



Eagle  
Mountain-  
Saginaw  
Independent  
School District

# Quarterly Report 4Q19



TEMPLETON  
DEMOGRAPHICS

hanleywood | metrostudy



# National Economic Conditions (November 2019)

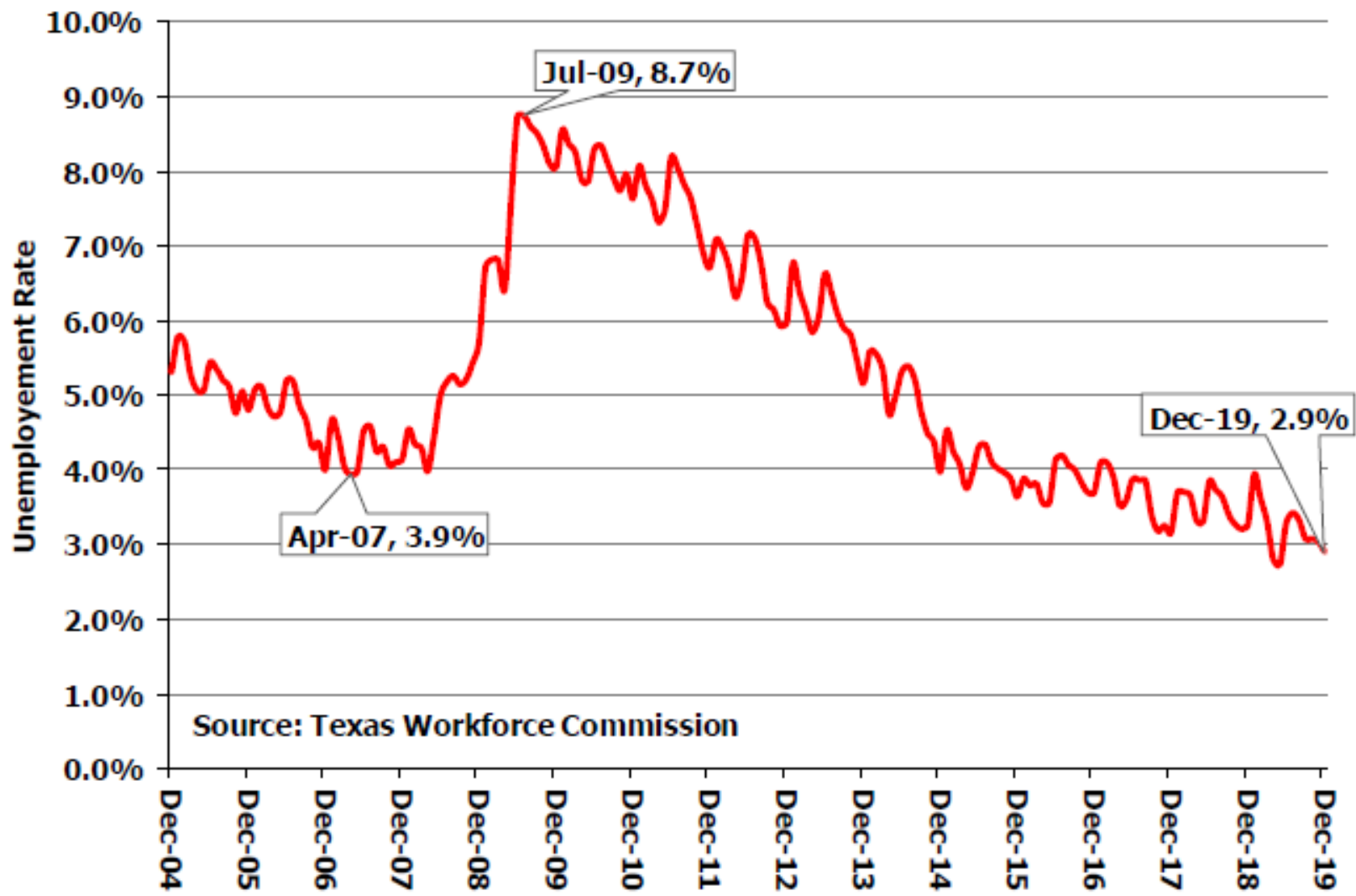
## Top Job Growth Markets Ranked by Change in Employment

Rank	MSA	Total Employment	Annual Job Growth	% Annual Job Growth
1	Dallas-Fort Worth-Arlington, TX	3,870,400	120,700	3.2%
2	New York-Newark-Jersey City, NY-NJ-PA	10,080,100	99,400	1.0%
3	Los Angeles-Long Beach-Anaheim, CA	6,343,200	96,000	1.5%
4	Houston-The Woodlands-Sugar Land, TX	3,223,100	85,500	2.7%
5	Atlanta-Sandy Springs-Roswell, GA	2,887,900	61,200	2.2%
6	Washington-Arlington-Alexandria, DC-VA-MD-WV	3,384,900	61,100	1.8%
7	San Francisco-Oakland-Hayward, CA	2,538,700	59,500	2.4%
8	Seattle-Tacoma-Bellevue, WA	2,132,900	59,200	2.9%
9	Phoenix-Mesa-Scottsdale, AZ	2,225,800	56,500	2.6%
10	Miami- Fort Lauderdale-West Palm Beach, FL	2,775,100	40,100	1.5%
11	Orlando-Kissimmee-Sanford, FL	1,364,900	36,700	2.8%
12	Denver-Aurora-Lakewood, CO	1,546,000	35,900	2.4%
13	San Diego-Carlsbad, CA	1,538,100	34,300	2.3%
14	San Antonio-New Braunfels, TX	1,102,200	33,700	3.2%
15	Riverside-San Bernardino-Ontario, CA	1,571,900	33,000	2.1%
16	San Jose-Sunnyvale-Santa Clara, CA	1,174,400	32,500	2.8%
17	Tampa- St. Petersburg-Clearwater, FL	1,404,700	30,800	2.2%
18	Las Vegas-Henderson-Paradise, NV	1,052,200	29,200	2.9%
19	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	3,011,300	29,000	1.0%
20	Austin-Round Rock, TX	1,112,200	29,000	2.7%
21	Charlotte-Concord-Gastonia, NC-SC	1,252,800	28,800	2.4%
22	Chicago-Naperville-Elgin, IL-IN-WI	4,848,600	28,600	0.6%
23	Jacksonville, FL	738,100	24,400	3.4%
24	Raleigh, NC	660,700	24,200	3.8%
25	Baltimore-Columbia-Towson, MD	1,456,900	23,600	1.6%





# Economic Conditions – DFW Area (December 2019)





# Economic Conditions- DFW Area (December 2019)

## Top Metrostudy CBSAs - Ranked by Annual Starts

Rank	Market	Annual Starts	Annual Change	% Change
1	Dallas/ Ft. Worth	34,718	1,117	3.3%
2	Houston	30,547	2,872	10.4%
3	Central Florida	26,632	1,674	6.7%
4	Phoenix/Tucson	25,877	2,755	11.9%
5	Atlanta	24,416	-35	-0.1%
6	Denver/Colorado Springs	19,287	-820	-4.1%
7	Austin	18,905	2,448	14.9%
8	Southern California	16,794	-3,596	-17.6%
9	Northern California	14,580	-2,742	-15.8%
10	San Antonio	13,748	2,626	23.6%
11	Raleigh/Durham	13,080	881	7.2%
12	Salt Lake City	12,860	-182	-1.4%
13	Tampa	12,754	2,131	20.1%
14	Charlotte	12,543	249	2.0%
15	Philadelphia Region	11,846	956	8.8%
16	Seattle	10,888	784	7.8%
17	Central California	10,843	130	1.2%
18	Suburban Maryland	10,710	421	4.1%
19	Las Vegas	10,635	-60	-0.6%
20	South Florida	9,150	1,188	14.9%
21	Nashville	9,138	467	5.4%
22	Jacksonville	8,695	736	9.2%
23	Northern Virginia	8,538	-687	-7.4%
24	Twin Cities	7,945	12	0.2%
25	Sarasota/Bradenton	6,908	1,254	22.2%





# Economic Conditions- Northwest Commerce Park, North FW



- Stream Realty Partners, a national real estate development, services, and investment firm, are breaking ground this February (2020) on Northwest Commerce Park (NCP) in north Fort Worth
- NCP is located 1.25 miles from the intersection of I-35W and SH 114, adjacent to Texas Motor Speedway
- This industrial project includes three buildings, totaling 1.1 million square feet of rentable space to meet the needs of current and future industrial users
- This site is within minutes of Alliance BNSF intermodal, Alliance Airport, and both UPS and FedEx hubs





# DFW Housing Market Analysis

Multiple Listing Service – YTD SFD Activity & Inventory

	<b>Dec-19</b>	<b>% Change</b>
<b>YTD Sales</b>	108,489	3.6%
<b>Average Price</b>	\$317,773	2%
<b>Median Price</b>	\$265,000	2%
<b>Listings</b>	20,535	-3.6%
<b>DOM</b>	60	3.4%
<b>Months Supply</b>	2.3	-7.0%

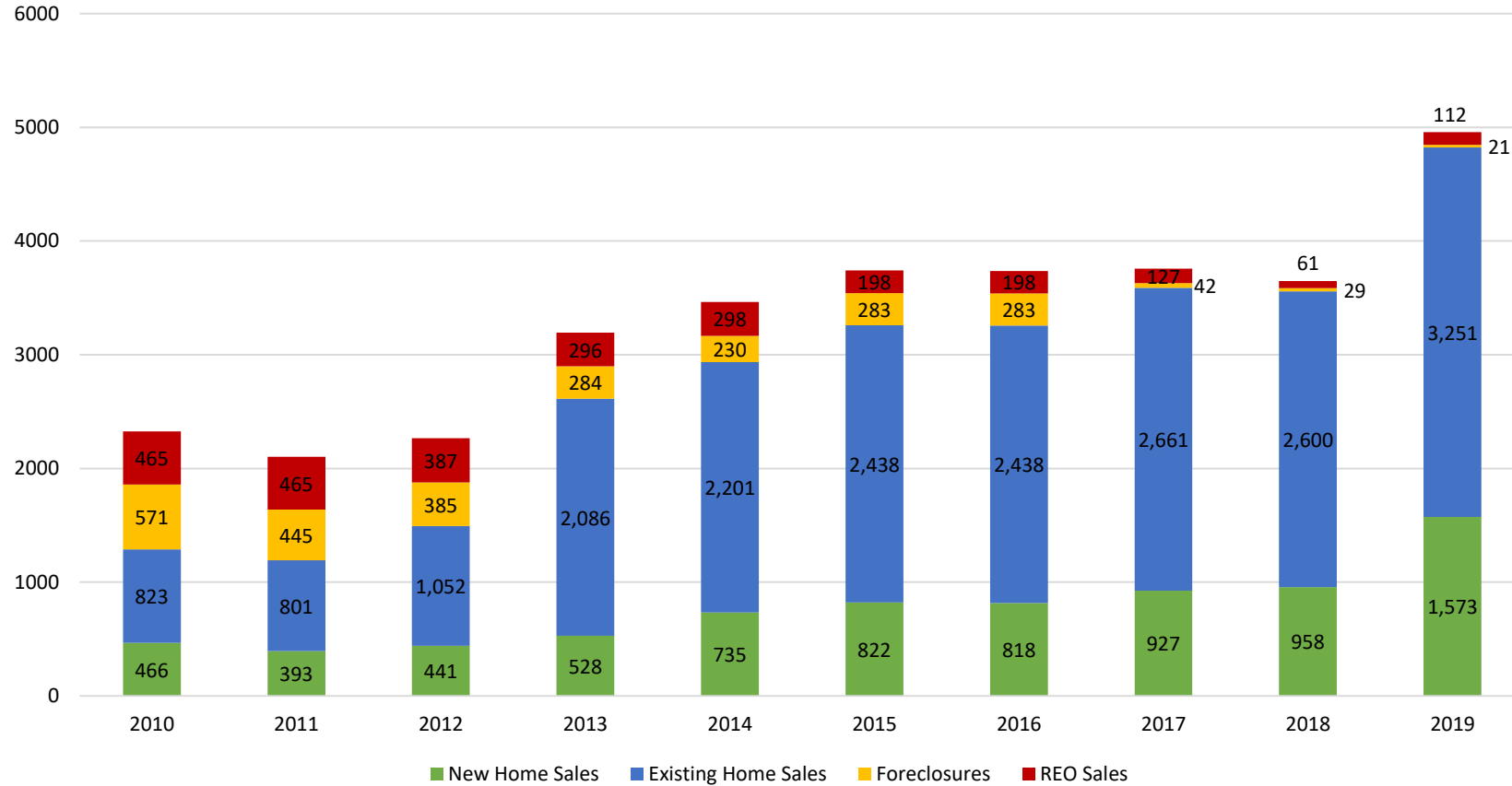
Source: Texas A&M Real Estate Center for NTREIS



# EMS ISD Housing Market Analysis

## Home Sales by Transaction Type, 2010 – 2019

Annual District Home Sales



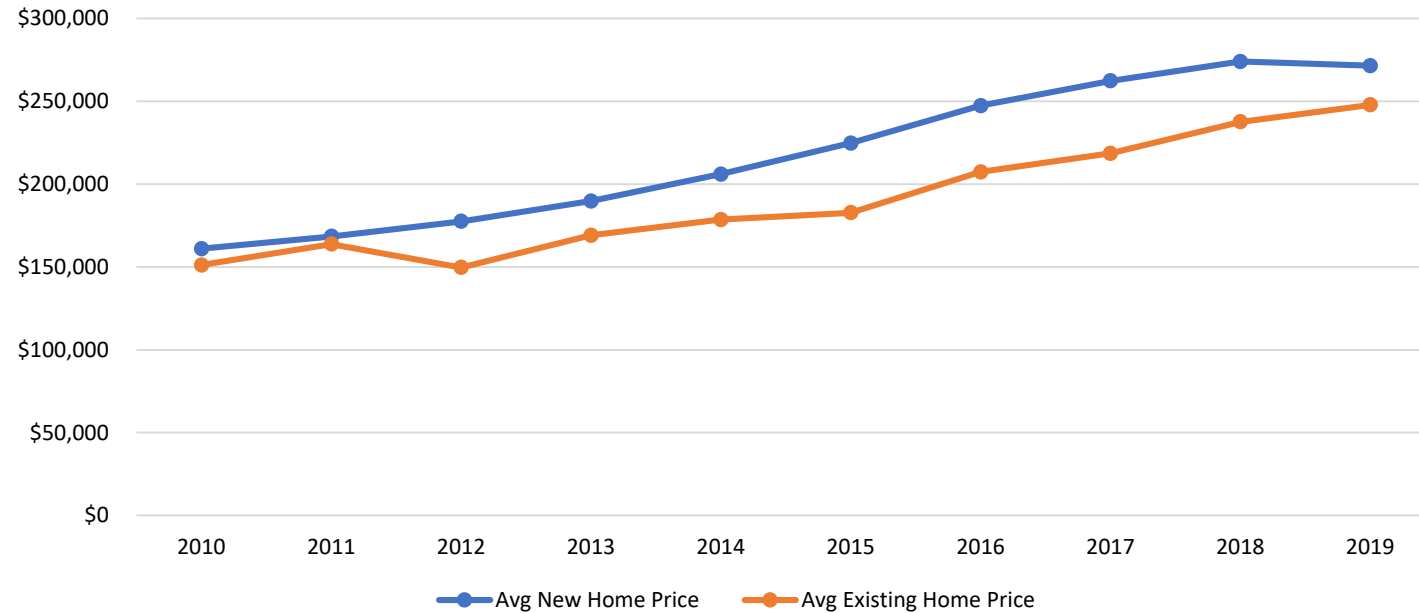
- The housing activity trend that began in 2013 continues to climb with close to 5,000 total sales transactions in 2019
- Total foreclosures and REO sales throughout EMS ISD have decreased by more than 90% since 2010
- New homes sales within the district have more than tripled since 2010



# EMS ISD Housing Market

## Average New vs. Existing Home Sale Price, 2010 – 2019

Average District New vs Existing Home Sale Price, 2010 – 2019



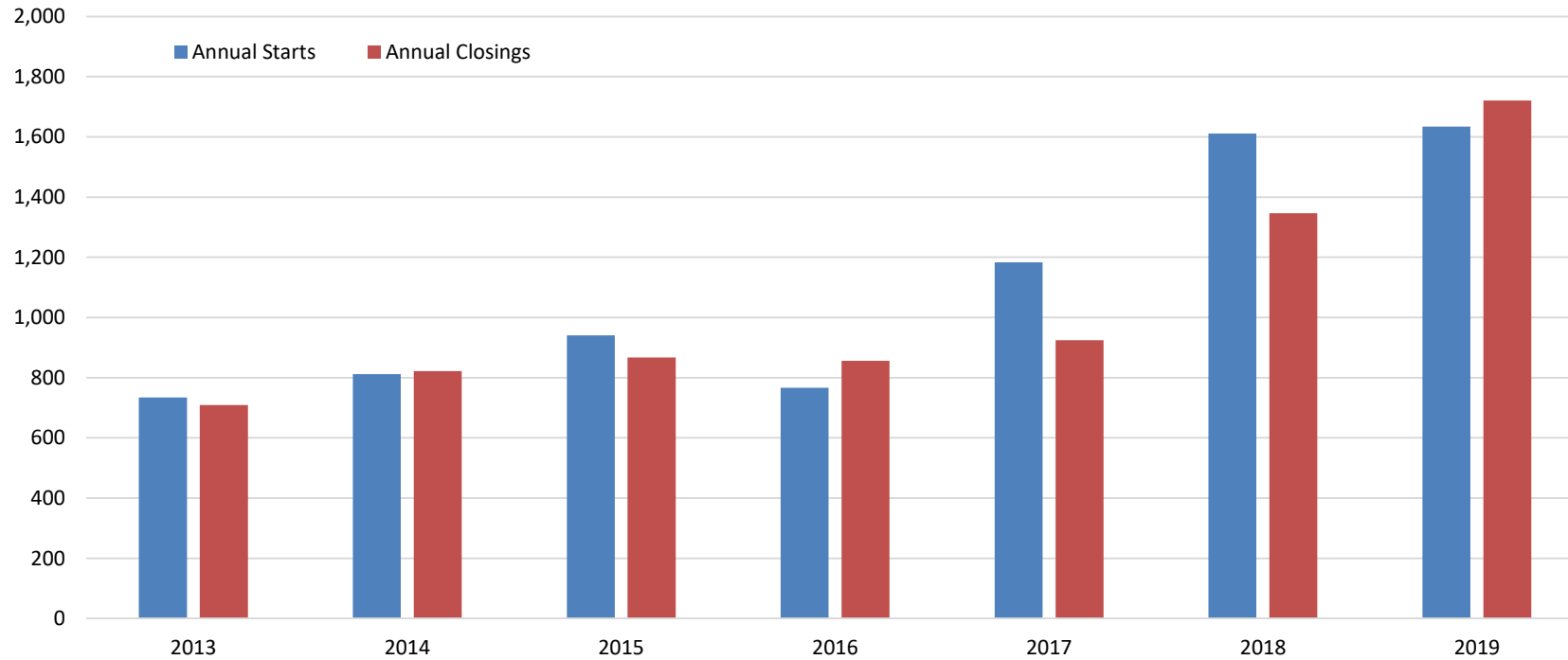
	Avg New Home Price	Avg Existing Home Price
2010	\$161,003	\$151,152
2011	\$168,397	\$163,737
2012	\$177,456	\$149,690
2013	\$189,753	\$169,032
2014	\$205,965	\$178,527
2015	\$224,715	\$182,696
2016	\$247,270	\$207,263
2017	\$262,235	\$218,517
2018	\$273,941	\$237,512
2019	\$271,376	\$247,786

- Since 2010, the average new home price in EMS ISD has increased by \$110,373, or 68.5%
- The average existing home price within the district has increased by 64%, or roughly \$96,634 since 2010





# EMS ISD New Housing Activity



Starts	2013	2014	2015	2016	2017	2018	2019
1Q	112	205	173	177	179	390	351
2Q	253	209	268	223	368	411	439
3Q	193	210	293	243	412	293	443
4Q	176	188	207	124	224	517	401
Total	734	812	941	767	1,183	1,611	1,634

Closings	2013	2014	2015	2016	2017	2018	2019
1Q	144	181	154	189	154	295	285
2Q	199	227	220	227	204	310	483
3Q	171	214	269	265	243	374	512
4Q	195	200	224	175	324	367	441
Total	709	822	867	856	925	1,346	1,721

- EMS ISD started approx. 400 homes in 4Q19, the second most starts in the past ten years
- The district closed 1,634 homes in 2019, the largest number of closings in the past ten years



# DFW New Home Ranking Report

## ISD Ranked by Annual Closings – 4Q19

Rank	District Name	Annual Starts	Annual Closings	VDL	Future
1	Prosper ISD	2,259	2,672	4,253	20,770
2	Denton ISD	2,609	2,440	4,599	18,786
3	Frisco ISD	2,108	2,216	3,645	4,743
4	Northwest ISD	2,196	1,981	3,080	20,090
5	Dallas ISD	1,681	1,727	1,871	5,809
<b>6</b>	<b>Eagle Mt.-Saginaw ISD*</b>	<b>1,634</b>	<b>1,721</b>	<b>2,113</b>	<b>16,953*</b>
7	Lewisville ISD	1,200	1,356	1,833	3,089
8	Forney ISD	1,460	1,216	3,001	27,886
9	Little Elm ISD	1,007	1,143	1,260	1,945
10	Crowley ISD	1,199	1,063	963	16,939
11	Mansfield ISD	962	964	1,389	7,020
12	Rockwall ISD	847	808	2,668	8,981
13	McKinney ISD	910	794	2,206	8,586
14	Fort Worth ISD	662	772	1,242	5,810
15	Wylie ISD	629	753	1,038	3,463
16	Royse City ISD	714	751	1,652	12,533
17	Melissa ISD	636	676	1,017	5,045
18	Princeton ISD	653	639	1,359	7,666
19	Plano ISD	559	634	718	1,299
20	Allen ISD	598	618	1,278	795




\* Based on additional Templeton Demographics housing research





# District Housing Overview by Elementary Zone

Elementary Zone	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Inventory	VDL	Future
BRYSON	0	0	8	0	0	0	198
CHISHOLM RIDGE	157	40	92	37	81	141	462
COMANCHE SPRINGS	192	17	209	50	39	321	1,046
COPPER CREEK	261	62	235	81	126	364	452
DOZIER	193	42	214	54	89	144	395
EAGLE MOUNTAIN	60	26	56	14	66	230	10,430
ELKINS	125	27	230	19	33	32	331
GILILLAND	0	0	0	0	0	0	0
GREENFIELD	5	3	5	1	4	6	266
HIGH COUNTRY	145	58	160	27	102	104	0
LAKE POINTE	260	70	254	94	113	462	2,541
NORTHBROOK	83	3	131	22	12	0	0
PARKVIEW	133	46	111	37	70	227	832
REMINGTON POINT	0	0	0	0	0	0	0
SAGINAW	0	0	0	0	0	0	0
WILLOW CREEK	20	7	16	5	15	82	0
<b>GRAND TOTAL</b>	<b>1,634</b>	<b>401</b>	<b>1,721</b>	<b>441</b>	<b>750</b>	<b>2,113</b>	<b>16,953</b>

-  Highest activity in the category
-  Second highest activity in the category
-  Third highest activity in the category



# Ten Year Forecast by Elementary Campus

Campus	Capacity	History	FALL	Enrollment Projections									
		2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
HAFLEY DEVELOPMENT CENTER	512	468	449	480	500	515	530	545	562	569	589	601	615
BRYSON ELEMENTARY	675	550	532	538	533	540	559	574	573	587	593	601	598
CHISHOLM RIDGE ELEMENTARY	803	664	636	643	662	683	711	737	762	778	790	794	802
COMANCHE SPRINGS ELEMENTARY	753	731	809	459	503	554	590	639	678	722	769	797	832
COPPER CREEK ELEMENTARY	803	0	0	443	472	513	538	583	611	626	633	631	639
DOZIER ELEMENTARY	803	715	556	622	666	746	774	832	861	875	889	886	890
EAGLE MOUNTAIN ELEMENTARY	758	660	658	672	683	697	706	727	776	837	900	959	1,029
ELKINS ELEMENTARY	736	368	444	486	506	528	544	590	594	594	599	595	598
GILILLAND ELMENTARY	734	522	489	493	480	489	489	484	494	505	504	500	495
GREENFIELD ELEMENTARY	803	751	755	744	769	769	763	758	758	764	769	784	800
HIGH COUNTRY ELEMENTARY	745	550	560	569	616	640	655	687	688	677	684	682	699
LAKE POINTE ELEMENTARY	779	722	793	861	966	1,066	1,107	1,202	1,233	1,255	1,286	1,335	1,396
NORTHBROOK ELEMENTARY	779	551	542	578	583	598	631	624	636	636	640	644	648
PARKVIEW ELEMENTARY	779	511	510	519	536	571	611	635	672	713	752	783	815
REMINGTON POINT ELEMENTARY	758	488	605	586	584	574	603	603	622	634	653	668	670
SAGINAW ELEMENTARY	519	356	325	324	337	336	343	344	349	357	354	355	360
WILLOW CREEK ELEMENTARY	727	604	593	578	580	584	603	605	609	616	612	614	616
<b>ELEMENTARY TOTALS</b>	<b>12,466</b>	<b>9,211</b>	<b>9,256</b>	<b>9,595</b>	<b>9,977</b>	<b>10,403</b>	<b>10,757</b>	<b>11,170</b>	<b>11,479</b>	<b>11,745</b>	<b>12,015</b>	<b>12,228</b>	<b>12,502</b>
Elementary Percent Change		3.622%	0.49%	3.67%	3.98%	4.27%	3.40%	3.84%	2.76%	2.32%	2.30%	1.77%	2.24%
Elementary Absolute Change		322	45	339	382	426	354	413	308	267	270	213	274

Green box = within 5% of capacity  
 Yellow box = over capacity



# Ten Year Forecast by Secondary Campus

Campus	Capacity	History	FALL	Enrollment Projections									
		2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
CREEKVIEW MIDDLE SCHOOL	1,078	993	820	808	789	776	781	783	823	841	865	855	845
HIGHLAND MIDDLE SCHOOL	1,050	885	929	903	857	810	843	865	867	883	906	947	945
PRAIRIE VISTA MIDDLE SCHOOL	1,002	889	753	819	789	780	736	766	767	802	828	887	897
WAYSIDE MIDDLE SCHOOL	1,002	965	919	938	961	946	990	1,003	1,076	1,123	1,202	1,228	1,278
ED WILLKIE MIDDLE SCHOOL	1,002	1,045	723	747	764	793	827	890	944	963	959	961	967
MARINE CREEK MIDDLE SCHOOL	1,200	0	1,039	1,129	1,133	1,119	1,037	1,061	1,064	1,109	1,111	1,147	1,194
<b>MIDDLE SCHOOL TOTALS</b>	<b>6,334</b>	<b>4,777</b>	<b>5,183</b>	<b>5,344</b>	<b>5,293</b>	<b>5,224</b>	<b>5,214</b>	<b>5,368</b>	<b>5,541</b>	<b>5,721</b>	<b>5,871</b>	<b>6,025</b>	<b>6,126</b>
Middle School Percent Change		8.15%	8.50%	3.11%	-0.95%	-1.30%	-0.19%	2.95%	3.22%	3.25%	2.62%	2.62%	1.68%
Middle School Absolute Change		360	406	161	-51	-69	-10	154	173	180	150	154	101
BOSWELL HIGH SCHOOL		2,032	2,212	2,253	2,347	2,473	2,511	2,583	2,590	2,629	2,650	2,743	2,854
SAGINAW HIGH SCHOOL		1,886	1,932	2,037	2,198	2,372	2,525	2,451	2,372	2,317	2,281	2,325	2,370
CHISHOLM TRAIL HIGH SCHOOL		2,019	2,214	2,335	2,422	2,493	2,585	2,601	2,633	2,619	2,663	2,667	2,701
WATSON HIGH SCHOOL		96	101	101	101	101	101	101	101	101	101	101	101
<b>HIGH SCHOOL TOTALS</b>		<b>6,033</b>	<b>6,459</b>	<b>6,726</b>	<b>7,068</b>	<b>7,439</b>	<b>7,722</b>	<b>7,736</b>	<b>7,696</b>	<b>7,666</b>	<b>7,695</b>	<b>7,836</b>	<b>8,026</b>
High School Percent Change		1.16%	7.06%	4.13%	5.08%	5.25%	3.80%	0.18%	-0.52%	-0.39%	0.38%	1.83%	2.42%
High School Absolute Change		69	426	267	342	371	283	14	-40	-30	29	141	190
TARRANT COUNTY JJAEP		0	1	1	1	1	1	1	1	1	1	1	1
ALTERNATIVE DISCIPLINE SCHOOL		33	26	26	26	26	26	26	26	26	26	26	26
<b>ALTERNATIVE SCHOOL TOTALS</b>		<b>33</b>	<b>27</b>	<b>27</b>	<b>27</b>	<b>27</b>	<b>27</b>	<b>27</b>	<b>27</b>	<b>27</b>	<b>27</b>	<b>27</b>	<b>27</b>
<b>DISTRICT TOTALS</b>		<b>20,054</b>	<b>20,925</b>	<b>21,692</b>	<b>22,365</b>	<b>23,093</b>	<b>23,720</b>	<b>24,301</b>	<b>24,743</b>	<b>25,159</b>	<b>25,608</b>	<b>26,116</b>	<b>26,681</b>
District Percent Change		3.82%	4.34%	3.67%	3.10%	3.26%	2.71%	2.45%	1.82%	1.68%	1.78%	1.98%	2.16%
District Absolute Change		737	871	767	673	728	627	581	441	417	449	508	565

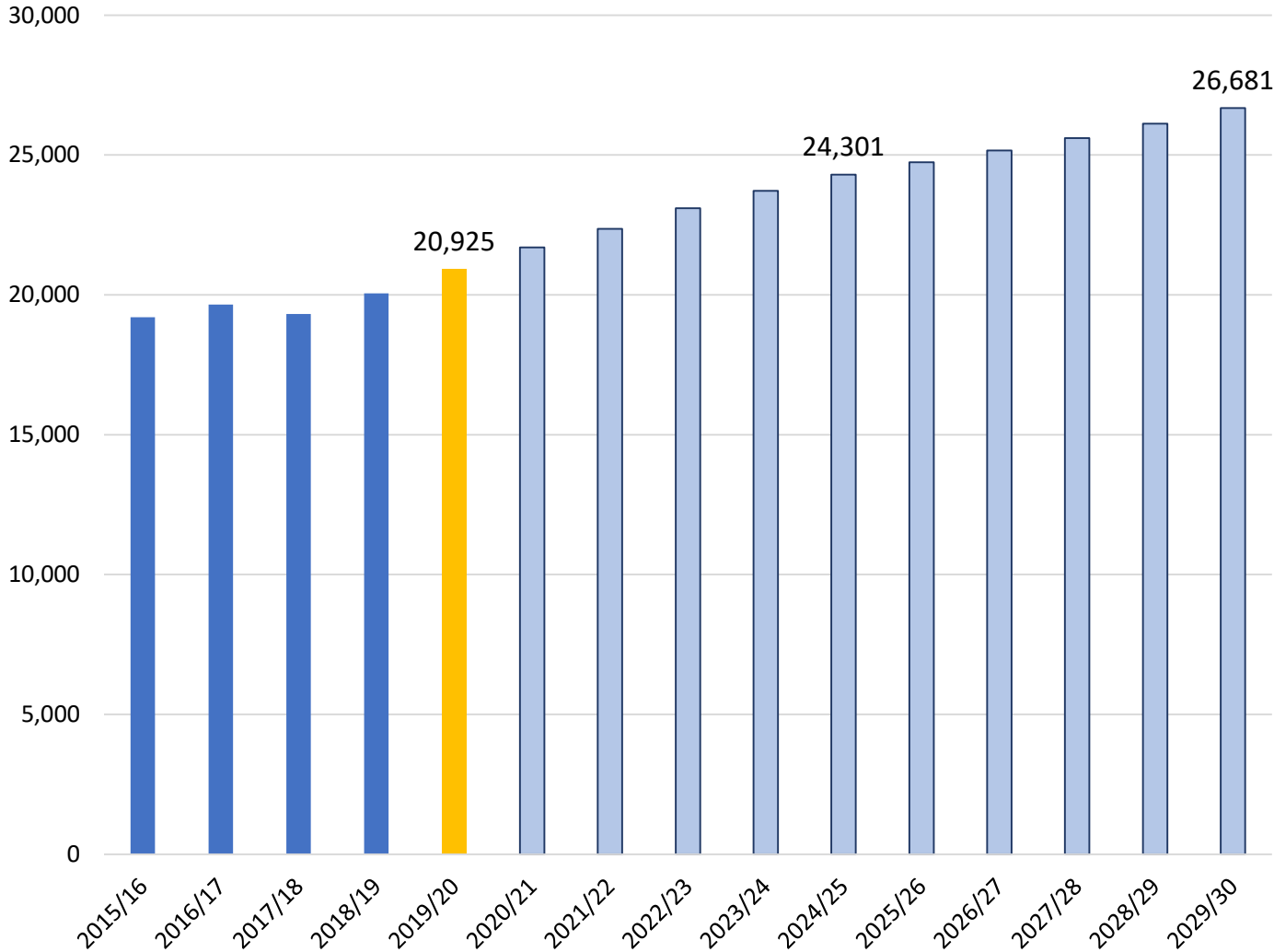
Green box = within 5% of capacity  
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# Key Takeaways



Projected Enrollment



- EMS ISD will continue to experience enrollment growth due to a strong housing market
- Comanche Springs and Lake Pointe Elementary zones could see more than 3,000 additional residential units in the next 5 years
- The district currently has more than 2,100 future lots with groundwork underway to be delivered in the next 6 to 12 months
- EMS ISD is expected to enroll approx. 24,300 students by 2024-25 and more than 26,500 students by 2029-30