

Ector County I.S.D.

Demographic Update

April 2017

Population and Survey Analysts



E.C.I.S.D. Demographic Trends

Employment Trends

Housing Projections

Ratios: Students per Household

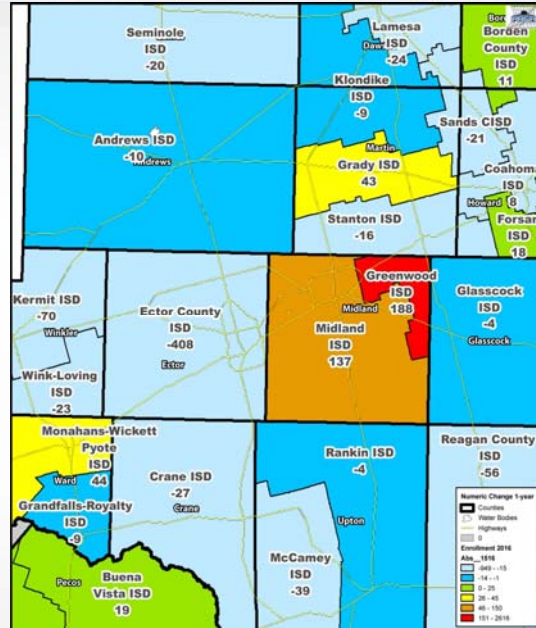
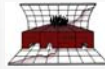
Projected Student Enrollment



Numeric Change in Student Enrollment

Fall 2015 to Fall 2016

- PEIMS enrollment estimate



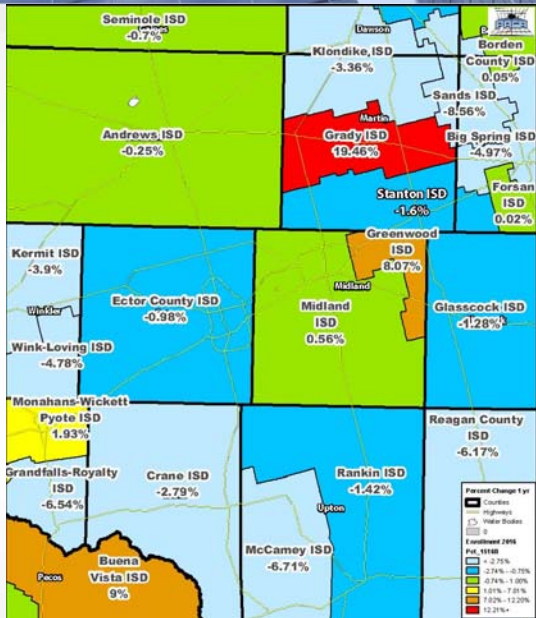
3

Population and Survey Analysts

Percent Change in Student Enrollment

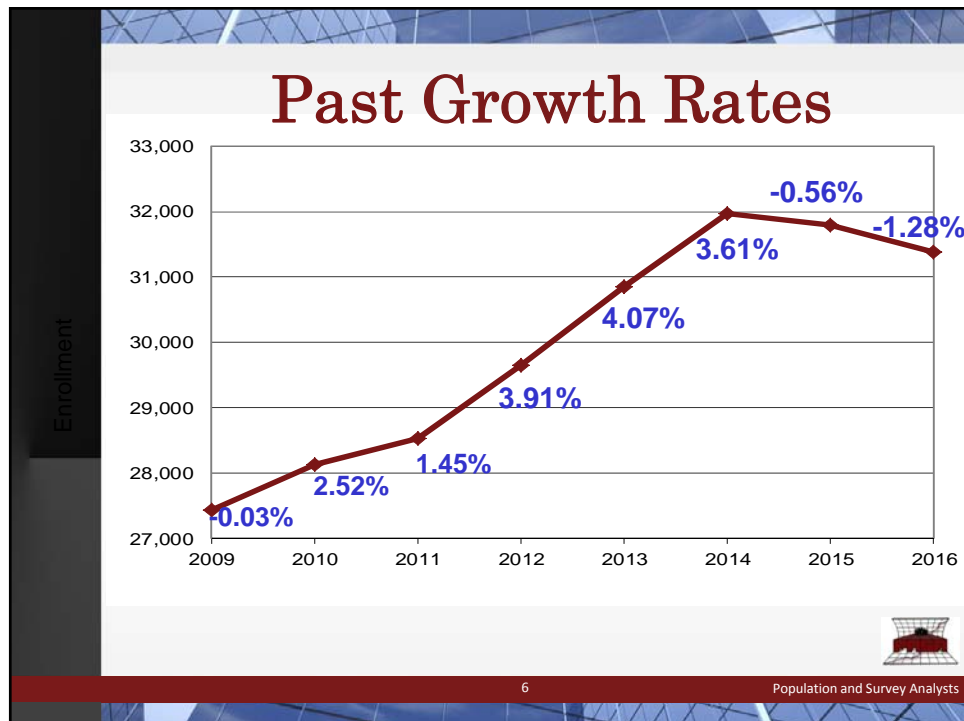
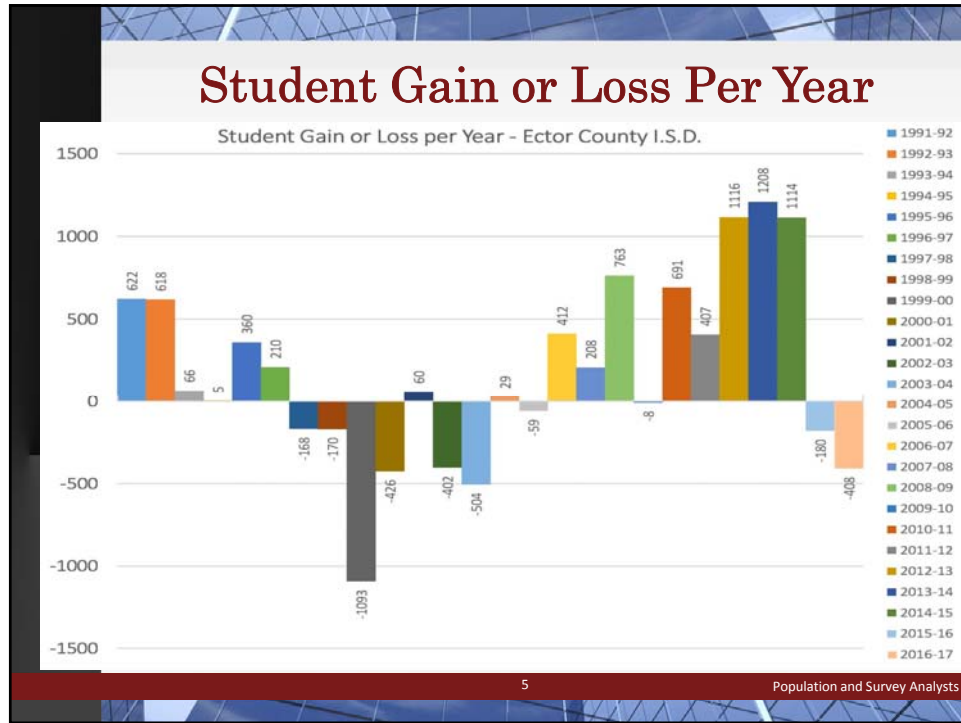
Fall 2015 to Fall 2016

- PEIMS enrollment estimate

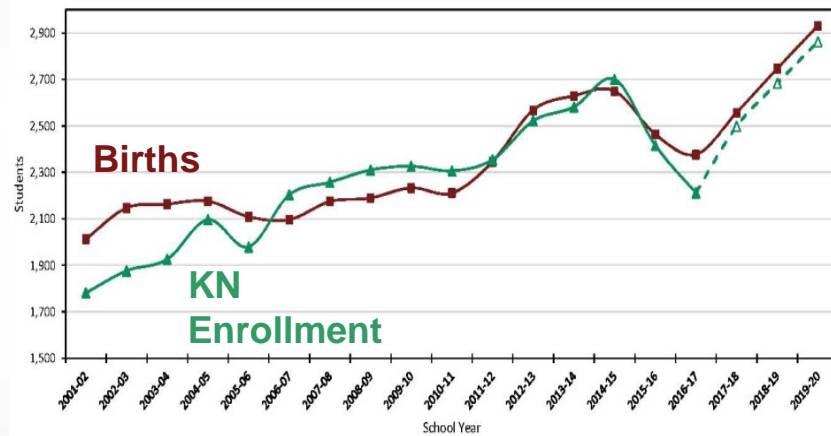


4

Population and Survey Analysts



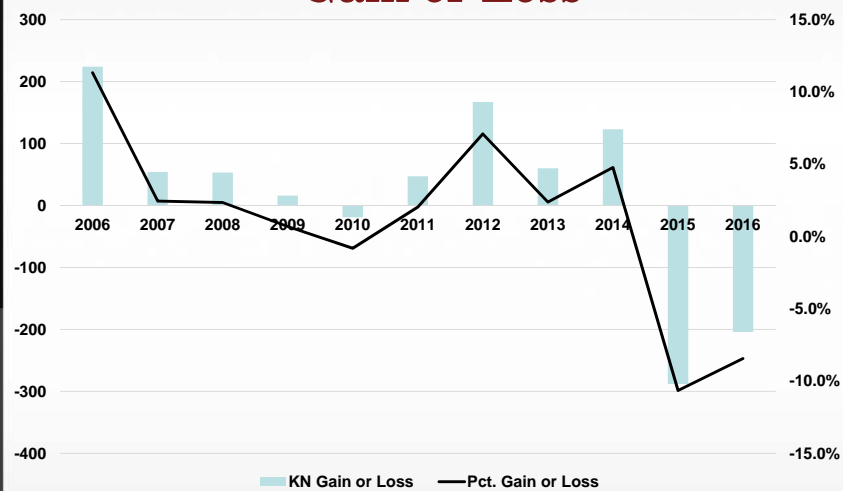
Kindergarten Enrollment vs. Births



7

Population and Survey Analysts

Kindergarten Enrollment Gain or Loss



8

Population and Survey Analysts

Unique Demographic Characteristics Ector County ISD

- ❑ Lower than Average Economically Disadvantaged population (51.31%)
 - ❖ Relative to 58.93% for State
- ❑ Slightly younger population (median age = 30.3 years)
 - ❖ Relative to State of Texas age = 34.4 years
- ❑ Lower than Average Education (16% have bachelor's degree or higher)
 - ❖ Relative to 28% in State of Texas
- ❑ Higher than average median income level (\$65,454)
 - ❖ Relative to \$55,653 in State of Texas



9

Population and Survey Analysts

Private and Charter School Enrollment

- ❑ Approximately 8% of ECISD residents in KN through 12th grades are enrolled in private schools, charter schools, or other ISDs
 - ❖ Private and Charter school expect to add just under 1,300 in enrollment over next 5 years
- ❑ Private Schools
 - ❖ 384 ECISD residents enrolled in Kindergarten to Grade 12
- ❑ Charter Schools
 - ❖ 2,222 ECISD residents enrolled in Kindergarten to Grade 12
- ❑ Other School Districts
 - ❖ 87 ECISD residents enrolled in Kindergarten to Grade 12



10

Population and Survey Analysts

E.C.I.S.D. Demographic Trends

→ Employment Trends

Housing Projections

Ratios: Students per Household

Projected Student Enrollment



11

Population and Survey Analysts

Annual Employment Trends

	December 2016	July 2016	January 2017	6-Month Pct. Change	Annual Pct. Change
City of Odessa					
Employment	54,423	54,155	54,379	0.41%	-0.08%
Unemployment Rate	5.1	6.7	5.4		
City of Midland					
Employment	66,330	66,414	66,404	-0.02%	0.11%
Unemployment Rate	4	4.8	4.1		
Ector County					
Employment	70,672	70,314	70,611	0.42%	-0.09%
Unemployment Rate	5.6	7.2	5.8		



12

Population and Survey Analysts

Optimism about Ector County Energy Employment

- * Conventional drilling sites in the Permian Basin were attracting billions for land acquisitions in 2016
 - ❑ **Apache** acquired 307,000+ acres with an expected 13% recovery rate
 - ❑ **Exxon-Mobil** bought BOPCO and other Bass family holdings for \$6.6 billion.
 - ❑ **Noble Energy** is now the second largest operator in the southern Delaware field. Noble doubled its acreage in the area
 - ❑ **Chevron** is now focusing on the Permian Basin
 - ❑ **Parsley** bought 71,000 Permian acres for \$2.8 billion
 - ❑ **SM Energy** picked up another investment for \$1.6 billion
 - ❑ **RSP Permian** bought Silver Hill Energy Partners, including 41,000 acres, for \$2.4 billion



13

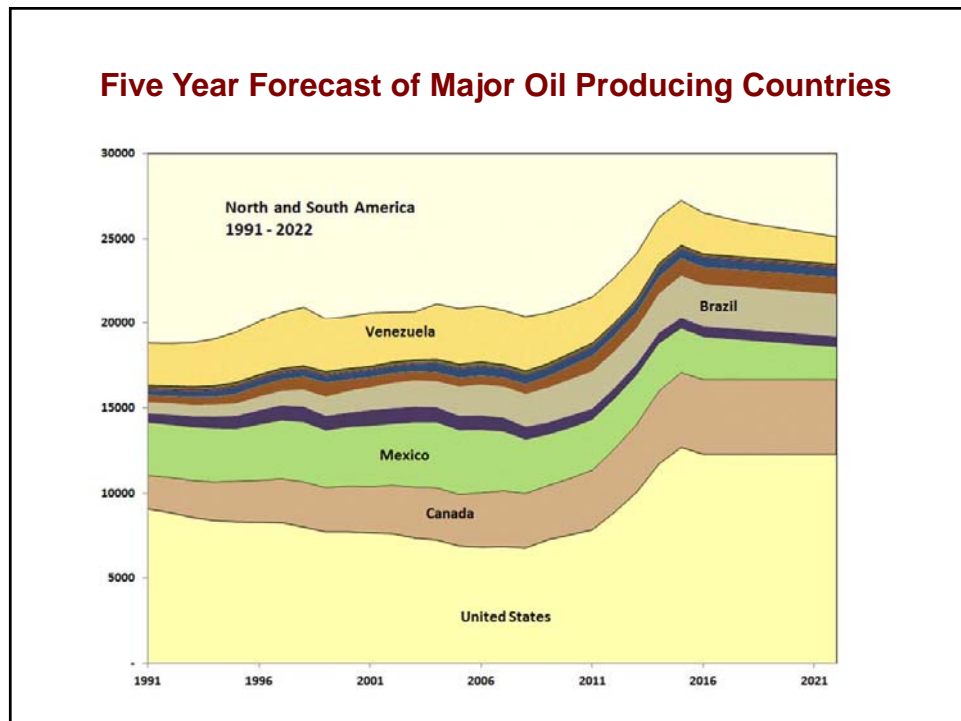
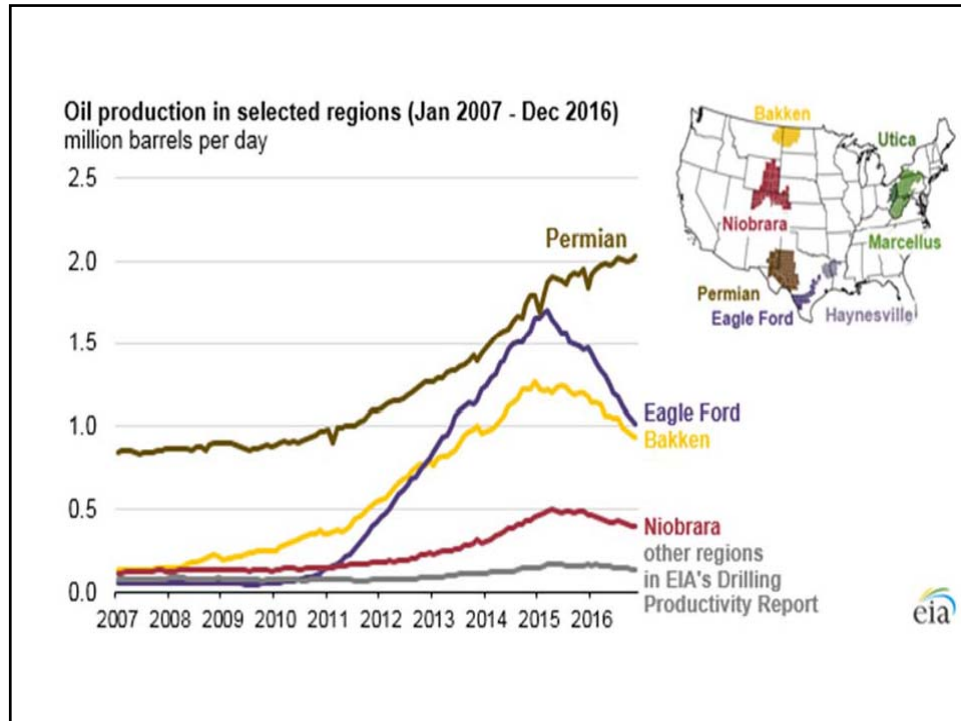
Population and Survey Analysts

Concerns about Ector County Energy Employment

- ❑ The new RSP earnings to date have averaged \$14,400 per acre, or \$30,000 less than what RSP paid.
- ❑ The newest field results of Apache's Alpine High production have also been disappointing. Their first five wells have produced 25% less than earlier estimated.
- ❑ French oil company Total passed on a planned Permian Basin investment, where the \$40,000 cost of entry per acre could not be justified without \$80-a-barrel oil.
- ❑ Other energy firms, seeing the high prices for entry into the Permian, are looking internationally for new fields.
- ❑ U.S. and global acceptance of energy alternatives is increasing.

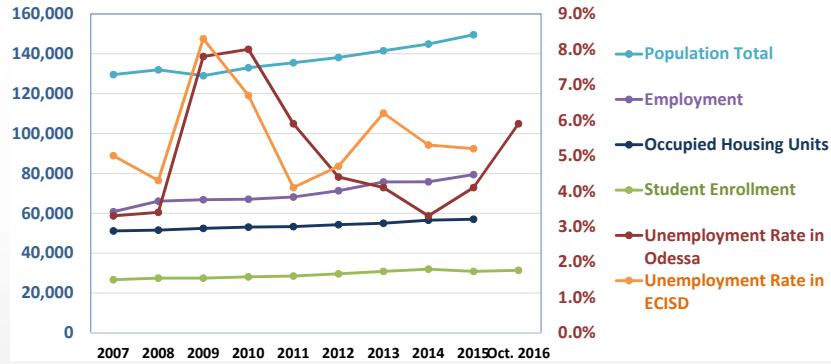
14

Population and Survey Analysts



Population, Housing, & Employment Variables

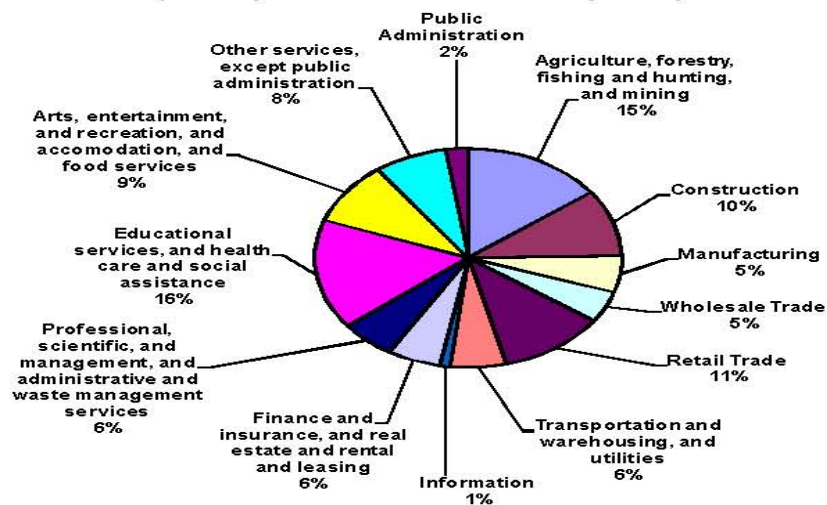
	Source	Geography	2007	2008	2009	2010	2011	2012	2013	2014	2015	Oct. 2016
Population Total	Am. Comm. Survey	ECISD boundary	129,570	131,941	128,988	133,015	135,545	138,193	141,542	144,932	149,557	
Occupied Housing Units	Am. Comm. Survey	ECISD boundary	51,151	51,551	52,397	53,070	53,275	54,309	55,034	56,510	57,024	
Student Enrollment	ECISD	ECISD boundary	26,680	27,443	27,435	28,126	28,533	29,649	30,857	31,971	30,857	31,383
Employment	Am. Comm. Survey	ECISD boundary	60,796	66,094	66,812	67,043	68,160	71,258	75,686	75,797	79,415	
Unemployment Rate in ECISD	Am. Comm. Survey	ECISD boundary	5.0%	4.3%	8.3%	6.7%	4.1%	4.7%	6.2%	5.3%	5.2%	
Unemployment Rate in Odessa	TX Workforce Omsn.	Odessa	3.3%	3.4%	7.8%	8.0%	5.9%	4.4%	4.1%	3.3%	4.1%	5.9%



17

Population and Survey Analysts

Ector County ISD Employment Sector (Out of Civilian Employed Population 16 Years and Over) Employed Population: 75,131 (out of 116,445 Total Residents in ECISD) As Reported by the 2015 American Community Survey Data



18

Population and Survey Analysts

E.C.I.S.D. Demographic Trends

Employment Trends

→ Housing Projections

Ratios: Students per Household

Projected Student Enrollment



19

Population and Survey Analysts

Ector County ISD Housing Trends

- ❑ **2016 MLS home sales** in Ector County increased slightly (1.4%) over 2015
 - ❖ But, increases were significantly below those seen in 2012 and 2013
 - ❖ December, 2016 saw an 19% increase in sales vs. December, 2015
- ❑ Average “Days on the Market” increased to 70 days on market versus 48 days in 2015
- ❑ Median home prices in 2016 in Odessa were \$165,000 vs. \$198,000 in 2014



20

Population and Survey Analysts

Ector County ISD Housing Trends

- Two **apartments** are currently underway
- There are no **hotels** under construction and no **condominiums**
- Many **multi-family** complexes planned
- Higher density housing in many newer developments
 - Smaller lots
 - Smaller home sizes
 - Especially true in the large subdivisions in east and northeast Odessa



21

Population and Survey Analysts

Ector County ISD Housing Trends

Permits for New Homes

2016 - 455
 2015 - 469
 2014 - 434
 2013 - 685

- Jobs with wages high enough to support home purchases are driving building
- Some builders recognize the niche market of young families in the area, and are building homes this group can afford



22

Population and Survey Analysts

Availability of Utilities

- ❑ Three active municipal water districts in the county, with one additional water district being developed.
- ❑ The City of Odessa is a member in the Colorado River Municipal Water District. The City resells water to the Ector County Utility District and to industrial customers from deep water wells in the west.
- ❑ Areas south of the City do not have subterranean rock formations and can install septic systems with less expense and difficulty than to the west.
- ❑ Greater Gardendale Utility District is so near to capacity that a moratorium on additional meters was imposed. It remains in place, likely through 2018.
- ❑ The rock formation in areas west of the City requires additional measures to install wells.
 - ❖ This added expense discourages first-time homebuyers



23

Population and Survey Analysts

Transportation Improvements

- ❑ Loop 338 was widened from Yukon to the Andrews Highway.
- ❑ County officials are discussing the possibility of a new road which might connect the South along the Crane Highway, from Apple Street to Farm to Market 866.
- ❑ New arterials offering improved access to I-20 and downtown would be an incentive to development in south Ector County, but there has been no development to-date.
- ❑ The Southern extension of John Ben Shepperd Parkway will facilitate development in industrial and commercial industries.
- ❑ Ector County now requires standards for roadways within residential developments such as MHPs or subdivisions for manufactured homes.
 - ❖ This means that private roads must be sufficient to permit school buses to transit, turn around and load/unload.



24

Population and Survey Analysts

Affordable Housing

The **Odessa Housing Finance Corporation**, the **City of Odessa**, and the **Odessa Housing Authority** have addressed the need for affordable housing:

- Home ownership has been a goal, with down payment assistance programs.
- A planned affordable subdivision, in Planning Unit 60, will have 110 homes.
- One apartment, currently under construction, will have 181 units.
- The Odessa Housing Authority also provides rental assistance with Section 8 vouchers which are in use throughout the County.

Tax Credit Housing:

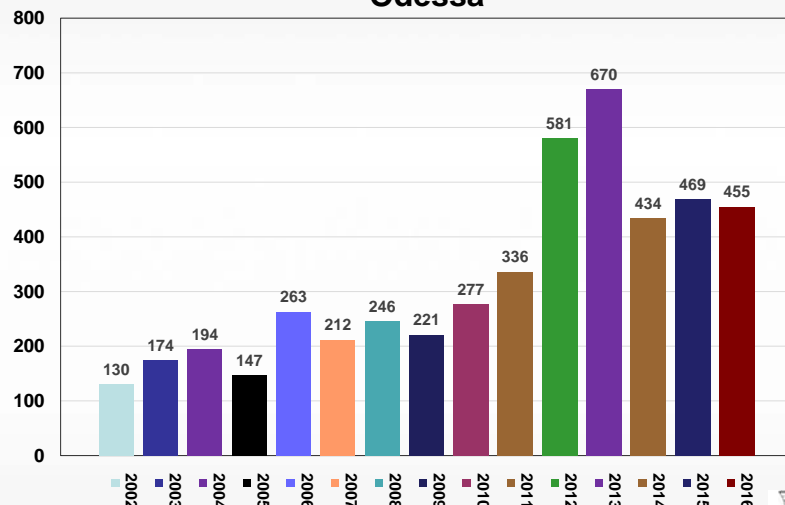
- PASA monitors the Competitive Tax Credit Housing Program
- Both in 2016 and in the upcoming 2017 cycle, **no tax credit housing** applications were submitted for E.C.I.S.D.
- In the last two years, the only submissions for tax credit housing in the region have been in Midland and San Angelo.



25

Population and Survey Analysts

New Housing Permits in the City of Odessa



26

Population and Survey Analysts

Largest Growth Single-Family Developments

<i>Subdivision Names or Owner(s) Names:</i>	<i>Planning Unit:</i>	<i>2017- 2021</i>	<i>2021- 2026</i>	<i>2017- 2026</i>
Parks Bell Ranch	9A & 9C	873	1082	1955
Northpark	58A	1100	50	1150
Desert Ridge I & II	76	490	360	850
James Hurt parcel	9A	24	465	489
Mardi Gras	58A	300	175	475
James Hurt parcel	58A	0	265	265
Total Above Subdivisions:		2,787	2,397	5,184
Total Single-Family Housing Projected:		4,070	2,961	7,031



27

Population and Survey Analysts

Summary of Largest Multi-Family Developments

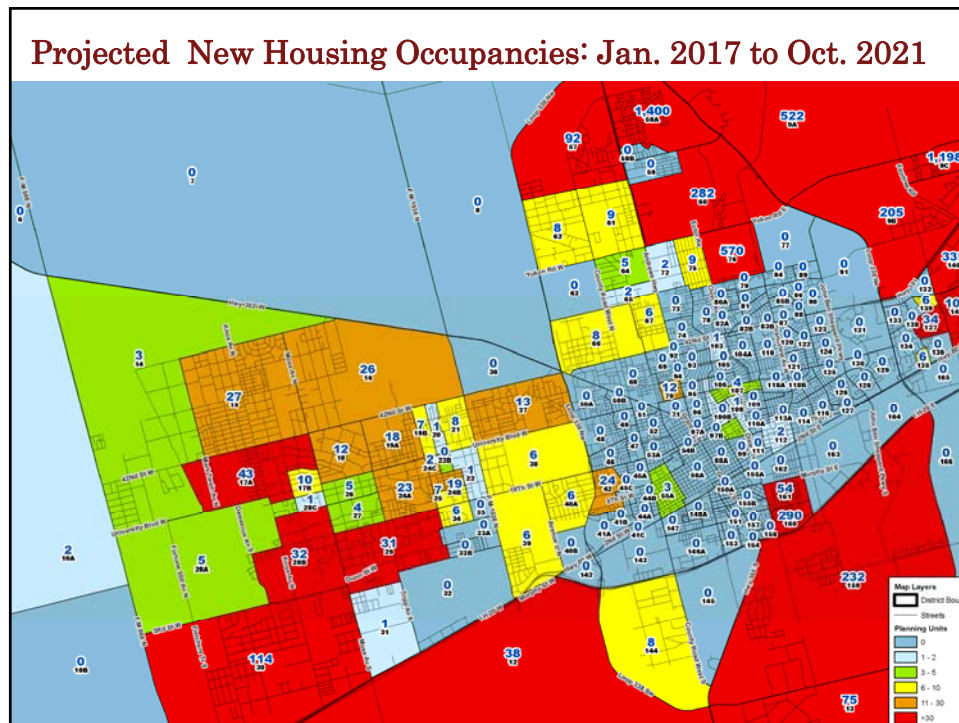
<i>Apartment Names or Owner(s) Names:</i>	<i>Planning Unit:</i>	<i>2017- 2021</i>	<i>2021- 2026</i>	<i>2017- 2026</i>
Parks Bell Ranch	9A & 9C	725	475	1200
Crossroads I & II	9B	175	450	625
Legado Ranch	140	260	0	260
Total Above Complexes:		1,160	925	2,085
Total Multi-Family Housing Projected:		1,460	925	2,385

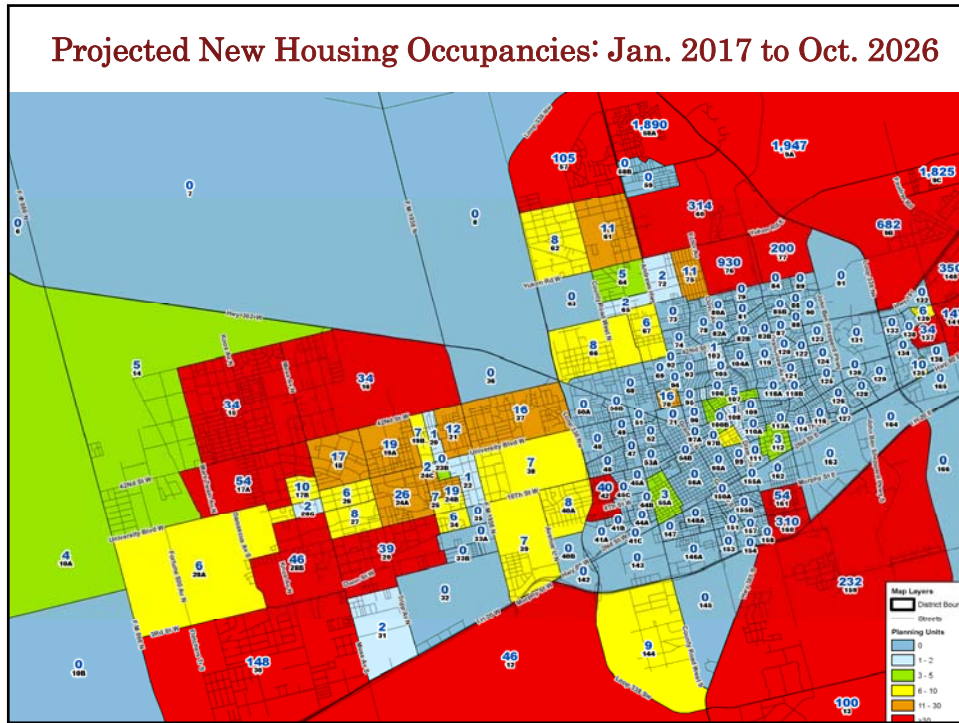


28

Population and Survey Analysts

Projected New Housing Occupancies January 2017 – Oct 2026					
	Single-Family	Multi-Family	Town-homes	MHP	Total
Jan 2017-Sep 2017	474	60	28	63	625
Oct 2017-Sep 2018	708	230	66	64	1,068
Oct 2018-Sep 2019	731	200	26	82	1,039
Oct 2019-Sep 2020	586	295	16	42	939
Oct 2020-Sep 2021	782	325	16	41	1,164
Oct 2021-Sep 2022	789	350	2	19	1,160
Oct 2022-Sep 2023	700	175	0	0	875
Oct 2023-Sep 2024	768	300	0	0	1,068
Oct 2024-Sep 2025	756	225	0	0	981
Oct 2025-Sep 2026	737	225	0	0	962
2016 - 2021	3,281	1,110	152	292	4,835
2021 - 2026	3,750	1,275	2	19	5,046
2016 - 2026	7,031	2,385	154	311	9,881





E.C.I.S.D. Demographic Trends
Employment Trends
Housing Projections
Ratios: Students per Household
Projected Student Enrollment

32 Population and Survey Analysts

Ratios of Students per Household

Single-Family Homes

Ratio of Students per
Occupied Housing Unit .56

Apartments

Ratio of Students per
Occupied Housing Unit .13



33

Population and Survey Analysts

E.C.I.S.D. Demographic Trends

Employment Trends

Housing Projections

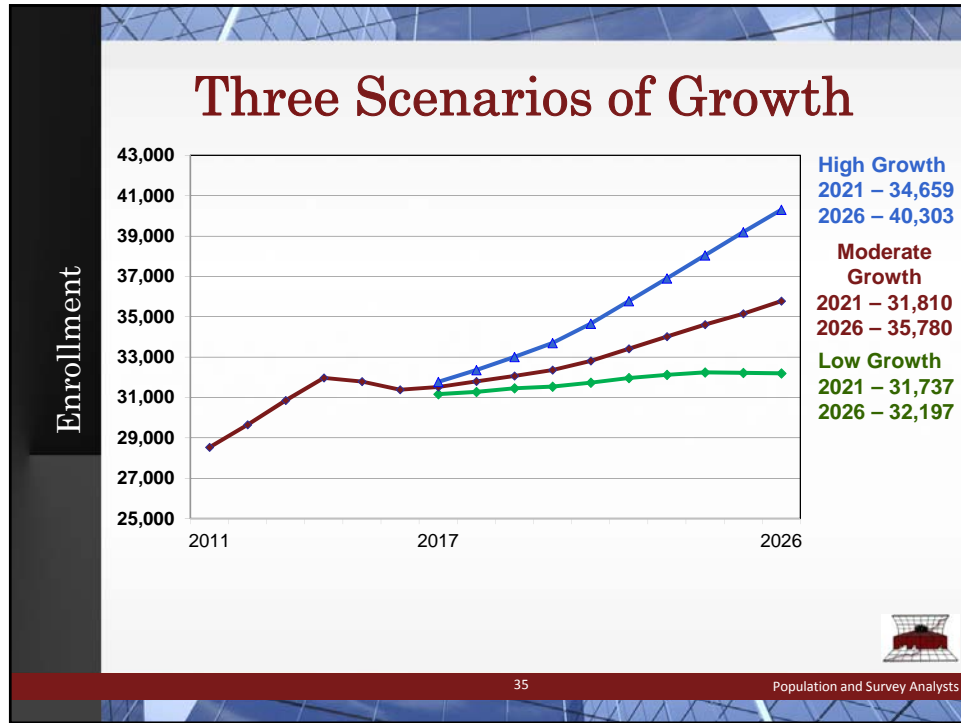
Ratios: Students per Household

→ Projected Student Enrollment



34

Population and Survey Analysts



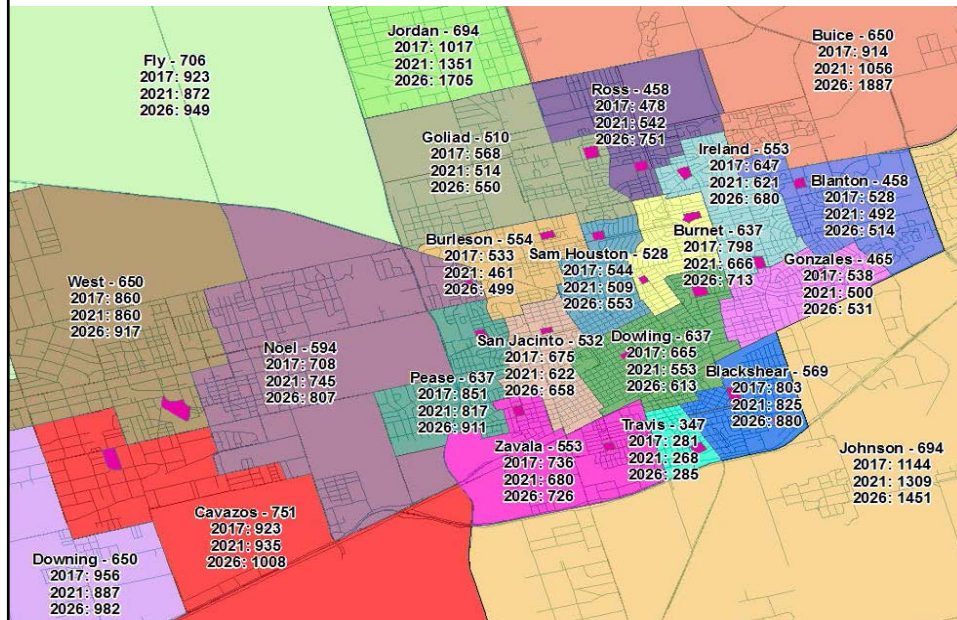
Three Scenarios of Growth

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Low										
Enrollment	31,163	31,272	31,453	31,534	31,737	31,960	32,122	32,243	32,219	32,197
% Growth	-0.70%	0.35%	0.58%	0.26%	0.64%	0.70%	0.51%	0.38%	-0.08%	-0.07%
Growth	-220	109	182	80	203	224	162	121	-24	-21
Moderate										
Enrollment	31,518	31,798	32,067	32,362	32,810	33,413	34,401	34,614	35,148	35,780
% Growth	0.43%	0.89%	0.85%	0.92%	1.38%	1.84%	1.80%	1.76%	1.54%	1.80%
Growth	135	280	269	295	448	603	603	598	534	632
High										
Enrollment	31,771	32,363	33,008	33,700	34,659	35,775	36,905	38,044	39,198	40,303
% Growth	1.24%	1.86%	1.99%	2.10%	2.84%	3.22%	3.16.00%	3.09%	3.03%	2.82%
Growth	388	592	645	692	958	1,117	1,129	1,140	1,154	1,105

36

Population and Survey Analysts

Projected Geocoded Elementary Students by School



	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Blackshear Elementary										
Geo-Coded + Transfers	666	687	684	685	688	699	710	722	732	743
Percent Utilization	117%	121%	120%	120%	121%	123%	125%	127%	129%	131%
Blanton Elementary										
Geo-Coded + Transfers	390	379	366	357	354	358	360	365	369	376
Percent Utilization	85%	83%	80%	78%	77%	78%	79%	80%	81%	82%
Buice Elementary										
Geo-Coded + Transfers	646	684	682	702	788	909	1042	1222	1411	1619
Percent Utilization	99%	105%	105%	108%	121%	140%	160%	188%	217%	249%
Burleson Elementary										
Geo-Coded + Transfers	376	346	309	308	304	310	318	324	334	342
Percent Utilization	68%	62%	56%	56%	55%	56%	57%	58%	60%	62%
Burnet Elementary										
Geo-Coded + Transfers	516	472	415	387	384	392	402	410	420	431
Percent Utilization	81%	74%	65%	61%	60%	62%	63%	64%	66%	68%
Cavazos Elementary										
Geo-Coded + Transfers	659	684	685	672	671	686	701	717	732	744
Percent Utilization	88%	91%	91%	89%	89%	91%	93%	95%	97%	99%
Dowling Elementary										
Geo-Coded + Transfers	499	459	417	394	387	398	412	422	434	447
Percent Utilization	78%	72%	65%	62%	61%	62%	65%	66%	68%	70%
Downing Elementary										
Geo-Coded + Transfers	702	682	663	629	633	650	672	689	710	728
Percent Utilization	108%	105%	102%	97%	97%	100%	103%	106%	109%	112%
Fly Elementary										
Geo-Coded + Transfers	783	756	747	729	732	748	766	781	795	809
Percent Utilization	111%	107%	106%	103%	104%	106%	108%	111%	113%	115%
Goliad Elementary										
Geo-Coded + Transfers	451	415	404	400	397	405	411	418	424	433
Percent Utilization	88%	81%	79%	78%	78%	79%	81%	82%	83%	85%
Gonzales Elementary										
Geo-Coded + Transfers	389	363	368	353	351	355	362	367	375	382
Percent Utilization	84%	78%	79%	76%	75%	76%	78%	79%	81%	82%

Projected
Elementary
Students by
School



Population and Survey Analysts

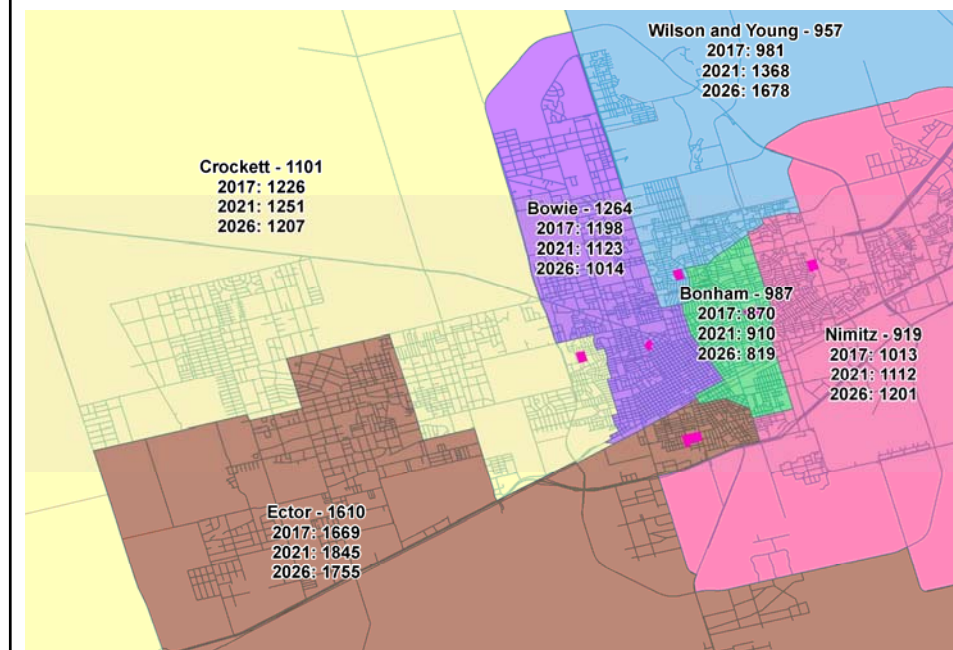
	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Ireland Elementary										
Geo-Coded + Transfers	464	440	442	441	438	447	459	469	484	497
Percent Utilization	84%	80%	80%	80%	79%	81%	83%	85%	88%	90%
Johnson Elementary										
Geo-Coded + Transfers	703	751	787	839	868	906	940	967	988	1010
Percent Utilization	101%	108%	113%	121%	125%	131%	135%	139%	142%	146%
Jordan Elementary										
Geo-Coded + Transfers	849	959	1064	1102	1183	1291	1367	1430	1493	1537
Percent Utilization	122%	138%	153%	159%	170%	186%	197%	206%	215%	221%
Noel Elementary										
Geo-Coded + Transfers	653	668	677	689	690	705	717	729	740	752
Percent Utilization	110%	112%	114%	116%	116%	119%	121%	123%	125%	127%
Pease Elementary										
Geo-Coded + Transfers	577	562	552	541	543	559	578	595	616	637
Percent Utilization	91%	88%	87%	85%	85%	88%	91%	93%	97%	100%
Ross Elementary										
Geo-Coded + Transfers	338	322	327	360	402	446	487	526	569	611
Percent Utilization	74%	70%	71%	79%	88%	97%	106%	115%	124%	133%
Sam Houston Elementary										
Geo-Coded + Transfers	481	463	467	451	446	453	464	472	480	490
Percent Utilization	91%	88%	88%	85%	84%	86%	88%	89%	91%	93%
San Jacinto Elementary										
Geo-Coded + Transfers	500	491	464	451	447	453	460	467	475	483
Percent Utilization	94%	92%	87%	85%	84%	85%	86%	88%	89%	91%
Travis Elementary										
Geo-Coded + Transfers	353	351	349	341	340	343	345	348	353	357
Percent Utilization	102%	101%	101%	98%	98%	99%	99%	100%	102%	103%
West Elementary										
Geo-Coded + Transfers	625	606	613	625	625	643	653	661	670	682
Percent Utilization	96%	93%	94%	96%	96%	99%	100%	102%	103%	105%
Zavala Elementary										
Geo-Coded + Transfers	620	588	571	568	564	569	579	587	597	610
Percent Utilization	112%	106%	103%	103%	102%	103%	105%	106%	108%	110%

Projected Elementary Students by School



Population and Survey Analysts

Projected Geocoded Middle School Students by Current Attendance Zone



Projected Middle School Students by Attendance Zone

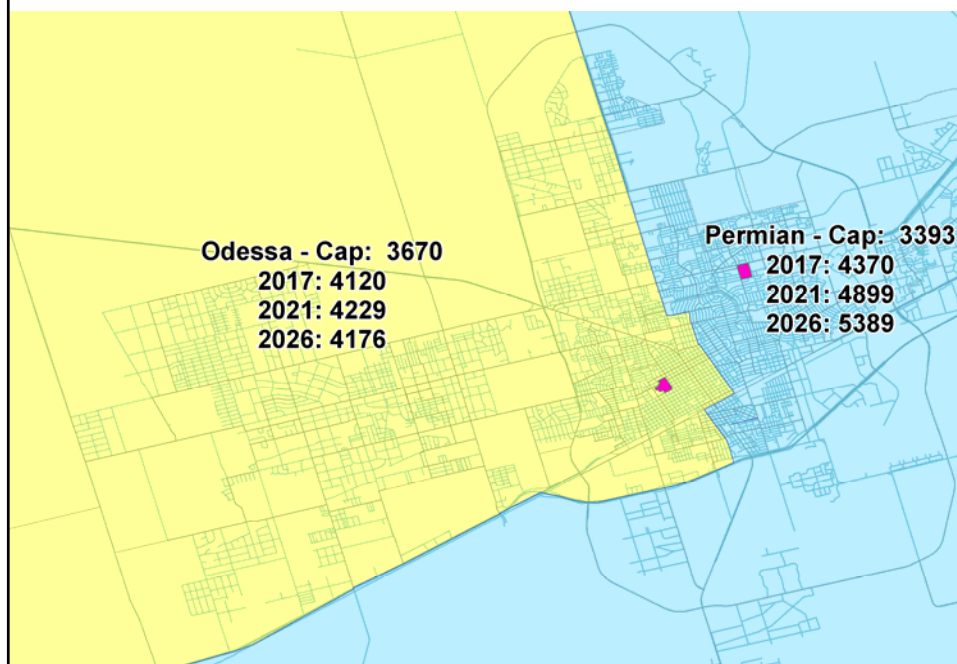
	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Bonham										
Geo-Coded + Transfers	832	856	872	895	872	819	765	751	761	781
Percent Utilization	84%	87%	88%	91%	88%	83%	78%	76%	77%	79%
Bowie										
Geo-Coded + Transfers	1247	1194	1175	1198	1172	1109	1051	1034	1049	1063
Percent Utilization	99%	94%	93%	95%	93%	88%	83%	82%	83%	84%
Crockett										
Geo-Coded + Transfers	1200	1202	1199	1238	1225	1184	1144	1137	1157	1181
Percent Utilization	109%	109%	109%	112%	111%	108%	104%	103%	105%	107%
Ector										
Geo-Coded + Transfers	1669	1746	1816	1874	1845	1776	1714	1700	1732	1755
Percent Utilization	104%	108%	113%	116%	115%	110%	106%	106%	108%	109%
Nimitz										
Geo-Coded + Transfers	1013	995	1013	1089	1112	1111	1107	1122	1157	1201
Percent Utilization	110%	108%	110%	118%	121%	121%	120%	122%	126%	131%
Wilson and Young										
Geo-Coded + Transfers	975	1145	1256	1318	1362	1376	1382	1441	1555	1672
Percent Utilization	102%	120%	131%	138%	142%	144%	144%	151%	162%	175%



41

Population and Survey Analysts

Projected Geocoded High School Students by Current Attendance Zone



Projected High School Students by School

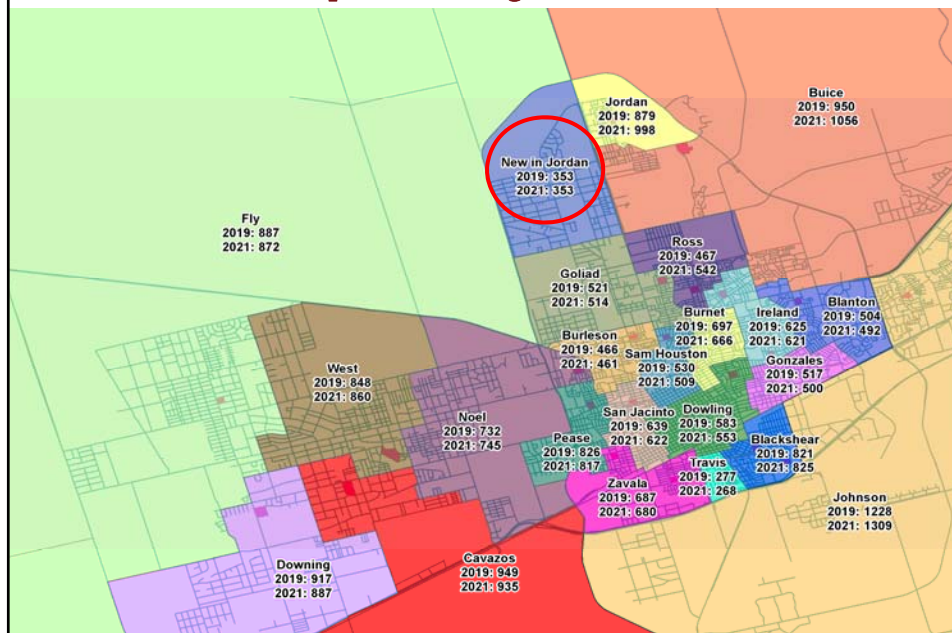
	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Odessa High										
Capacity	3,670	3,670	3,670	3,670	3,670	3,670	3,670	3,670	3,670	3,670
Projected Geo-Coded Students	4,120	4,152	4,173	4,160	4,229	4,330	4,440	4,433	4,275	4,176
Potential Transfers	-115	-115	-115	-115	-115	-115	-115	-115	-115	-115
Geo-Coded + Transfers	4,005	4,037	4,058	4,045	4,114	4,215	4,325	4,318	4,160	4,061
Percent Utilization	109%	110%	111%	110%	112%	115%	118%	118%	113%	111%
Student Margin	-335	-367	-388	-375	-444	-545	-655	-648	-490	-391
Pemian High										
Capacity	3,393	3,393	3,393	3,393	3,393	3,393	3,393	3,393	3,393	3,393
Projected Geo-Coded Students	4,370	4,516	4,642	4,708	4,899	5,120	5,351	5,446	5,402	5,389
Potential Transfers	-546	-546	-546	-546	-546	-546	-546	-546	-546	-546
Geo-Coded + Transfers	3,824	3,970	4,096	4,162	4,353	4,574	4,805	4,900	4,856	4,843
Percent Utilization	113%	117%	121%	123%	128%	135%	142%	144%	143%	143%
Student Margin	-431	-577	-703	-769	-960	-1,181	-1,412	-1,507	-1,463	-1,450
TOTAL										
Capacity	7,063	7,063	7,063	7,063	7,063	7,063	7,063	7,063	7,063	7,063
Projected Geo-Coded Students	8,490	8,668	8,815	8,868	9,128	9,450	9,791	9,879	9,677	9,565
Potential Transfers	-661	-661	-661	-661	-661	-661	-661	-661	-661	-661
Geo-Coded + Transfers	7,829	8,007	8,154	8,207	8,467	8,789	9,130	9,218	9,016	8,904
Student Margin	-766	-944	-1,091	-1,144	-1,404	-1,726	-2,067	-2,155	-1,953	-1,841



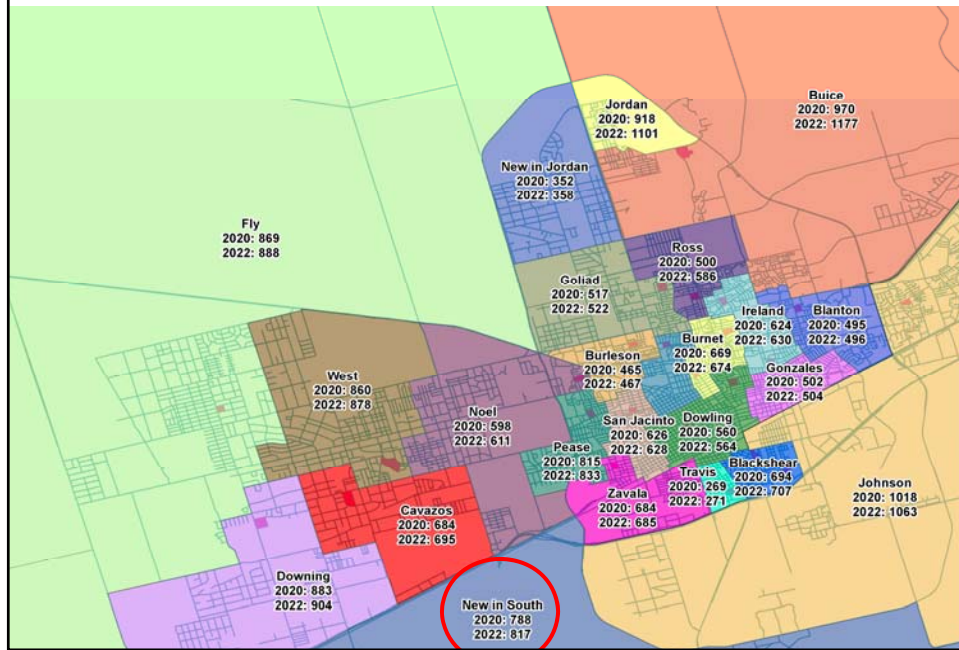
43

Population and Survey Analysts

Elementary Step 1: Open New School Near Jordan (Need to Split Planning Units in Area)



Elementary Step 2: Open New School in South



Elementary Step 3: Open New School in Buice Area

