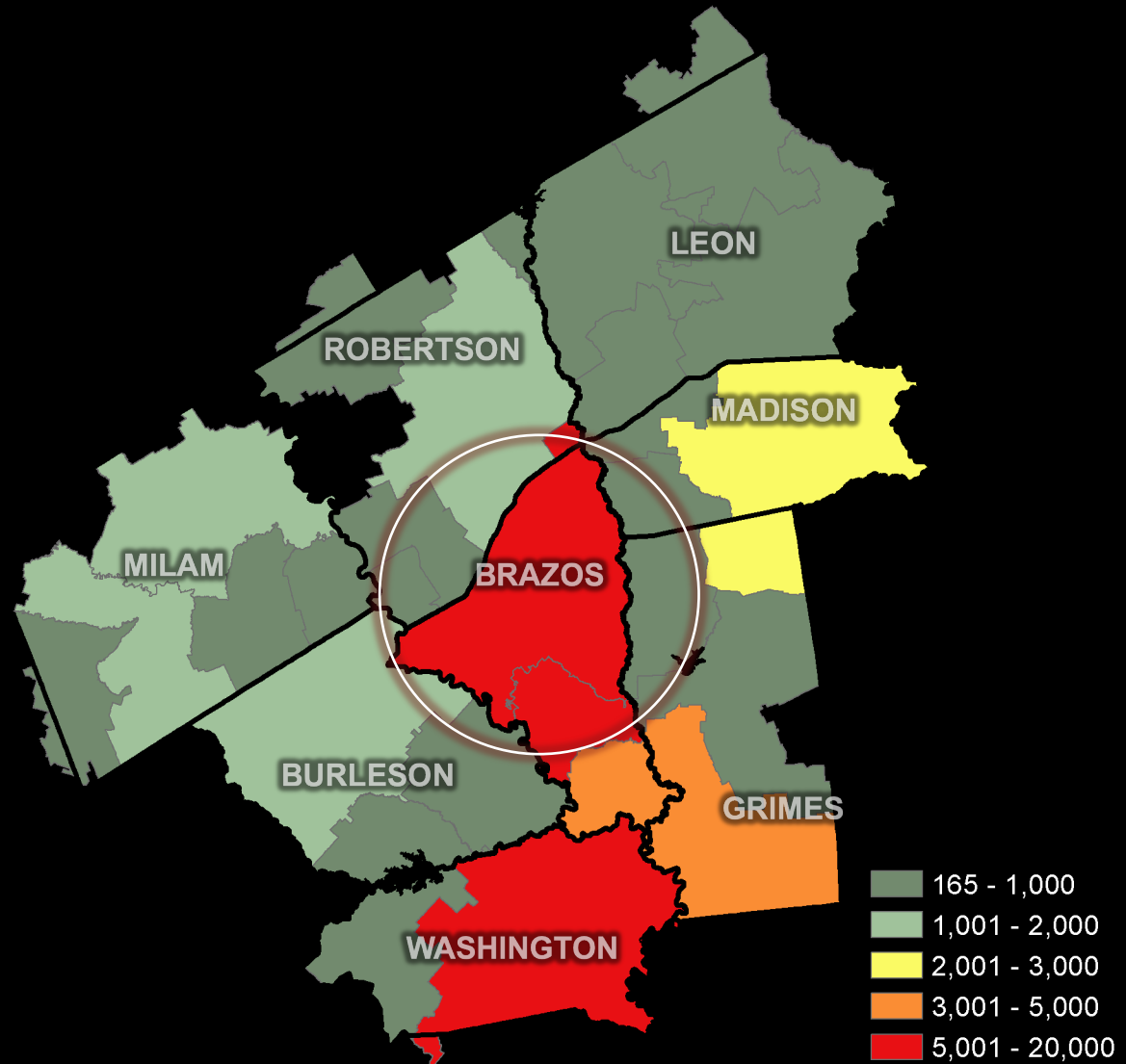


Total School District Enrollment

2017-18: College Station-Bryan Region



	School District	Enrollment
1	Bryan ISD	16,189
2	College Station ISD	13,570
3	Brenham ISD	5,023
4	Navasota ISD	3,047
5	Madisonville CISD	2,358
6	Cameron ISD	1,854
7	Caldwell ISD	1,804
8	Rockdale ISD	1,531
9	Franklin ISD	1,254
10	Buffalo ISD	945
11	Hearne ISD	862
12	Anderson-Shiro CISD	860
13	Leon ISD	759
14	Centerville ISD (Leon)	687
15	Mumford ISD	616

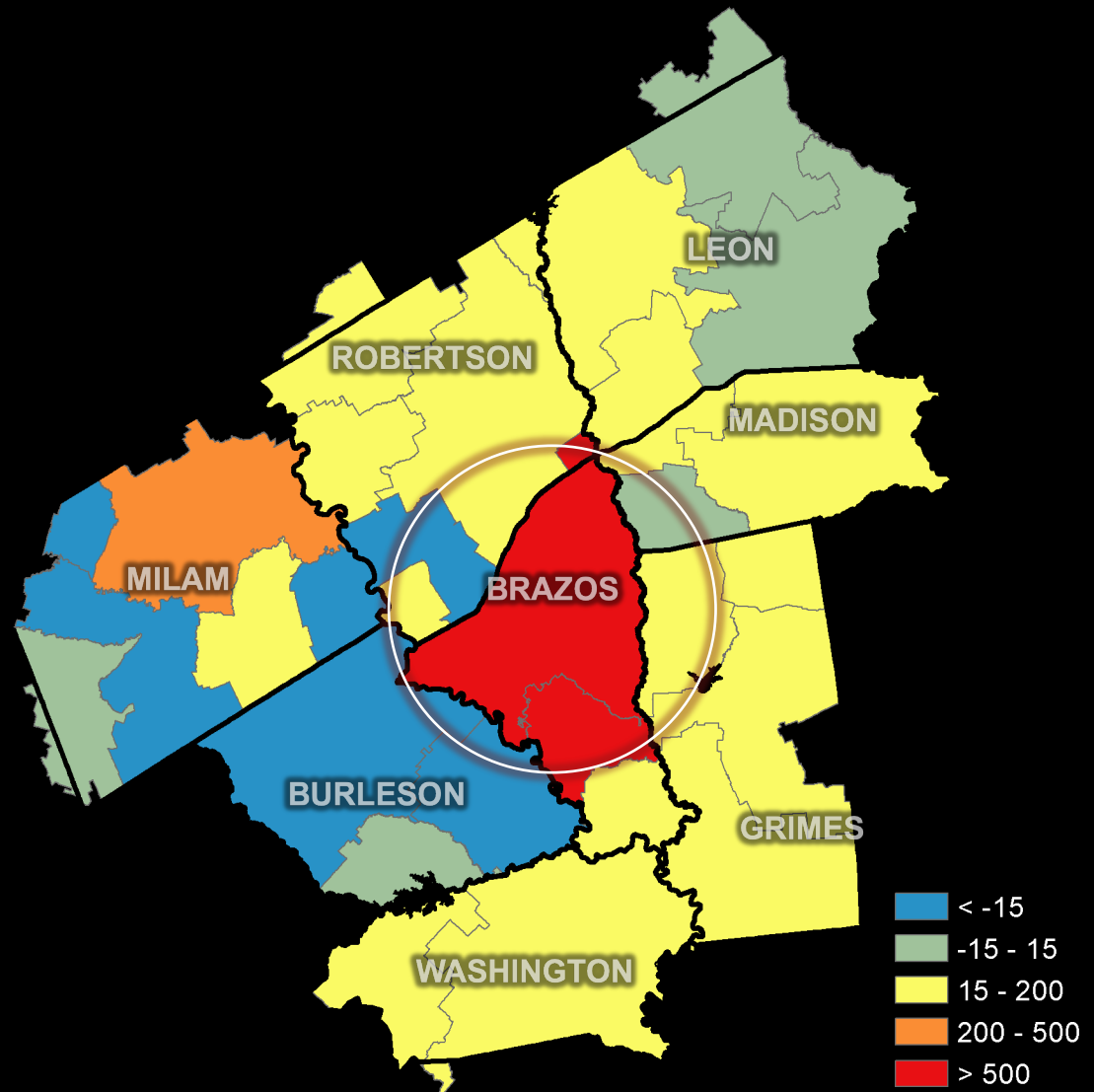


Numeric Change in Enrollment

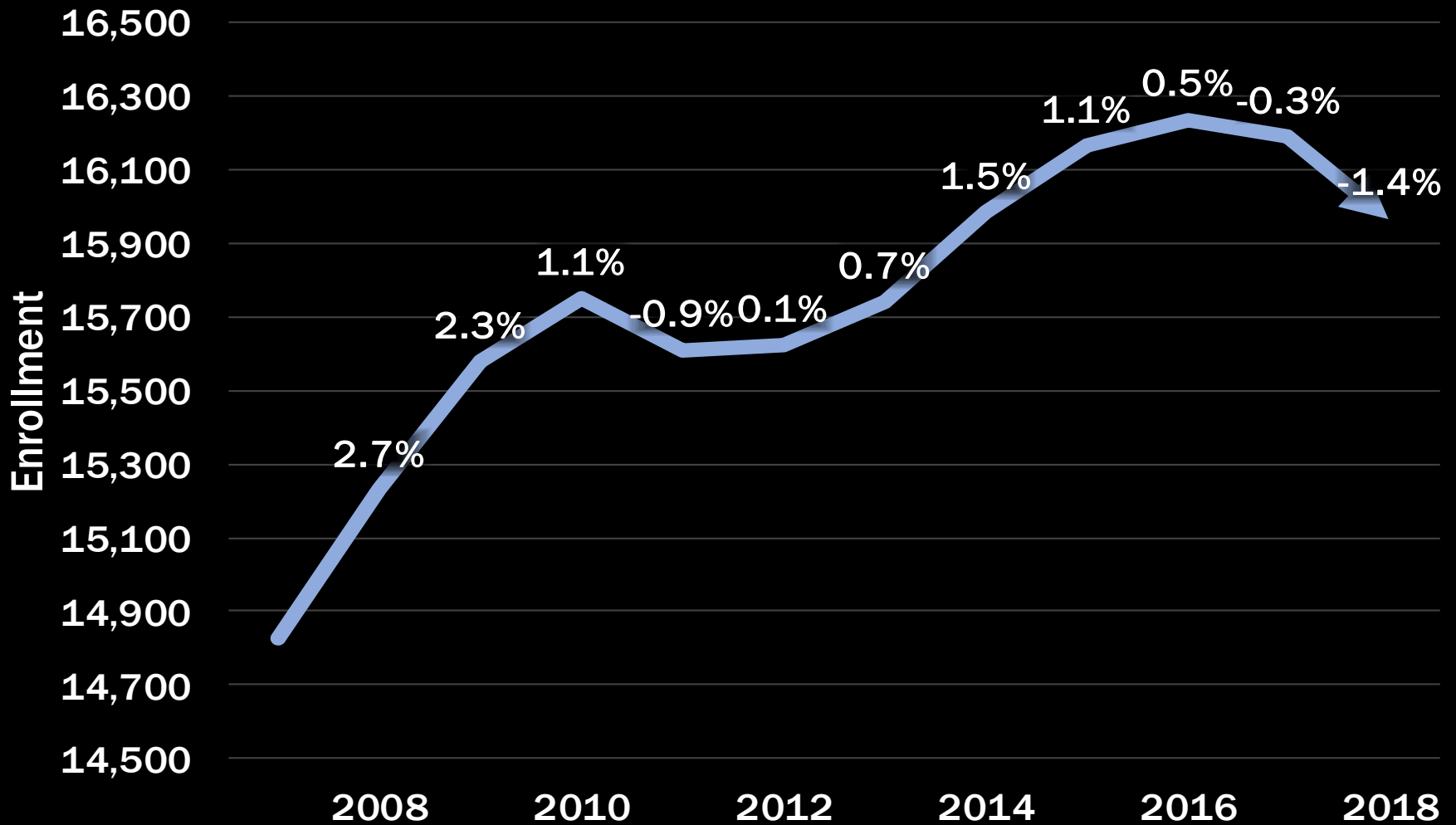


2012-13 to 2017-18: College Station-Bryan Region

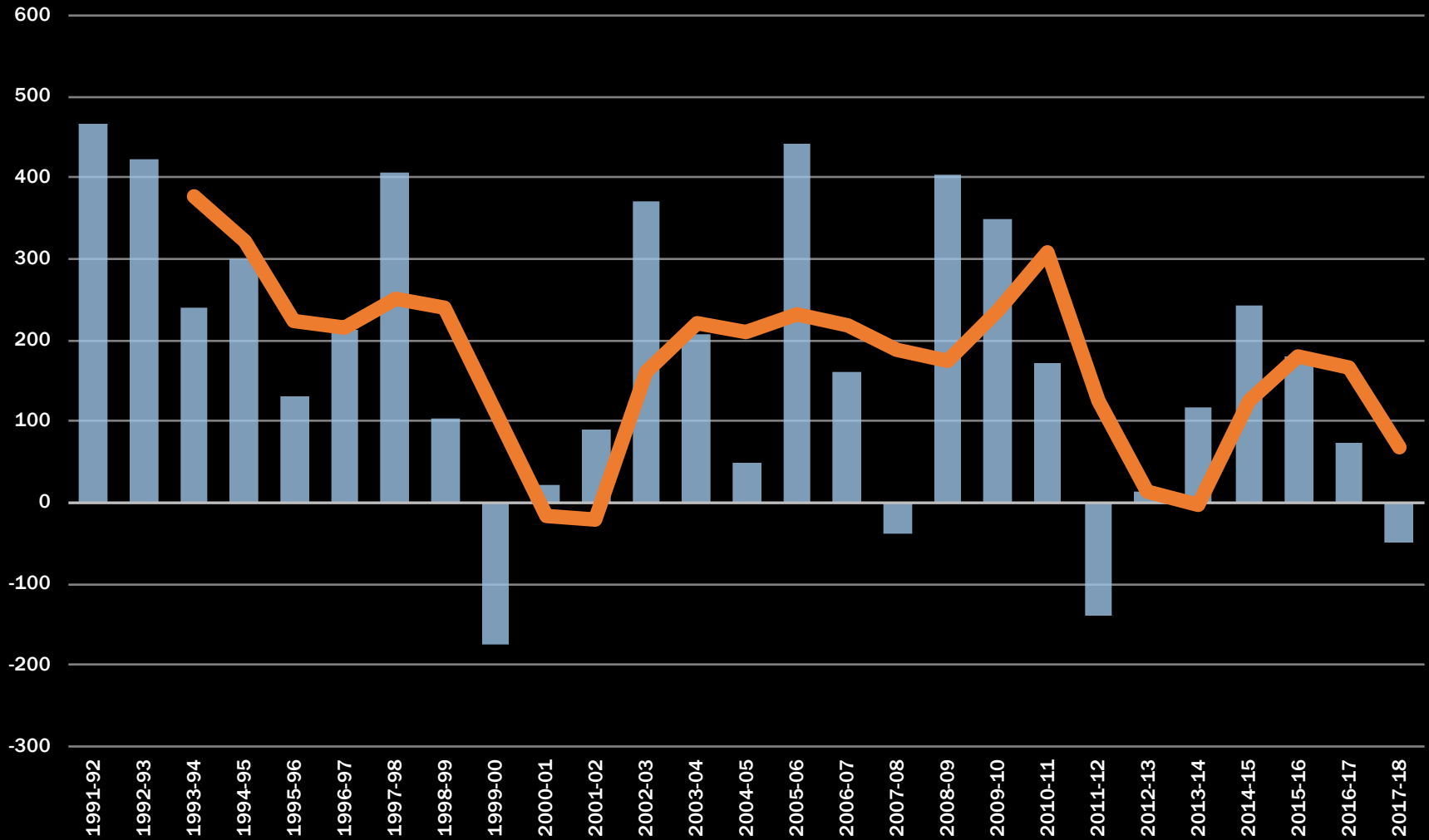
	School District	Change
1	College Station ISD	2,392
2	Bryan ISD	565
3	Cameron ISD	234
4	Franklin ISD	182
5	Anderson-Shiro CISD	131
6	Madisonville CISD	110
7	Burton ISD	90
8	Normangee ISD	88
9	Bremond ISD	73
10	Brenham ISD	60
11	Milano ISD	51
12	Leon ISD	41
13	Navasota ISD	37
14	Iola ISD	36
15	Calvert ISD	20



Annual Growth Rates – B.I.S.D.



Total Student Gain or Loss – B.I.S.D.



Demographic Characteristics



32.6 Median Age

Brazos County 26.5

Population
Ages 5-17



17%

Brazos County 15%



Median
Household
Income

\$44,921

Brazos County \$45,155

Mean Travel
Time to Work



18.2

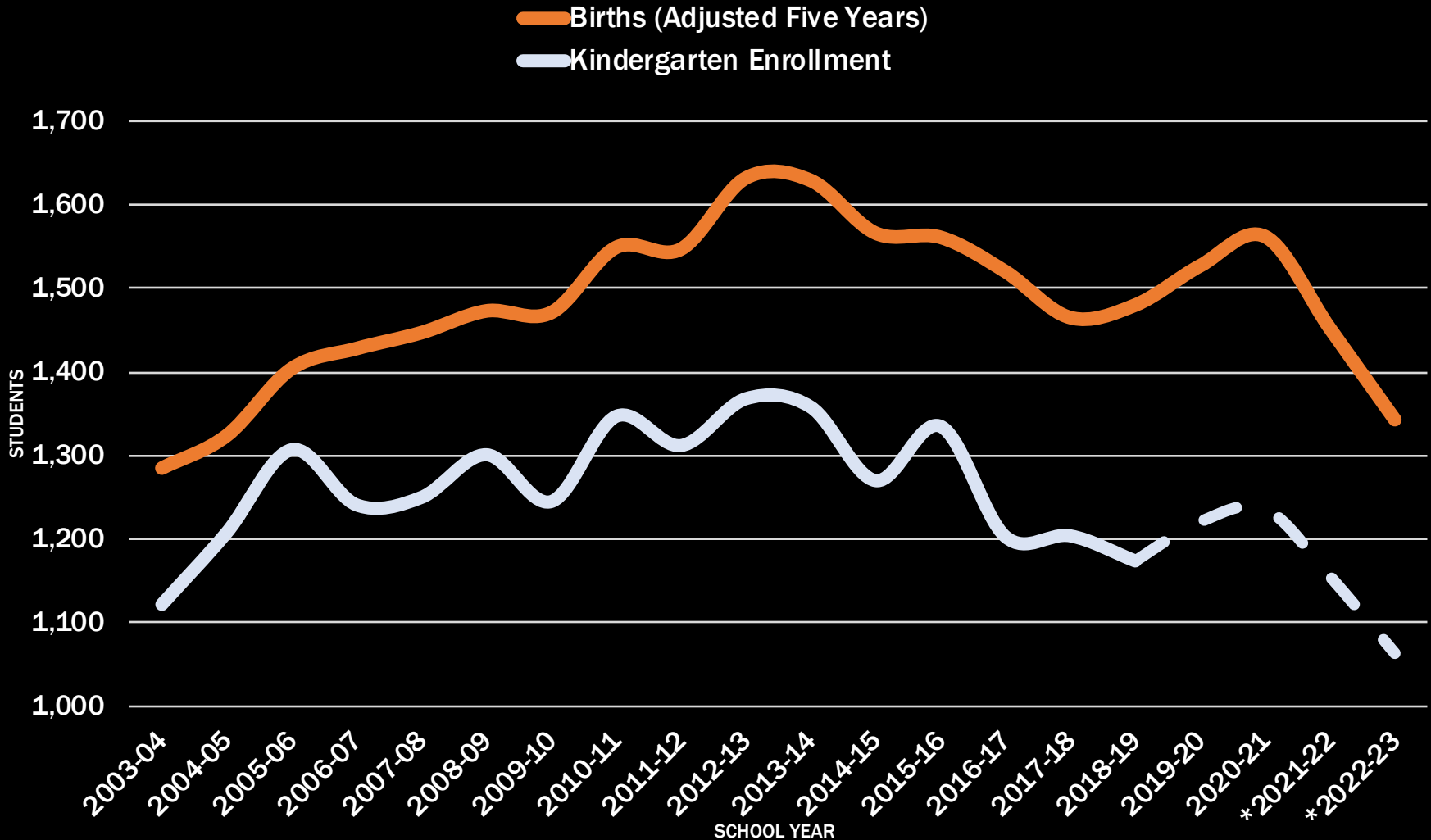
Brazos County 17.3

74.9% Economically Disadvantaged Student Population

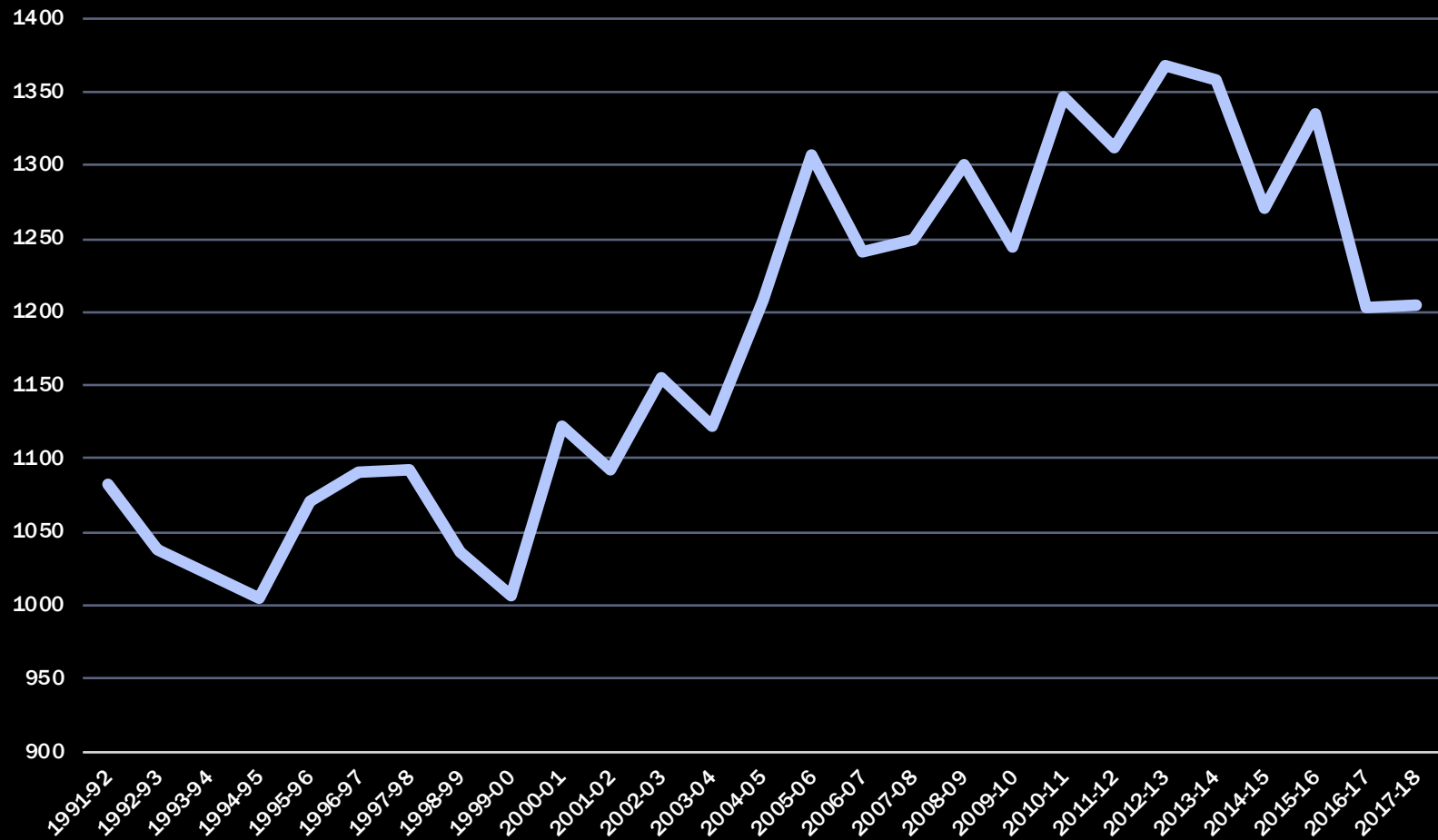
State of Texas 58.1%



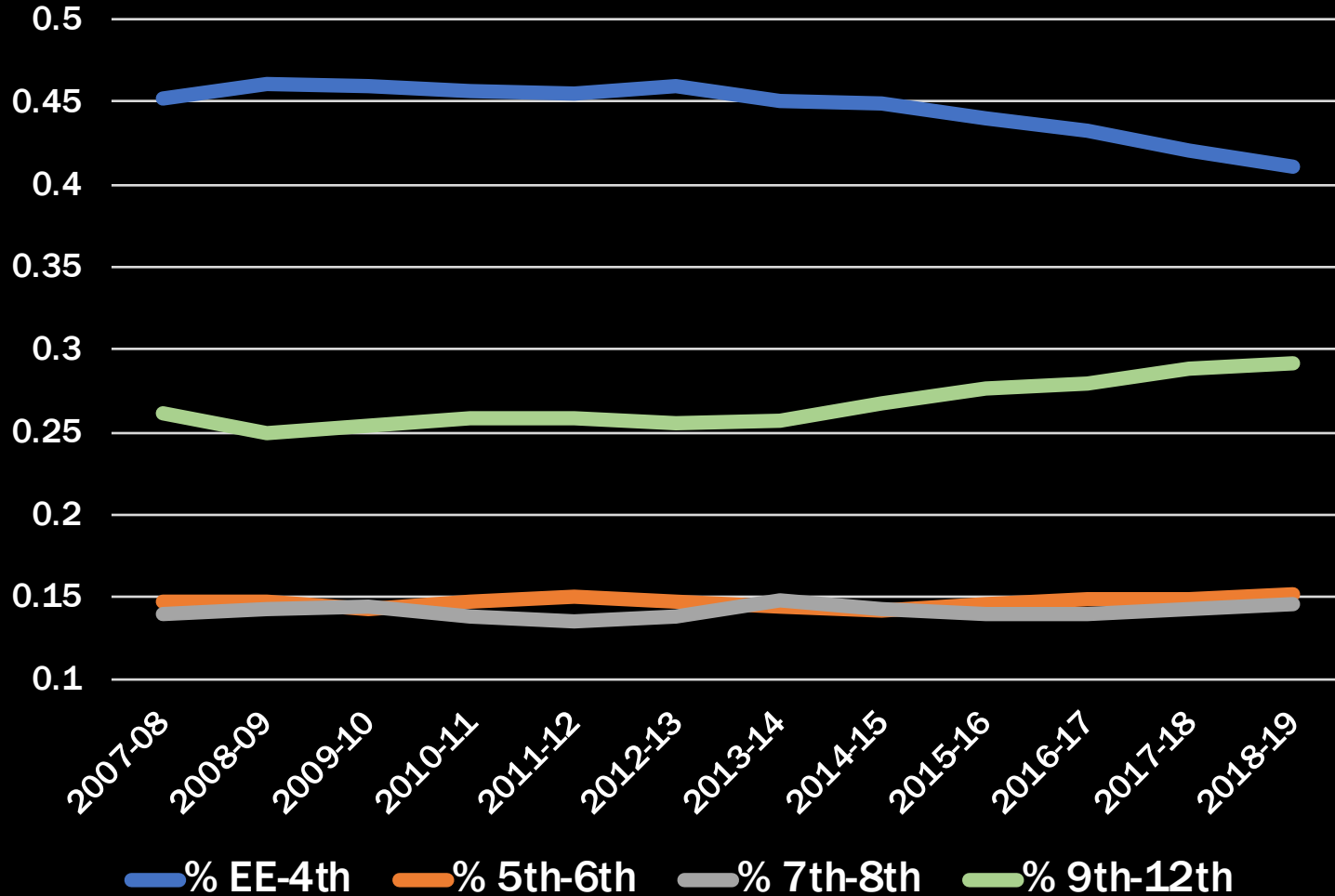
Kindergarten vs. Births



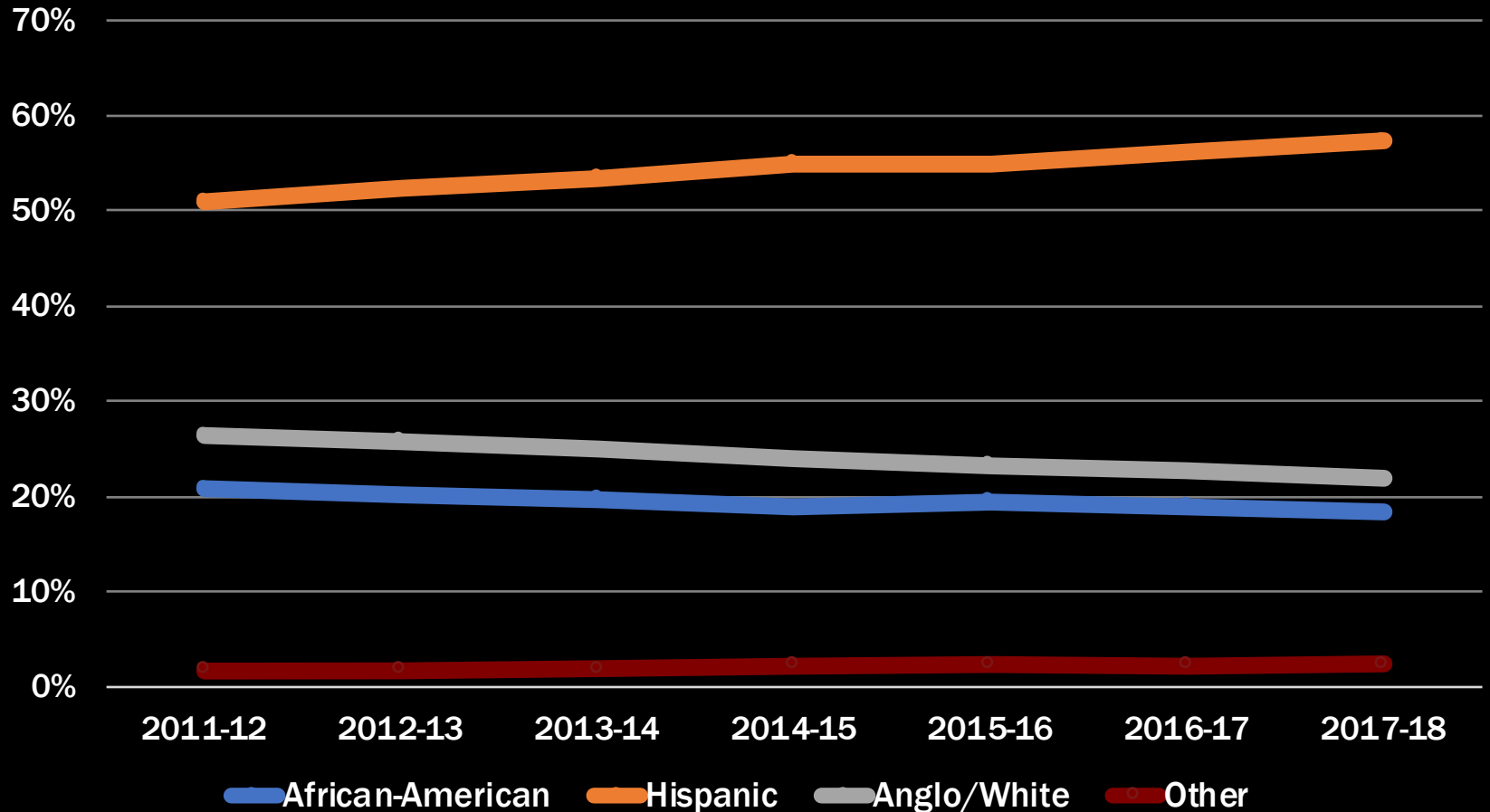
Historical Kindergarten Enrollment



Historical Proportion of Students by Grade Group



Historical Proportion of Students by Ethnicity



K-12 Enrollment Share

Private and Charter School Estimates



	2016-17	2017-18	2018-19
K-12 Residents	17,220	17,210	17,114
Enrolled in the District ¹	15,436 (89.6%)	15,429 (89.7%)	15,184 (88.7%)
Attending Private Schools ²	860 (5%)	860 (5%)	851 (5%)
Attending Charter Schools ³	562 (3.3%)	568 (3.3%)	741 (4.3%)
Attending Nearby Districts ³	362 (2.1%)	353 (2.1%)	338 (2%)

¹ Actual KN-12th district enrollment minus transfer students from other school districts

² Private school enrollment data collected by Population and Survey Analysts

³ Texas Education Agency, PEIMS 2016-17 through 2017-18 (2018-19 based on interviews and estimates)



Charter Schools in Brazos County

Largest schools in the area include:

- **Arrow Academy (SOS) ~87 from BISD**
- **Brazos School for Inquiry & Creativity ~126 from BISD**
- **Harmony Science Academy ~326 from BISD**
- **International Leadership of Texas ~183 from BISD**

BISD students are also enrolled in virtual academies and other charters in small numbers

IL Texas has purchased a Bryan campus site across SH 6 from Rayburn

- IL Texas typically opens 2 KN-8th schools, followed by a high school, and this is their plan in Brazos County
- All future building is on hold at the moment, until some debt is retired
- Any future school located in BISD boundaries will be heavily oriented to BISD students; proximity is important since transportation is not normally provided



EMPLOYMENT

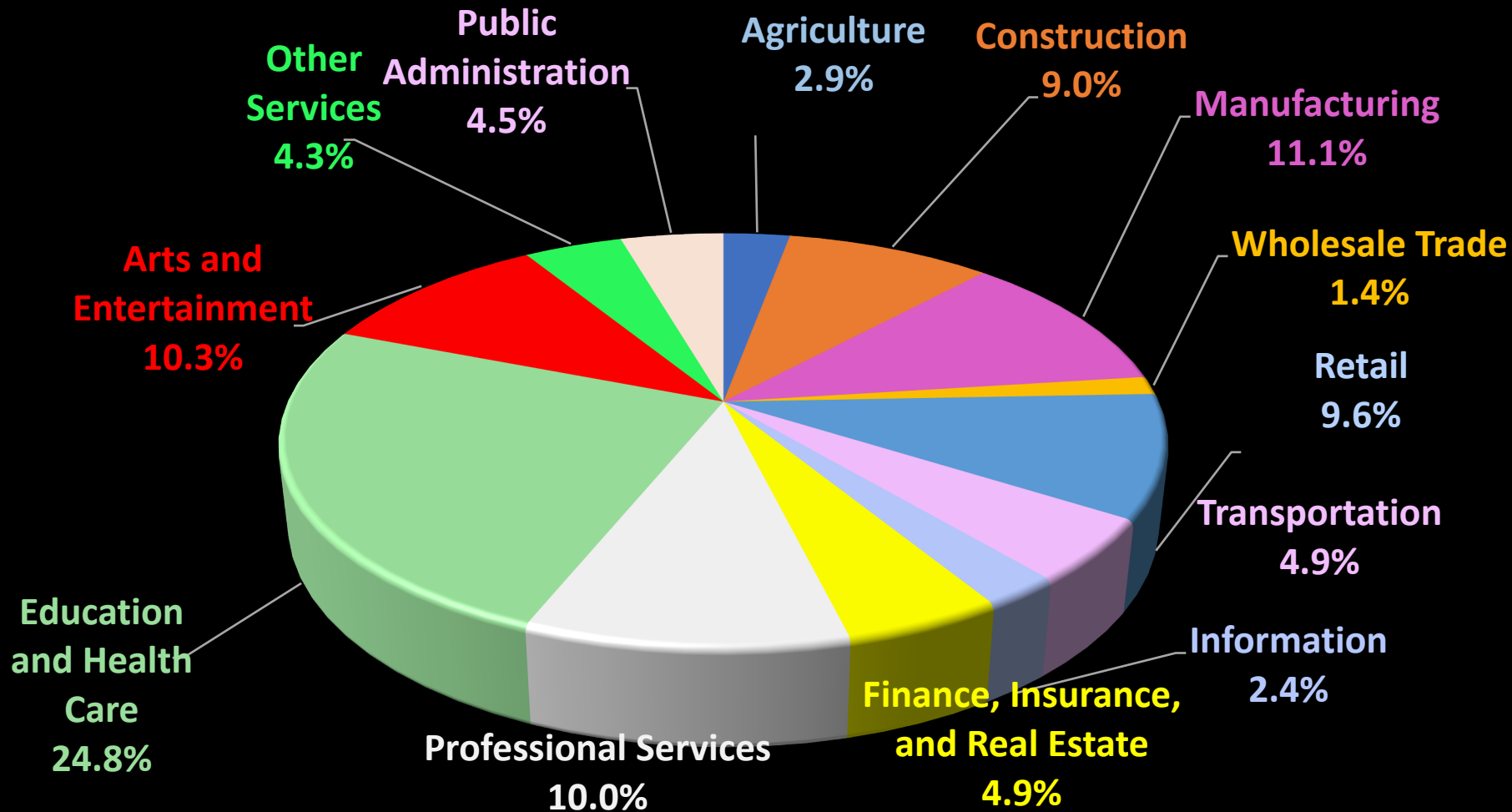
Annual Employment Trends



	February 2018	August 2018	February 2019	6-Month Pct. Change	Annual Pct. Change
Bryan					
Employment	42,192	40,733	43,373	6.48%	2.80%
Unemployment Rate	2.9	3.1	2.8		
College Station					
Employment	58,719	56,689	60,363	6.48%	2.80%
Unemployment Rate	2.9	3.2	3		
Brazos County					
Employment	114,344	110,391	117,546	6.48%	2.80%
Unemployment Rate	2.9	3.1	2.9		

Employment by Sector

District Residents in the Workforce



Employment in Bryan ISD – Pt. I



- RELLIS Campus
 - RELLIS campus adding staff – but many faculty may commute from the non-local “home-campuses”
 - RELLIS will add secondary employment, but small residential impact this coming decade



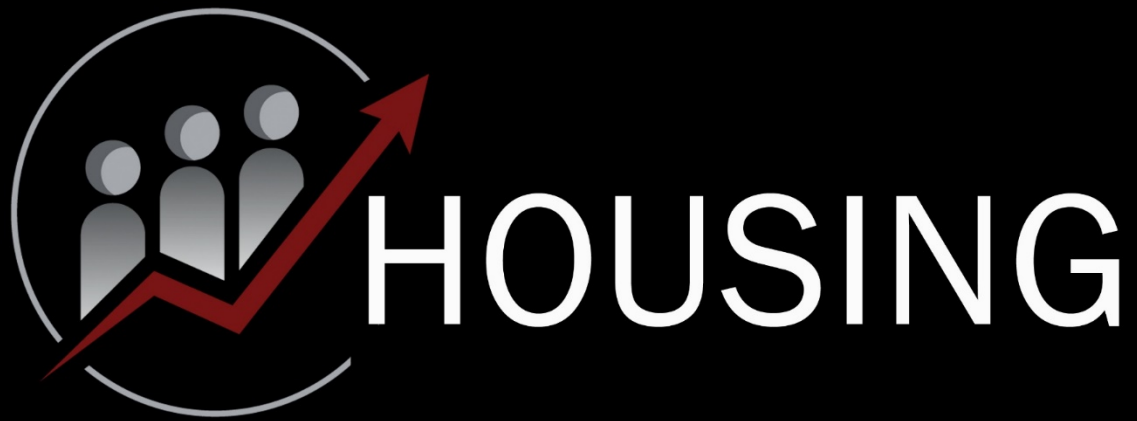
- TAMU – Flagship Campus
 - Large TAMU student increases in last decade – in several years during past decade, TAMU likely ranked 1st or 2nd in student numeric increase in nation
 - Difficult to measure enrollment due to online courses and due to counting students in non-local programs with local leadership
 - Massive impact on housing demand in B.I.S.D.
 - Student multiplier impact of 2 to 2.5 times in regard to local employment (Dr. Lonnie Jones, TAMU)

Employment in Bryan ISD – Pt. II



- Energy Employment
 - Fairly stable provision of energy-related jobs
- BioCorridor
 - Residential growth is now occurring near this employment center
- Distribution centers and logistics hubs
 - Parkwood-Carrabba Business Park & expansion of centers along SH 21, plus expanded Business Park in western BISD
- Growing sectors – in last 10 years: 1. manufacturing, 2. arts & entertainment, 3. transportation, & 4. public administration (of work force living within Bryan I.S.D.)



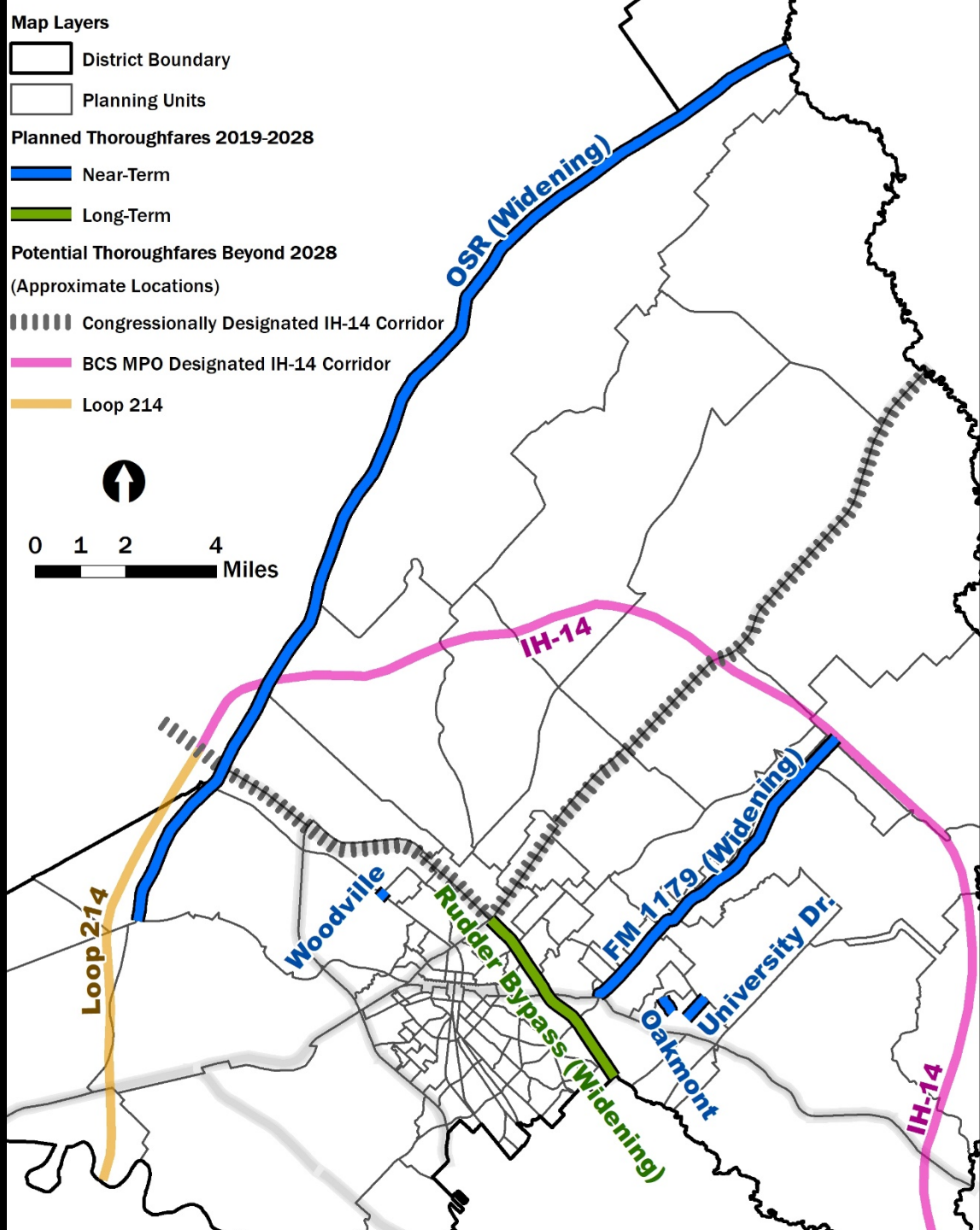


Transportation



- **University Drive extension**
Landowners and developers also have plans to develop adjacent arterials
- **Outside 10-year time frame, IH 14**
And, probable Loop 214 within 10 years
- **OSR widening in next 4.5 years (and replacing 6 bridges)**
- **Woodville Rd. – extension over the RR tracks to Mumford Rd. – thus opening up Mumford Rd. for further development**





Planned Thoroughfares

TIRZ and Revitalization Zones

➤ Midtown Area

- Will theoretically encourage residential development
- Most of area has already had low density re-development

➤ Other zones include: Downtown, Burton Creek, Bryan Town Center, & Traditions

- Will be oriented to non-residential land use and residential development for millennials or empty-nest residents

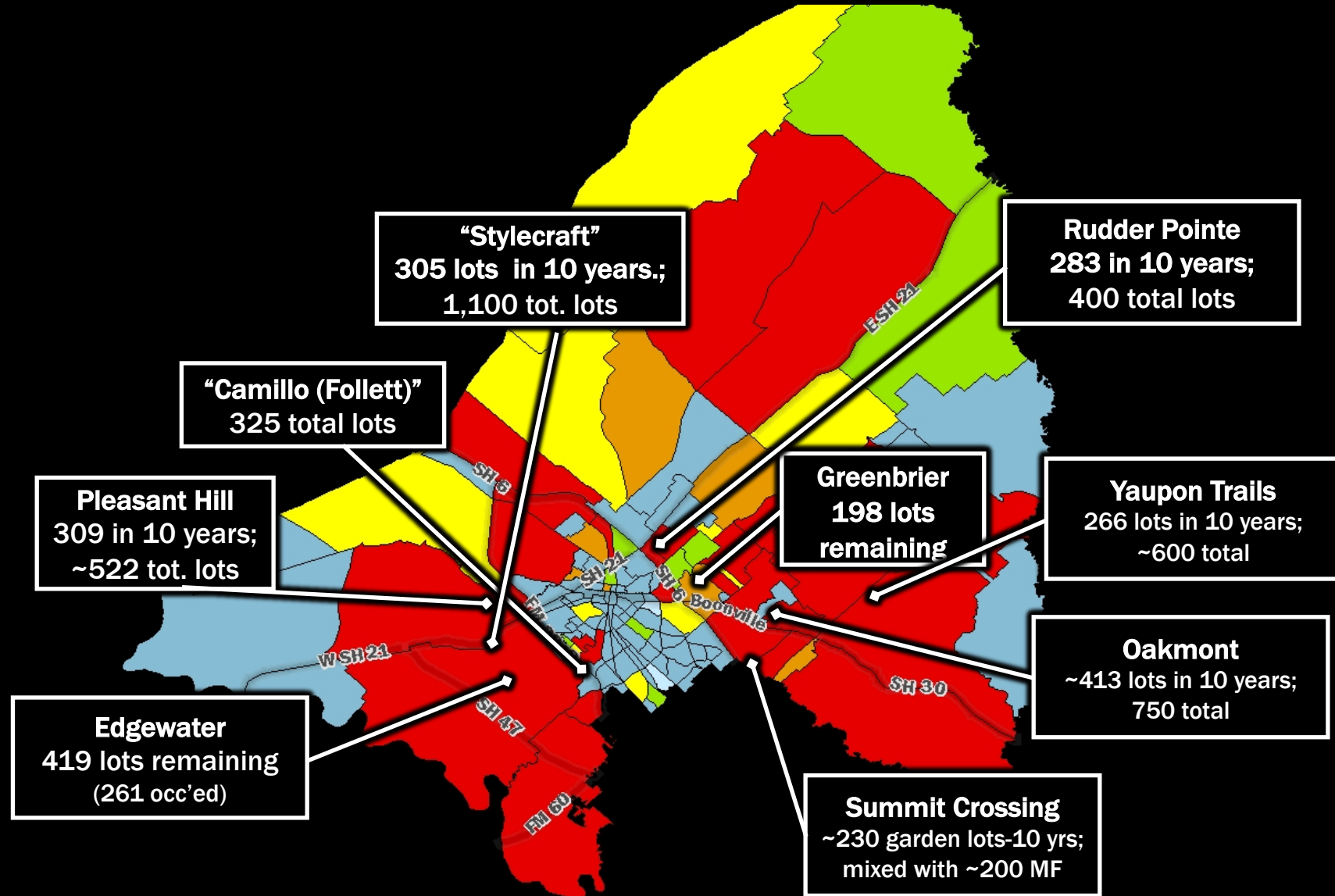


Opportunity Zones



- **103.7 acres in the District is in Opportunity Zones (or 25% of B.I.S.D.)**
 - Cannot easily be used for subdivisions, due to resale rules
 - Can be used for apartments and condos and townhomes
 - Provides tax advantages for owners developing in these zones
 - Potentially provides more housing for BISD students

PROJECTED SUBDIVISION OCCUPANCIES 2019-2028 - and to Build-Out



Multi Family Development



➤ Harrison Holdings – N. off Old Reliance Rd. – 1 to 2 complexes

➤ Arden and Clark – on FM 1179 (by Greenbrier)

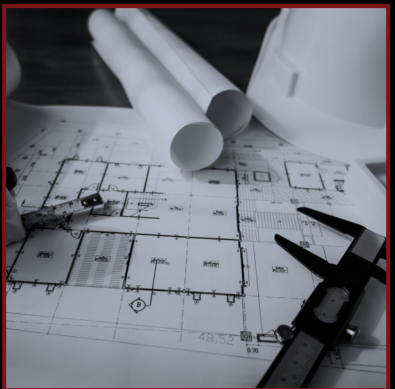


➤ Residences at Oakmont – 256 units all open by July 2019

➤ Ariza – 266 units-now leasing (off Harvey Rd) – 78% occupied

➤ Summit Crossing – large complex planned adjacent to American Momentum Bank

➤ Forest Pines – 255 units NE on FM 2818



➤ Potential near Blinn

➤ 6 possible locations in PU 138, S. off SH 47 & S.W. off Turkey Creek Rd. (including Bryan Commerce & Dev.)

➤ Shops at Brazos Valley – could have 1 complex – E. on Earl Rudder Bypass

➤ Park Hudson Place II – could have ~200 units by 2025

➤ Diamond P Holdings – ~2 complexes & condos/homes

➤ Ranch @ Riverside Parkway – 60 units E. off SH 47

Other Influential Developments with Few Students Projected



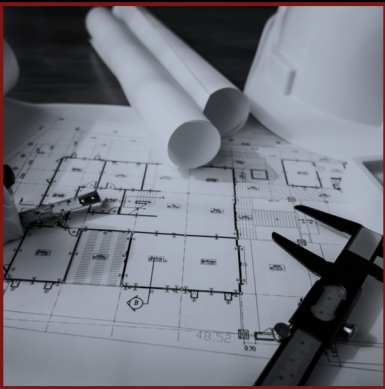
- Traditions (now 1 student in 237 homes)
 - By 2028 – ~500 future homes/condos/townhomes
 - Adjacent land potentially to be developed



- Miramont (now zero students in 102 homes)
 - 152 homes by 2028 w/another 131 by build-out
 - Potential for more development in adjacent acreage

- Trafalgar Square (now clearing portion)

Commercial, ~130 townhomes & unknown # apartments

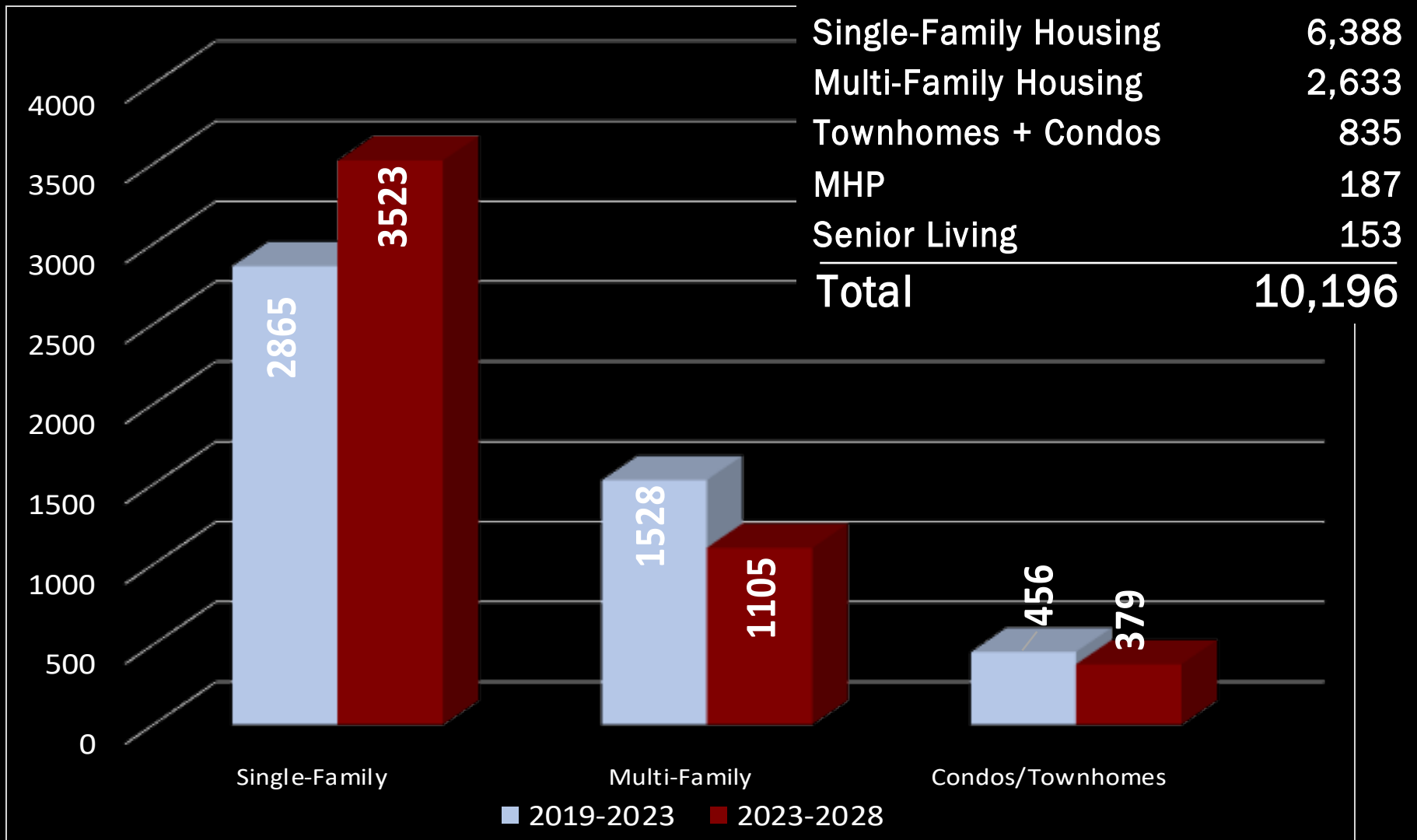


- Summit Crossing (2 students in 92 homes)
 - 231 homes occupied in next 10 years & 130 >2028
 - Potential for one multi-family complex (~200+ units)

Projected New Housing Occupancies



2019-2028





STUDENTS
per HOME

Students per Occupied Home

Districtwide



0.46



Single-Family

0.23



Multi-Family

Students per Home

- 36 of ~424 single-family subdivision averaged at least 1 students per home

Of these 36: 13 subdivisions (36%) were MHPs

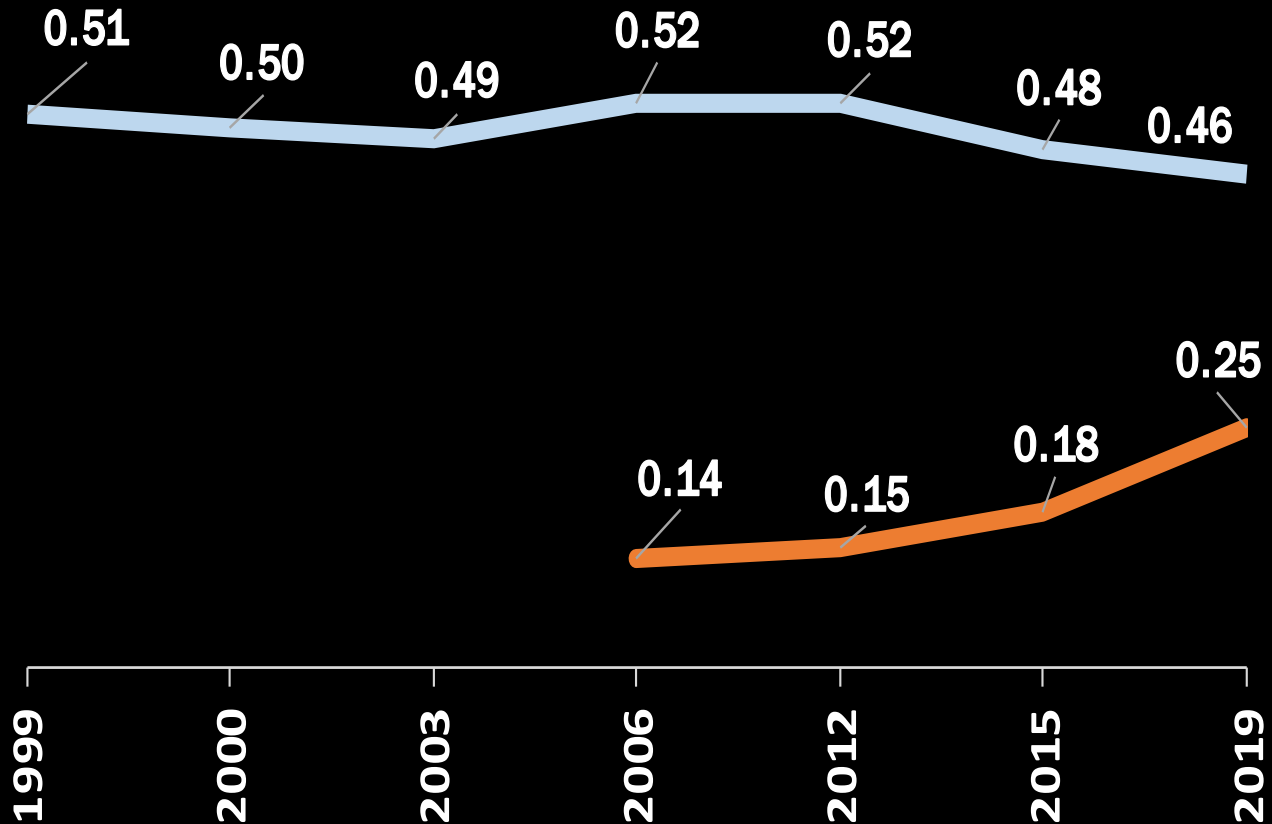
- Highest ratios included 1.78 for Mesquite Flats MHP and 1.89 for Faith subdivision




Historical Students per Home









Single-Family




Multi-Family

Student Growth by Type of Housing

	2018 Proportion by Housing Type	Resident Students in 2017	Resident Students in 2018	Added Students 2017 to 2018		Percent of Growth
				#	%	
 Subdivisions - Built-out	67%	9,625	9,494	-131	-1%	---
 Subdivisions - Actively Building	6%	777	787	10	1%	43%
 Apartments	12%	1,669	1,682	13	1%	57%
 THs/Condos	1%	142	134	-8	-6%	---
 MHP	14%	2,046	2,040	-6	0%	---



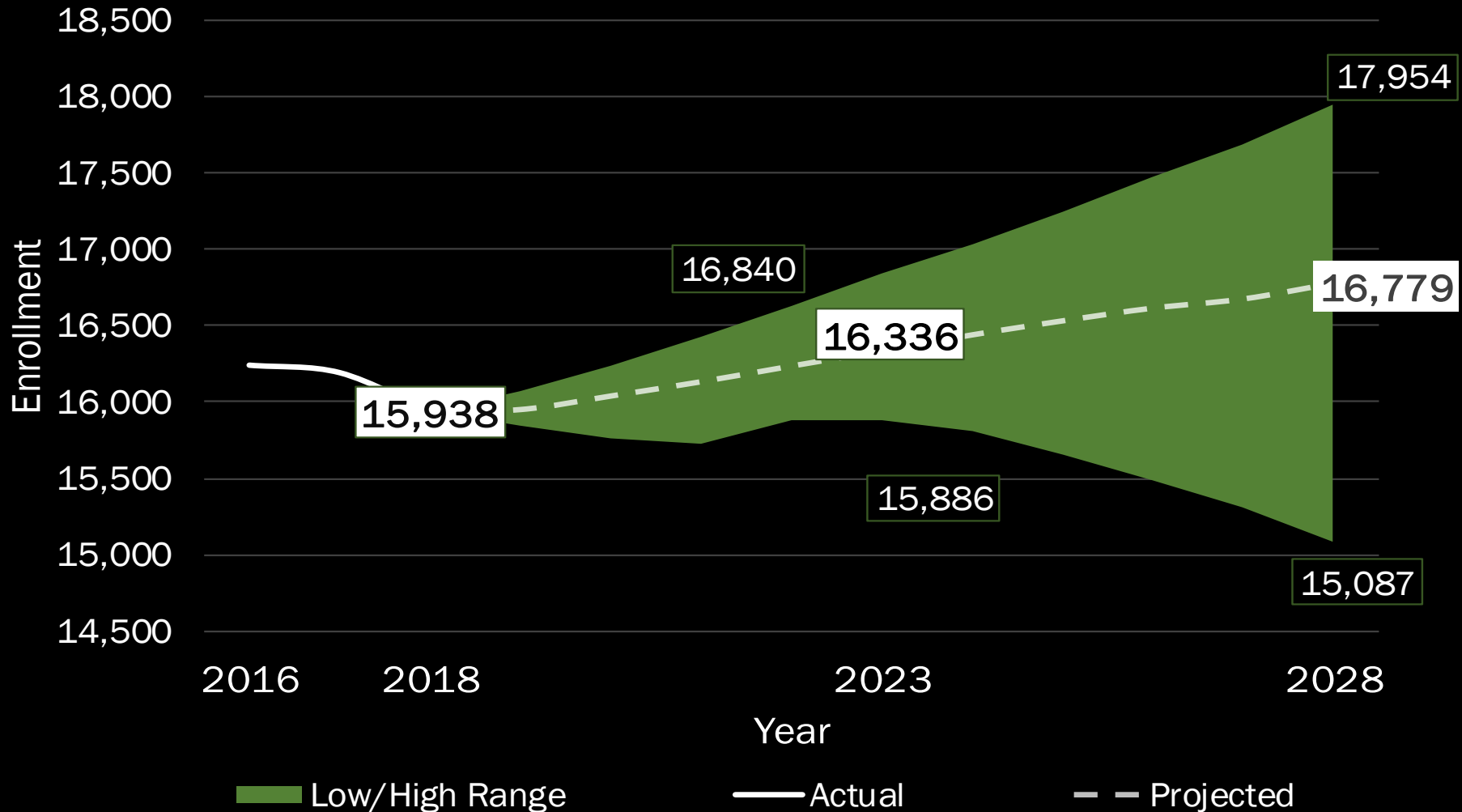
Moderate Growth Scenario



Projected Enrollment at PEIMS Snapshot Date

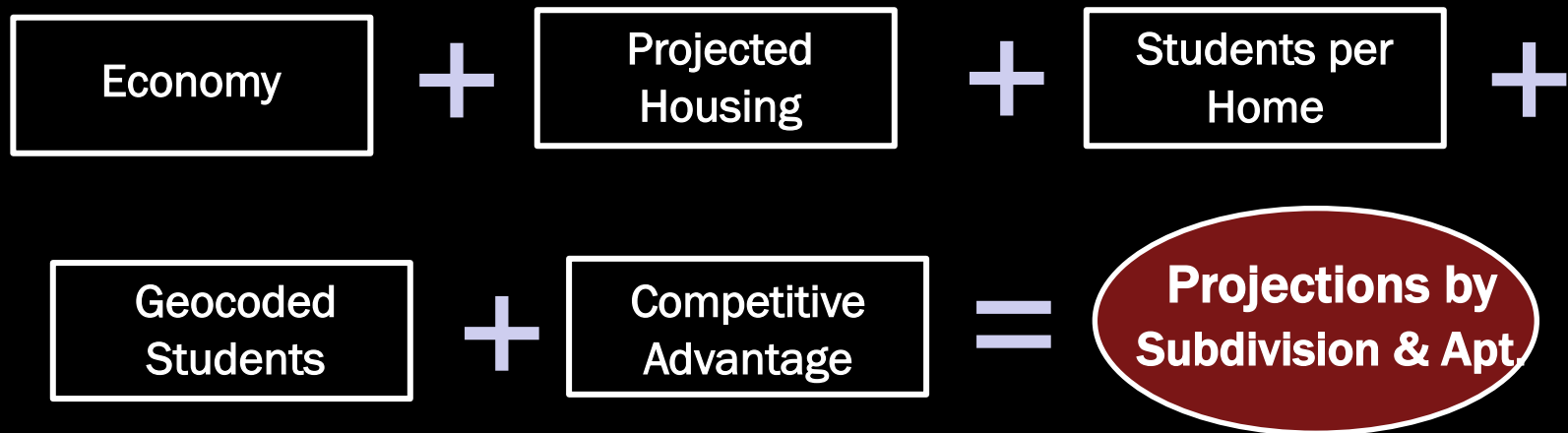
	2019	2020	2021	2022	2023
Enrollment	15,949	16,038	16,132	16,235	16,336
% Growth	0.07%	0.56%	0.56%	0.64%	0.62%
Growth	11	89	94	103	101
	2024	2025	2026	2027	2028
Enrollment	16,440	16,532	16,616	16,676	16,779
% Growth	0.63%	0.56%	0.50%	0.37%	0.61%
Growth	103	93	83	61	102

Three Scenarios of Growth

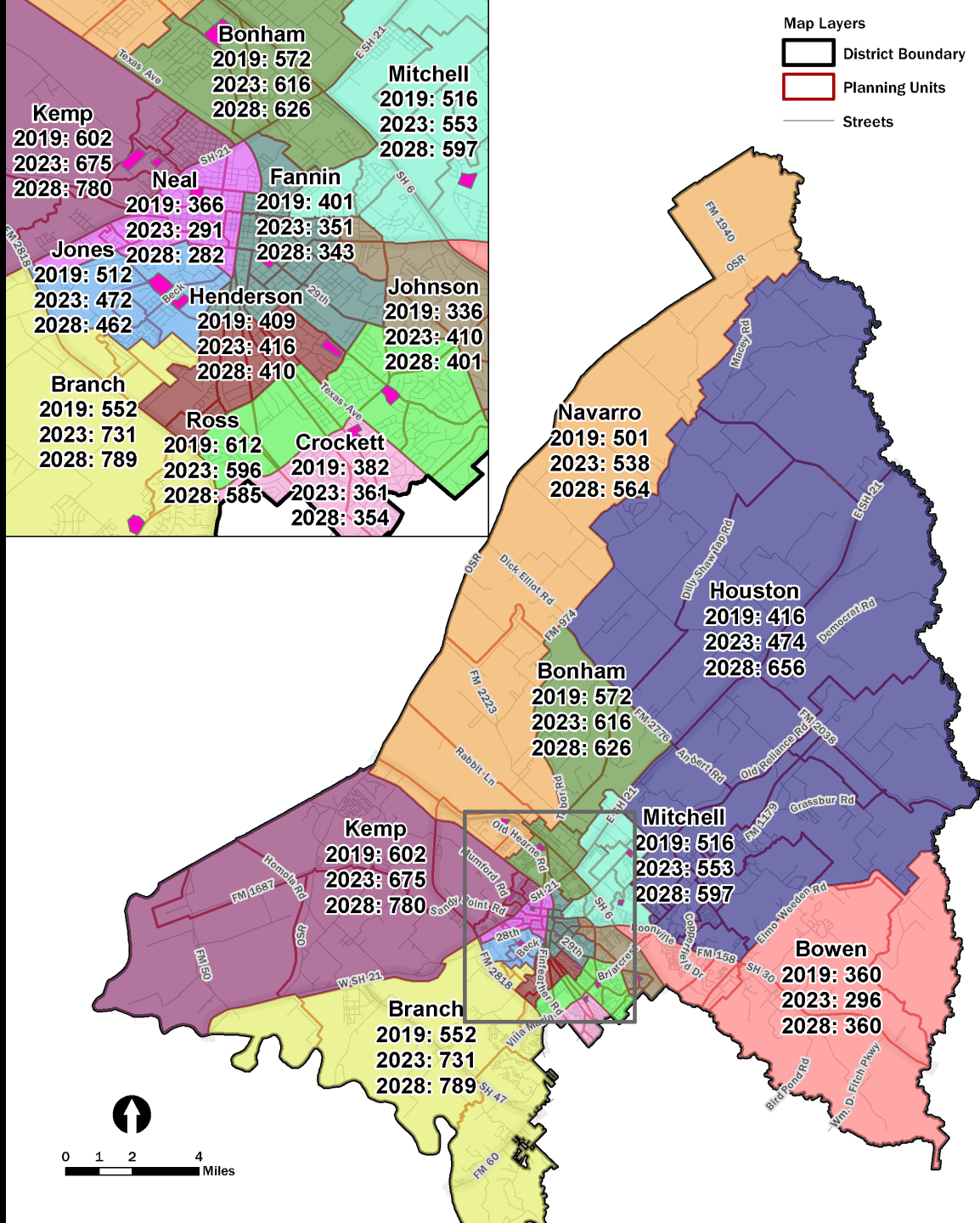




The Process



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






Projected Geocoded EE-4th by Current Attendance Zone

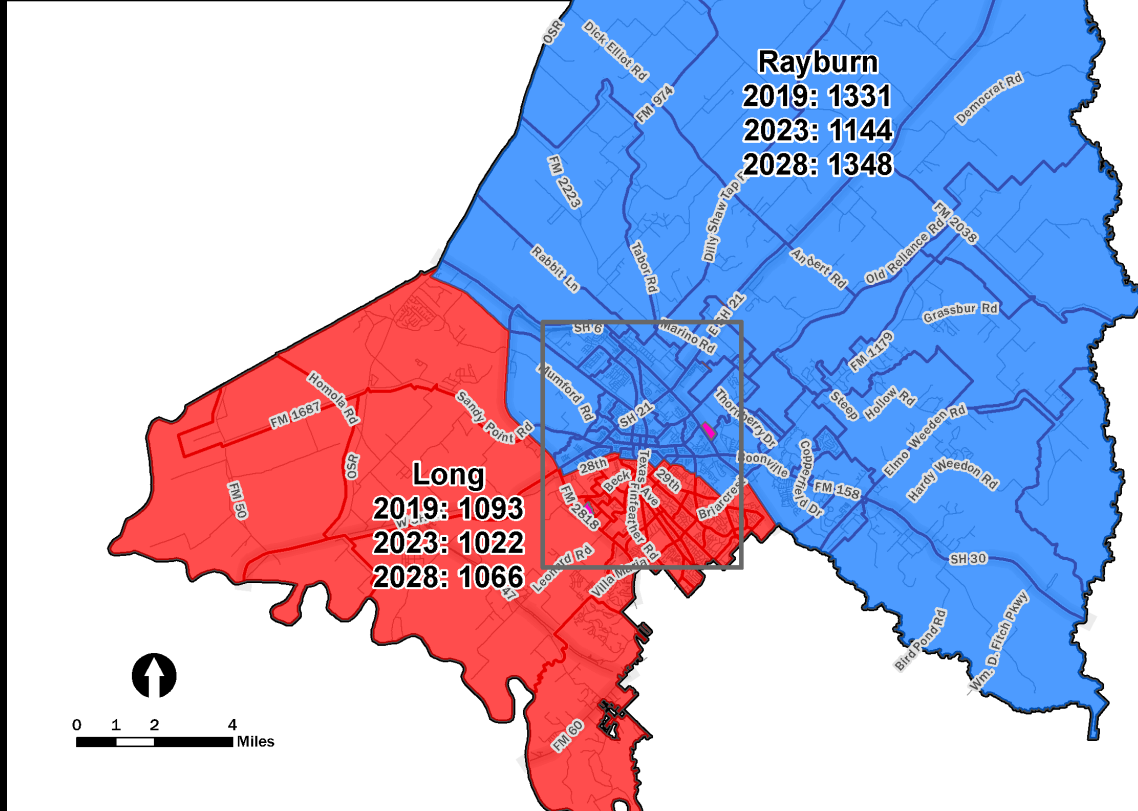
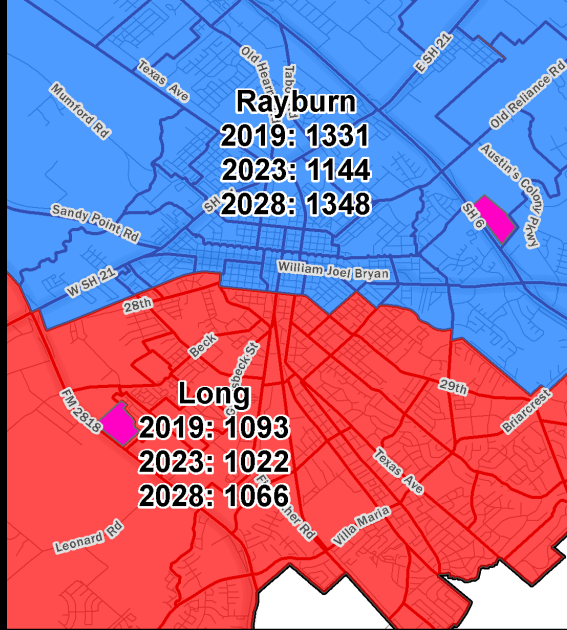
Elementary Planning Summary

Projected RESIDENT Students with Current TRANSFERS

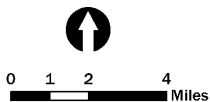
	Capacity	2019- 20	2020- 21	2021- 22	2022- 23	2023- 24	2024- 25	2025- 26	2026- 27	2027- 28	2028- 29
Bonham	772	603	621	641	648	647	652	657	659	658	657
Bowen	416	382	355	337	310	318	331	346	359	370	382
Branch	535	486	525	575	639	665	698	715	720	721	723
Crockett	634	442	438	435	425	423	422	422	420	418	416
Fannin	535	482	463	441	435	432	431	431	428	427	424
Henderson	515	542	540	546	552	549	551	550	547	545	543
Houston	495	336	357	361	383	394	426	468	500	538	576
Johnson	535	452	473	499	528	526	523	523	521	527	517
Jones	634	544	519	504	506	504	503	503	501	496	494
Kemp	673	623	621	643	682	696	721	748	766	783	801
Mitchell	535	383	378	383	415	420	434	448	453	457	464
Navarro	634	411	426	435	449	448	453	463	468	471	474
Neal	436	345	311	300	273	270	269	268	268	264	261
Ross	594	505	517	519	494	489	489	489	486	482	478
Total Elementary	7,943	6,536	6,544	6,619	6,739	6,781	6,903	7,031	7,096	7,157	7,210

Yellow highlights denote the year when a school is projected to exceed 100% capacity.

- Map Layers
-  District Boundary
 -  Planning Units
 -  Streets

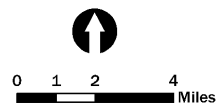
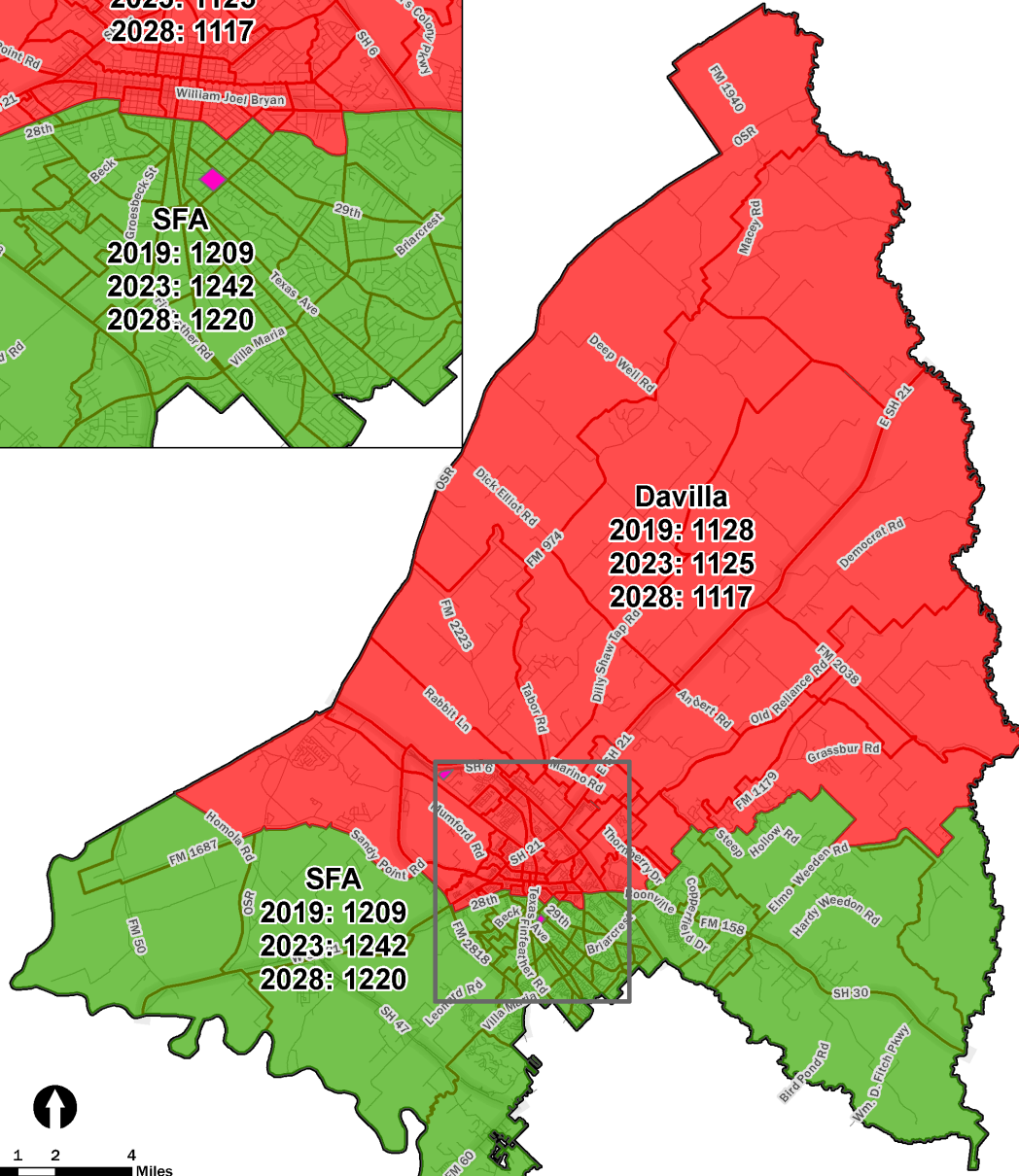
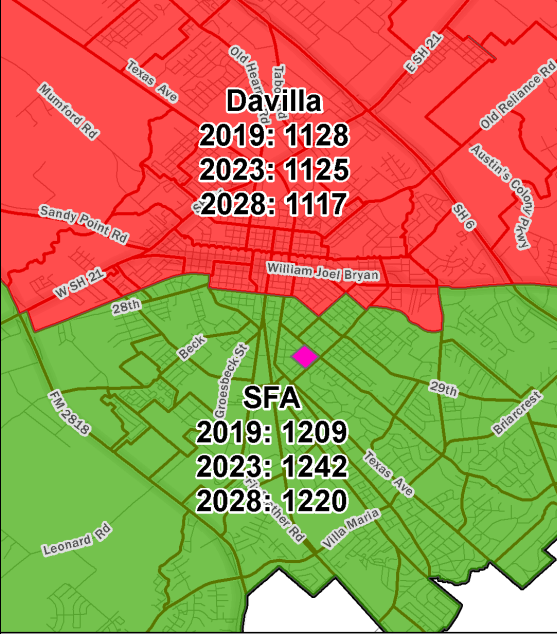


Projected Geocoded 5th-6th by Current Attendance Zone





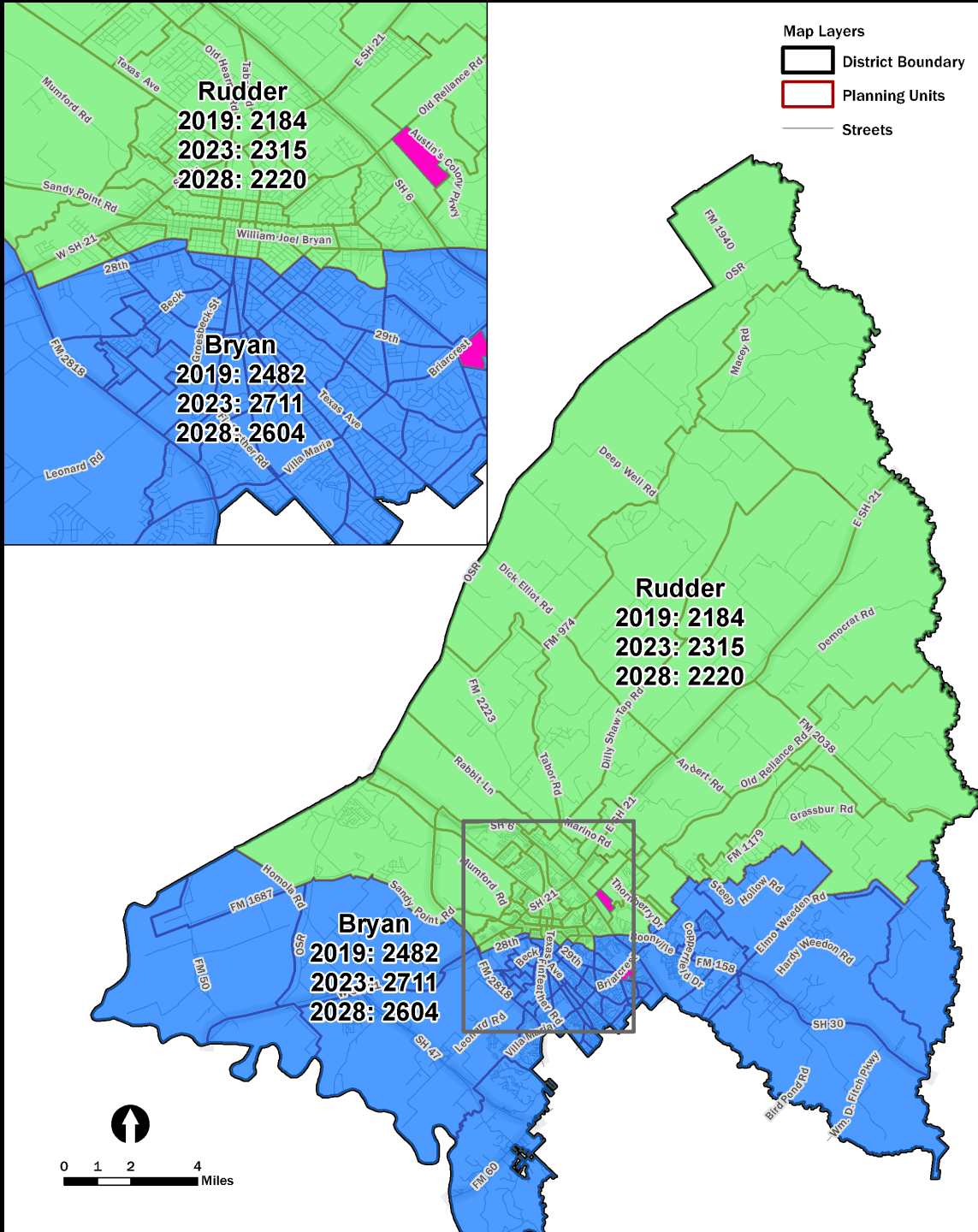
- Map Layers
- District Boundary
 - Planning Units
 - Streets



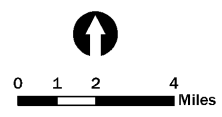
Projected Geocoded 7th-8th by Current Attendance Zone



- Map Layers
- District Boundary
 - Planning Units
 - Streets



Projected Geocoded 9th-12th by Current Attendance Zone



Secondary Planning Summary

Projected RESIDENT Students with Current TRANSFERS

	Capacity	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
Long	1,188	1,264	1,270	1,237	1,186	1,193	1,193	1,200	1,216	1,236	1,237
Rayburn	1,010	1,159	1,090	1,019	969	972	979	1,007	1,074	1,145	1,176
Davila	1,341	1,095	1,165	1,178	1,088	1,092	1,061	1,014	1,022	1,043	1,084
SFA	1,168	1,186	1,201	1,194	1,209	1,219	1,172	1,133	1,136	1,156	1,197
Bryan	2,520	2,388	2,430	2,508	2,594	2,617	2,650	2,656	2,620	2,542	2,510
Rudder	1,944	1,652	1,674	1,723	1,776	1,783	1,810	1,820	1,782	1,715	1,688

Does not include students attending other HS programs, including Bryan Collegiate.

Yellow highlights denote the year when a school is projected to exceed 100% capacity.



QUESTIONS?



BRYAN ISD

May 2019