



CITY OF FULSHEAR

"FIND YOUR FUTURE IN FULSHEAR"

30603 FM 1093 WEST/ PO Box 279 ~ FULSHEAR, TEXAS 77441

PHONE: 281-346-1796 ~ FAX: 281-346-2556

WWW.FULSHEARTEXAS.GOV

CITY COUNCIL:

MAYOR: Aaron Groff

MAYOR PRO-TEM: Kaye Kahlich

COUNCIL MEMBER: Kent Pool

COUNCIL MEMBER: Dana Hollingsworth

COUNCIL MEMBER: Debra Cates

COUNCIL MEMBER: Lisa Martin

COUNCIL MEMBER: Joel Patterson

COUNCIL MEMBER: John Kelly

STAFF:

CITY MANAGER: Jack Harper

CITY SECRETARY: Kimberly Kopecky

CITY ATTORNEY: J. Grady Randle

JOINT SPECIAL CITY COUNCIL MEETING APRIL 16, 2019

NOTICE IS HEREBY GIVEN OF A SPECIAL CITY COUNCIL MEETING OF THE CITY OF FULSHEAR WITH THE CITY OF FULSHEAR DEVELOPMENT CORPORATION (CDC) AND THE FULSHEAR DEVELOPMENT CORPORATION (FDC) TO BE HELD ON **TUESDAY, APRIL 16, 2019 AT 6:00 P.M.** IN IRENE STERN COMMUNITY CENTER, 6920 KATY FULSHEAR ROAD, FULSHEAR, TEXAS FOR CONSIDERING THE FOLLOWING ITEMS. THE CITY COUNCIL RESERVES THE RIGHT TO ADJOURN INTO EXECUTIVE SESSION AT ANY TIME DURING THE COURSE OF THIS MEETING TO DISCUSS ANY MATTERS LISTED ON THE AGENDA, AS AUTHORIZED BY THE TEXAS GOVERNMENT CODE, INCLUDING, BUT NOT LIMITED TO, SECTIONS 551.071 (CONSULTATION WITH ATTORNEY), 551.072 (DELIBERATIONS ABOUT REAL PROPERTY), 551.073 (DELIBERATIONS ABOUT GIFTS AND DONATIONS), 551.074 (PERSONNEL MATTERS), 551.076 (DELIBERATIONS ABOUT SECURITY DEVICES), 551.087 (ECONOMIC DEVELOPMENT), 418.175.183 (DELIBERATIONS ABOUT HOMELAND SECURITY ISSUES) AND AS AUTHORIZED BY THE TEXAS TAX CODE, INCLUDING, BUT NOT LIMITED TO, SECTION 321.3022 (SALES TAX INFORMATION).

"Incidental Meeting Notice: A quorum of the City of Fulshear City Council, Planning & Zoning Commission, City of Fulshear Development Corporation (Type A), Fulshear Development Corporation (Type B), Parks & Recreation Commission, Historic Preservation & Museum Commission, Zoning Board of Adjustment, or any or all of these, may be in attendance at the meeting specified in the foregoing notice, which attendance may constitute a meeting of such governmental body or bodies as defined by the Texas Open Meetings Act, Chapter 551, Texas Government Code. Therefore, in addition to the foregoing notice, notice is hereby given of a meeting of each of the above-named governmental bodies, the date, hour, place, and subject of which is the same as specified in the foregoing notice."

- I. CALL TO ORDER
- II. QUORUM & ROLL CALL

III. PUBLIC HEARINGS

- A. FM 359 ANNEXATION – 1st PUBLIC HEARING – 6:00 p.m.**
- B. FM 359 ANNEXATION – 2nd PUBLIC HEARING – 6:10 p.m.**

The City of Fulshear, Texas, proposes to institute annexation proceedings to enlarge and extend the boundary limits of the City to include the following described territory, to-wit:

A 100-foot-wide portion of Farm to Market Road 359, beginning at the Point where the Present City Limits Line Crosses FM 359 and extending northwesterly a distance of approximately 3,600 feet, ending at a point which is approximately 900 feet North of the Intersection of FM 359 and Rodgers Road.

Notice is hereby given to all interested persons that the City Council of the City of Fulshear, Texas, will conduct two Public Hearings on Tuesday, April 16, 2019, at the Irene Stern Community Center, 6920 Katy Fulshear Road, Fulshear, Texas 77441. The first Public Hearing will begin at 6:00 p.m. and the second Public Hearing will begin at 6:10 p.m.

The purpose of the Public Hearings is to receive input from the public on a proposal for the City of Fulshear to annex the above identified tract of land.

At said times and places all persons shall have the right to appear and be heard. All persons desiring to attend the Public Hearings may view the City Council's agenda to confirm the scheduling of the Public Hearings. The agenda will be available at Fulshear City Hall at least 72 hours preceding the Public Hearings. All persons desiring to be heard at such Public Hearings are invited to attend the Public Hearings.

A more detailed map of the property proposed for annexation is on file at the office of the Fulshear City Secretary at Fulshear City Hall.

- C. ROGERS ROAD TRACT ANNEXATION – 1st PUBLIC HEARING – 6:20 p.m.**
- D. ROGERS ROAD TRACT ANNEXATION – 2nd PUBLIC HEARING – 6:30 p.m.**

The City of Fulshear, Texas, proposes to institute annexation proceedings to enlarge and extend the boundary limits of the City to include the following described territory, to-wit:

All of the called 9.9225 Acre tract conveyed to R1 Rodgers Road LLC in the deed recorded under Fort Bend County's Clerks File number 2017115986

Notice is hereby given to all interested persons that the City Council of the City of Fulshear, Texas, will conduct two Public Hearings on Tuesday, April 16, 2019, at the Irene Stern Community Center, 6920 Katy Fulshear Road, Fulshear, Texas 77441. The

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IV. JOINT DISCUSSION AND PRESENTATION WITH CITY OF FULSHEAR DEVELOPMENT CORPORATION (CDC) AND FULSHEAR DEVELOPMENT CORPORATION (FDC)

A. DISCUSSION AND PRESENTATION ON 2019 FULSHEAR DEMOGRAPHIC UPDATE FROM POPULATION AND SURVEY ANALYSTS (PASA)

V. ADJOURNMENT

NOTE: IN COMPLIANCE WITH THE AMERICAN WITH DISABILITIES ACT, THIS FACILITY IS WHEELCHAIR ACCESSIBLE AND ACCESSIBLE PARKING SPACES ARE AVAILABLE. REQUESTS FOR ACCOMMODATIONS OR INTERPRETIVE SERVICE MUST BE MADE AT LEAST 48 BUSINESS HOURS PRIOR TO THIS MEETING. PLEASE CONTACT THE CITY SECRETARY'S OFFICE AT 281-346-1796 FOR FURTHER INFORMATION.

I, KIMBERLY KOPECKY, CITY SECRETARY OF THE CITY, DO HEREBY CERTIFY THAT THE ABOVE NOTICE OF MEETING AND AGENDA FOR THE CITY COUNCIL OF THE CITY OF FULSHEAR, TEXAS WAS POSTED ON APRIL 9, 2019 BY 5:00 P.M. IN PLACE CONVENIENT AND READILY ACCESSIBLE AT ALL TIMES TO THE GENERAL PUBLIC, IN COMPLIANCE WITH CHAPTER 551, TEXAS GOVERNMENT CODE.



KIMBERLY KOPECKY, CITY SECRETARY

AGENDA MEMO
SPECIAL MEETING OF THE CITY COUNCIL
CITY OF FULSHEAR, TEXAS

AGENDA OF: April 16, 2019	AGENDA ITEM(S): III-A, B, C, & D
DATE SUBMITTED: April 10, 2019	DEPARTMENT: Planning & Development
PREPARED BY: Sharon Valiante, Director of Public Works Brant Gary, Assistant City Manager Zach Goodlander, Dir. of Development Svcs.	PRESENTER: Sharon Valiante, Director of Public Works Brant Gary, Assistant City Manager Zach Goodlander, Dir. of Development Svcs.

PUBLIC HEARINGS TO BE HELD AS FOLLOWS:

- SUBJECT:**
- A. FM 359 ANNEXATION – 1st PUBLIC HEARING – 6:00 p.m.**
 - B. FM 359 ANNEXATION – 2nd PUBLIC HEARING – 6:10 p.m.**
 - C. ROGERS ROAD TRACT – 1st PUBLIC HEARING – 6:20 p.m.**
 - D. ROGERS ROAD TRACT – 2nd PUBLIC HEARING – 6:30 p.m.**

ATTACHMENTS: Public Hearing Notices & Relevant Information

EXECUTIVE SUMMARY

The City has been working through the annexation process for the tract of land located at the NW corner of FM 359 & Rogers Road. The City Attorney has identified a process to provide for separate annexations for the ROW of FM 359 and the tract of land requesting annexation. Both annexations require two public hearings.

The first two hearings (A&B) refer to the portion of FM 359 as described below:

A 100-foot-wide portion of Farm to Market Road 359, beginning at the Point where the Present City Limits Line Crosses FM 359 and extending northwesterly a distance of approximately 3,600 feet, ending at a point which is approximately 900 feet North of the Intersection of FM 359 and Rodgers Road.

The second two hearings (C&D) refer to the tract of land at the NW corner of Rogers Road and FM 359 as described below:

All of the called 9.9225 Acre tract conveyed to R1 Rodgers Road LLC in the deed recorded under Fort Bend County's Clerks File number 2017115986.

In anticipation of the completion of the required hearings, it is expected that City Council will consider formal annexation of these areas in May.

RECOMMENDATION

Staff recommends the City Council conduct the public hearings regarding the proposed annexations.

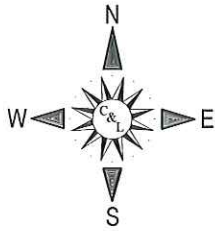
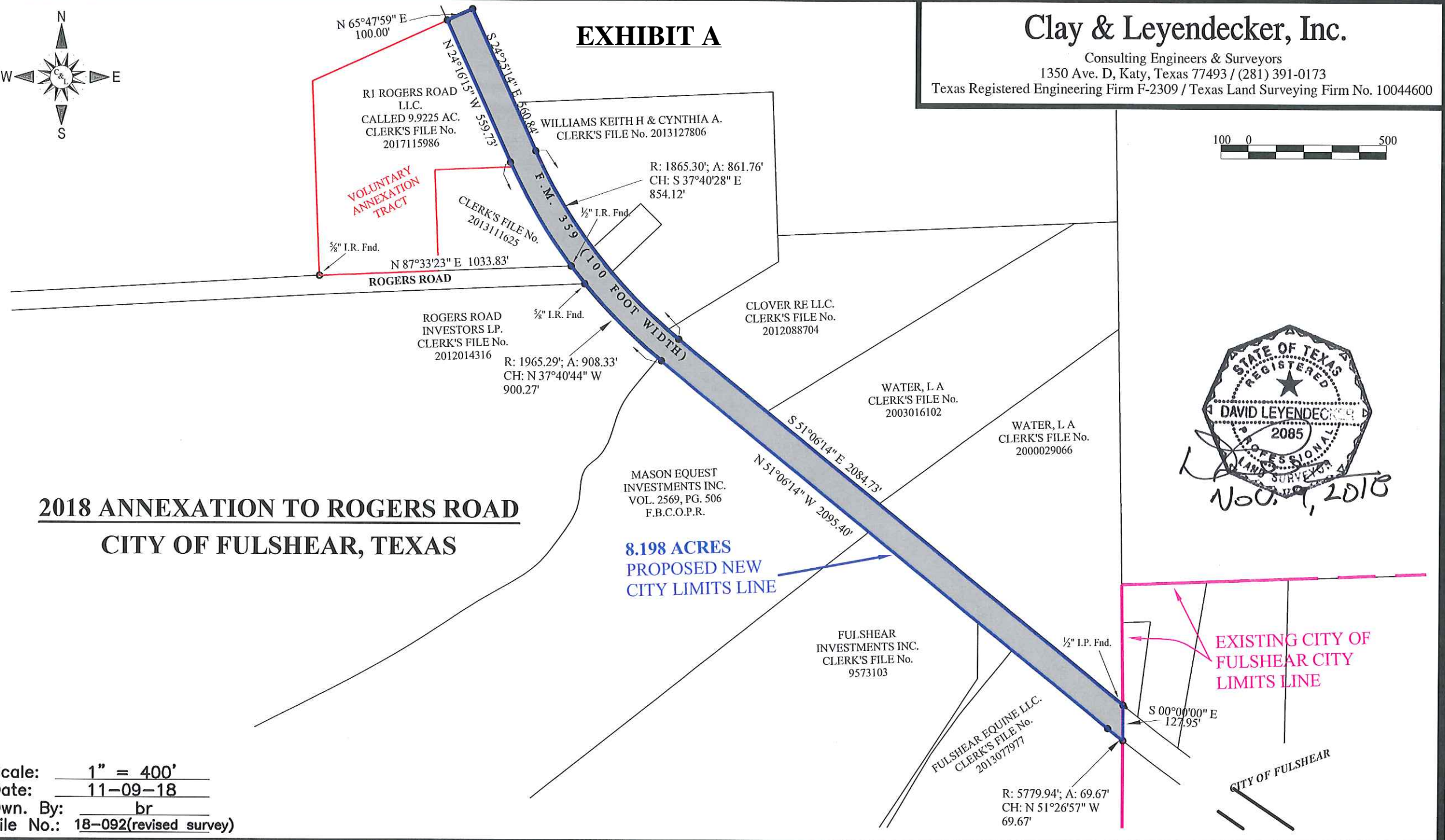


EXHIBIT A

Clay & Leyendecker, Inc.

Consulting Engineers & Surveyors
1350 Ave. D, Katy, Texas 77493 / (281) 391-0173
Texas Registered Engineering Firm F-2309 / Texas Land Surveying Firm No. 10044600



2018 ANNEXATION TO ROGERS ROAD CITY OF FULSHEAR, TEXAS

8.198 ACRES
PROPOSED NEW
CITY LIMITS LINE



Scale: 1" = 400'
Date: 11-09-18
Dwn. By: br
File No.: 18-092(revised survey)

R: 5779.94'; A: 69.67'
CH: N 51°26'57" W
69.67'

NOTICE OF PUBLIC HEARINGS

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The purpose of the Public Hearings is to receive input from the public on a proposal for the City of Fulshear to annex the above identified tract of land.

At said times and places all persons shall have the right to appear and be heard. All persons desiring to attend the Public Hearings may view the City Council's agenda to confirm the scheduling of the Public Hearings. The agenda will be available at Fulshear City Hall at least 72 hours preceding the Public Hearings. All persons desiring to be heard at such Public Hearings are invited to attend the Public Hearings.

A more detailed map of the property proposed for annexation is on file at the office of the Fulshear City Secretary at Fulshear City Hall.

If you have any questions regarding this Notice, please call the City Secretary's office at 281-346-1796.

Posted: April 2, 2019

NOTICE OF PUBLIC HEARINGS

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Posted: April 2, 2019

Addresses for notices for Annexation – Rogers Rd at FM 359

Texas Department of Transportation

Attn: Government Affairs
125 East 11th St.
Austin, TX 78701

Fort Bend County Drainage District

Attn: Mark Vogler
1124 Blume Road
Rosenberg, TX 77471

Fort Bend County

Office of the County Judge
Attn: K. P. George
301 Jackson St
Richmond, TX 77469

Fulshear-Simonton Fire Department

Fort Bend County ESD #4
Attn: Brandi Crone
30626 5th Street
Fulshear, Texas 77441

Lamar CISD:

Kevin McKeever
Administrator of Operations
3911 Avenue I
Rosenberg, TX 77471

Comcast of Houston LLC, a Delaware Limited Liability Company, herein referred to as "Comcast Cable"

Leslie Noyola
Construction Coord 2
Planning and Design
8590 Tidwell
Houston TX 77040

CenterPoint Energy, Inc.

Wes Maresh
1111 Louisiana
Houston, TX 77002

SiEnergy Gas

Houston Regional Office:

*12811 Royal Drive
Suite 113
Stafford, Texas 77477*

Headquarters:

*3 Lakeway Centre Court
Suite 110
Lakeway, Texas 78734*

PUBLISHER'S AFFIDAVIT

THE STATE OF TEXAS §
COUNTY OF FORT BEND §

Before me, the undersigned authority, on this day personally appeared Lee Hartman who being by me duly sworn, deposes and says that he is the Publisher of Fort Bend Herald and that said newspaper meets the requirements of Section 2051.044 of the Texas Government Code, to wit:

- 1. it devotes not less than twenty-five percent (25%) of its total column lineage to general interest items;
2. it is published at least once each week;
3. it is entered as second-class postal matter in the county where it is published; and
4. it has been published regularly and continuously since 1959.
5. it is generally circulated within Fort Bend County.

(CLIPPING) (S)

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Publisher further deposes and says that the attached notice was published in said newspaper on the following date(s) to wit:

4-2

_____, A.D. 2019

[Signature]

Lee Hartman
Publisher

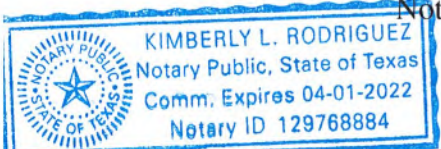
SUBSCRIBED AND SWORN BEFORE ME by Lee Hartman, who

X a) is personally known to me, or

b) provided the following evidence to establish his/her identity, _____

on this the 3 day of April, A.D. 2019 to certify which witness my hand and seal of office.

[Signature]
Notary Public, State of Texas



7-2

City of Fulshear

PUBLISHER'S AFFIDAVIT

R1 Rodgers Road

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COUNTY OF FORT BEND §

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Lee Hartman
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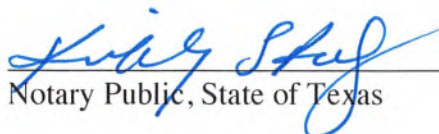
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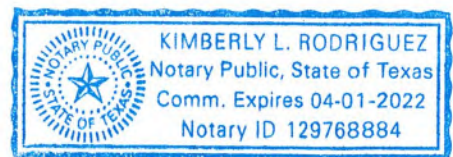
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Notary Public, State of Texas





**FULSHEAR ECONOMIC DEVELOPMENT
COMMUNICATION FORM
April 16, 2019**

ITEM	TITLE
	Fulshear Demographic Update
ITEM/MOTION	
Discussion and presentation on 2019 Fulshear Demographic Update from Population and Survey Analysts (PASA).	
ESTIMATED EXPENDITURE:	BUDGET ACCOUNT:

SUBMITTED BY:

Angela E. Fritz
Economic Development Director

SUPPORTING DOCUMENTS:

1. PASA 2019 Update - Executive Summary
2. [Fulshear 2019 Demographic Update – Full Report](#)

EXECUTIVE SUMMARY

The EDCs initially funded an inaugural demographic study for the City of Fulshear in 2017 to better measure the City's population, and to project future residential and population growth based on real-time, on the ground data specific to Fulshear. The City engaged PASA, a demography firm who already works extensively on the ground in Fort Bend and the greater Houston area on school district demographic reports and updates, to complete the project.

2019 marks the third year of the report which establishes a baseline population and growth projections for the City and its ETJ. These data have become the foundational in planning efforts across the City. The reports are available on the City's website and are utilized and referenced frequently. Additionally, an accompanying Development Overview Map is created, which is also used extensively across the organization.

Justin Silhavy, Director of Demographic Projections for PASA, will be on hand to present an overview of the update, and to answer any questions the EDCs or City Council might have.

EXECUTIVE SUMMARY



Population and Survey Analysts (PASA) has recently completed a Demographic Update for the City of Fulshear, and the findings are summarized below. The Demographic Update included the study of the current population, potential growth based on new housing, and trends occurring in the population throughout the northwest Fort Bend County region. PASA projects population by using forward-looking techniques and does not rely on past rates of change.

OCTOBER 2018 POPULATION ESTIMATE

After evaluating the current population of the City and the City’s Extra-territorial Jurisdiction (ETJ), recent trends in population, projected additional housing occupancies and their resulting household size, and the over-arching economic and employment concerns, PASA has estimated the population inside the City Limits to be 12,025. This represents a population increase of 1,741 (16.9%) from October 2017 to October 2018.

City	12,025
ETJ	16,009
City + ETJ	28,034

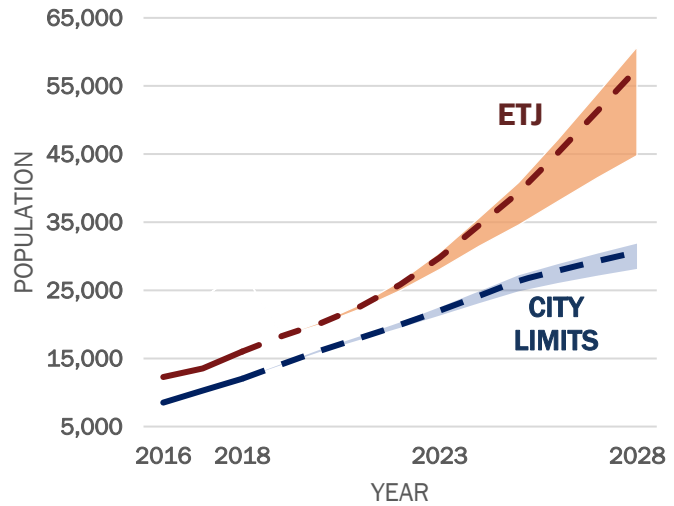
ANNUAL POPULATION PROJECTIONS

	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
City											
Population	12,025	14,141	16,187	18,040	19,953	22,022	24,192	26,372	27,893	29,306	30,622
Change		2,116	2,046	1,853	1,913	2,069	2,170	2,180	1,521	1,413	1,316
Growth		18%	14%	11%	11%	10%	10%	9%	6%	5%	4%
ETJ											
Population	16,009	18,271	20,184	22,652	25,852	29,811	34,579	39,365	45,191	51,367	57,520
Change		2,262	1,913	2,468	3,200	3,959	4,768	4,786	5,826	6,176	6,153
Growth		14%	10%	12%	14%	15%	16%	14%	15%	14%	12%
City + ETJ		32,412	36,371	40,692	45,805	51,833	58,771	65,737	73,084	80,673	88,142

Without annexation, growth in the City Limits is expected to decrease from 1,900–2,200 annually to 1,316 in 2028. The annual population change within the ETJ is projected to grow larger throughout the ten-year projection period. By October 2019, an additional 2,262 people are projected to live in the Fulshear ETJ. By 2023, the population of the ETJ is projected to substantially increase, expanding by 4,000 annually until 2025 and then by 6,176 in 2027.

GROWTH SCENARIOS

PASA takes a “conservative” approach to projecting growth, and develops a Low, Moderate, and High scenario of growth for each of the years in the projection period. These scenarios are shown on a graph to the right. The moderate growth scenarios are illustrated with hashed trend lines. In blue, the population in the City Limits is projected to grow to over 30,000 by 2028. The population of the ETJ is projected to increase to just under 60,000 in the same period. The shaded portions of the chart indicate the low- and high-growth scenarios for each jurisdiction.



PROJECTIONS BY COMMUNITY

PASA has generated population projections by Planning Unit, neighborhood-level geographies, to aid in long range planning and has then aggregated the data into the boundaries of both master-planned communities and City regions. Population projections of selected communities are included in the following chart:

Community	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
CITY LIMITS											
Cross Creek Ranch	10,242	12,004	13,631	15,005	16,320	17,576	18,868	20,168	20,812	21,317	21,695
Downtown Area (A03, B02)	316	363	327	346	399	491	586	681	807	957	1,120
Fulbrook on Fulshear Creek	1,023	1,245	1,457	1,682	1,920	2,187	2,469	2,753	3,035	3,317	3,601
Fulshear Run	106	177	262	348	439	611	767	923	964	993	1,025
Polo Ranch	0	34	158	307	518	751	984	1,217	1,466	1,715	1,964
ETJ											
Churchill Farms	1,863	1,959	1,979	1,999	2,019	2,039	2,059	2,080	2,101	2,122	2,143
Firethorne	9,205	9,757	9,954	10,286	10,762	11,241	11,595	11,957	12,118	12,289	12,469
Foster Farms	0	0	3	3	3	37	194	351	772	1,275	1,832
Fulbrook	669	730	759	788	814	839	864	889	914	937	960
Fulshear Farms	0	0	0	201	469	998	1,756	2,514	3,508	4,597	5,768
Fulshear Lakes	0	0	58	235	557	984	1,503	2,022	2,752	3,524	4,330
Harrison Interests Tract	0	0	0	0	27	211	584	957	1,738	2,675	3,691
Jordan Ranch	667	1,148	1,810	2,555	3,428	4,458	5,542	6,631	7,573	8,505	9,220
Tamarron	3,089	3,997	4,632	5,309	5,991	6,789	7,692	8,599	9,530	10,456	11,377

PROJECTIONS BY AGE GROUP

City of Fulshear

Age Group	2018		2023	
	*Estimate	%	**Projection	%
Under 5 Years	1,106	9.2%	2,195	10.0%
5 to 17 Years	3,066	25.5%	5,503	25.0%
18 to 24 Years	474	6.7%	1,204	5.5%
25 to 34 Years	1,190	9.9%	1,608	7.3%
35 to 54 Years	4,064	33.8%	6,722	30.5%
55 to 74 Years	1,599	13.3%	3,982	18.1%
75 Years and Over	192	1.6%	808	3.7%
All Age Groups	12,025		22,022	

Source: U.S. Census

*Estimate is based on the Five-Year, 2017 American Community Survey

**PASA projection

PROJECTED NEW HOUSING UNITS

PASA has projected new housing occupancies for the next ten years. These projections are based on interviews with land owners, real estate experts, commercial brokers, and City and County officials. These projections are for the number of new housing units only and are not a reflection of the total population expected in each development.

	Projected New Housing Occupancies				
	Single-Family	Multi-Family	Mixed Use	Age-Restricted	Total
Jan 2019–Oct 2019	878	80	0	83	1,041
Oct 2019–Oct 2020	1,083	180	0	83	1,346
Oct 2020–Oct 2021	1,270	155	25	75	1,525
Oct 2021–Oct 2022	1,611	140	30	75	1,856
Oct 2022–Oct 2023	1,933	240	85	75	2,333
Oct 2023–Oct 2024	2,273	235	145	75	2,728
Oct 2024–Oct 2025	2,367	320	175	75	2,937
Oct 2025–Oct 2026	2,433	335	195	75	3,038
Oct 2026–Oct 2027	2,501	375	215	75	3,166
Oct 2027–Oct 2028	2,449	400	215	29	3,093
Jan 2019–Oct 2023	6,775	795	140	391	8,101
Oct 2023–Oct 2028	12,023	1,665	945	329	14,962
Jan 2019–Oct 2028	18,798	2,460	1,085	720	23,063

PROPORTION OF HOUSING UNITS BY HOUSING TYPE

Housing Type	2018		2023 Projected		2028 Projected	
Single-Family/Condo/Mixed Use	9,048	98.6%	14,856	91.9%	26,934	89.1%
Age-Restricted SF	128	1.4%	519	3.2%	848	2.8%
Multi-Family	0	0.0%	795	4.9%	2,460	8.1%
Total Housing Units	9,176		16,170		30,242	

*Housing Units in the City Limits and ETJ

HOUSEHOLD SIZE AND HOUSING TYPES

The average household size of neighborhoods in the Study Area can vary dramatically. Neighborhood attributes such as lot sizes, amenities, and lifestyle options impact the number of people residing in individual homes. Conventional suburban residential communities generally have a larger median household size, particularly as the neighborhood ages and a “peak” population develops. Traditional suburban single-family neighborhoods in northern Fort Bend County have a median household size of 3.15 to 3.50. In comparison, estate communities such as Fulbrook and nearby Weston Lakes have a median household size of approximately 2.65 to 2.85 according to the U.S. Census. Exurban communities on the fringes of the Metro Area are often marketed to older, smaller households. These exurban neighborhoods feature larger lots that appeal to retirees.

Housing Type	Typical Household Size
Multi-Family, majority 1-bedroom	1.55-1.85
Multi-Family, majority 2+ bedroom	1.85-2.25
Single-Family, Family Oriented	3.15-3.30 initially; 3.30-3.50 at peak
Single-Family, Age-Restricted 55+	1.65-1.80
Single-Family, Acreage/Rural Estate	2.65-2.85

PASA has estimated household size for each current and future neighborhood by using various data sources to create useful population estimates and projections by Planning Unit. In order to determine household size estimates, census-estimated household sizes by Census Block Group and Census Tract were analyzed as well as Lamar CISD and Katy ISD enrollment counts by neighborhood. Housing styles, apartment bedroom counts, and covenants that restrict youth from living in homes were also considered along with other demographic characteristics of developing neighborhoods. **The weighted mean household size in the Study Area was determined to be 3.15.**

Multi-family developments in the western suburbs tend to have a median household size of 1.55 to 2.25 depending on the proportion of one-bedroom apartments to total number of units within each individual property.

PROPORTION OF POPULATION BY HOUSING TYPE

Housing Type	2018		2023 Projected		2028 Projected	
Single-Family	27,810	99.20%	49,736	96.0%	81,875	92.9%
Age-Restricted SF	224	0.80%	908	1.8%	1,484	1.7%
Multi-Family	0	0.00%	1,189	2.3%	4,783	5.4%
Population	28,034		51,833		88,142	

*Housing Units in the City and ETJ

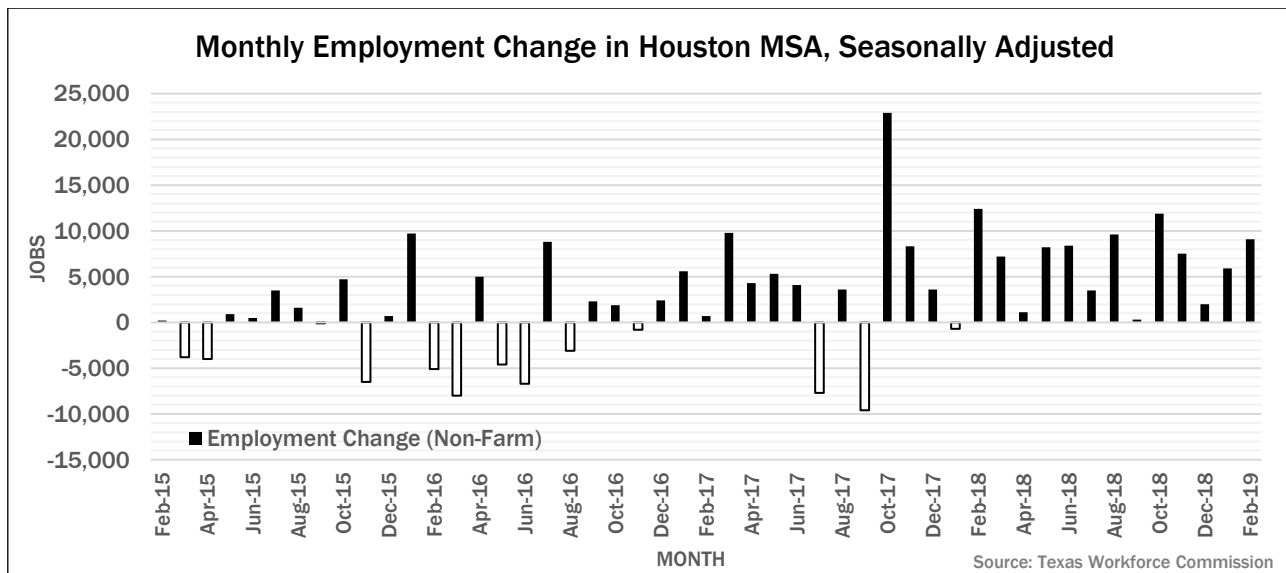
HOUSING OCCUPANCY STATUS

PASA considers vacant housing when creating population projections for such a large study area. The U.S. Census estimates that 6.3% of the existing housing stock in the City of Fulshear is vacant per the 2017 American Community Survey. In the two Census Tracts covering the Study Area, the Survey estimates the vacancy rate to be 5.8%, cumulatively. PASA has assumed a 4% vacancy rate for the Study Area since much of the Area is outside the City of

Fulshear but inside the county. Also, PASA does not consider new homes available for purchase to be occupied. New housing communities are surveyed by PASA staff and only occupied homes are counted. Unoccupied, new homes are included in the housing projections for each individual community. As neighborhoods age, PASA assumes vacancies will gradually increase closer to 5% as homes are placed on the market and resold. The housing counts available in this report, however, include totals for all homes completed. These housing counts and projected housing counts include all occupied and vacant homes for completeness so planners can determine the projected number of utility connections annually.

ECONOMIC GROWTH

The availability of large tracts of raw land, affordable housing, and high-quality schools will pull many of Houston Metro’s new residents and homebuyers toward Fulshear over the next few decades. PASA’s low and high growth scenarios should be considered if any turbulence in the local or national economy were to occur. As was evident during the Financial Recession of the late-2000s, suburban communities can be dramatically affected by an economic slowdown. In the north Dallas suburbs for example, the fast-growing City of Frisco saw housing permits drop 77% in a three-year period from 2006 to 2009.



The Greater Houston Partnership released a positive employment forecast for 2019. The forecast suggests that all sectors of the economy will see continued growth, with health care, construction and administrative performing the strongest. Overall, 71,000 new jobs are projected to be created across the Houston Metro Area—the majority of which, 12.6%, will be in healthcare, a leading sector in Metro Houston’s economy. This projected increase in employment mirrors the 12-month period ending February 2019. During this period, 74,700 jobs were added in the Metro Area. Both state and local employment is strong. The Texas unemployment rate was 3.8% in February 2019. Also in February 2019, Fort Bend County’s unemployment was 3.9%.

ENERGY SECTOR OUTLOOK

In August 2018, the United States became the world's largest oil producer. The Permian Basin in West Texas is the leading production region in the country and continues to grow. The State's booming oil and gas industry continues to react to volatile markets, technological advancements, and infrastructure improvements. After high third quarter profit announcements by many energy companies, the commodity's price drop in the fourth quarter is creating uncertainty in the sector's ability to maintain the growth. Pipeline constraints are currently lowering prices of oil in the Permian Basin region of West Texas. Production in the Permian Basin is projected to nearly double, from 3.4 million barrels per day to 5.4 million barrels per day by 2023, according to a recent report by IHS Markit. Much of the increase is expected after 2020, as mid-stream energy companies complete numerous pipeline construction projects from the Permian Basin to the Gulf Coast refining centers.

Industry experts expect the oil and gas boom to continue since companies have proven their ability to make profits even when the price per barrel hovers around \$50 per barrel. Since the 2015 oil bust, many companies have been investing carefully and are better prepared to survive low oil prices. Dr. Ray Perryman of The Perryman Group suggests that energy companies believe technological advancements in drilling will likely produce higher yields at lower costs within the next five years. The Houston economy in turn is likely to have more stable growth and less unpredictability in the coming decade.

MANUFACTURING AND LOGISTICS

As online commerce expands along with the population of Texas and other south-central states, distribution and warehousing will have a larger role in Houston's economy. Fulshear is located near one of the three fulfillment/distribution hubs in Metro Houston, the far west-northwest suburbs. The Interstate 10 Corridor between Katy and Brookshire has seen tremendous growth in industrial development, and more companies continue to expand in the area. The proximity to Interstate 10 and U.S. 290 is proving to be a draw for many retailers and distributors who want central access to Houston and quick access to other parts of the growing region and state including San Antonio and Austin.

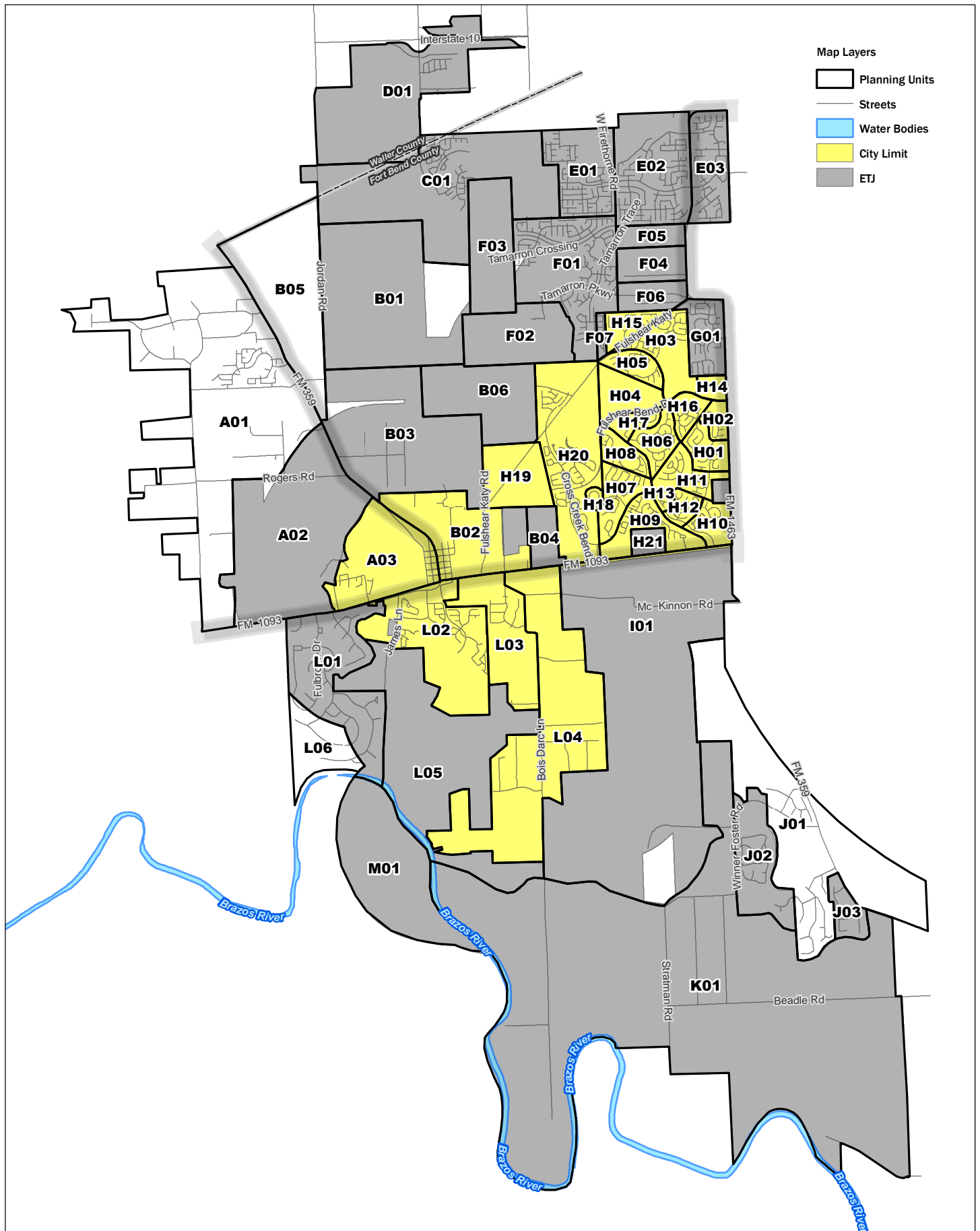
Recent industrial expansions in the region include:

- Amazon completed its 1 million-square foot fulfillment center at the northeast corner of Woods Road and Katy Freeway. The company originally planned to hire 1,000 employees to work in the warehouse in southeastern Waller County, just north of Interstate 10;
- Goya Foods expanded its north American Processing Center along U.S. 90 at Woods Road in the summer of 2018, creating 30 jobs.
- Twinwood broke ground on the 650-acre Twinwood Business Park in mid-2018. Located just inside Waller County, along and south of the future Twinwood Ranch Road, MAN Diesel & Turbo is constructing a 137,000-sq. ft. facility. The company plans to relocate its Houston and Deer Park manufacturing centers to this new facility. An estimated 142 jobs will be located at the facility which is expected to open in mid-2019. Twinwood aims to become a research and development hub for manufacturing, distribution, and light industrial companies and is part of a larger master-planned community in Simonton that will ultimately consist of approximately 10,000 acres of residential and commercial development.

- In May 2018, a new 150-acre industrial park named Pintail Crossing was announced and planned along Interstate 10 in Katy. In December 2018, Costco Wholesale Corp. purchased the entire property from Hines Development, with plans to build a regional distribution center on the site.
- Dollar Tree announced in February 2019 plans to construct a 1.2 million-sq. ft. distribution facility in Rosenberg. The City of Rosenberg is planning to annex 203 acres southwest of the intersection of Spur 10 and Klosterhoff Road for the site, and it is likely to create 200 jobs upon completion. Within three years, the facility is projected to employ 300-400.

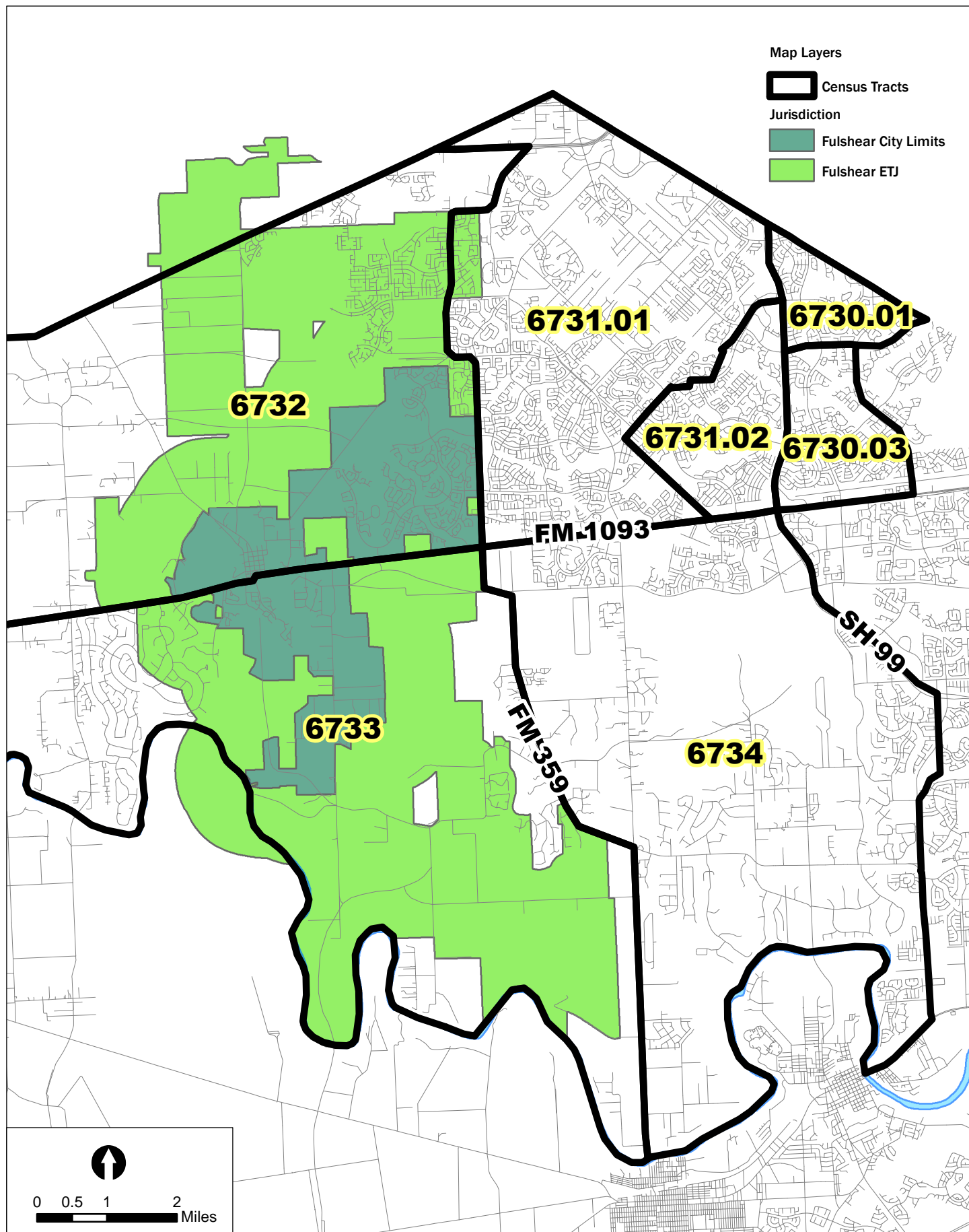
Planning Units in the Study Area

City of Fulshear: City Limits and ETJ



2010 Census Tract Boundaries

North Fort Bend County



Demographic Characteristics by Census Tract
2017 Five-Year American Community Survey



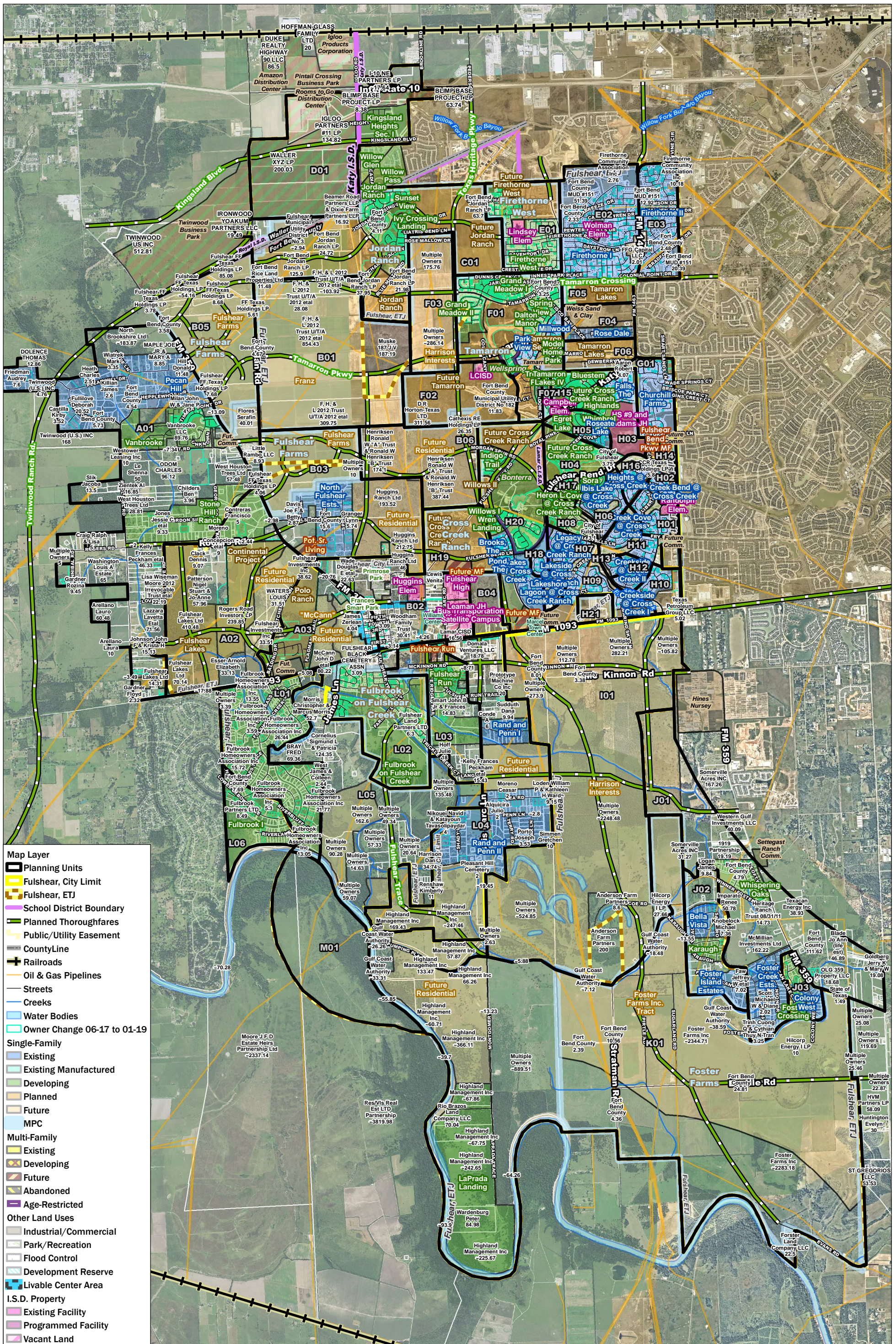
Demographic Characteristics	Tract 6730.01	Tract 6730.03	Tract 6731.01	Tract 6731.02	Tract 6732	Tract 6733	Tract 6734
Total households	2,703	3,924	18,670	5,974	4,421	2,316	7,462
Average household size	3.01	3.27	3.5	3	3.25	2.66	3.08
Total Population	8,144	12,831	65,528	17,950	14,373	6,162	22,998
Under 5	4.5%	6.0%	8.9%	4.7%	10.7%	4.4%	10.3%
Ages 5-17	23.7%	27.9%	27.1%	25.7%	23.0%	14.5%	19.7%
Ages 18-24	5.7%	6.9%	6.2%	5.8%	5.2%	4.8%	7.3%
Ages 25-34	5.4%	4.3%	9.4%	7.3%	11.4%	6.2%	12.6%
Ages 35-49	23.7%	30.3%	30.8%	27.4%	27.4%	15.5%	24.8%
Ages 50-59	18.4%	16.0%	9.1%	14.7%	12.5%	18.4%	12.6%
60 Year and Over	18.8%	8.6%	8.6%	14.3%	9.8%	36.3%	12.7%
Population 25 and Over							
Bachelor's degree or higher	69.1%	70.7%	63.8%	61.0%	56.7%	56.1%	50.2%
Labor Force Over 16							
Percent Unemployed	3.3%	1.9%	3.6%	2.8%	2.4%	2.5%	3.0%
Median Household Income	\$142,241	\$156,310	\$148,974	\$114,846	\$145,247	\$156,157	\$116,320
Housing Characteristics							
Median Home Value, Owner-Occupied	\$313,600	\$314,900	\$330,900	\$300,200	\$363,200	\$439,300	\$291,800
Owner-occupied housing units	88.1%	91.0%	85.9%	80.7%	95.4%	94.6%	92.3%
Renter-occupied housing units	11.9%	9.0%	14.1%	19.3%	4.6%	5.4%	7.7%

Residential Development Overview

City of Fulshear



0 0.5 1 2 Miles



- Map Layer**
- Planning Units
 - Fulshear, City Limit
 - Fulshear, ETJ
 - School District Boundary
 - Planned Thoroughfares
 - Public/Utility Easement
 - CountyLine
 - Railroads
 - Oil & Gas Pipelines
 - Streets
 - Creeks
 - Water Bodies
 - Owner Change 06-17 to 01-19
- Single-Family**
- Existing
 - Existing Manufactured
 - Developing
 - Planned
 - Future
 - MPC
- Multi-Family**
- Existing
 - Developing
 - Future
 - Abandoned
- Other Land Uses**
- Industrial/Commercial
 - Park/Recreation
 - Flood Control
 - Development Reserve
 - Livable Center Area
 - I.S.D. Property
 - Existing Facility
 - Programmed Facility
 - Vacant Land

Oil and Gas Pipelines

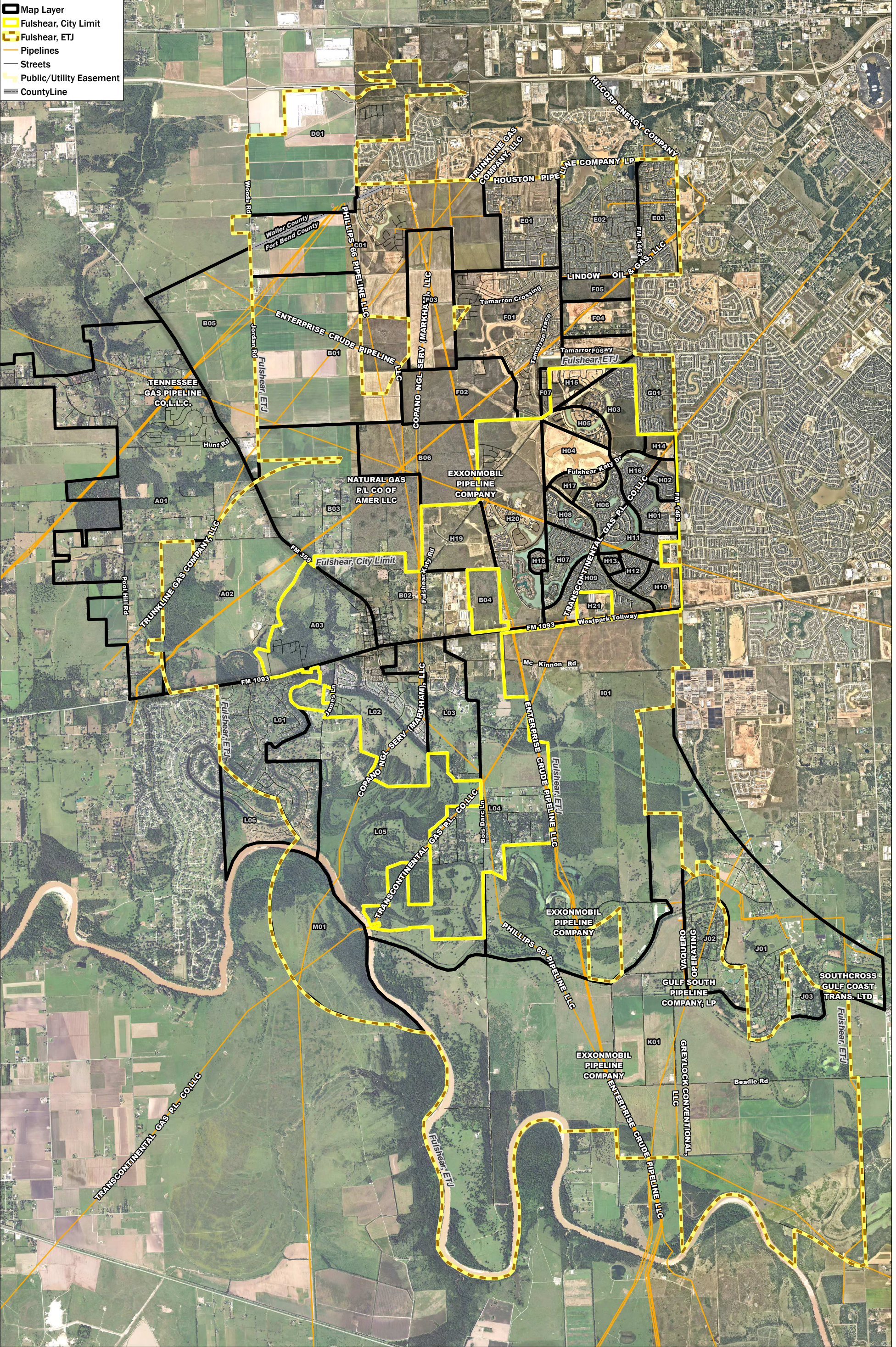
City of Fulshear



0 0.5 1 2 Miles

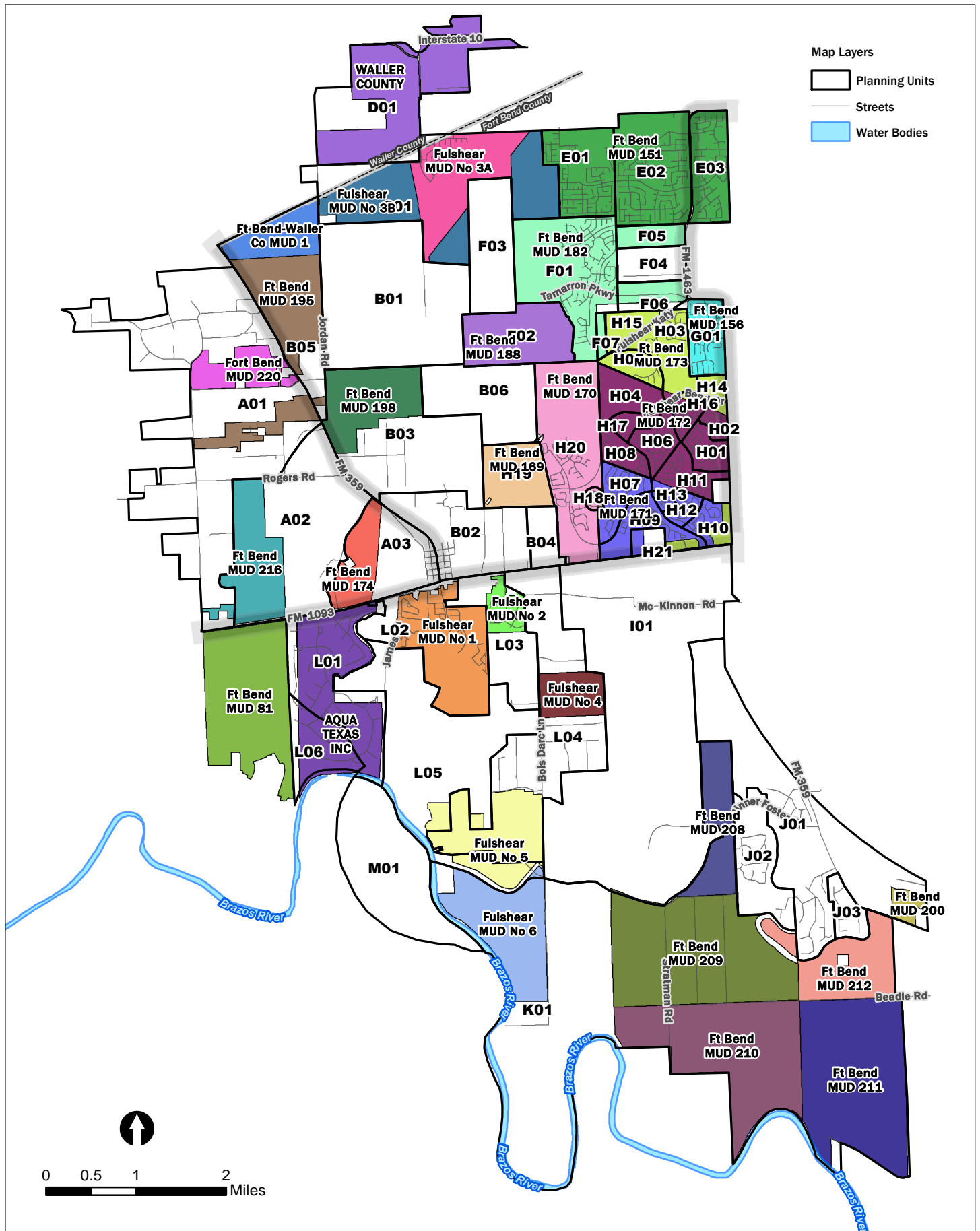


- Map Layer
- Fulshear, City Limit
- Fulshear, ETJ
- Pipelines
- Streets
- Public/Utility Easement
- CountyLine



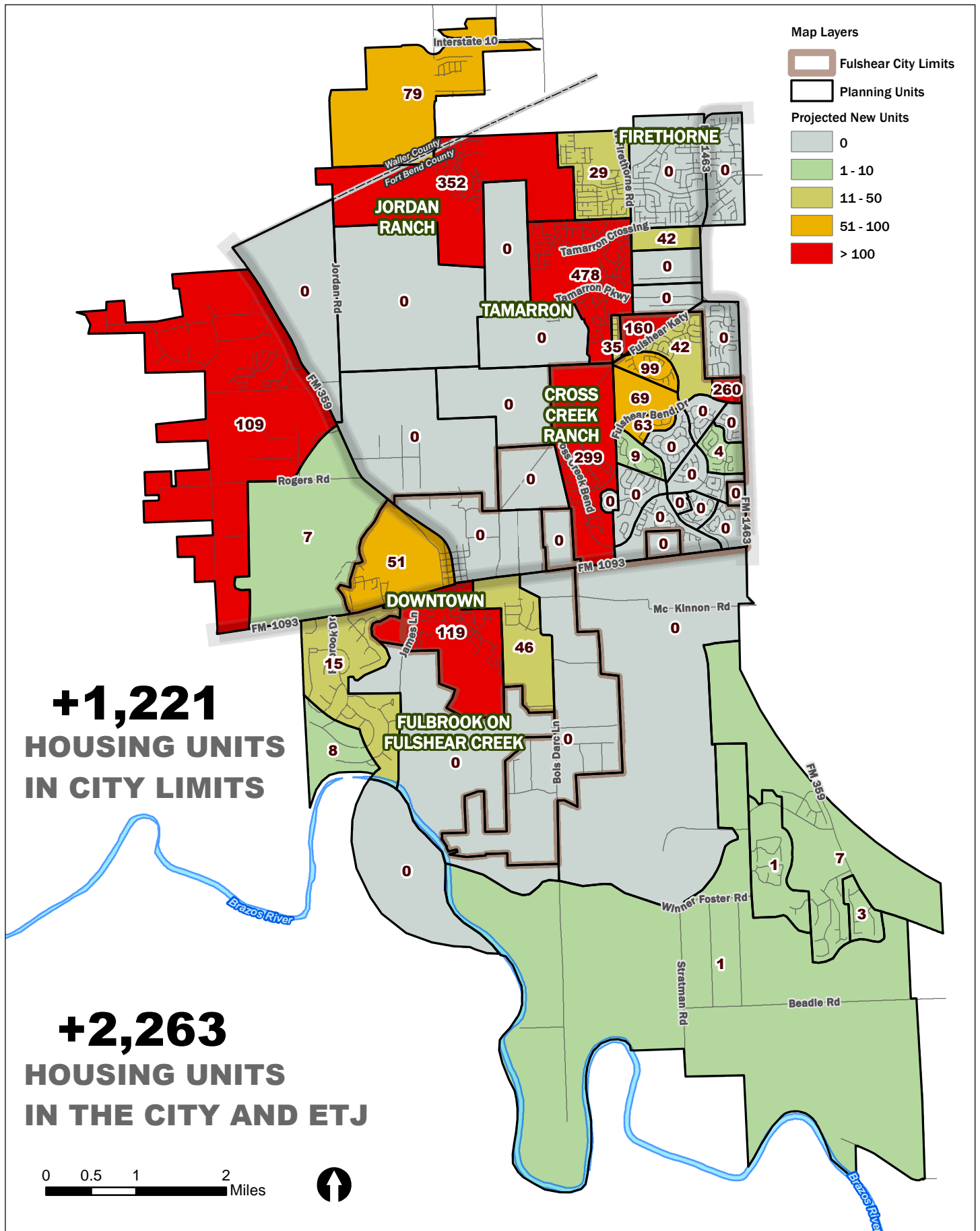
Municipal Utility Districts

City of Fulshear: City Limits and ETJ



Projected New Housing Units

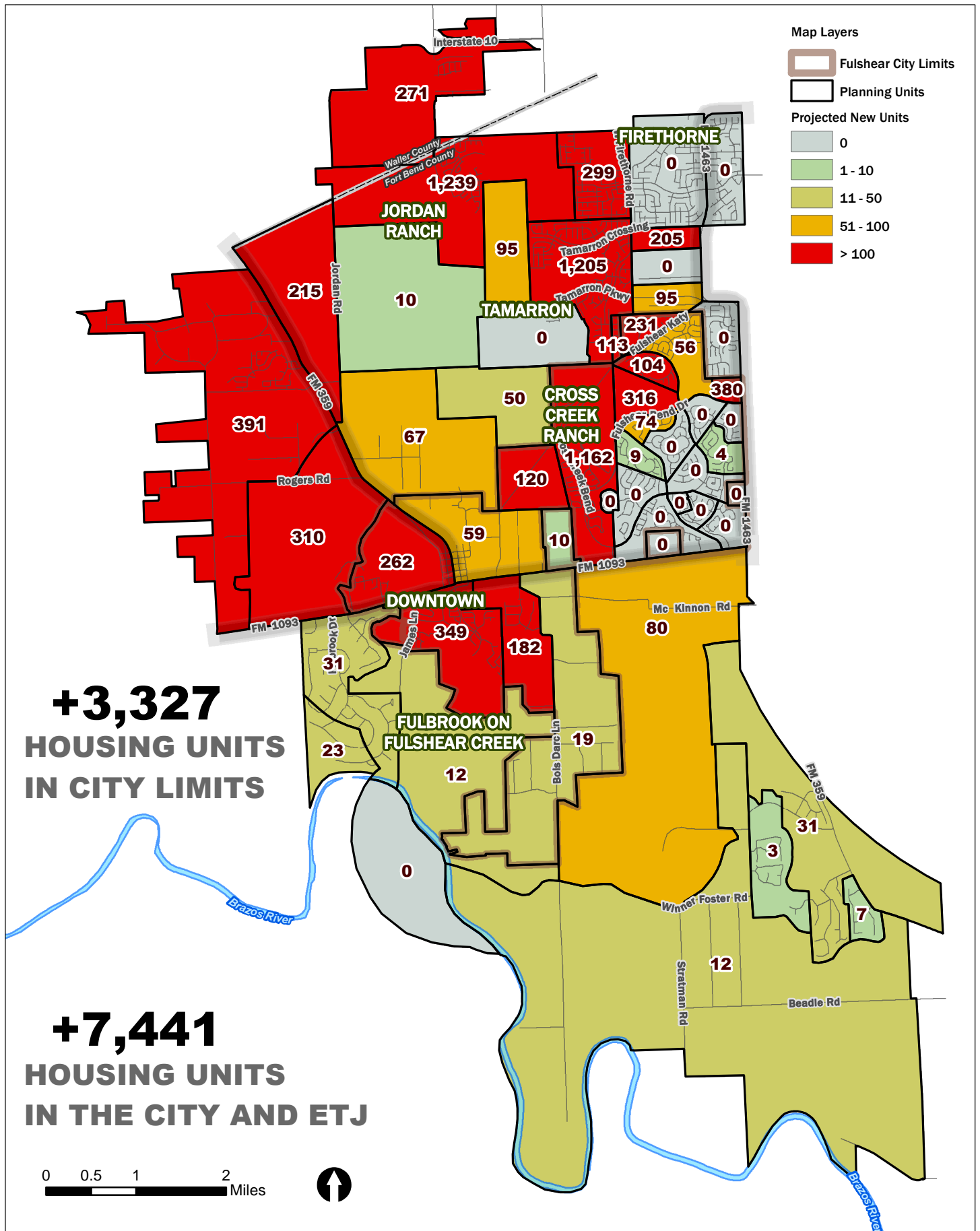
October 2018 to October 2020, Two Years



0 0.5 1 2 Miles

Projected New Housing Units

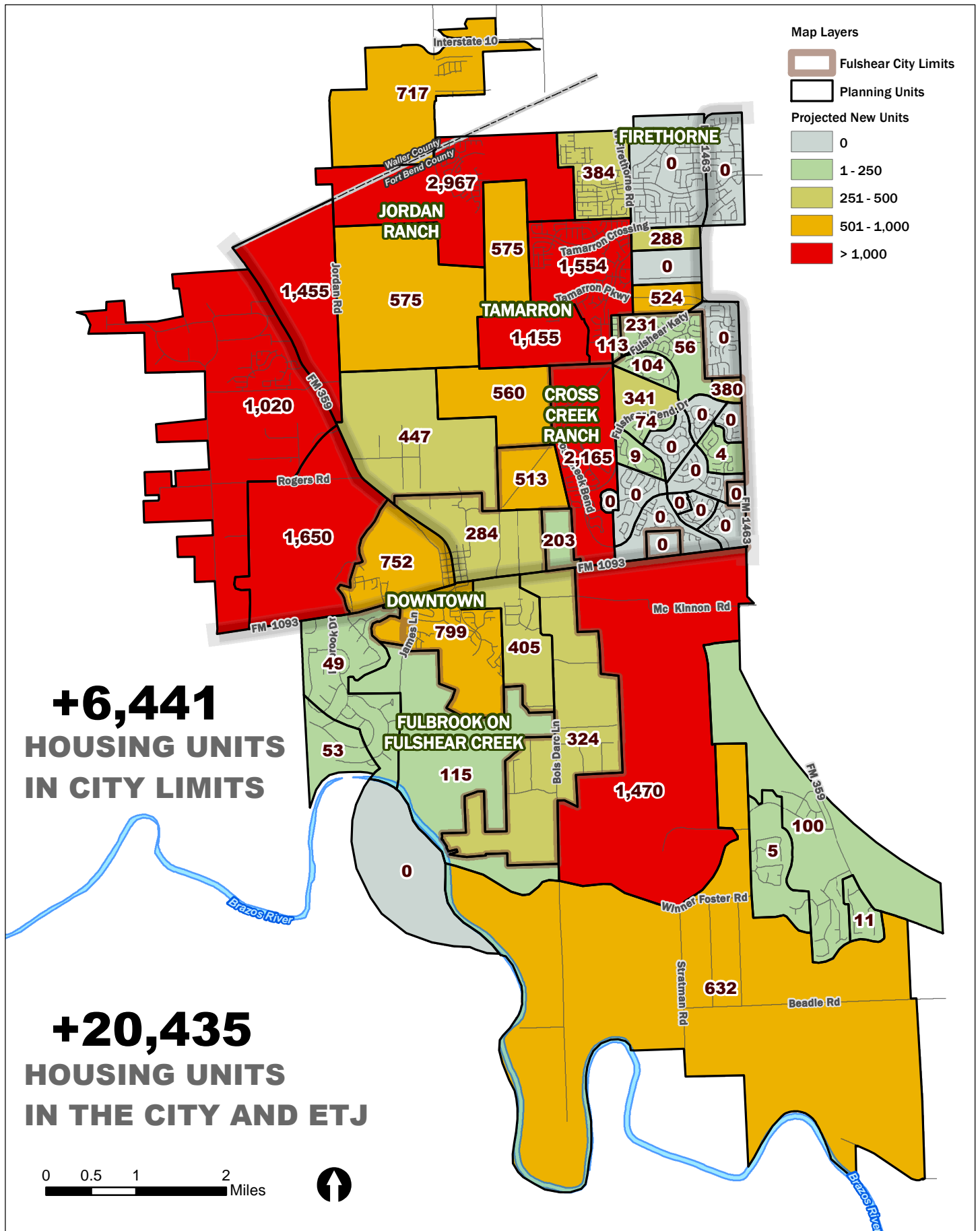
October 2018 to October 2023, Five Years



0 0.5 1 2 Miles

Projected New Housing Units

October 2018 to October 2028, Ten Years



PROJECTED HOUSING UNITS BY PLANNING UNIT
FULSHEAR, TEXAS



Planning Unit	Area	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
A01	X	251	294	360	436	533	642	767	906	1,055	1,188	1,271
A02	ETJ	17	17	24	81	186	327	503	750	1,034	1,340	1,667
A03	CL	63	74	114	164	239	325	412	503	602	707	815
B01	ETJ	0	0	0	0	0	10	50	140	260	410	575
B02	CL	71	71	71	79	97	130	166	209	254	303	355
B03	ETJ	48	48	48	49	75	115	166	232	308	394	495
B04	ETJ	0	0	0	0	0	10	35	73	113	158	203
B05	X	0	0	0	25	85	215	410	625	880	1,160	1,455
B06	ETJ	0	0	0	0	15	50	110	200	315	435	560
C01	ETJ	224	366	576	816	1,101	1,463	1,847	2,206	2,555	2,908	3,191
D01	ETJ	0	29	79	132	192	271	373	486	597	667	717
E01	ETJ	999	1,010	1,028	1,088	1,193	1,298	1,363	1,383	1,383	1,383	1,383
E02	ETJ	1,330	1,330	1,330	1,330	1,330	1,330	1,330	1,330	1,330	1,330	1,330
E03	ETJ	633	633	633	633	633	633	633	633	633	633	633
F01	ETJ	1,048	1,309	1,526	1,754	1,983	2,253	2,476	2,579	2,597	2,600	2,602
F02	ETJ	0	0	0	0	0	0	70	270	555	855	1,155
F03	ETJ	0	0	0	5	40	95	165	260	365	470	575
F04	ETJ	19	19	19	19	19	19	19	19	19	19	19
F05	ETJ	0	7	42	87	147	205	263	288	288	288	288
F06	ETJ	3	3	3	28	53	98	173	248	327	427	527
F07	ETJ	0	11	35	74	111	113	113	113	113	113	113
G01	ETJ	574	574	574	574	574	574	574	574	574	574	574
H01	CL	260	264	264	264	264	264	264	264	264	264	264
H02	CL	173	173	173	173	173	173	173	173	173	173	173
H03	CL	345	367	387	399	401	401	401	401	401	401	401
H04	CL	0	2	69	146	238	316	339	341	341	341	341
H05	CL	124	191	223	228	228	228	228	228	228	228	228
H06	CL	224	224	224	224	224	224	224	224	224	224	224
H07	CL	239	239	239	239	239	239	239	239	239	239	239
H08	CL	111	117	120	120	120	120	120	120	120	120	120
H09	CL	336	336	336	336	336	336	336	336	336	336	336
H10	CL	160	160	160	160	160	160	160	160	160	160	160
H11	CL	239	239	239	239	239	239	239	239	239	239	239
H12	CL	134	134	134	134	134	134	134	134	134	134	134
H13	CL	50	50	50	50	50	50	50	50	50	50	50
H14	CL	0	80	260	350	380	380	380	380	380	380	380
H15	CL	148	232	308	367	379	379	379	379	379	379	379
H16	CL	186	186	186	186	186	186	186	186	186	186	186
H17	CL	32	68	95	104	106	106	106	106	106	106	106
H18	CL	67	67	67	67	67	67	67	67	67	67	67
H19	CL	0	0	0	0	45	120	250	400	485	513	513
H20	CL	440	575	739	984	1,286	1,602	1,907	2,111	2,281	2,461	2,605
H21	ETJ	0	0	0	0	0	0	0	0	0	0	0
I01	ETJ	0	0	0	0	10	80	220	450	740	1,090	1,470
J01	X	134	137	141	147	154	165	177	189	202	218	234
J02	ETJ	62	62	63	64	64	65	65	66	67	67	67
J03	ETJ	46	47	49	50	51	53	53	54	55	56	57
K01	ETJ	0	0	1	1	1	12	62	146	282	447	632
L01	ETJ	258	266	273	279	284	289	293	297	301	304	307
L02	CL	335	389	454	524	599	684	774	864	954	1,044	1,134
L03	CL	34	54	80	107	136	216	292	360	389	414	439
L04	CL	133	133	133	133	135	152	191	247	310	381	457
L05	ETJ	11	11	11	11	16	23	34	54	74	100	126
L06	X	10	14	18	23	28	33	39	45	51	57	63
M01	ETJ	0	0	0	0	0	0	0	0	0	0	0

HOUSING UNIT PROJECTIONS BY JURISDICTIONAL AREA

FULSHEAR, TEXAS



Projected New Housing Units Added Annually

Area	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
City	-	521	700	652	684	770	786	704	581	548	495
ETJ	-	470	572	761	1,003	1,308	1,604	1,861	2,034	2,183	2,198
City + ETJ	-	991	1,272	1,413	1,687	2,078	2,390	2,565	2,615	2,731	2,693
Outside ETJ	-	50	74	112	169	255	338	372	423	435	400

Projected Housing Units

Area	2018 Estimate	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
City	3,904	4,425	5,125	5,777	6,461	7,231	8,017	8,721	9,302	9,850	10,345
ETJ	5,272	5,742	6,314	7,075	8,078	9,386	10,990	12,851	14,885	17,068	19,266
City + ETJ	9,176	10,167	11,439	12,852	14,539	16,617	19,007	21,572	24,187	26,918	29,611
Outside ETJ	395	445	519	631	800	1,055	1,393	1,765	2,188	2,623	3,023