

*Northwest
Independent
School
District*

Quarterly
Report
3Q18



*Learn from Yesterday...
Understand Today...
Plan for Tomorrow*



TEMPLETON
DEMOGRAPHICS

hanleywood | metrostudy



Economic Conditions – DFW MSA (September 2018)

1.7%

63,352 new jobs
National rate 1.1%



Job Growth

**Unemployment
Rate**



U.S. 3.6%
Texas 3.7%
DFW MSA 3.4%
Fort Worth 3.5%

-0.1%

35,066

2,980 more
starts than 3Q17



**Annual
Home Starts**





DFW New Home Ranking Report

ISD Ranked by Annual Closings – 3Q18

Rank	District Name	Annual Starts	Annual Closings	VDL	Future
1	Prosper ISD	2,900	2,698	5,071	22,777
2	Frisco ISD	2,367	2,310	4,926	5,139
3	Denton ISD	2,421	2,164	3,603	22,041
4	Northwest ISD*	1,880	1,876	2,625	29,742
5	Dallas ISD	1,873	1,644	2,122	5,646
6	Little Elm ISD	1,352	1,456	1,429	2,611
7	Eagle Mt.-Saginaw ISD	1,318	1,303	1,553	20,497
8	Forney ISD	1,335	1,247	1,589	15,749
9	Lewisville ISD	1,330	1,070	1,828	4,037
10	Rockwall ISD	894	897	2,244	9,602
11	Wylie ISD	868	885	999	3,769
12	Crowley ISD	1,005	804	1,407	13,186
13	McKinney ISD	790	785	1,923	8,571
14	Princeton ISD	792	694	716	7,937
15	Mansfield ISD	845	687	1,391	6,428
16	Midlothian ISD	669	672	1,072	19,743
17	Allen ISD	754	637	1,037	1,289
18	Waxahachie ISD	685	612	831	10,954
19	Keller ISD	530	603	651	1,563
20	Royse City ISD	702	582	1,263	9,355

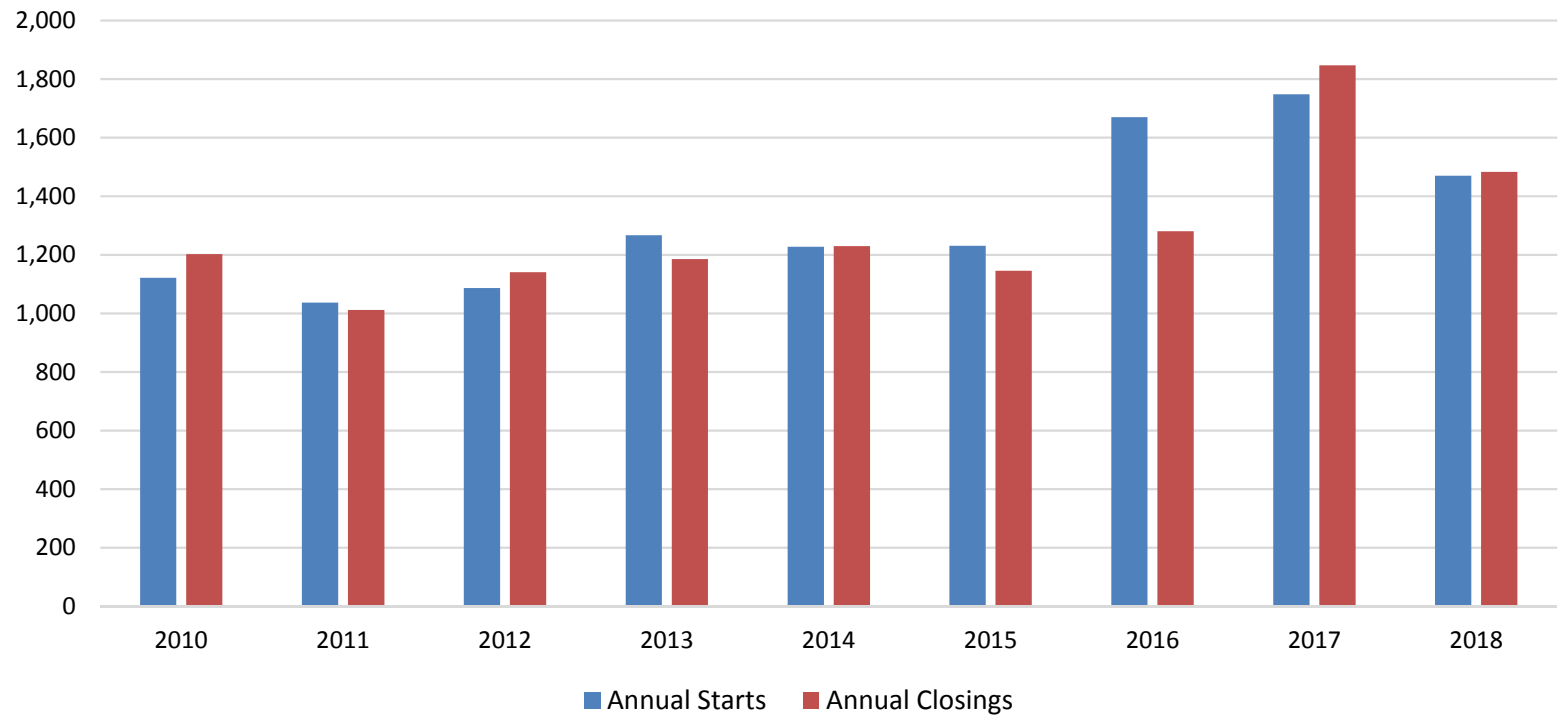
*Adjusted based on additional research by Templeton Demographics staff





New Housing Activity

Northwest ISD



Starts	2013	2014	2015	2016	2017	2018
1Q	288	357	230	309	449	495
2Q	362	282	310	321	445	472
3Q	347	350	377	537	458	503
4Q	270	239	314	503	396	
Total	1,267	1,228	1,231	1,670	1,748	1,470

Closings	2013	2014	2015	2016	2017	2018
1Q	225	269	287	279	426	417
2Q	318	341	263	345	562	517
3Q	299	347	283	320	473	549
4Q	344	273	313	337	386	
Total	1,186	1,230	1,146	1,281	1,847	1,483

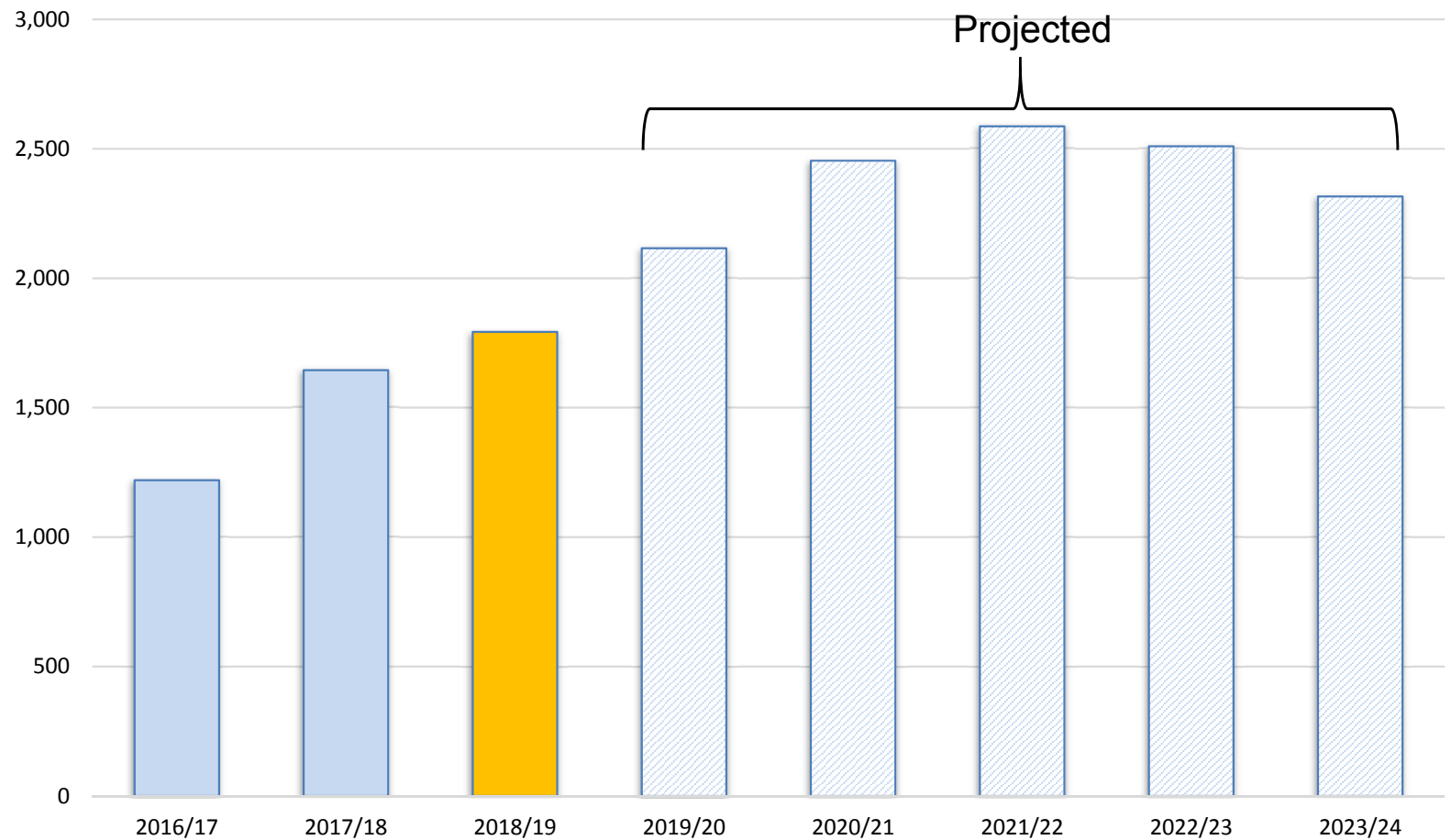
- Northwest ISD is on pace to start more than 1,900 new homes in 2018
- The district had more than 500 new home closings in 3Q18, the most 3rd quarter closings since 2007





Forecasted District Housing Activity

NISD New Home Closings

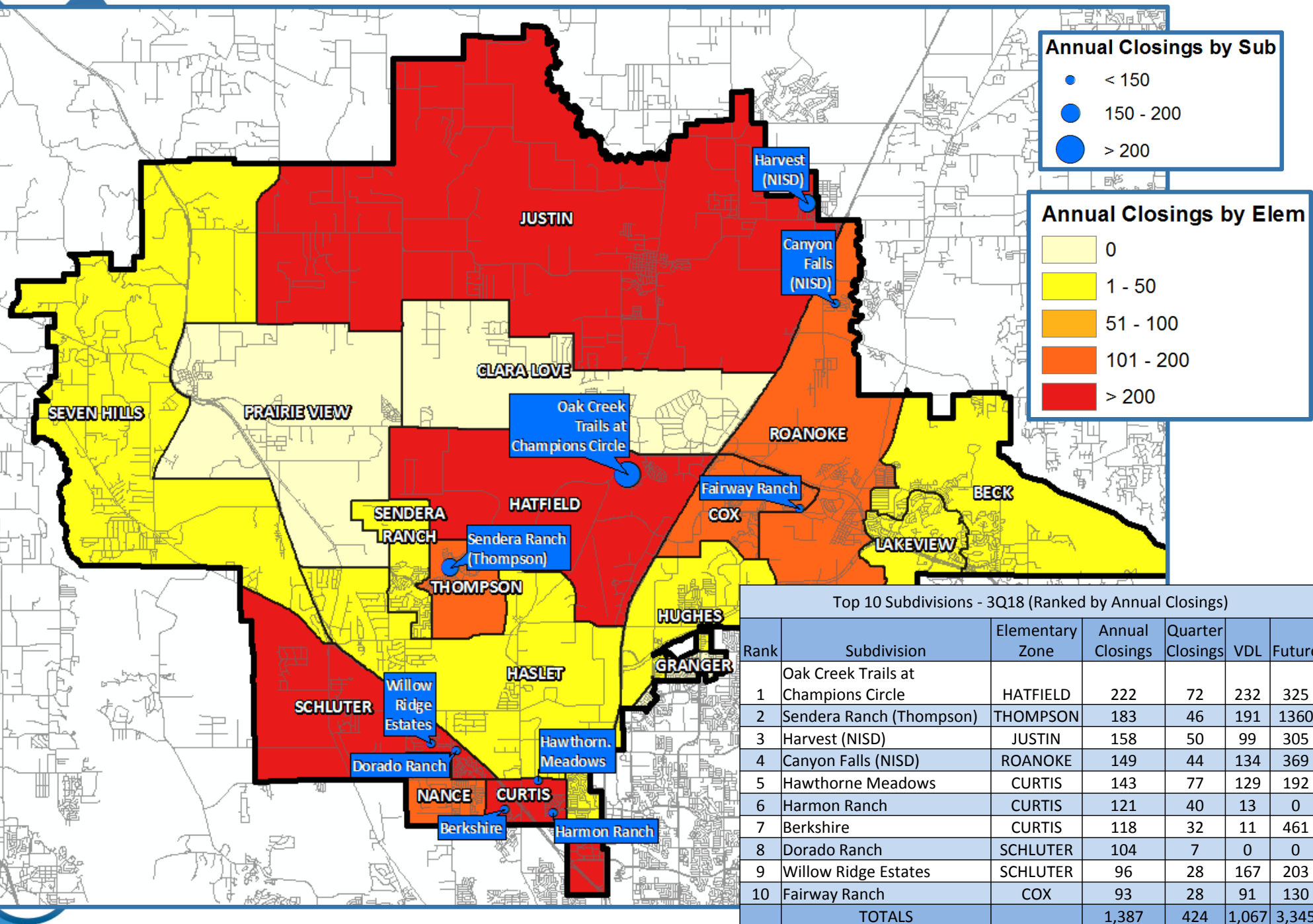


Northwest ISD is forecasted to close roughly 2,500 new homes annually for the next 3-5 years





Annual Closing Distribution





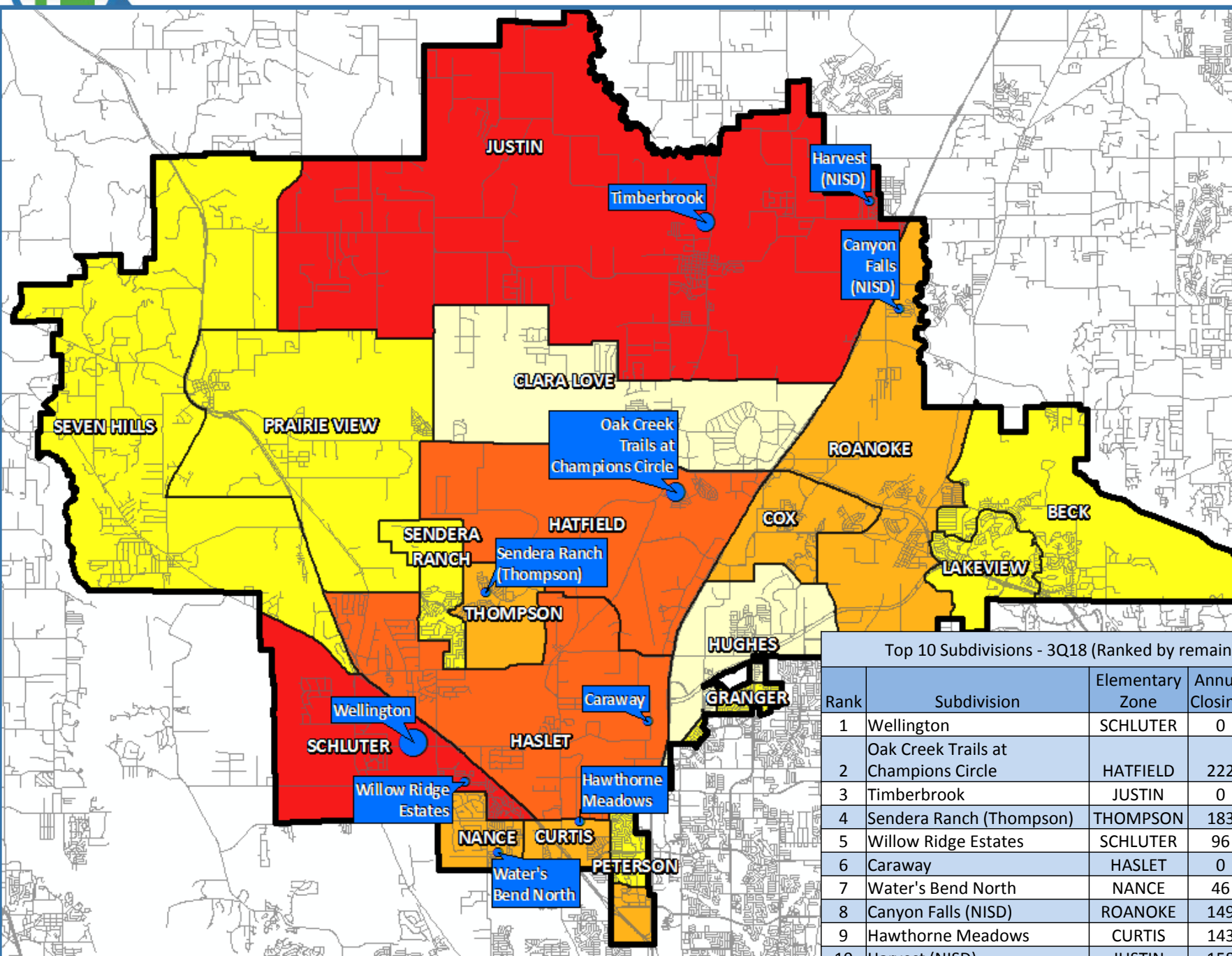
VDL Distribution

VDL by Sub

- < 200
- 200 - 400
- > 400

VDL by Elem

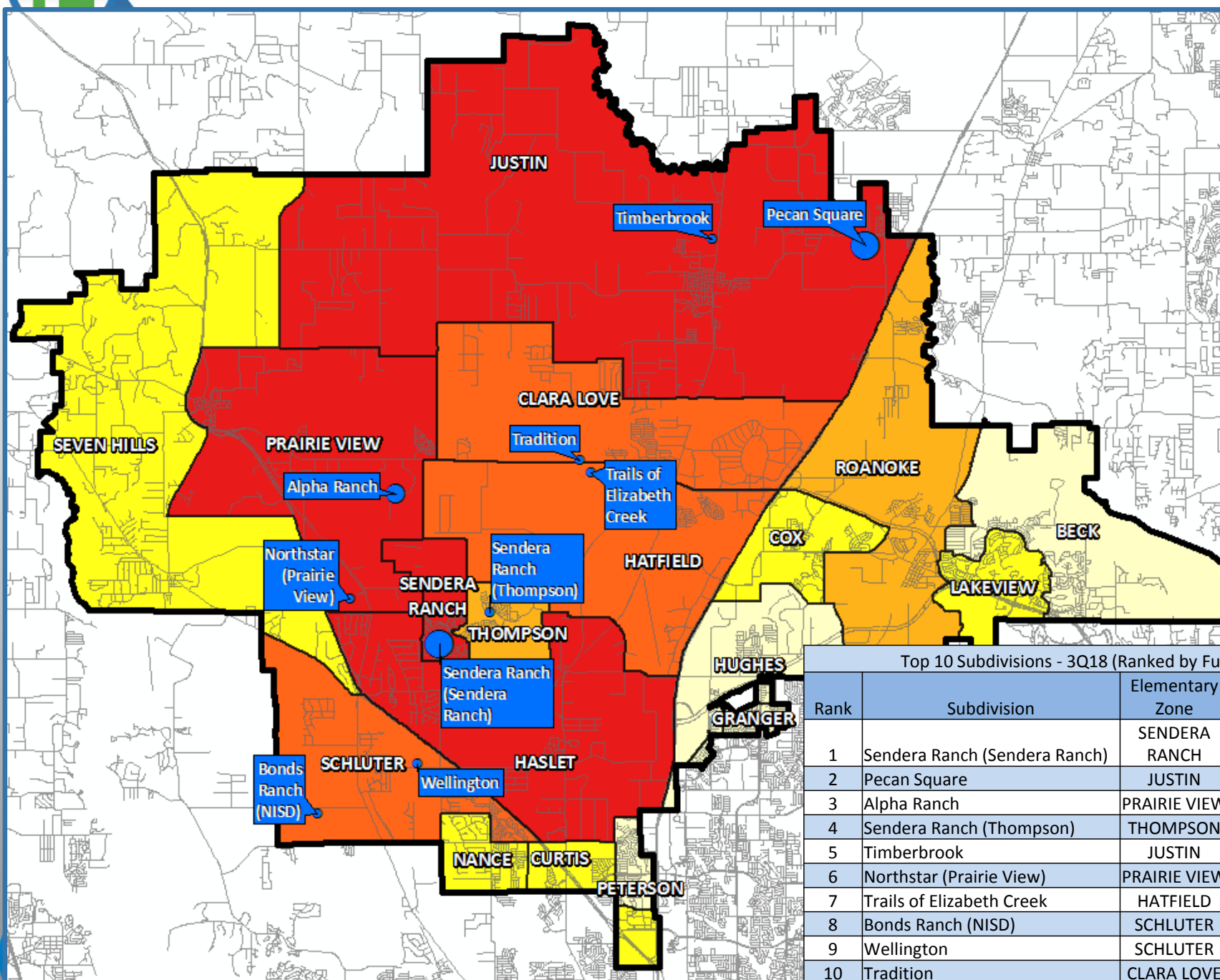
- 0
- 1 - 100
- 101 - 200
- 201 - 300
- > 300



Top 10 Subdivisions - 3Q18 (Ranked by remaining VDL)

Rank	Subdivision	Elementary Zone	Annual Closings	VDL	Future
1	Wellington	SCHLUTER	0	470	1,171
2	Oak Creek Trails at Champions Circle	HATFIELD	222	232	325
3	Timberbrook	JUSTIN	0	205	1,352
4	Sendera Ranch (Thompson)	THOMPSON	183	191	1,360
5	Willow Ridge Estates	SCHLUTER	96	167	203
6	Caraway	HASLET	0	157	142
7	Water's Bend North	NANCE	46	152	176
8	Canyon Falls (NISD)	ROANOKE	149	134	369
9	Hawthorne Meadows	CURTIS	143	129	192
10	Harvest (NISD)	JUSTIN	158	99	305
TOTALS			997	1,936	5,595


Futures Distribution





Housing Activity by Elementary Zone

Elementary Zone	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Under Construction	Inventory	Vacant Dev. Lots	Future Lots
BECK	39	12	38	10	17	25	73	0
CLARA LOVE	0	0	0	0	0	0	0	2,348
COX	158	47	178	50	71	101	121	441
CURTIS	488	155	382	149	185	238	153	653
GRANGER	0	0	0	0	0	0	4	0
HASLET	27	11	28	7	12	18	278	3,357
HATFIELD	220	39	245	72	45	57	237	1,913
HUGHES	18	0	37	10	0	10	0	0
JUSTIN	324	84	265	79	121	173	540	5,628
LAKEVIEW	9	2	11	3	3	4	9	305
NANCE	119	20	128	39	38	52	160	609
PETERSON	7	0	8	2	0	1	2	0
PRAIRIE VIEW	0	0	0	0	0	0	1	5,318
ROANOKE	138	36	158	46	41	59	179	873
SCHLUTER	137	62	202	35	61	78	642	2,700
SENDERA RANCH	4	0	4	1	0	6	15	3,587
SEVEN HILLS	6	0	9	0	1	2	20	700
THOMPSON	186	35	183	46	41	71	191	1,360
Grand Total	1,880	503	1,876	549	636	895	2,625	29,792

 Highest activity in the category

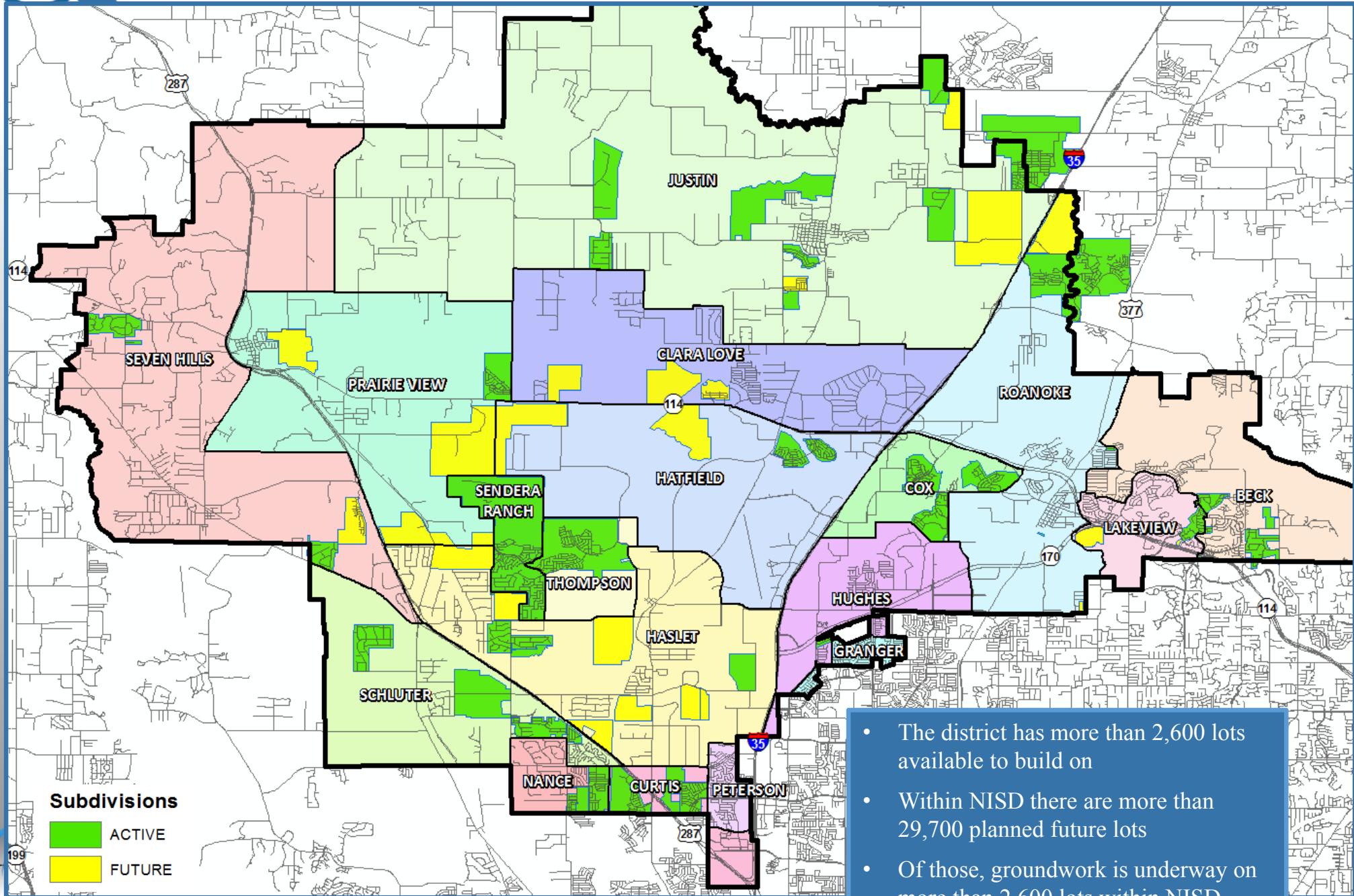
 Second highest activity in the category

 Third highest activity in the category





District Housing Overview



- The district has more than 2,600 lots available to build on
- Within NISD there are more than 29,700 planned future lots
- Of those, groundwork is underway on more than 2,600 lots within NISD



Residential Activity

Berkshire

- 760 total lots
- 461 futures
- 243 occupied
- 24 under construction
- Building 100 – 120 in 2018
- \$275K - \$425K
- Future school site in development
- Current yield = 0.391

Hawthorne Meadows

- 603 total lots
- 192 futures
- 143 homes occupied
- 282 annual starts
- 125 under construction
- Building 200 homes in 2018
- \$230K - \$300K
- Current yield = 0.420





Residential Activity

Northstar

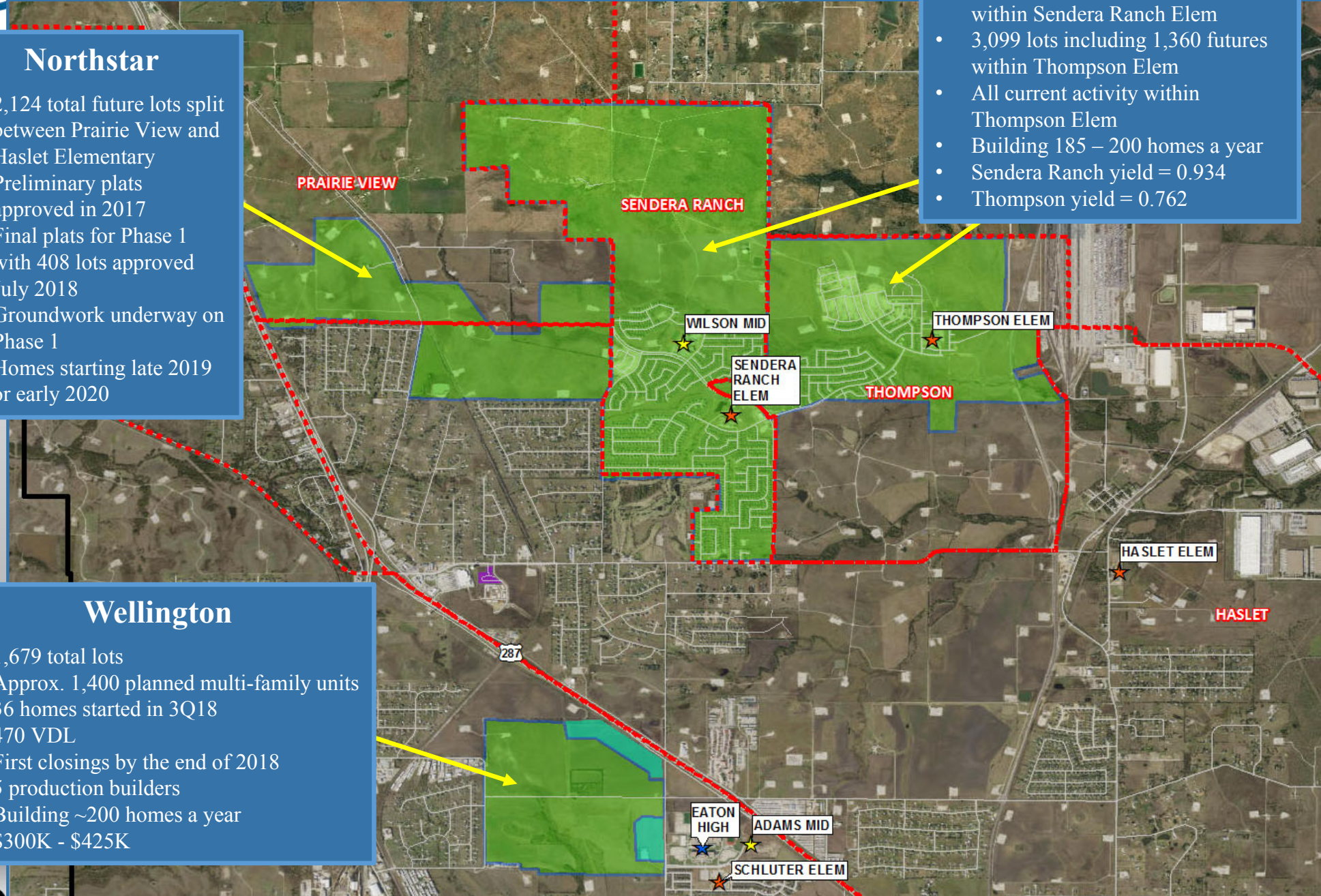
- 2,124 total future lots split between Prairie View and Haslet Elementary
- Preliminary plats approved in 2017
- Final plats for Phase 1 with 408 lots approved July 2018
- Groundwork underway on Phase 1
- Homes starting late 2019 or early 2020

Wellington

- 1,679 total lots
- Approx. 1,400 planned multi-family units
- 36 homes started in 3Q18
- 470 VDL
- First closings by the end of 2018
- 5 production builders
- Building ~200 homes a year
- \$300K - \$425K

Sendera Ranch

- 8,308 total lots
- 5,209 lots including 3,587 futures within Sendera Ranch Elem
- 3,099 lots including 1,360 futures within Thompson Elem
- All current activity within Thompson Elem
- Building 185 – 200 homes a year
- Sendera Ranch yield = 0.934
- Thompson yield = 0.762





Residential Activity

Pecan Square

- 3,425 total future lots
- Groundwork started June 2018 on Phase 1
- First lots delivering 3Q19
- First residents expected late 2019 or early 2020
- Anticipate building 200 homes in 2020, 250 homes in 2021 and 300 homes by 2022
- \$270K - \$500K+



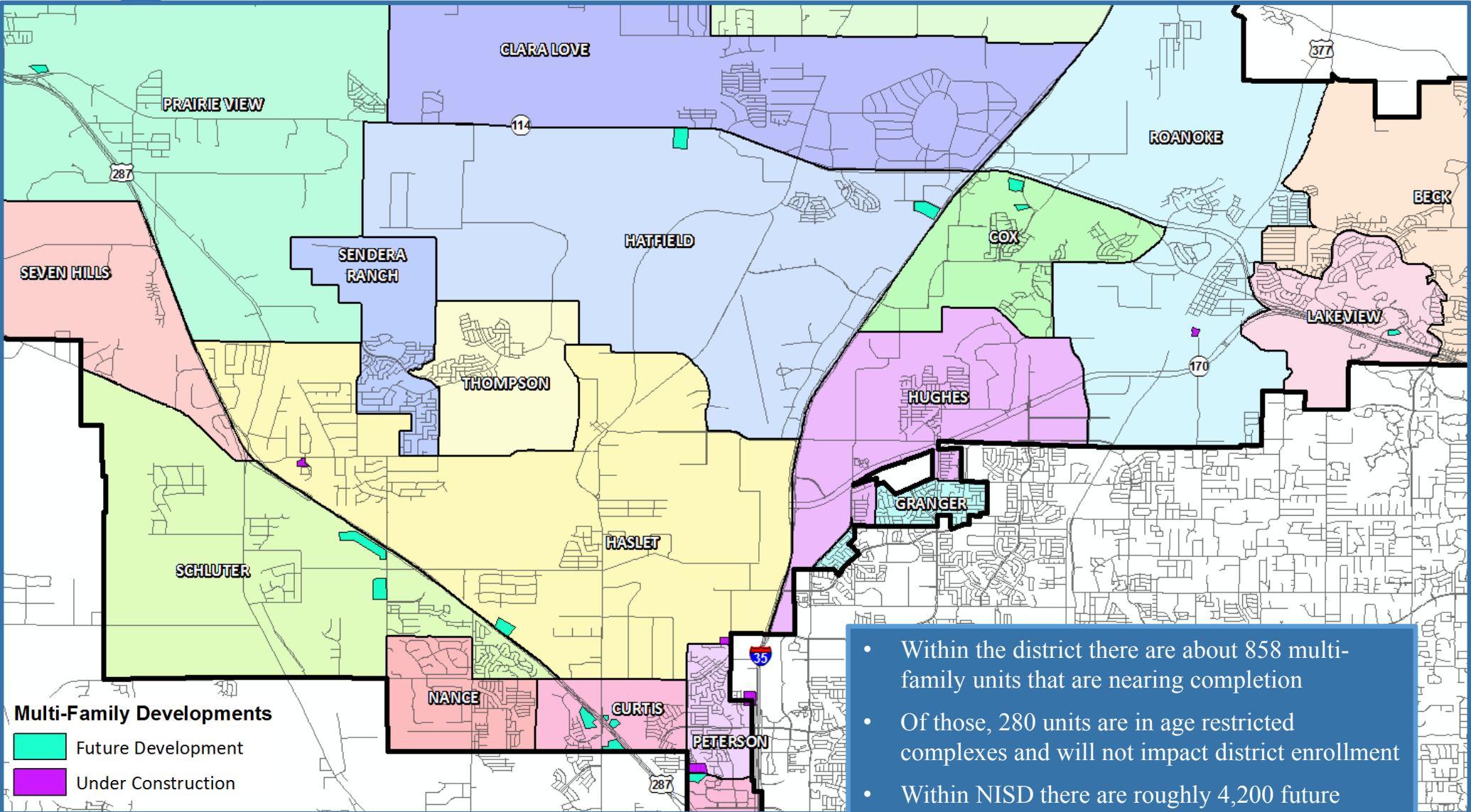
Timberbrook

- 1,550 total lots
- Sections 1A & B with 209 lots delivered 2Q18
- First homes under construction
- First residents expected early 2019
- \$250K - \$425K





District Multi-Family Overview



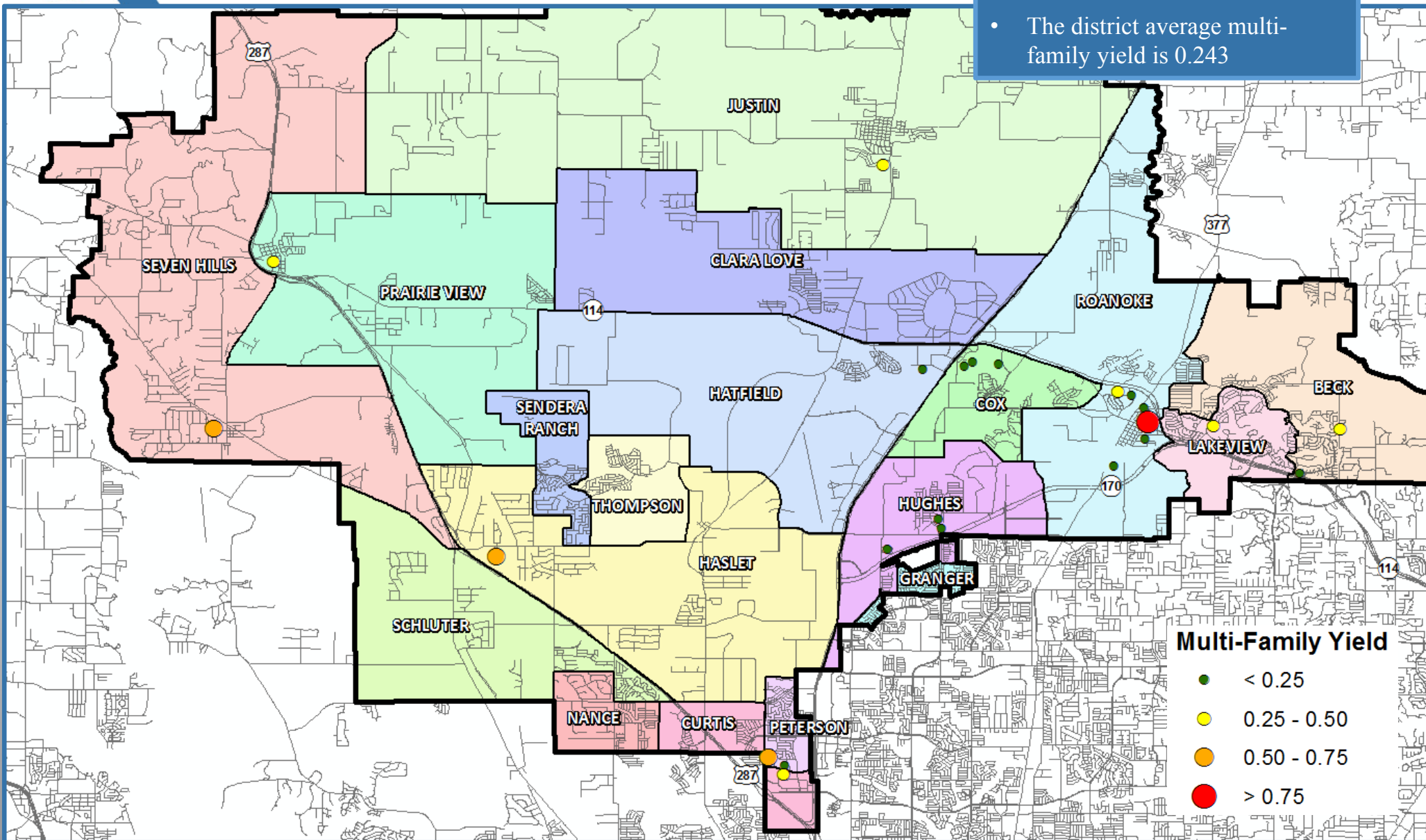
- Within the district there are about 858 multi-family units that are nearing completion
- Of those, 280 units are in age restricted complexes and will not impact district enrollment
- Within NISD there are roughly 4,200 future multi-family units in the planning stages





Multi-Family Yield Analysis

- Within NISD there are currently 1,082 students residing in 4,460 multi-family units
- The district average multi-family yield is 0.243





Residential Yield Analysis

	2015-16	2016-17	2017-18	2018-19	3 Year Difference
Total Students	20,948	21,996	23,133	24,111	3,163
Out of District	472	539	497	473	1
Unmatched	207	153	214	67	-140
Total Students (Geocoded Inside District)	20,269	21,304	22,422	23,571	3,302
Multi-Family					
Students in MF	803	845	1,034	1,082	279
MF Units	3,445	3,944	4,460	4,460	1,015
% Students in MF	3.96%	3.96%	4.61%	4.59%	0.63%
MF Yield	0.233	0.214	0.232	0.243	0.01
Single Family					
Students in SF	19,466	20,459	21,388	22,489	3,023
SF Parcels	32,190	33,410	35,055	36,931	4,741
% Students in SF	96.04%	96.03%	95.39%	95.41%	-0.63%
SF Yield	0.605	0.612	0.610	0.609	0.004

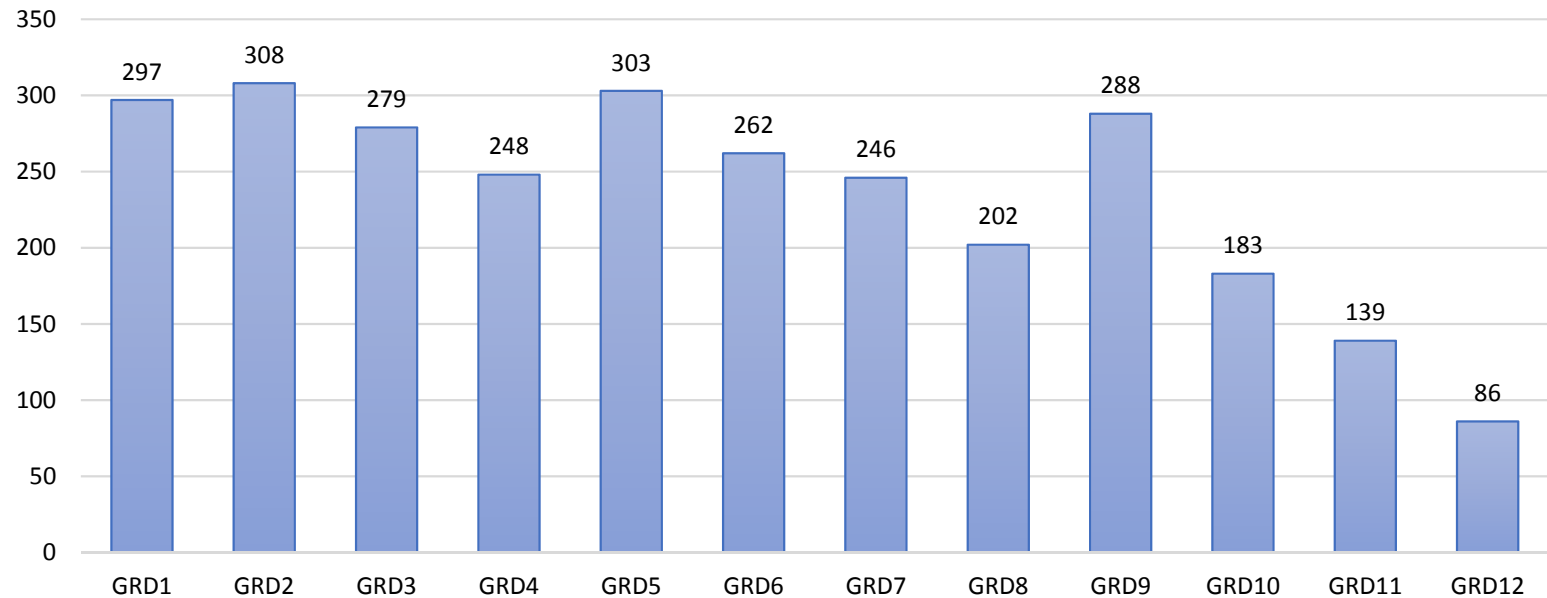


Multi-Family figures
include Manufactured
Home communities



Newcomers and Leavers Analysis

2018/19 Newcomers by Grade



	2015-16	2016-17	2017-18	2018-19	Change
Newcomers	2,581	2,597	2,847	2,841	+260
Leavers	1,910	2,045	2,312	2,386	+476
NET CHANGE	671	552	535	455	-216

* Student geocode data is taken from an enrollment snapshot, totals may vary from official enrollment reports.

Newcomers: Number of student IDs that were in the 2018-19 student geocode, and did not exist in 2017-18 student file (excludes incoming KG, PK and EE).

Leavers: Number of student IDs that were in the 2017-18 student geocode, and did not exist in 2018-19 student file (excludes graduating seniors).

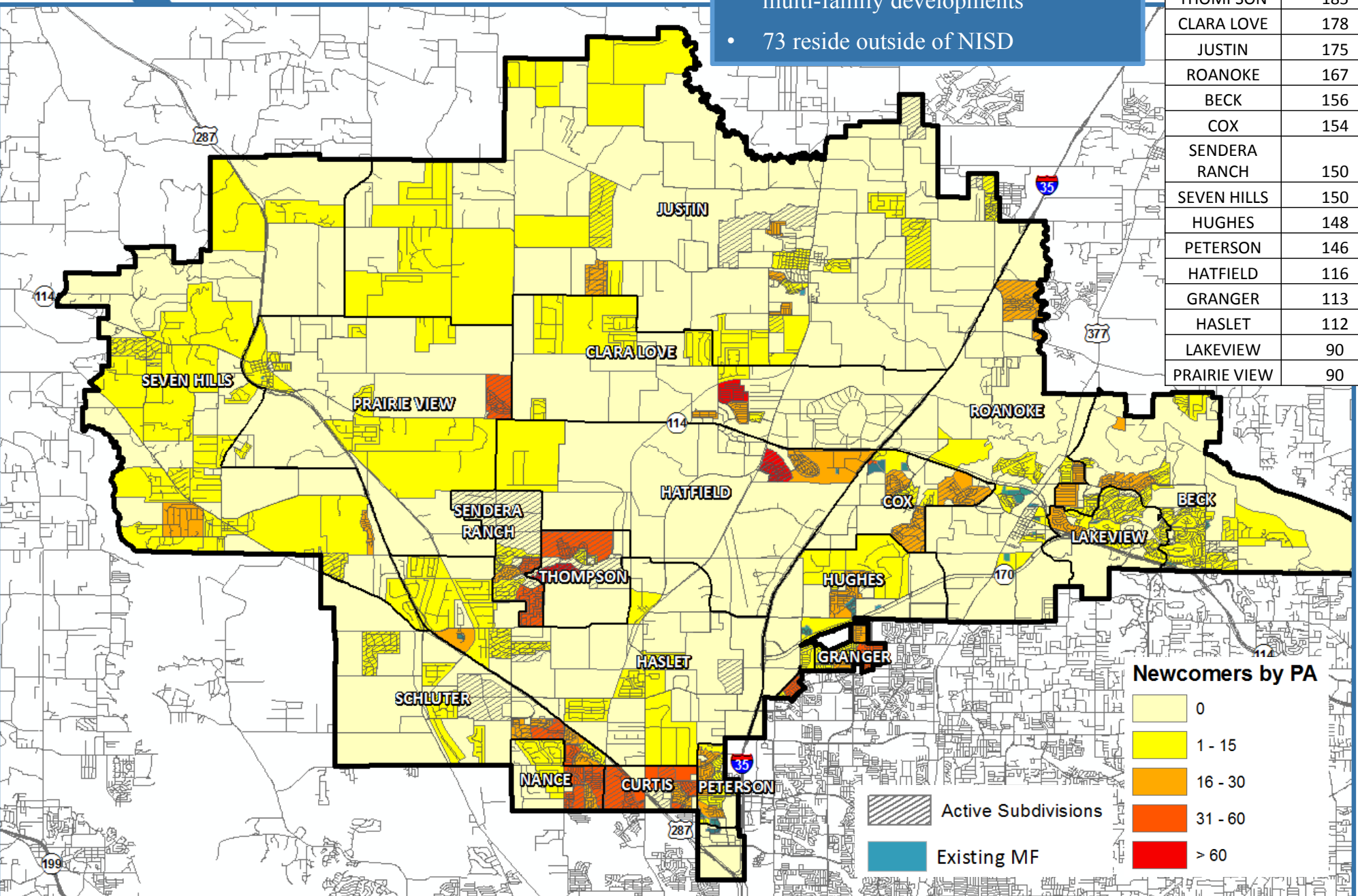




Newcomer Density

- There are 2,740 newcomers geocoded within the NISD boundary in 2018/19
- Of those, 279, or 10.2% reside within multi-family developments
- 73 reside outside of NISD

Elementary Zone	2018/19 Newcomers
SCHLUTER	210
CURTIS	205
NANCE	195
THOMPSON	185
CLARA LOVE	178
JUSTIN	175
ROANOKE	167
BECK	156
COX	154
SENDERA RANCH	150
SEVEN HILLS	150
HUGHES	148
PETERSON	146
HATFIELD	116
GRANGER	113
HASLET	112
LAKEVIEW	90
PRAIRIE VIEW	90





Ten Year Forecast

By Grade Level

Year (Oct.)	EE/PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Growth	% Growth
2014/15	311	1,550	1,538	1,618	1,596	1,553	1,557	1,550	1,521	1,541	1,595	1,481	1,275	1,145	19,831		
2015/16	333	1,541	1,662	1,674	1,650	1,674	1,664	1,626	1,595	1,577	1,765	1,622	1,398	1,195	20,976	1,145	5.8%
2016/17	360	1,622	1,621	1,736	1,714	1,783	1,727	1,747	1,725	1,658	1,727	1,778	1,546	1,300	22,044	1,068	5.1%
2017/18	445	1,753	1,709	1,705	1,822	1,814	1,882	1,813	1,782	1,784	1,802	1,763	1,665	1,402	23,141	1,097	5.0%
2018/19	503	1,792	1,814	1,808	1,803	1,861	1,911	1,942	1,883	1,822	1,952	1,829	1,617	1,579	24,116	975	4.2%
2019/20	503	1,930	1,900	1,922	1,917	1,899	1,964	2,006	2,030	1,950	2,040	1,993	1,710	1,560	25,324	1,208	5.0%
2020/21	503	2,033	2,072	2,008	2,031	2,016	2,030	2,064	2,092	2,099	2,172	2,069	1,867	1,654	26,710	1,386	5.5%
2021/22	503	2,121	2,186	2,203	2,123	2,143	2,155	2,130	2,155	2,169	2,336	2,198	1,950	1,815	28,187	1,477	5.5%
2022/23	503	2,211	2,280	2,331	2,316	2,252	2,269	2,265	2,220	2,234	2,389	2,342	2,069	1,876	29,557	1,370	4.9%
2023/24	503	2,310	2,378	2,417	2,443	2,428	2,364	2,366	2,366	2,310	2,455	2,363	2,211	2,002	30,916	1,359	4.6%
2024/25	503	2,412	2,458	2,508	2,524	2,553	2,551	2,461	2,450	2,440	2,528	2,446	2,235	2,134	32,203	1,287	4.2%
2025/26	503	2,519	2,574	2,586	2,613	2,655	2,685	2,688	2,546	2,541	2,675	2,511	2,344	2,215	33,655	1,452	4.5%
2026/27	503	2,605	2,696	2,705	2,709	2,730	2,783	2,800	2,792	2,631	2,782	2,661	2,440	2,322	35,159	1,504	4.5%
2027/28	503	2,690	2,781	2,836	2,816	2,830	2,857	2,883	2,885	2,883	2,880	2,765	2,587	2,414	36,610	1,451	4.1%
2028/29	503	2,777	2,877	2,928	2,962	2,944	2,978	2,983	2,987	2,985	3,149	2,864	2,649	2,494	38,080	1,470	4.0%

Yellow box = largest grade per year

Green box = second largest grade per year

- Northwest ISD is expected to enroll more than 25,000 students next fall, and more than 30,000 by 2023
- 5 year student growth = 6,800
- 2023/24 enrollment = 30,916 students
- 10 year student growth = 13,964
- 2028/29 enrollment = 38,080 students





Ten Year Forecast

By Elementary Campus

		HISTORY	Current	ENROLLMENT PROJECTIONS									
Campus	Capacity	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Beck Elementary	850	838	822	789	796	801	812	814	849	864	882	892	896
Clara Love Elementary	850	614	743	722	723	753	813	887	974	1,041	1,120	1,191	1,264
Cox Elementary	850	620	677	751	815	881	933	963	974	983	985	994	1,018
Curtis Elementary	850	0	503	622	743	860	927	970	993	1,008	1,004	995	987
Granger Elementary	850	928	793	788	796	802	810	804	819	835	835	832	833
Haslet Elementary	650	708	469	490	532	600	700	800	887	989	1,090	1,188	1,260
Hatfield Elementary	450	505	380	412	454	518	572	647	733	797	841	891	949
Hughes Elementary	850	632	691	719	754	775	811	837	853	854	847	848	853
Justin Elementary	650	572	633	681	757	845	929	990	1,046	1,087	1,141	1,218	1,320
Lakeview Elementary	650	623	591	610	606	611	618	626	640	656	690	711	737
Nance Elementary	650	572	616	643	673	724	752	800	823	828	833	836	833
Peterson Elementary	850	769	741	793	807	834	856	865	883	875	876	854	846
Prairie View Elementary	650	447	447	463	458	484	512	539	580	643	724	808	901
Roanoke Elementary	850	754	763	789	836	887	914	958	998	1,039	1,077	1,100	1,128
Sendera Ranch Elementary*	650	565	655	650	652	652	665	694	719	759	824	916	1,002
Seven Hills Elementary	650	572	564	563	579	568	578	581	586	604	616	635	660
Schluter Elementary	850	720	798	866	949	989	1,045	1,093	1,143	1,224	1,277	1,327	1,391
Thompson Elementary*	650	691	606	684	763	850	915	975	1,009	1,049	1,069	1,077	1,091
ELEMENTARY SCHOOL TOTALS	13,300	11,130	11,492	12,035	12,693	13,434	14,162	14,843	15,509	16,135	16,731	17,313	17,969
Elementary Absolute Growth		567	362	543	658	741	728	681	666	626	596	582	656
Elementary Percent Growth		5.37%	3.25%	4.73%	5.47%	5.84%	5.42%	4.81%	4.49%	4.04%	3.69%	3.48%	3.79%

*Additional capacity opening in 2019/20

Green box = within 5% of capacity

Yellow box = over capacity





Ten Year Forecast

By Secondary Campus

		HISTORY	Current	ENROLLMENT PROJECTIONS									
Campus	Capacity	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Adams Middle School	1,200	0	1,177	1,307	1,415	1,548	1,703	1,787	1,862	1,963	2,067	2,140	2,178
Chisholm Trail Middle School	1,100	1,067	472	463	502	464	468	458	474	499	542	586	627
Gene Pike Middle School	1,100	933	982	1,039	1,074	1,104	1,147	1,210	1,294	1,412	1,582	1,718	1,802
Medlin Middle School	1,100	1,117	1,121	1,152	1,173	1,153	1,170	1,207	1,202	1,190	1,185	1,255	1,321
Tidwell Middle School	1,200	1,212	965	1,052	1,063	1,111	1,116	1,191	1,228	1,307	1,351	1,409	1,402
Wilson Middle School	1,200	1,050	930	973	1,028	1,074	1,115	1,189	1,291	1,404	1,496	1,543	1,625
MIDDLE SCHOOL TOTALS	6,900	5,379	5,647	5,986	6,255	6,454	6,719	7,042	7,351	7,775	8,223	8,651	8,955
Middle School Absolute Growth		249	268	339	269	199	265	323	309	424	448	428	304
Middle School Percent Growth		4.85%	4.98%	6.00%	4.49%	3.18%	4.11%	4.81%	4.39%	5.77%	5.76%	5.20%	3.51%
Northwest High School	2,525	1,756	1,817	1,920	1,981	2,067	2,142	2,205	2,256	2,372	2,477	2,564	2,697
Byron Nelson High School	2,400	2,508	2,502	2,532	2,696	2,823	2,976	3,088	3,144	3,200	3,313	3,389	3,492
Eaton High School	2,500	2,190	2,437	2,629	2,863	3,187	3,336	3,516	3,721	3,951	4,193	4,471	4,745
Steele Accelerated High School	450	144	190	190	190	190	190	190	190	190	190	190	190
Denton County JJAEP		1	1	1	1	1	1	1	1	1	1	1	1
Denton Creek		33	30	31	31	31	31	31	31	31	31	31	31
HIGH SCHOOL TOTALS	7,875	6,632	6,977	7,303	7,762	8,299	8,676	9,031	9,343	9,745	10,205	10,646	11,156
High School Absolute Growth		281	345	326	459	537	377	355	312	402	460	441	510
High School Percent Growth		4.42%	5.20%	4.67%	6.29%	6.92%	4.54%	4.09%	3.45%	4.30%	4.72%	4.32%	4.79%
DISTRICT TOTALS	28,075	23,141	24,116	25,324	26,710	28,187	29,557	30,916	32,203	33,655	35,159	36,610	38,080
District Absolute Growth		1,097	975	1,208	1,386	1,477	1,370	1,359	1,287	1,452	1,504	1,451	1,470
District Percent Growth		5.0%	4.2%	5.0%	5.5%	5.5%	4.9%	4.6%	4.2%	4.5%	4.5%	4.1%	4.0%

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





Summary

- Fort Worth's unemployment rate is 3.5%.
- Northwest ISD is on pace to have nearly 1,900 new homes in 2018, and is forecasted to close between 2,000 and 2,500 homes a year for the next 3 to 5 years.
- Wellington, Caraway and Timberbrook have started homebuilding, and will have first residents late 2018 and early 2019.
- Roughly 5% of the total student population resides in multi-family developments.
- Schluter and Curtis Elementary zones added more than 200 newcomers to the district this year.
- NISD can expect an increase of approximately 6,800 students during the next 5 years.
- 2023/24 enrollment projection: 30,916 students.
- NISD is projected to enroll 38,080 students for the 2028/29 school year.