



Quarterly Report 4Q20



TEMPLETON
DEMOGRAPHICS

hanleywood | metrostudy

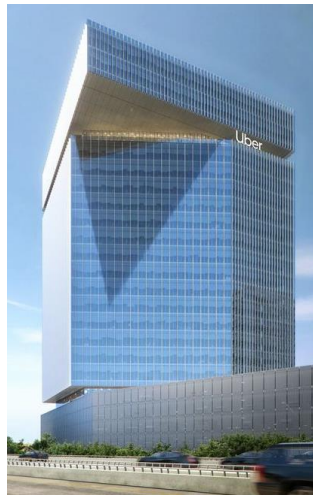


Local Economic Update- Dallas



Walmart Fulfillment Center

- Plans \$800 million project spanning 1.9 million sq. ft. at southwest corner E Belt Line Rd & Sunrise Rd
- Expected to create 1,300 jobs
- Expected to bring in approx. \$2.3 million in annual revenue to the city of Lancaster



Amazon Warehouse

- Announced new fulfillment center in Forney in August 2020; estimated to open in 2021
- Located at 1475 Akron Way; spans approx. 1.2 million sq. ft. and will bring in 500 new jobs
- Forney home to new Amazon distribution center located at 1101 S Gateway Blvd; completed late 2020
- Spans 200,000 sq. ft., its expected to create 100 new jobs



Uber HQ

- Construction expected to be complete May 2022
- 2 year extension on economic incentives approved by Dallas City Council May 2020 due to pandemic impact
- Hired approx. 200 employees pre-pandemic; targets restarting hiring process Fall 2021
- Plans to employ at least 2,500 workers by end of 2023



Local Economic Update- Fort Worth



Facebook Expansion

- Announced expansion of data center located at 5000 Like Way in December 2020
- Construction of 170,000 sq. ft. expansion underway with completion anticipated in 2022
- Total cost approx. \$200 million
- Created 50 new jobs

Charles Schwab

- Officially moved HQ to Westlake in January 2021
- New \$100 million campus spans 500,000 sq. ft. on more than 70 acres at Hwy 170 & Hwy 114
- Merged with Ameritrade in October 2020 for \$26 million; combined employee force of Charles Schwab (2,500 employees) and 2,000 Ameritrade employees
- Entire HQ at capacity could house more than 6,000 workers

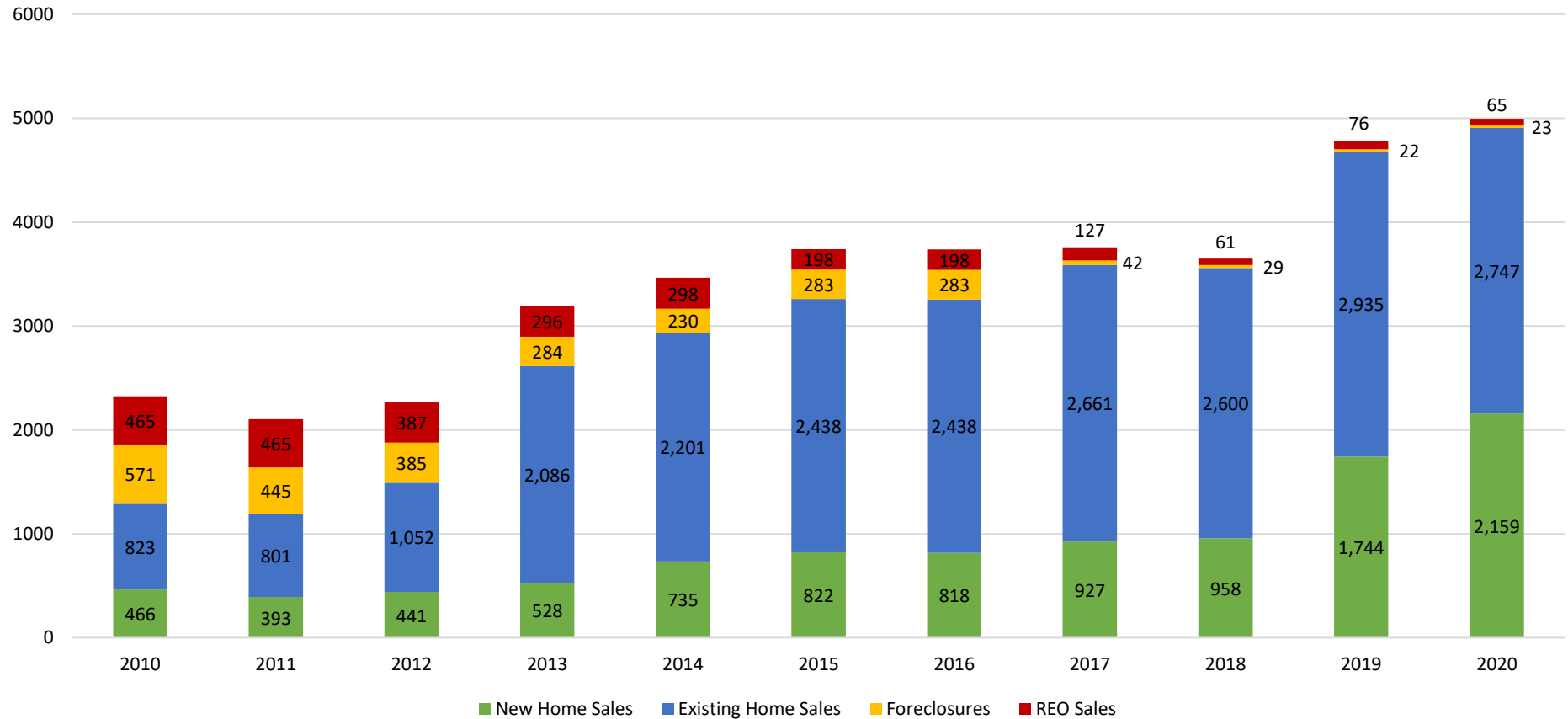




EMS ISD Housing Market Analysis

Home Sales by Transaction Type, 2010 – 2020

Annual District Home Sales



- The housing activity trend that began in 2013 continues to climb with close to 5,000 total sales transactions in 2020
- 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

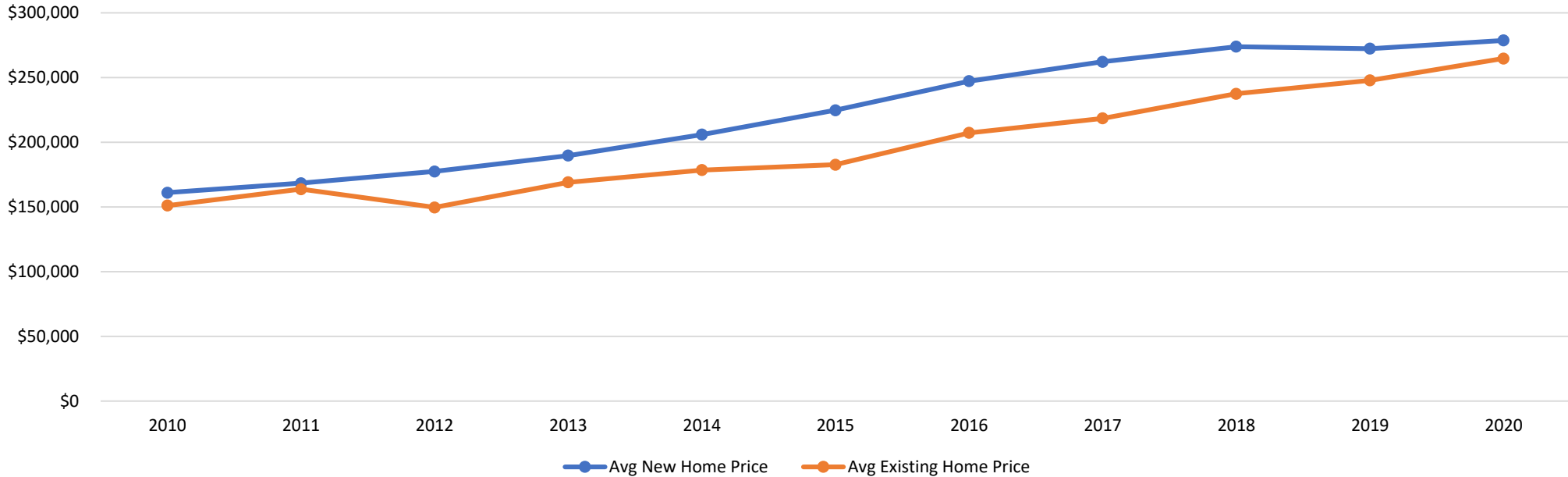




EMS ISD Housing Market

Average New vs. Existing Home Sale Price, 2010 – 2020

Average District New vs Existing Home Sale Price, 2010 – 2020



	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	\$272,368	\$247,786
2020	\$278,726	\$264,764

- Since 2010, the average new home price in EMS ISD has increased by \$117,723, or 73.1%
- The average existing home price within the district has increased by 75.2%, or roughly \$113,612 since 2010





DFW New Home Ranking Report

ISD Ranked by Annual Closings – 4Q20

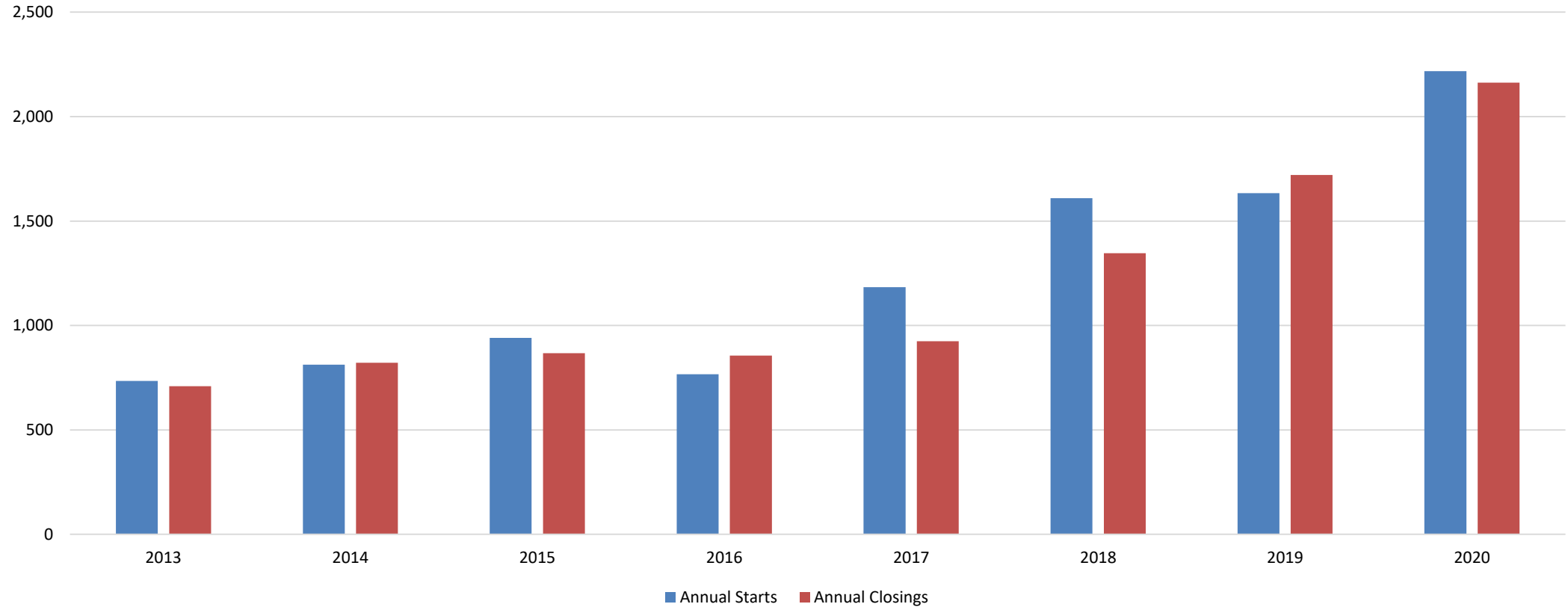
Rank	District Name	Annual Starts	Annual Closings	Inventory	VDL	Future
1	Prosper ISD	2,711	2,874	1,404	3,708	19,968
2	Denton ISD	2,895	2,783	1,512	3,884	19,641
3	Frisco ISD	2,262	2,578	1,311	2,826	8,156
4	Northwest ISD	2,833	2,421	1,535	3,423	25,118
5	Eagle Mt.-Saginaw ISD*	2,217	2,162	803	1,454	17,922
6	Dallas ISD	1,445	1,810	1,513	2,283	6,762
7	Forney ISD	1,936	1,614	1,059	3,074	26,741
8	Lewisville ISD	1,010	1,214	566	1,551	2,863
9	Crowley ISD	943	1,161	366	1,625	16,488
10	Rockwall ISD	1,188	1,112	687	1,838	9,045
11	Little Elm ISD	880	1,008	442	731	1,665
12	Princeton ISD	1,209	978	507	1,188	7,617
13	Mansfield ISD	1,039	928	622	1,074	7,099
14	McKinney ISD	878	921	484	1,871	10,124
15	Royse City ISD	1,247	906	671	2,229	9,784
16	Waxahachie ISD	879	822	504	868	19,434
17	Melissa ISD	943	790	447	473	4,783
18	Wylie ISD	853	742	446	822	3,237
19	Allen ISD	582	687	374	1,003	596
20	Midlothian ISD	874	681	563	1,080	17,827

*Adjusted based on additional research by Templeton Demographics staff





ISD New Home Starts and Closings



Starts	2015	2016	2017	2018	2019	2020
1Q	173	177	179	389	351	530
2Q	268	223	368	411	439	593
3Q	293	243	412	293	442	514
4Q	207	124	224	517	401	580
Total	941	767	1,183	1,610	1,633	2,217

Closings	2015	2016	2017	2018	2019	2020
1Q	154	189	154	295	285	340
2Q	220	227	204	310	483	567
3Q	269	265	243	374	512	664
4Q	224	175	324	367	441	591
Total	867	856	925	1,346	1,721	2,162





New Housing Activity by Elementary Zone

Elementary Zone	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Under Construction	Inventory	Vacant Dev. Lots	Future Lots
BRYSON	147	76	71	35	59	76	51	450
CHISHOLM RIDGE	159	44	172	41	45	68	75	433
COMANCHE SPRINGS	465	131	309	41	135	195	65	1,552
COPPER CREEK	193	59	242	46	52	77	302	325
DOZIER	163	15	216	72	15	36	56	317
EAGLE MOUNTAIN	66	15	61	14	29	37	291	10,641
ELKINS	243	66	194	77	71	105	250	773
GILILLAND	0	0	0	0	0	0	0	0
GREENFIELD	1	0	3	2	1	1	4	226
HIGH COUNTRY	104	2	203	11	2	3	0	47
LAKE COUNTRY	122	50	129	33	64	98	178	604
LAKE POINTE	421	66	440	183	8	22	12	1,953
NORTHBROOK	0	0	12	0	0	0	0	0
PARKVIEW	109	48	87	29	57	69	112	601
REMINGTON POINT	0	0	0	0	0	0	0	0
SAGINAW	0	0	0	0	0	0	0	0
WILLOW CREEK	24	8	23	7	12	16	58	0
Grand Total	2,217	580	2,162	591	550	803	1,454	17,922



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 %
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		
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	67	398	1,417	1,468	1,444	1,476	1,497	1,601	1,742	1,781	1,671	1,777	1,648	1,587	1,419	20,993	939	4.68%
2020/21	49	334	1,341	1,456	1,505	1,493	1,482	1,546	1,644	1,807	1,785	1,806	1,749	1,626	1,484	21,107	114	0.54%
JAN 2021	64	365	1,381	1,487	1,533	1,507	1,507	1,584	1,656	1,823	1,796	1,805	1,743	1,572	1,412	21,235	128	0.61%
2021/22	55	481	1,514	1,568	1,598	1,620	1,607	1,596	1,640	1,711	1,869	1,966	1,811	1,705	1,541	22,281	1,174	5.56%
2022/23	58	505	1,596	1,688	1,662	1,719	1,727	1,715	1,775	1,730	1,783	2,000	1,974	1,737	1,592	23,260	979	4.39%
2023/24	61	531	1,685	1,774	1,795	1,766	1,822	1,826	1,887	1,871	1,810	1,975	1,993	1,914	1,628	24,339	1,079	4.64%
2024/25	64	556	1,769	1,835	1,860	1,906	1,860	1,926	1,881	1,978	1,923	1,959	1,977	1,930	1,798	25,222	883	3.63%
2025/26	67	574	1,833	1,926	1,913	1,969	1,988	1,949	1,975	1,967	2,043	2,099	1,961	1,913	1,808	25,985	764	3.03%
2026/27	68	586	1,874	1,992	1,987	2,010	2,041	2,060	1,981	2,062	2,023	2,227	2,090	1,898	1,793	26,692	707	2.72%
2027/28	71	610	1,954	2,031	2,051	2,077	2,069	2,117	2,077	2,065	2,111	2,203	2,222	2,026	1,779	27,463	771	2.89%
2028/29	72	620	1,990	2,109	2,090	2,143	2,139	2,137	2,148	2,173	2,101	2,238	2,171	2,145	1,898	28,175	712	2.59%
2029/30	74	638	2,050	2,140	2,162	2,178	2,200	2,214	2,154	2,245	2,210	2,267	2,222	2,101	2,010	28,864	690	2.45%
2030/31	77	656	2,112	2,204	2,191	2,251	2,245	2,279	2,230	2,248	2,284	2,379	2,249	2,149	1,969	29,522	658	2.28%

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



Ten Year Forecast by Campus

Campus	Capacity	History	Fall	Enrollment Projections									
		2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31
HAFLEY DEVELOPMENT CENTER	512	465	347	500	527	556	584	605	619	645	657	676	697
BRYSON ELEMENTARY	675	541	543	536	562	586	600	604	618	629	639	635	634
CHISHOLM RIDGE ELEMENTARY	803	647	614	661	701	741	781	809	834	851	861	876	886
COMANCHE SPRINGS ELEMENTARY	753	829	467	580	689	793	915	1,002	1,095	1,204	1,303	1,369	1,429
COPPER CREEK ELEMENTARY	803	0	430	464	509	547	595	620	639	648	646	656	670
DOZIER ELEMENTARY	803	570	618	663	732	783	837	871	886	900	898	905	903
EAGLE MOUNTAIN ELEMENTARY	758	664	628	431	455	467	474	511	552	594	642	704	775
ELKINS ELEMENTARY	736	456	517	547	581	616	646	685	698	708	706	708	719
GILILLAND ELEMENTARY	734	486	452	472	471	475	475	487	496	493	488	483	478
GREENFIELD ELEMENTARY	803	768	670	746	756	749	750	746	759	766	784	804	821
HIGH COUNTRY ELEMENTARY	745	560	550	600	642	661	702	708	696	705	706	727	744
LAKE COUNTRY ELEMENTARY	803	0	0	518	560	594	618	643	679	711	754	801	846
LAKE POINTE ELEMENTARY	779	804	882	713	786	862	925	977	1,023	1,048	1,076	1,112	1,150
NORTHBROOK ELEMENTARY	779	547	525	569	585	617	616	626	627	629	632	636	639
PARKVIEW ELEMENTARY	779	537	515	540	586	635	663	702	751	793	827	863	908
REMINGTON POINT ELEMENTARY	758	604	548	570	574	596	598	616	628	647	663	667	678
SAGINAW ELEMENTARY	519	336	322	330	328	329	324	314	316	312	313	318	320
WILLOW CREEK ELEMENTARY	727	600	578	598	625	654	673	694	703	698	706	715	717
ELEMENTARY TOTALS	13,269	9,414	9,206	10,038	10,669	11,261	11,776	12,219	12,618	12,980	13,301	13,655	14,014
Elementary Percent Change		2.204%	-2.21%	9.04%	6.28%	5.55%	4.57%	3.77%	3.26%	2.87%	2.47%	2.67%	2.63%
Elementary Absolute Change		203	-208	832	631	592	515	444	399	362	321	355	359

Green box = within 5% of capacity
 Yellow box = over 100% capacity



Ten Year Forecast by Campus

Campus	Capacity	History	Fall	Enrollment Projections									
		2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31
CREEKVIEW MIDDLE SCHOOL	1,078	831	806	757	749	798	857	863	851	882	923	948	960
HIGHLAND MIDDLE SCHOOL	1,050	925	841	811	806	862	894	896	907	947	984	984	993
PRAIRIE VISTA MIDDLE SCHOOL	1,002	752	842	823	845	888	932	939	942	967	1,005	1,037	1,060
WAYSIDE MIDDLE SCHOOL	1,002	921	954	998	1,022	1,099	1,129	1,230	1,262	1,292	1,308	1,378	1,424
WILLKIE MIDDLE SCHOOL	1,002	718	715	755	810	885	898	969	984	1,026	1,032	1,046	1,079
MARINE CREEK MIDDLE SCHOOL	1,200	1,040	1,073	1,071	1,051	1,031	1,067	1,083	1,115	1,134	1,165	1,211	1,241
MIDDLE SCHOOL TOTALS	6,334	5,187	5,231	5,215	5,283	5,563	5,777	5,980	6,061	6,248	6,417	6,604	6,757
Middle School Percent Change		8.58%	0.85%	-0.31%	1.30%	5.30%	3.85%	3.51%	1.35%	3.09%	2.70%	2.91%	2.32%
Middle School Absolute Change		410	44	-16	68	280	214	203	81	187	169	187	153
BOSWELL HIGH SCHOOL		2,183	2,255	2,346	2,463	2,529	2,633	2,683	2,789	2,903	2,982	3,061	3,130
SAGINAW HIGH SCHOOL		1,925	2,009	2,169	2,265	2,338	2,352	2,380	2,432	2,492	2,593	2,602	2,624
CHISHOLM TRAIL HIGH SCHOOL		2,207	2,290	2,397	2,464	2,532	2,568	2,607	2,676	2,724	2,766	2,826	2,881
WATSON HIGH SCHOOL		97	104	104	104	104	104	104	104	104	104	104	104
HIGH SCHOOL TOTALS		6,412	6,658	7,016	7,296	7,503	7,657	7,774	8,001	8,223	8,445	8,593	8,739
High School Percent Change		6.28%	3.84%	5.38%	3.99%	2.84%	2.05%	1.53%	2.92%	2.77%	2.70%	1.75%	1.70%
High School Absolute Change		379	246	358	280	207	154	117	227	222	222	148	146
TARRANT COUNTY JJAEP		4	1	1	1	1	1	1	1	1	1	1	1
ALTERNATIVE DISCIPLINE SCHOOL		22	11	11	11	11	11	11	11	11	11	11	11
ALTERNATIVE SCHOOL TOTALS		26	12	12	12	12	12	12	12	12	12	12	12
DISTRICT TOTALS		21,039	21,107	22,281	23,260	24,339	25,222	25,985	26,692	27,463	28,175	28,864	29,522
District Percent Change		4.91%	0.32%	5.56%	4.39%	4.64%	3.63%	3.03%	2.72%	2.89%	2.59%	2.45%	2.28%
District Absolute Change		985	68	1,174	979	1,079	883	764	707	771	712	690	658

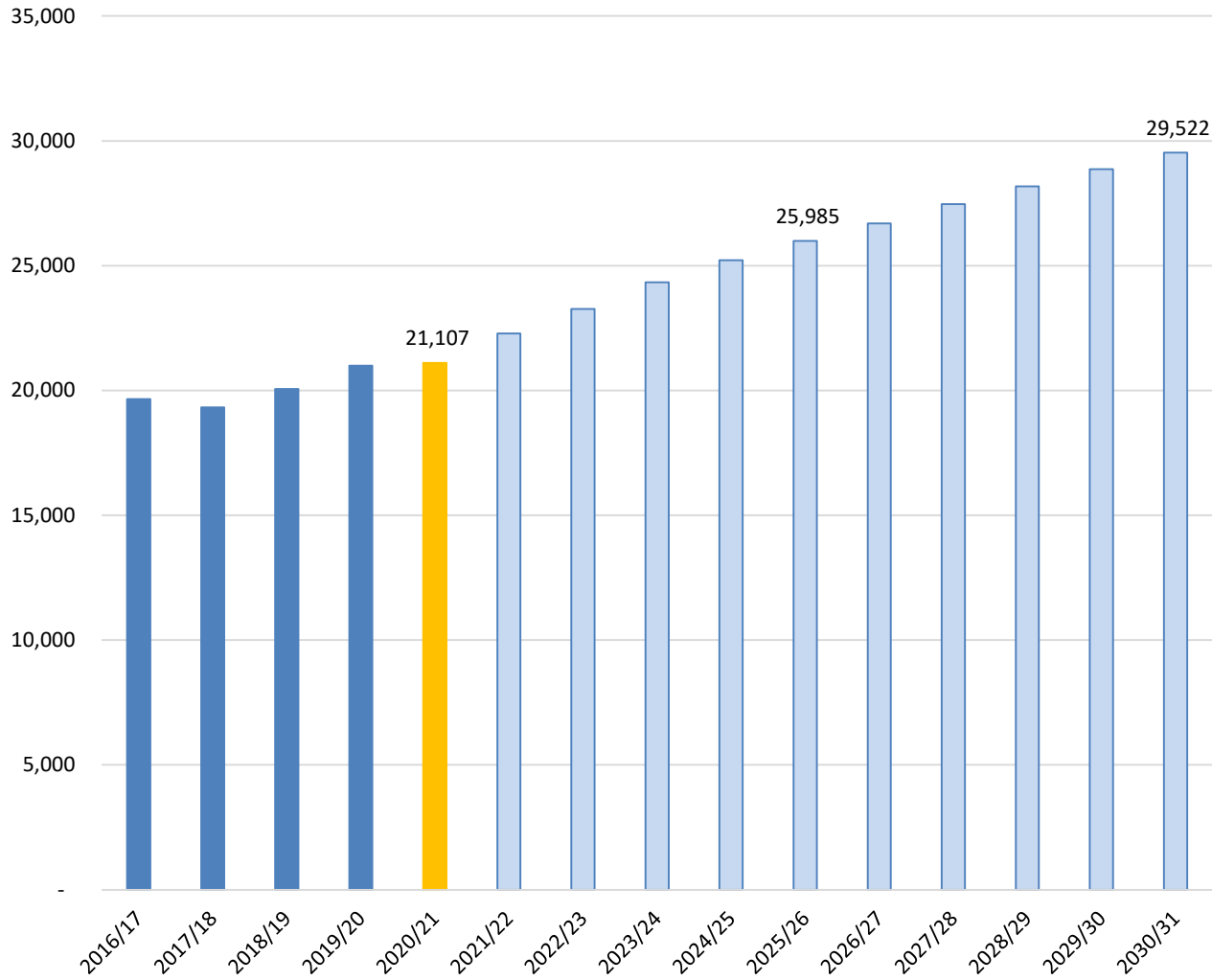
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Key Takeaways



Enrollment Forecast



- The housing activity trend that began in 2013 continues to climb with close to 5,000 total sales transactions in 2020
- EMS ISD has 35 actively building subdivisions and 21 future subdivisions in the planning stages
- Of these, groundwork is underway on 2,800 lots in 12 subdivisions
- EMS ISD will enroll more than 25,900 students for the 2025/26 school year, and more than 29,500 by 2030/31