



Eagle
Mountain
Saginaw
Independent
School District

Quarterly Report 1Q20

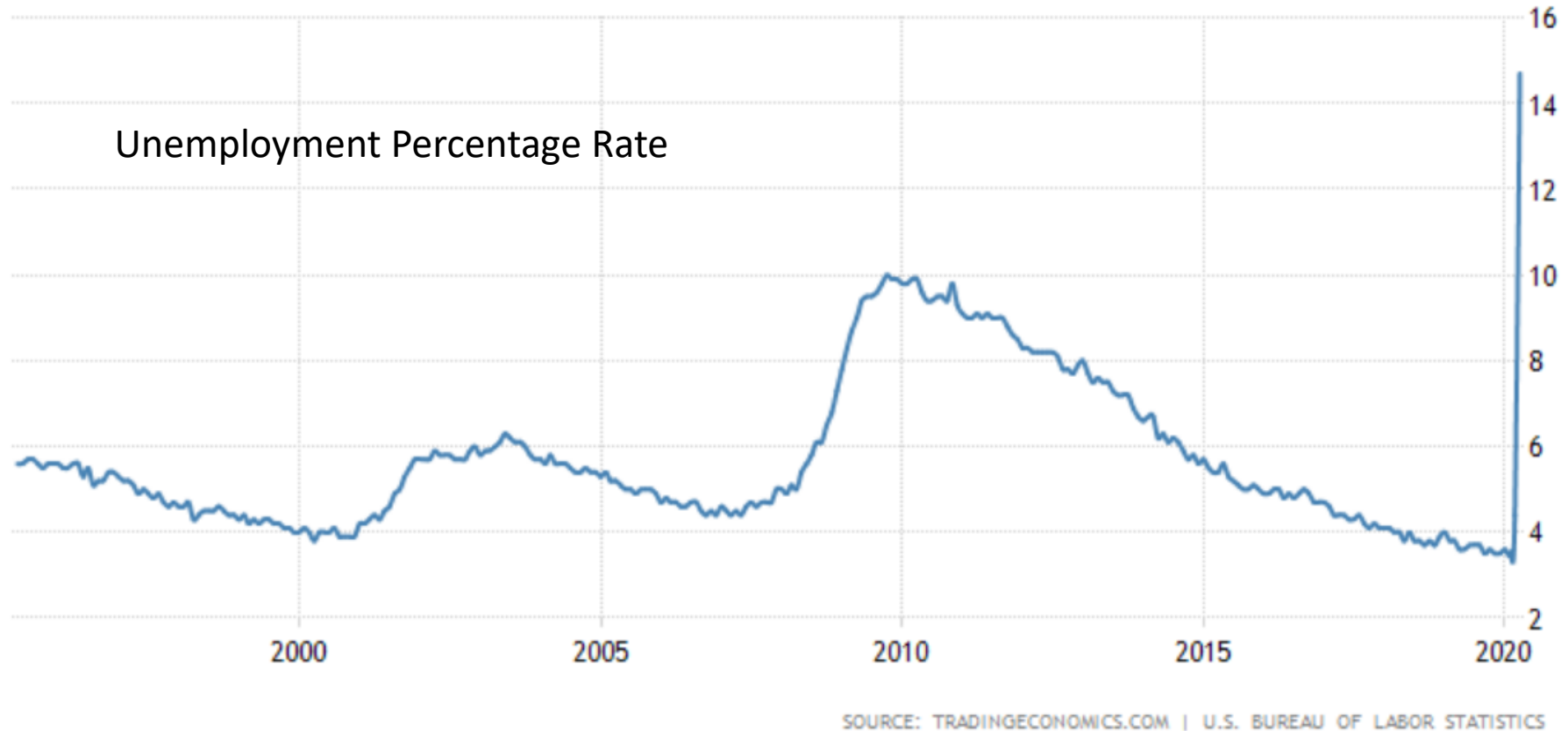


TEMPLETON
DEMOGRAPHICS

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Impacts of COVID-19 ...



- The current situation with COVID-19 is very fluid and ever-changing
- Approximately 30 million Americans filed for unemployment between mid March and late April
- National GDP decreased to -4.8% in 1Q20
- National GDP is forecasted to decrease by 28%, approximately \$2 billion in 2Q



Statewide Economic Conditions

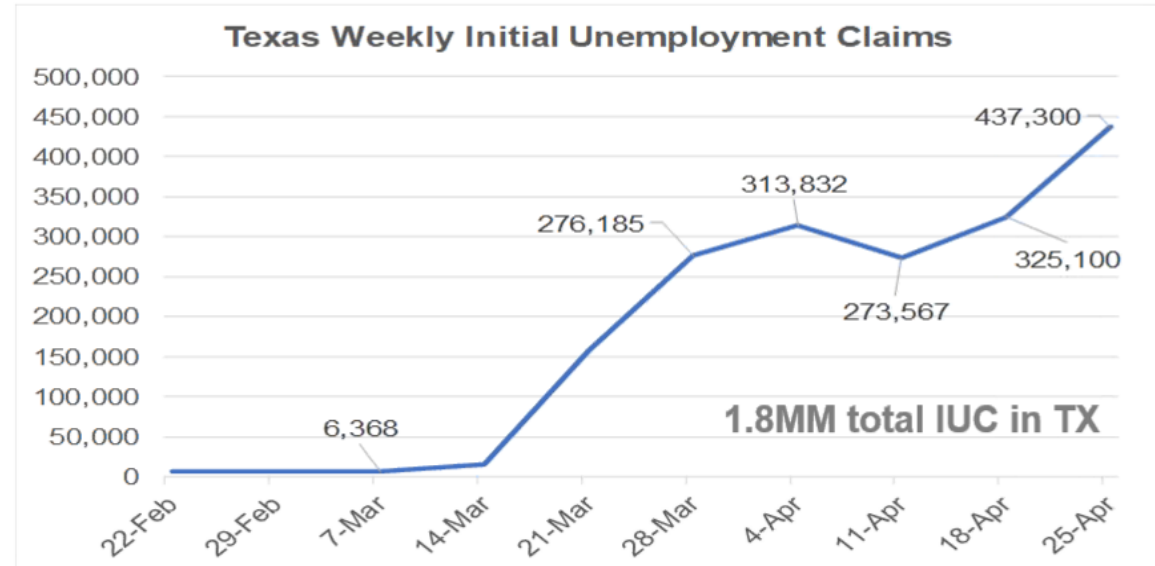
Lower Risk Markets: Short-Term

Salt Lake City	Austin
Minneapolis	Denver
Columbus	Tampa
Portland	Raleigh
Dallas	Phoenix

Higher Risk Markets: Short-Term

Las Vegas	Houston
Los Angeles/OC	Atlanta
Riverside	San Francisco
Miami	Jacksonville
Orlando	Cincinnati

Initial Unemployment Claims

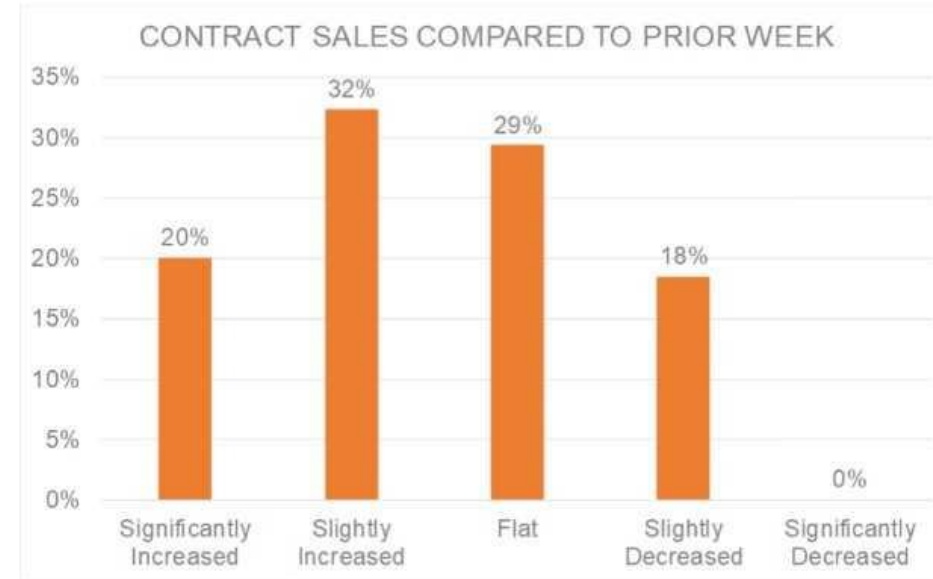
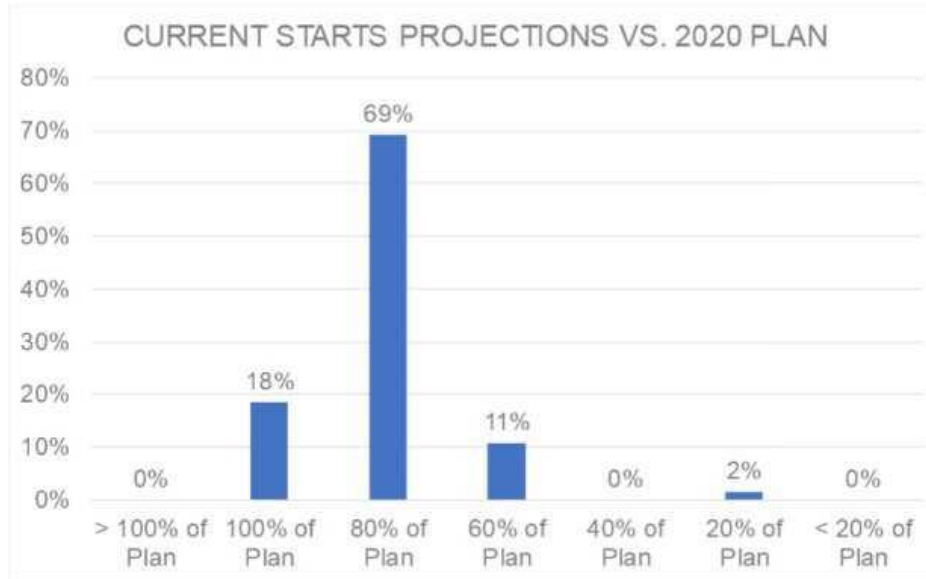


- Dallas and Austin are considered two of the markets nationwide with lower economic risk from the COVID pandemic, however, Houston is expected to experience high risk due to their connection to the oil industry
- Due to COVID impact, Texas has laid off approx. 12% of its workforce; ranked 6th best state economy in the nation
- Texas has 5 of the Top 10 Most Recession-Resistant Cities in America (Frisco, Plano, Denton, Austin and Lubbock)



Covid-19 and the Housing Market

Texas Builders Survey: Starts & Contract Sales (April 27TH)



While starts will be down in 2020, sales activity is adapting and stabilizing.

- Home sales in Texas have improved by late April as cancellations flattened
- Online home sales traffic and virtual interaction increased during the end of April
- Existing home listings decreased 11% YOY while new home listings increased 2% YOY; this is caused by a reluctance to list and show an existing home and a decline in new home sales activity
- Most builders expect to build roughly 80% of plan in 2020
- Low new and existing home inventory coming into the decline means a slowdown will not result in an oversupplied market



DFW New Home Ranking Report

ISD Ranked by Annual Closings – 1Q20

Rank	District Name	Annual Starts	Annual Closings	VDL	Inv	Futures
1	Prosper ISD	2,369	2,801	4,065	1,376	20,205
2	Denton ISD	2,577	2,578	4,242	1,290	20,129
3	Frisco ISD	2,177	2,299	3,107	1,597	4,814
4	Northwest ISD	2,339	2,299	3,333	1,241	22,918
5	Dallas ISD	1,751	1,793	1,980	1,979	6,035
6	Eagle Mt.-Saginaw ISD*	1,812	1,776	1,814	939	16,724*
7	Lewisville ISD	1,177	1,390	1,796	688	3,077
8	Forney ISD	1,502	1,295	2,800	749	28,172
9	Crowley ISD	1,350	1,201	1,040	567	16,652
10	Little Elm ISD	975	1,170	1,125	510	1,953
11	Mansfield ISD	926	985	1,300	482	7,276
12	McKinney ISD	986	972	2,110	570	8,503
13	Rockwall ISD	948	832	2,558	614	8,843
14	Royse City ISD	673	703	2,196	362	11,737
15	Wylie ISD	640	692	1,118	371	3,414
16	Plano ISD	490	689	675	322	1,286
17	Princeton ISD	714	676	1,269	284	7,801
18	Fort Worth ISD	526	672	1,317	379	5,680
19	Waxahachie ISD	895	667	882	514	20,225
20	Melissa ISD	715	658	960	381	4,985


* Based on additional Templeton Demographics housing research






District Housing Overview by Elementary Zone

Elementary	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Under Construction	Inventory	Vacant Dev. Lots	Futures
BRYSON	12	12	1	0	6	12	186	0
CHISHOLM RIDGE	150	29	122	39	40	71	112	462
COMANCHE SPRINGS	228	85	211	24	85	100	236	1,046
COPPER CREEK	262	55	259	58	66	123	313	452
DOZIER	206	47	229	50	51	86	175	317
EAGLE MOUNTAIN	79	22	58	15	63	73	207	10,430
ELKINS	154	34	251	28	47	62	151	419
GILILLAND	0	0	0	0	0	0	0	0
GREENFIELD	6	1	4	1	4	4	5	266
HIGH COUNTRY	202	74	173	47	93	129	30	47
LAKE POINTE	358	154	284	55	165	212	259	2,541
NORTHBROOK	54	0	115	10	0	2	0	0
PARKVIEW	78	11	56	12	29	46	63	744
REMINGTON POINT	0	0	0	0	0	0	0	0
SAGINAW	0	0	0	0	0	0	0	0
WILLOW CREEK	23	5	13	1	13	19	77	0
Grand Total	1,812	529	1,776	340	662	939	1,814	16,724

 Highest activity in the category

 Second highest activity in the category

 Third highest activity in the category



Ten Year Forecast by Grade Level

	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	Total %
2015/16	78	383	1,291	1,359	1,533	1,552	1,451	1,463	1,427	1,531	1,499	1,512	1,533	1,384	1,207	19,203		
2016/17	90	365	1,327	1,363	1,404	1,590	1,583	1,510	1,512	1,474	1,552	1,595	1,506	1,488	1,294	19,653	450	2.34%
2017/18	93	431	1,255	1,340	1,328	1,389	1,518	1,535	1,466	1,489	1,467	1,620	1,578	1,417	1,391	19,317	-336	-1.71%
2018/19	110	413	1,357	1,396	1,400	1,398	1,498	1,639	1,645	1,597	1,546	1,621	1,632	1,491	1,311	20,054	737	3.82%
2019/20	56	393	1,390	1,454	1,443	1,459	1,475	1,586	1,749	1,770	1,674	1,760	1,657	1,611	1,448	20,925	871	4.34%
2020/21 ADJ	53	424	1,452	1,511	1,509	1,503	1,517	1,553	1,709	1,797	1,809	1,876	1,752	1,591	1,524	21,580	655	3.13%
2020/21	53	427	1,463	1,523	1,520	1,516	1,529	1,564	1,722	1,810	1,822	1,876	1,752	1,591	1,524	21,692	767	3.67%
2021/22	55	445	1,516	1,597	1,590	1,588	1,586	1,600	1,645	1,795	1,863	2,004	1,880	1,697	1,504	22,365	673	3.10%
2022/23	57	459	1,562	1,651	1,663	1,677	1,662	1,672	1,685	1,708	1,841	2,040	1,996	1,817	1,603	23,093	728	3.26%
2023/24	58	472	1,607	1,692	1,720	1,742	1,748	1,717	1,719	1,748	1,757	2,068	2,031	1,925	1,715	23,720	627	2.71%
2024/25	60	485	1,652	1,739	1,774	1,809	1,815	1,835	1,802	1,783	1,793	1,907	2,066	1,963	1,817	24,301	581	2.45%
2025/26	62	501	1,704	1,780	1,803	1,870	1,870	1,889	1,854	1,865	1,832	1,965	1,905	1,991	1,852	24,743	441	1.82%
2026/27	63	507	1,725	1,847	1,840	1,890	1,932	1,943	1,907	1,915	1,909	2,019	1,951	1,835	1,878	25,159	417	1.68%
2027/28	65	524	1,783	1,862	1,909	1,924	1,940	2,009	1,955	1,968	1,958	2,087	2,011	1,882	1,732	25,608	449	1.78%
2028/29	66	534	1,820	1,915	1,921	1,994	1,977	2,001	2,011	2,025	1,999	2,097	2,045	1,934	1,777	26,116	508	1.98%
2029/30	68	548	1,865	1,953	1,970	2,004	2,048	2,048	1,997	2,081	2,058	2,177	2,075	1,967	1,824	26,681	565	2.16%

Yellow box = largest grade per year
 Green box = second largest grade per year



One Year Covid-19 Impact Projections

Campus	Fall	2020/21 Enrollment Projections by Grade										Original Projection
	2019/20	EE	PK	K	1st	2nd	3rd	4th	5th	Total	Change	2020/21
HAFLEY DEVELOPMENT CENTER	449	53	424	0	0	0	0	0	0	477	28	480
BRYSON ELEMENTARY	532	0	0	84	91	88	85	90	100	537	5	538
CHISHOLM RIDGE ELEMENTARY	636	0	0	106	106	98	99	115	113	638	2	643
COMANCHE SPRINGS ELEM	809	0	0	69	67	71	76	92	70	444	-365	459
COPPER CREEK ELEMENTARY	0	0	0	77	78	71	71	60	79	435	435	443
DOZIER ELMENTARY	556	0	0	99	108	96	128	77	103	612	56	622
EAGLE MOUNTAIN ELEMENTARY	658	0	0	103	108	115	119	111	116	671	13	672
ELKINS ELEMENTARY	444	0	0	76	78	72	94	76	84	481	37	486
GILILLAND ELEMENTARY	489	0	0	73	74	87	86	78	95	493	4	493
GREENFIELD ELEMENTARY	755	0	0	115	130	130	135	127	107	744	-11	744
HIGH COUNTRY ELEMENTARY	560	0	0	85	83	88	102	113	92	564	4	569
LAKE POINTE ELEMENTARY	793	0	0	153	167	127	142	131	127	846	53	861
NORTHBROOK ELEMENTARY	542	0	0	95	95	105	69	104	110	578	36	578
PARKVIEW ELEMENTARY	510	0	0	76	80	98	83	77	99	515	5	519
REMINGTON POINT ELEM	605	0	0	91	96	108	75	112	105	586	-19	586
SAGINAW ELEMENTARY	325	0	0	57	57	54	54	59	43	324	-1	324
WILLOW CREEK ELEMENTARY	593	0	0	92	94	101	85	96	109	577	-16	578
ELEMENTARY SCHOOL TOTALS	9,256	53	424	1,452	1,511	1,509	1,503	1,517	1,553	9,522	266	9,595



One Year Covid-19 Impact Projections

Campus	Fall	2020/21 Enrollment Projections by Grade									Original Projection
	2019/20	6th	7th	8th	9th	10th	11th	12th	Total	Change	2020/21
CREEKVIEW MIDDLE SCHOOL	820	258	264	280	0	0	0	0	801	-19	808
HIGHLAND MIDDLE SCHOOL	929	257	328	312	0	0	0	0	898	-31	903
PRAIRIE VISTA MIDDLE SCHOOL	753	277	258	272	0	0	0	0	807	54	819
WAYSIDE MIDDLE SCHOOL	919	286	328	318	0	0	0	0	932	13	938
WILLKIE MIDDLE SCHOOL	723	241	237	263	0	0	0	0	741	18	747
MARINE CREEK MIDDLE SCHOOL	1,039	389	376	361	0	0	0	0	1,126	87	1,129
MIDDLE SCHOOL TOTALS	5,183	1,708	1,791	1,806	0	0	0	0	5,305	122	5,344
BOSWELL HIGH SCHOOL	2,212	0	0	0	598	616	525	514	2,253	41	2,253
SAGINAW HIGH SCHOOL	1,932	0	0	0	623	479	477	458	2,037	105	2,037
CHISHOLM TRAIL HIGH SCHOOL	2,214	0	0	0	644	638	553	500	2,335	121	2,335
WATSON HIGH SCHOOL	101	0	3	0	8	16	32	42	101	0	101
HIGH SCHOOL TOTALS	6,459	0	3	0	1,873	1,749	1,587	1,514	6,726	267	6,726
Tarrant County JJAEP	1	0	0	0	0	0	1	0	1	0	1
Alternative Discipline Campus	26	1	3	3	3	3	3	10	26	0	26
ALTERNATIVE SCHOOL TOTALS	27	1	3	3	3	3	4	10	27	0	27
TOTAL ENROLLMENT	20,925	1,709	1,797	1,809	1,876	1,752	1,591	1,524	21,580	655	21,692





Key Takeaways

V

– too sharp

W

– “double dip” recession due to secondary outbreak

U

– too long at the bottom with too abrupt of a rebound



Forecasted Shape Of The Recovery



- The national unemployment rate is between 16%-18% and Texas' is roughly 12% in April
- After record new home starts in 1Q20, builders expect to complete 80% of 2020 plan
- Existing home listings have decreased by more than 10% due to owners pulling them from the market
- EMS ISD's original 2020/21 enrollment projection was 21,692
- The district's Covid-19 2020/21 enrollment projection is 20,925



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