

Heritage Subdivision

School Enrollment Impact Study for the School Years 2020-21 and 2025-26

Introduction

The focus of this report is to ascertain the impact of the 435 single family detached housing unit Heritage subdivision on the elementary, middle school and high enrollment for the school years 2020-21 and 2025-26. The subdivision will be split between 333 age restricted housing units (55 year old and older) and 102 traditional housing units. All 119 housing units proposed to be built in the municipality of Wesley Chapel will be age restricted. In the municipality of Indian Trail, 214 will be age restricted and 102 will be traditional. These calculations assume the following:

- A. The subdivision will be built out and sold over a 5 year period (2017 through 2021) with roughly 20% of the homes sold and occupied each year.
- B. The age restriction regulations will be enforced on 333 of the housing units
- C. The homes will sell in the mid \$300,000 range.
- D. The U.S. 74 bypass is completed by the end on 2018.
- E. There are no water or sewer restrictions implemented over the next 4 years.
- F. The 30 year fixed home mortgage rate stays below 5% over the next 4 years.

Methods and Data

Using single year of age data from the 2010 census and geo-coded student information by grade from the Union County Schools, yield factors by age were calculated for subdivisions in the Union County area that have similar housing unit types and sale prices (N=800 housing units) as the proposed Heritage subdivision. The calculated average yield factors by housing unit were then summed into four categories, preschool (age 0-4), elementary (age 5-10), middle school (ages 11-13) and high school (ages 14-17). These yield factors were then applied to the proposed 405 housing units to be built in the Heritage subdivision to establish the estimated number of school age and preschool students living in the area for the 2020-21 school year. These results were then aged forward to estimate the total student impact by school for the 2025-26 school year.

Results

The results of the yield calculations for the traditional housing units by age categories are as follows: Preschool - 0.29 average child per housing unit, elementary - 0.37, middle school - 0.12 and high school - 0.05. The results of the yield calculations for the age restricted housing units by age categories are as follows: Preschool - 0.05 average child per housing unit, elementary - 0.03, middle school - 0.01 and high school - nil.

When these yield rates were applied to the Heritage subdivision, the results for the 2020-21 school year in the Indian Trail area was as follows: 40 preschool students, 44 elementary, 15 middle school and 5 high school, for a total of 63 students. (See Appendix A) When these yield rates were applied to the Heritage subdivision, the results for the 2025-26 school year in the Indian Trail area was as follows: 14 preschool students, 40 elementary, 27 middle school and 16 high school, for a total of 83 students. (See Appendix A)

Given the housing unit type and price range of the traditional housing units in the Heritage subdivision, this section of the development will contain a relatively large number of preschool students by 2020. Thus the full impact of the development on school enrollment will not be seen until the 2025-26 school year.

To establish the full impact, the estimated number of students was aged forward from 2020-21 school year to 2025-26. The total estimated impact for 2025-26 is 83 students for the Indian Trail area and 7 students for the Wesley Chapel area.

Appendix A: Enrollment Impact

**Heritage Subdivision: Municipality of Indian Trail
(102 Traditional Units)**

Grade Level	Yield Factor	2020-21 School Year	2025-26 School Year
Preschool	0.29	30	6
K-5	0.37	38	32
6-8	0.12	12	24
9-12	0.05	5	16
Total K-12 Students		55	72

**Heritage Subdivision: Municipality of Indian Trail
(214 Age Restricted Units)**

Grade Level	Yield Factor	2020-21 School Year	2025-26 School Year
Preschool	0.05	10	8
K-5	0.03	6	8
6-8	0.01	2	3
9-12	nil	0	0
Total K-12 Students		8	11

**Heritage Subdivision: Municipality of Wesley Chapel
(119 Age Restricted Units)**

Grade Level	Yield Factor	2020-21 School Year	2025-26 School Year
Preschool	0.05	6	7
K-5	0.03	3	5
6-8	0.01	1	2
9-12	nil	0	0
Total K-12 Students		4	7

Respectfully,
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