

# School Impact Study Heritage at Marvin Subdivision

Prepared for:

**Jones Homes USA**

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This study provides a projection of the elementary, middle, and high school enrollment of single family detached unit residents in Union County Public Schools for the 2031-32 school year.

### **Study Assumptions**

- The subdivision is currently expected to include 73 single family detached residential housing units.
- The site is currently expected to open for sale in the Spring of 2024, with a four year build out cycle.
- The site is currently expected to be 100% 4-bedroom single family detached units.
- The units are currently expected to sell in the \$800,000 range.
- The 30-year fixed home mortgage rate stays below 6.27% over the next five years.
- There are no water or sewer restrictions implemented over the next four years.
- There are no major changes in the distribution of enrollment across public non-charter, public charter, private, and home schools over the next ten years.
- There are no major social, economic, or political changes in the Charlotte Metropolitan Statistical Area over the next ten years.<sup>1</sup>

### **Methods and Data**

The subdivision site is geocoded to identify its Census tract location and elementary and middle/high school attendance zones, which are also geocoded to Census tracts. Using 2010 Decennial Census single year of age data and 2019 5-year American Community Survey (ACS) data for housing units within the Marvin Elementary, Marvin Ridge Middle School, and Marvin Ridge High School attendance zones, housing unit yield factors by age (0-17) are calculated. These yield factors represent the average number of children per housing unit in the area. Birth rates for the geographic area are estimated using the aforementioned Census Bureau data and the 2021 North Carolina Office of State Budget and Management population projections for Union County. The yield factors and birth rates are next adjusted using ACS data on housing unit characteristics in the school attendance zones to account for the proposed distribution of unit bedrooms. The final estimated housing unit yield factors and birth rates are applied to the

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<sup>1</sup> Note that it remains very difficult to predict how the COVID-19 pandemic will impact public school enrollment 10 years from now. While the crisis has somewhat abated, there remains a large amount of uncertainty about how the pandemic will affect individual future behavior/future policies regarding public school attendance. This study takes into account the early evidence that the pandemic resulted in a baby bust in the United States, which is expected to cause a decline in the forecasted number of younger (under 10) school-age children in the projection timeframe.

73 proposed units in the Heritage at Marvin site, and the results are aged forward to produce a ten-year projection of the number of residents age 0-17 in the proposed subdivision. Estimated rates of public school enrollment from the American Community Survey are applied to those figures, resulting in the total projected impact of the proposed subdivision on Union County Public Schools for the 2031-32 school year.

## Results

The 2031-32 school year projected yield rates (average number of children attending public school per housing unit) by age group for the proposed housing units are:

| <b>Preschool<br/>(Ages 0-4)</b> | <b>Elementary<br/>(Ages 5-10)</b> | <b>Middle<br/>(Ages 11-13)</b> | <b>High<br/>(Ages 14-17)</b> | <b>Total<br/>(Ages 0-17)</b> |
|---------------------------------|-----------------------------------|--------------------------------|------------------------------|------------------------------|
| 0.315                           | 0.411                             | 0.219                          | 0.233                        | 1.178                        |

When these yield rates are applied to the site, the total 2031-32 school year projected impact on Union County Public School enrollment is 86 students. The projections by grade level/age group are:

| <b>Preschool<br/>(Ages 0-4)</b> | <b>Elementary<br/>(Ages 5-10)</b> | <b>Middle<br/>(Ages 11-13)</b> | <b>High<br/>(Ages 14-17)</b> | <b>Total<br/>(Ages 0-17)</b> |
|---------------------------------|-----------------------------------|--------------------------------|------------------------------|------------------------------|
| 23                              | 30                                | 16                             | 17                           | 86                           |

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