



Northwest  
Independent  
School  
District

# Quarterly Report 1Q20



TEMPLETON  
DEMOGRAPHICS

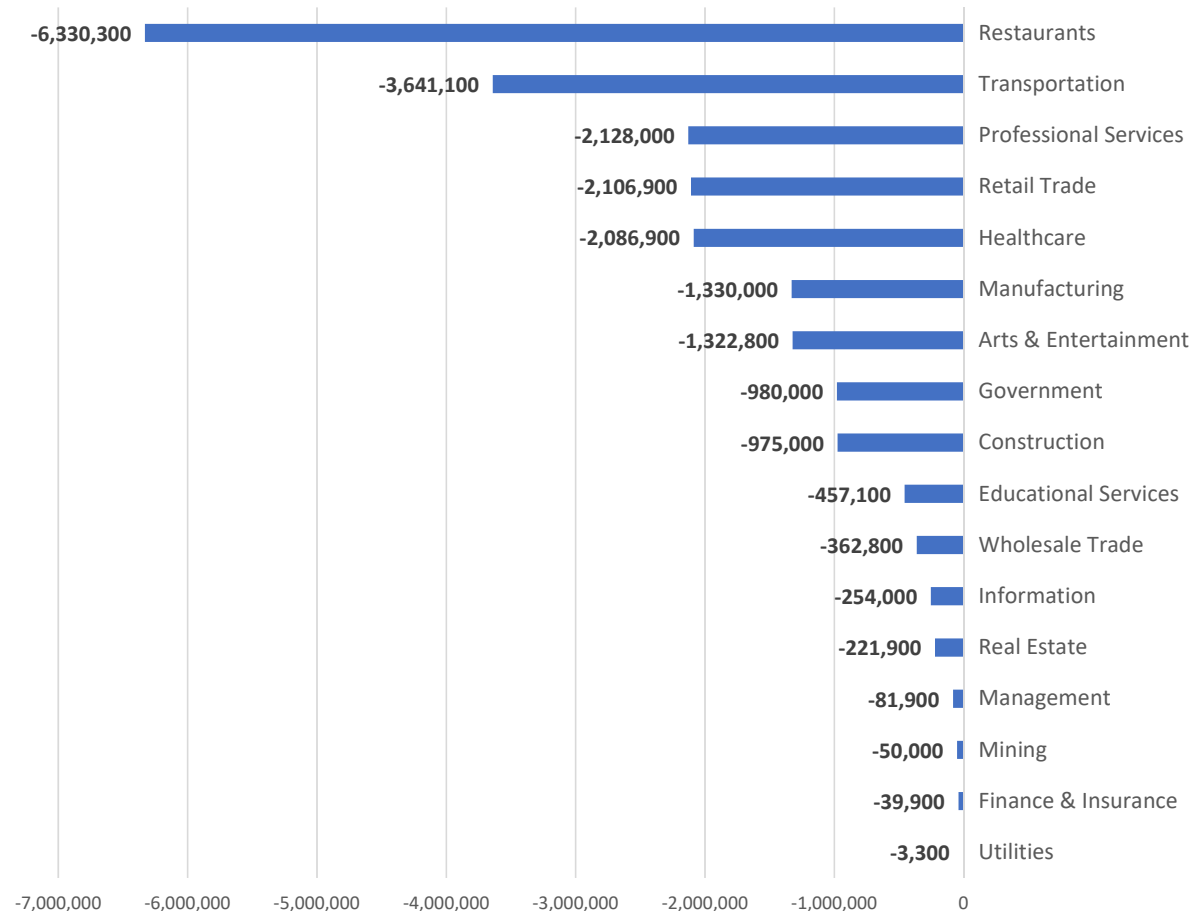
hanleywood | metrostudy



# 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

Change in Employment by Industry, March 2020 - April 2020



Source: Bureau of Labor Statistics



# Statewide Economic Conditions

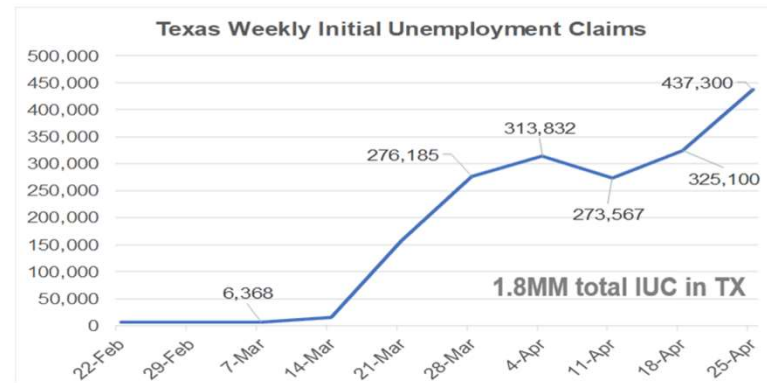
## Lower Risk Markets: Short-Term

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

## Higher Risk Markets: Short-Term

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

## Initial Unemployment Claims



Weekly Initial Unemployment Claim by Industry (State of Texas)*			DFW Annual Wages
Industry	Total	% of Total	
Accommodation and Food Services	204,482	22%	\$25k
Retail Trade	123,456	13%	\$37k
Health Care and Social Assistance	113,868	12%	\$55k
Administrative and Support	78,360	8%	\$48k
N/Av	59,797	6%	-
Other Services	56,856	6%	\$42k
Construction	47,919	5%	\$66k
Manufacturing	47,085	5%	\$79k
Professional, Scientific, and Tech Services	37,835	4%	\$97k
Wholesale Trade	28,692	3%	\$83k
Arts, Entertainment, and Recreation	26,592	3%	\$41k
Transportation and Warehousing	26,440	3%	\$59k
Educational Services	23,051	2%	\$52k
Mining	19,877	2%	-
Real Estate Rental and Leasing	17,059	2%	\$71k
Information	13,120	1%	\$98k
Finance and Insurance	8,608	1%	\$93k
Management of Companies and Enterprises	4,828	1%	\$116k
Public Administration	3,014	0%	\$74k
Agriculture, Forestry, Fishing and Hunting	736	0%	\$39k
Utilities	507	0%	\$92k
<b>Totals:</b>	<b>942,182</b>		

\* Totals from 3/7/20 through 4/11/20

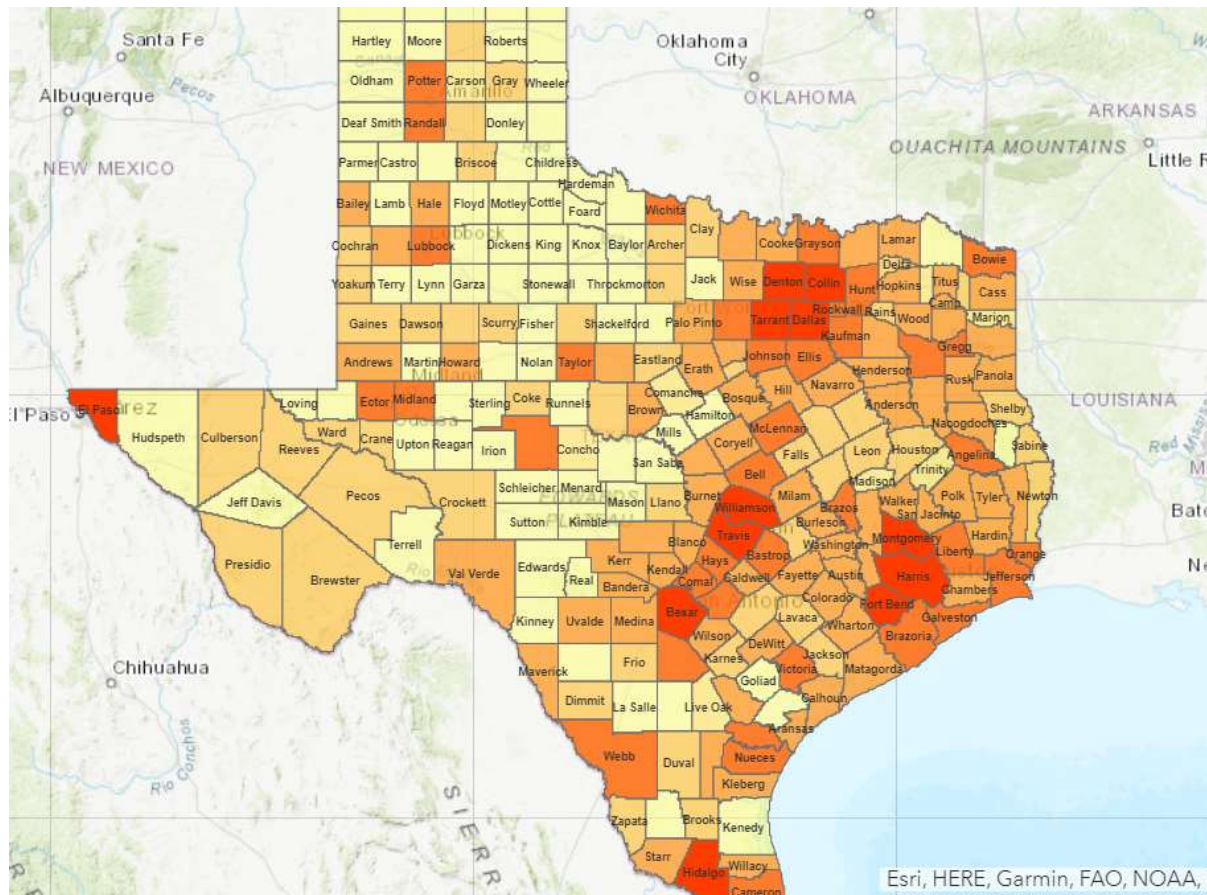
- Dallas and Austin are considered two of the markets nationwide with low risk from the COVID pandemic, however, Houston is expected to experience high risk during the pandemic due to their connection to the oil industry
- Due to COVID impact, Texas has laid off approx. 12% of its workforce; ranked 6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



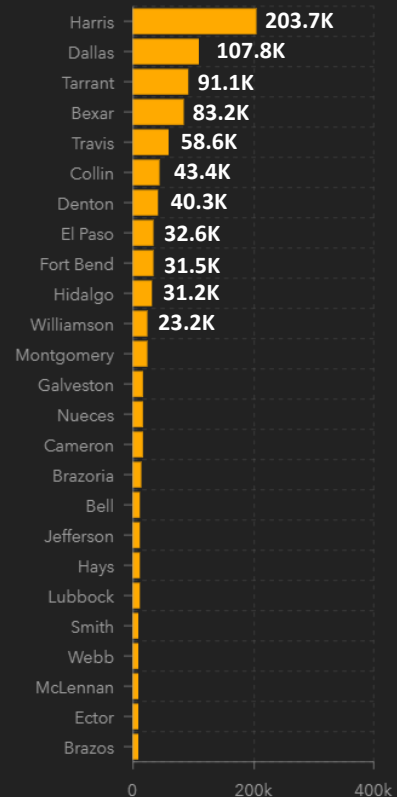


# Statewide Economic Conditions

Unemployment Claims by County 3/18/20-4/18/20



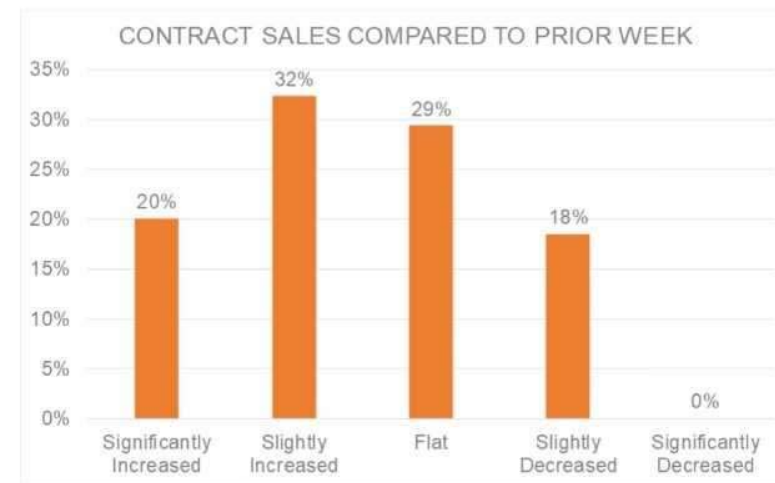
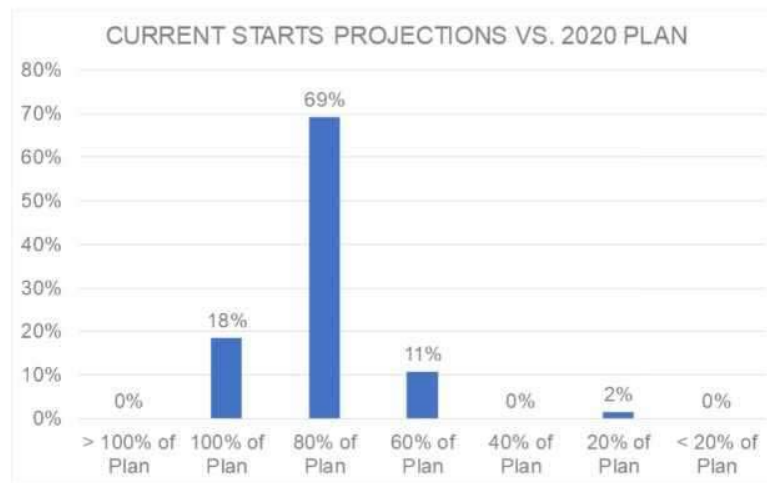
## Top 25 UI Claims by County





## Covid-19 and the Housing Market

### Texas Builders Survey: Starts & Contract Sales (April 27<sup>TH</sup>)



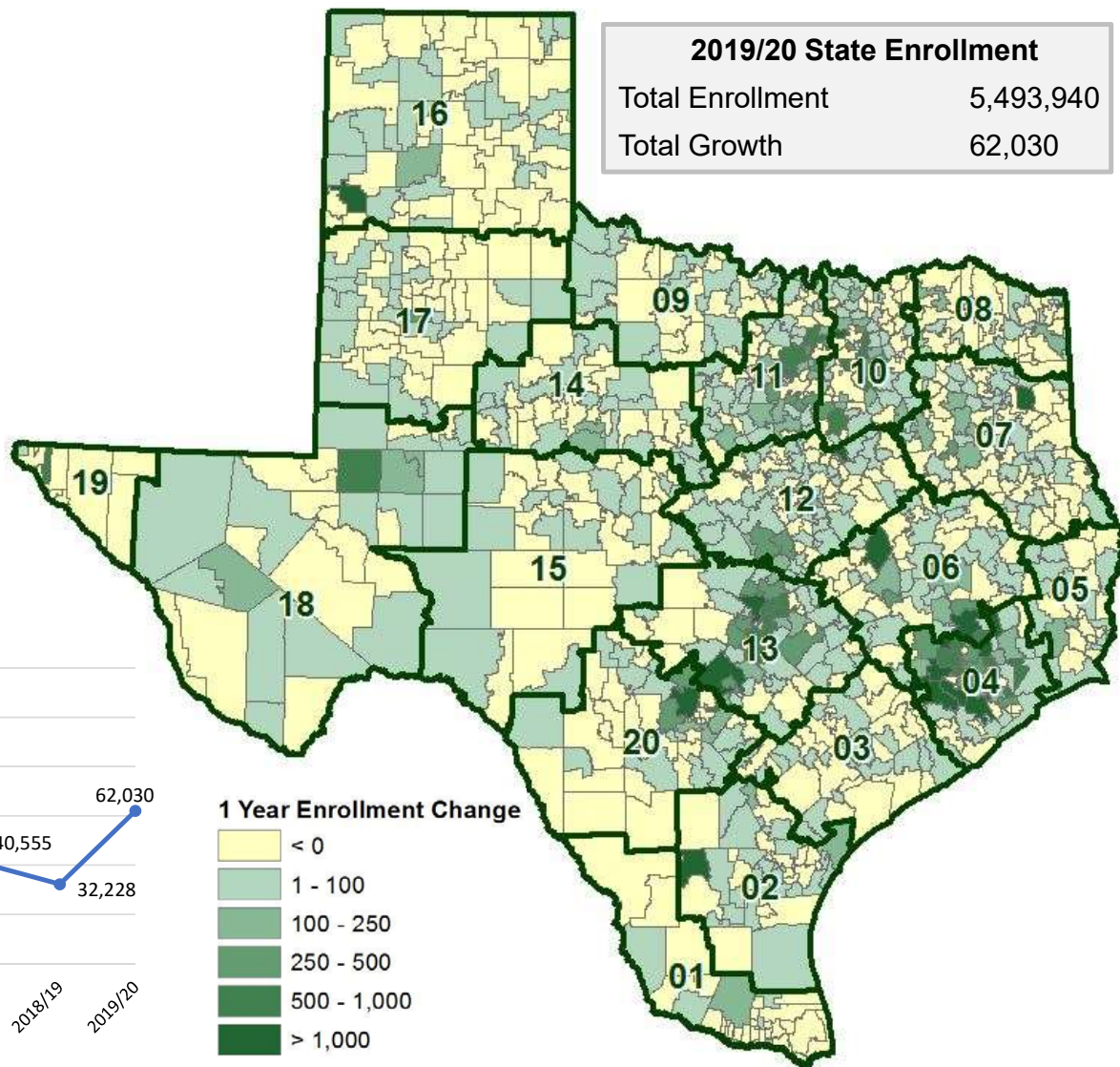
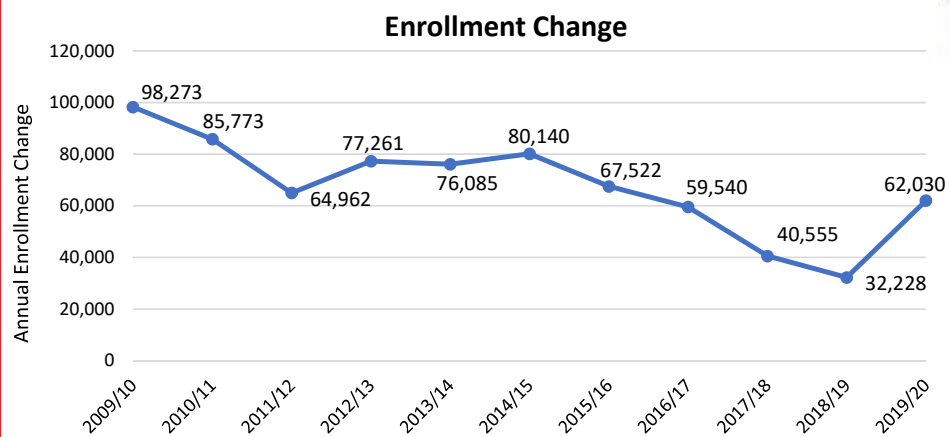
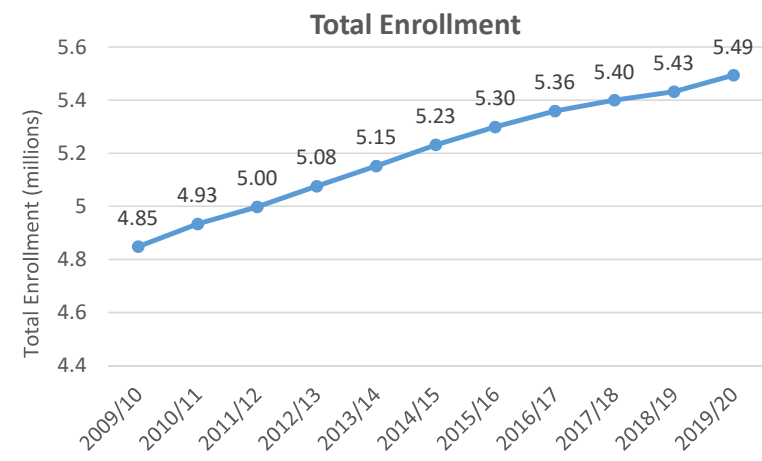
*While starts will be down in 2020, sales activity is adapting and stabilizing.*

- 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





## State Enrollment Trends

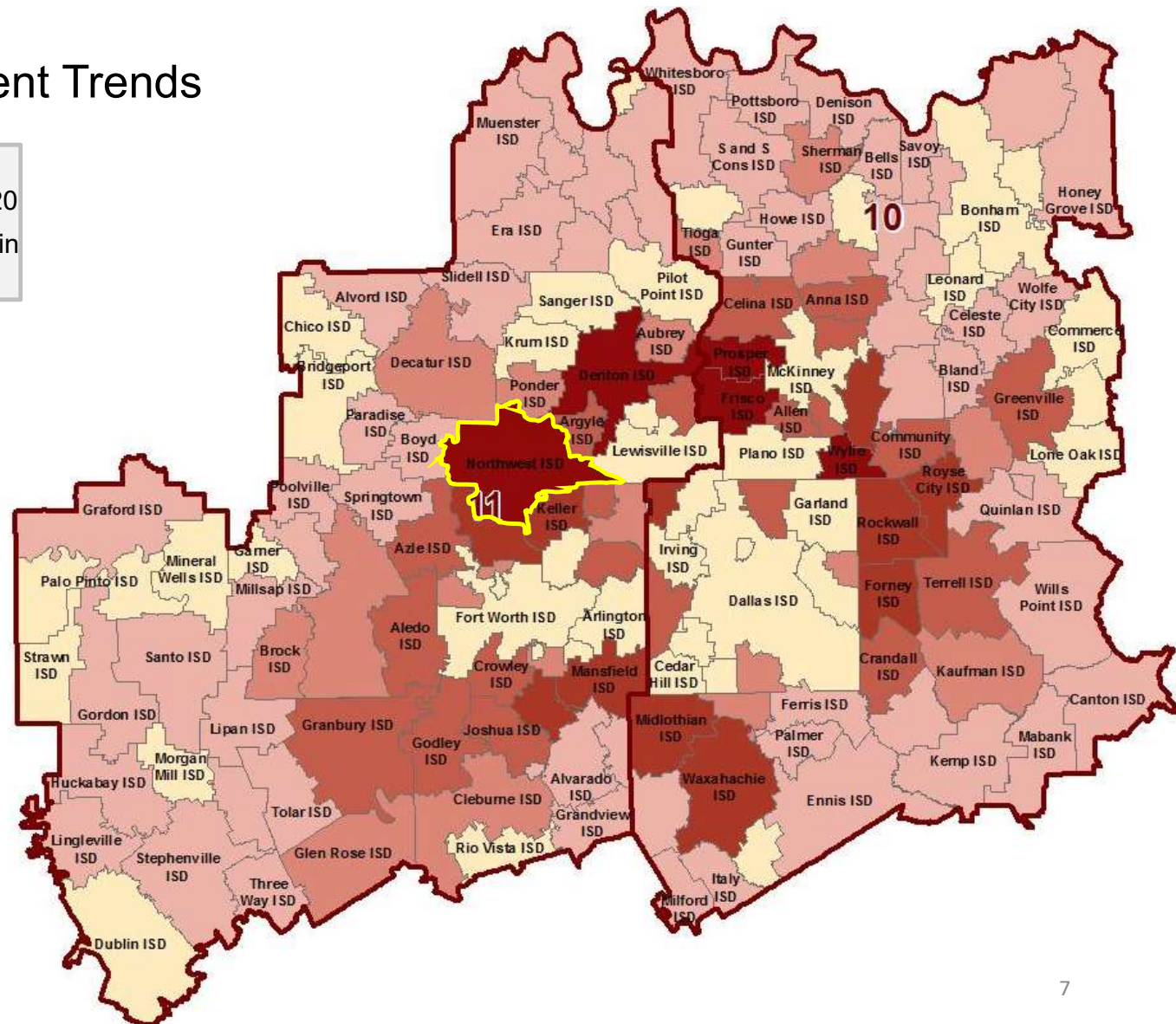
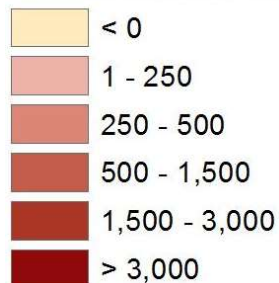




## Region 10 & 11 Enrollment Trends

Northwest ISD has added 5,209 students between 2014/15 and 2019/20  
NISD is the #1 fastest growing district in Region 11

### 5 Yr Enrollment Change





## DFW New Home Ranking Report

### ISD Ranked by Annual Closings – 1Q20

Rank	District Name	Annual Starts	Annual Closings	VDL	Inventory	Future
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**	2,337	2,089	3,330	1,239	42,303
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	18,974
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

\*\*Includes Age-Restricted subdivisions





## District Housing Overview by Elementary Zone

Elementary Zone	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Under Construction	Inventory	Vacant Dev. Lots	Future Lots
BECK	20	4	25	5	7	10	37	0
CLARA LOVE	0	0	0	0	0	0	0	4,520
COX	282	68	246	66	64	107	186	0
CURTIS	246	47	220	86	62	131	189	461
GRANGER	0	0	0	0	0	0	4	0
HASLET	128	45	78	24	63	103	399	2,399
HATFIELD	197	131	227	6	111	132	29	1,106
HUGHES	0	0	7	0	0	0	0	0
JUSTIN	205	35	192	53	59	99	445	3,792
LAKEVIEW	12	0	10	4	5	6	33	0
LANCE THOMPSON	614	162	422	116	198	350	955	4,474
NANCE	93	15	114	28	38	55	21	1,323
PETERSON	0	0	0	0	0	1	2	0
PRAIRIE VIEW	0	0	0	0	0	0	0	11,643
ROANOKE	10	7	9	3	7	8	34	8
SCHLUTER	286	74	269	61	66	140	671	1,357
SENDERA RANCH	0	0	0	0	0	4	15	3,587
SEVEN HILLS	2	0	0	0	2	2	18	6,735
JC THOMPSON	242	42	270	59	39	91	292	898
<b>TOTAL</b>	<b>2,337</b>	<b>630</b>	<b>2,089</b>	<b>511</b>	<b>721</b>	<b>1,239</b>	<b>3,330</b>	<b>42,303</b>

\*Does **NOT** include Age-Restricted subdivisions

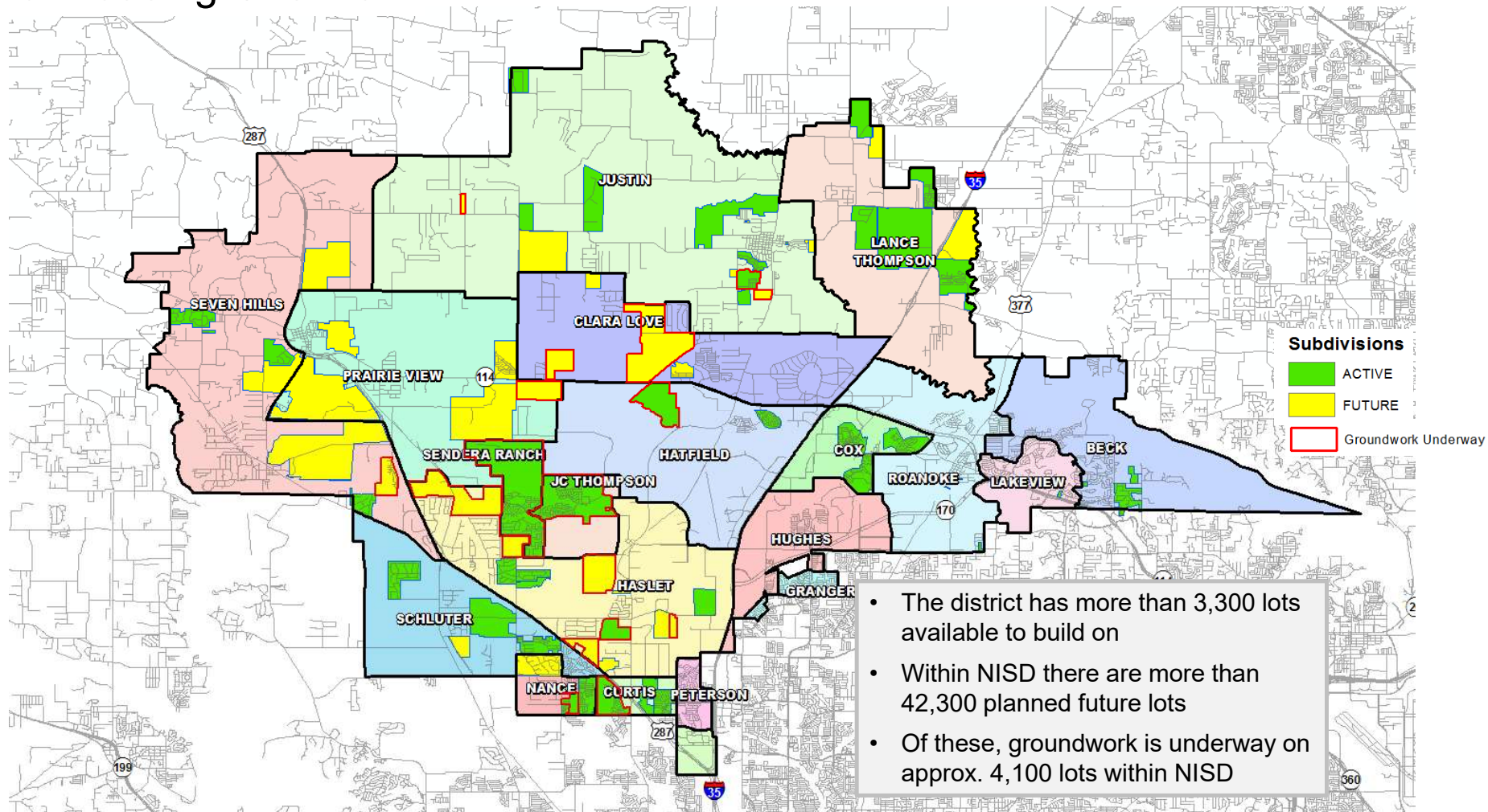
Highest activity in the category

Second highest activity in the category

Third highest activity in the category

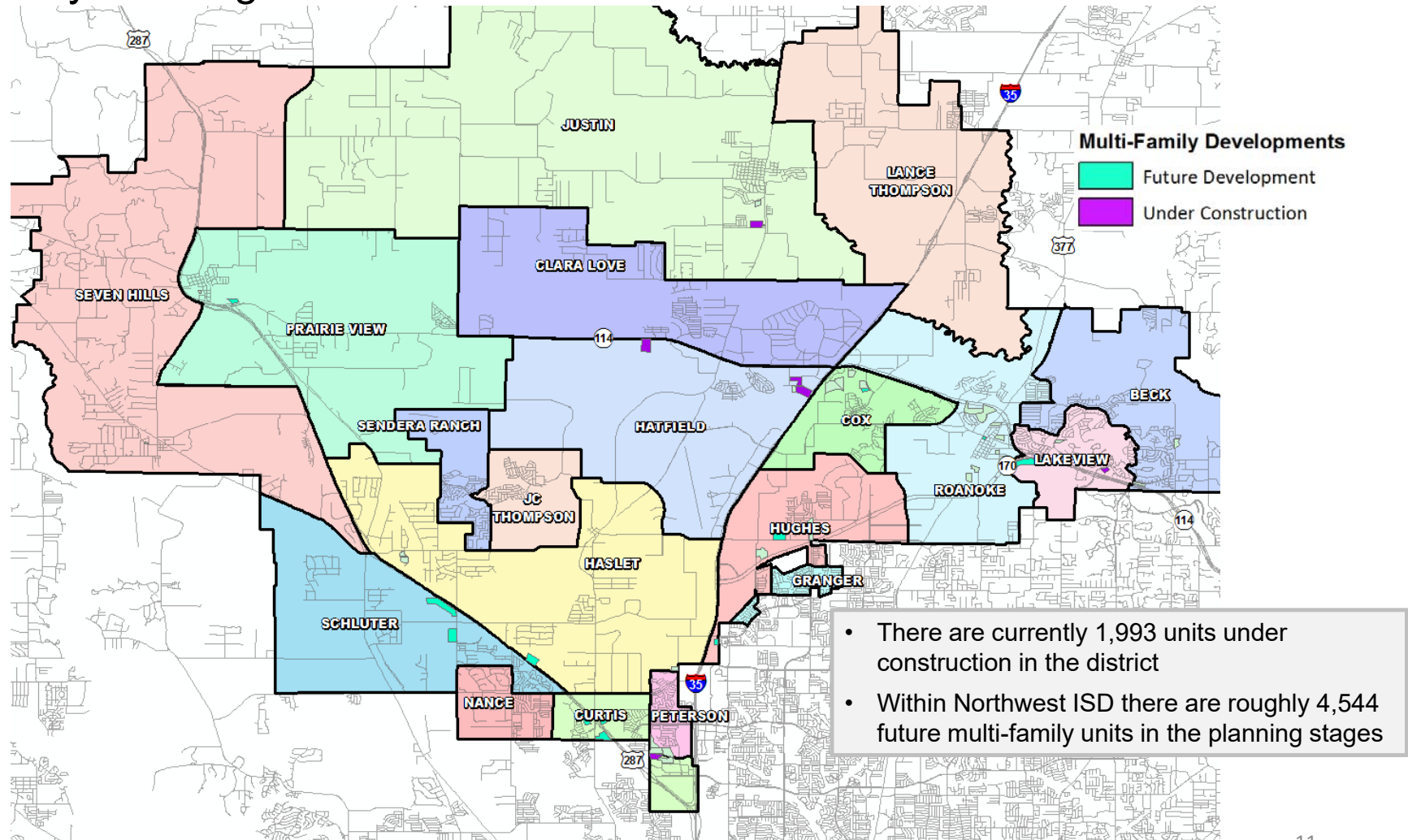


## District Housing Overview





## Multi-Family Housing Overview





# TEA Transfer Report

Transfers In From	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	5 Year Change
Argyle ISD	12	14	20	14	17	21	9
Birdville ISD	11	16	18	16	14	16	5
Boyd ISD	6	3	3	16	12	11	5
Decatur ISD	25	26	26	40	44	43	18
Denton ISD	10	16	22	18	26	29	19
Eagle Mt-Saginaw ISD	70	84	105	107	117	105	35
Keller ISD	193	185	160	146	124	128	-65
Lewisville ISD	7	12	9	3	12	3	-4
Ponder ISD	13	10	10	3	11	10	-3
Springtown ISD	3	5	5	3	10	13	10
<b>Total Transfers In*</b>	<b>432</b>	<b>481</b>	<b>494</b>	<b>471</b>	<b>467</b>	<b>446</b>	<b>14</b>

Transfers Out To	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	5 Year Change
Argyle ISD	10	27	22	27	34	51	41
Birdville ISD	26	27	24	19	22	32	6
Boyd ISD	96	96	85	74	79	50	-46
Carroll ISD	146	153	158	174	177	172	26
Decatur ISD	29	32	36	28	35	29	0
Eagle Mt-Saginaw ISD	64	56	64	43	51	37	-27
Grapevine-Colleyville ISD	26	20	27	34	38	46	20
Hallsville ISD	0	0	0	0	22	33	33
International Leadership of Texas	254	261	306	469	465	456	202
Keller ISD	45	66	125	187	190	195	150
Lewisville ISD	8	5	12	15	18	24	16
Ponder ISD	27	25	31	27	27	23	-4
Texas College Preparatory Academie	44	21	28	29	32	37	-7
Westlake Academy Charter School	95	114	123	129	143	166	71
<b>Total Transfers Out*</b>	<b>951</b>	<b>984</b>	<b>1,133</b>	<b>1,360</b>	<b>1,440</b>	<b>1,470</b>	<b>519</b>

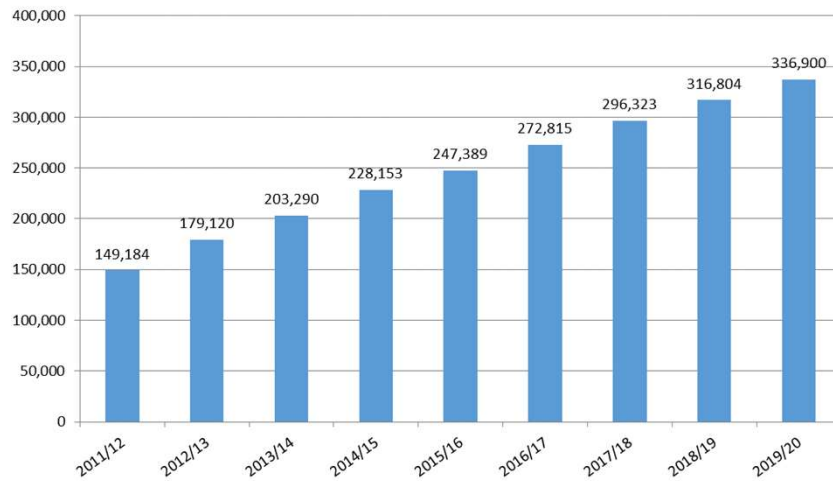
\*Totals include additional districts per TEA rounding rules



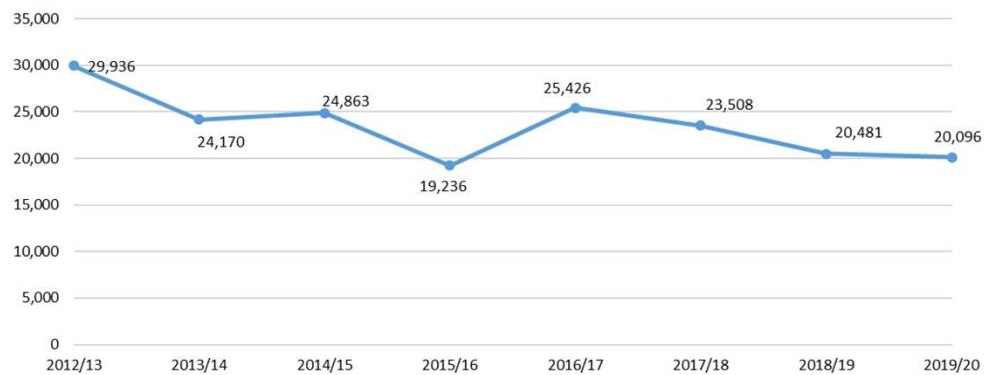


# Charter Schools in Texas

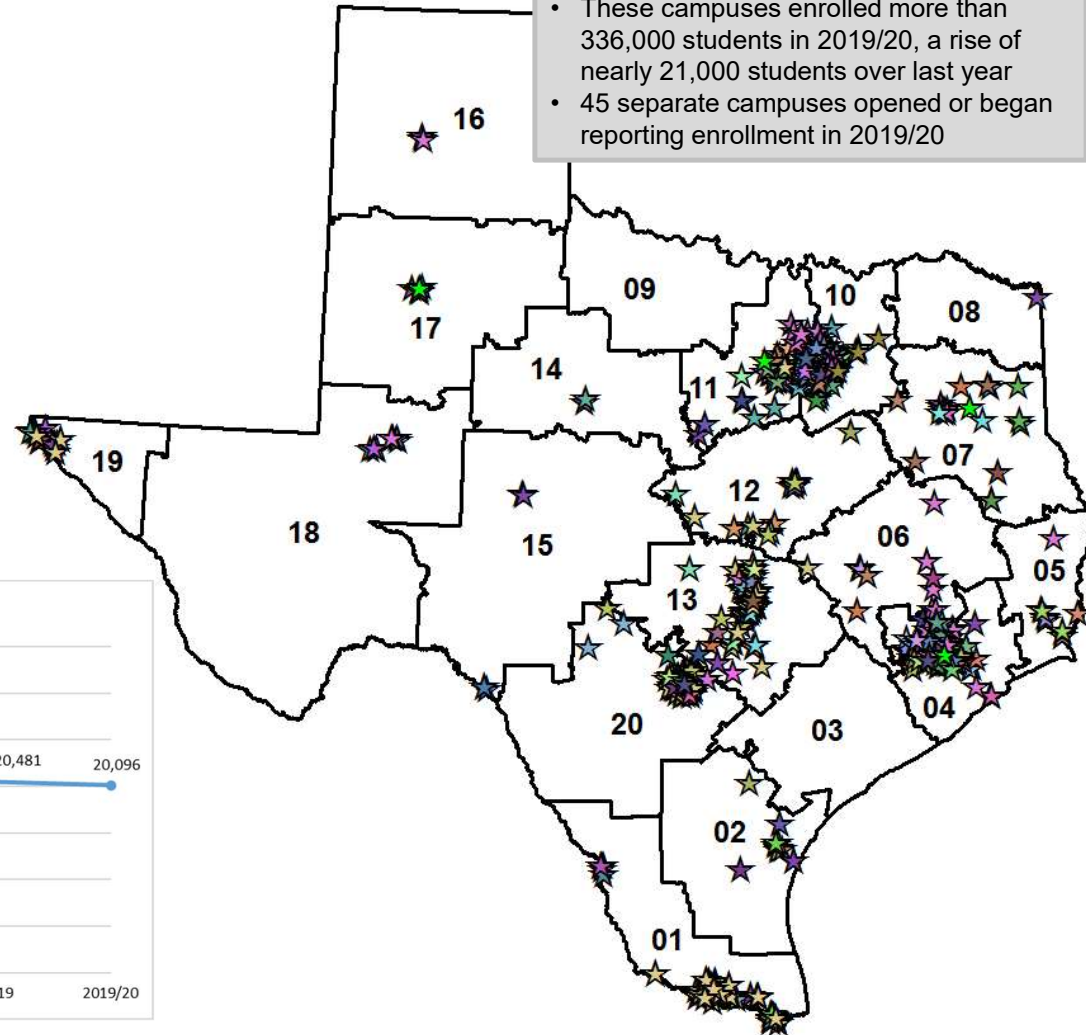
Total Charter Enrollment



Charter Enrollment Change



- There are currently more than 780 charter school campuses open across Texas
- These campuses enrolled more than 336,000 students in 2019/20, a rise of nearly 21,000 students over last year
- 45 separate campuses opened or began reporting enrollment in 2019/20



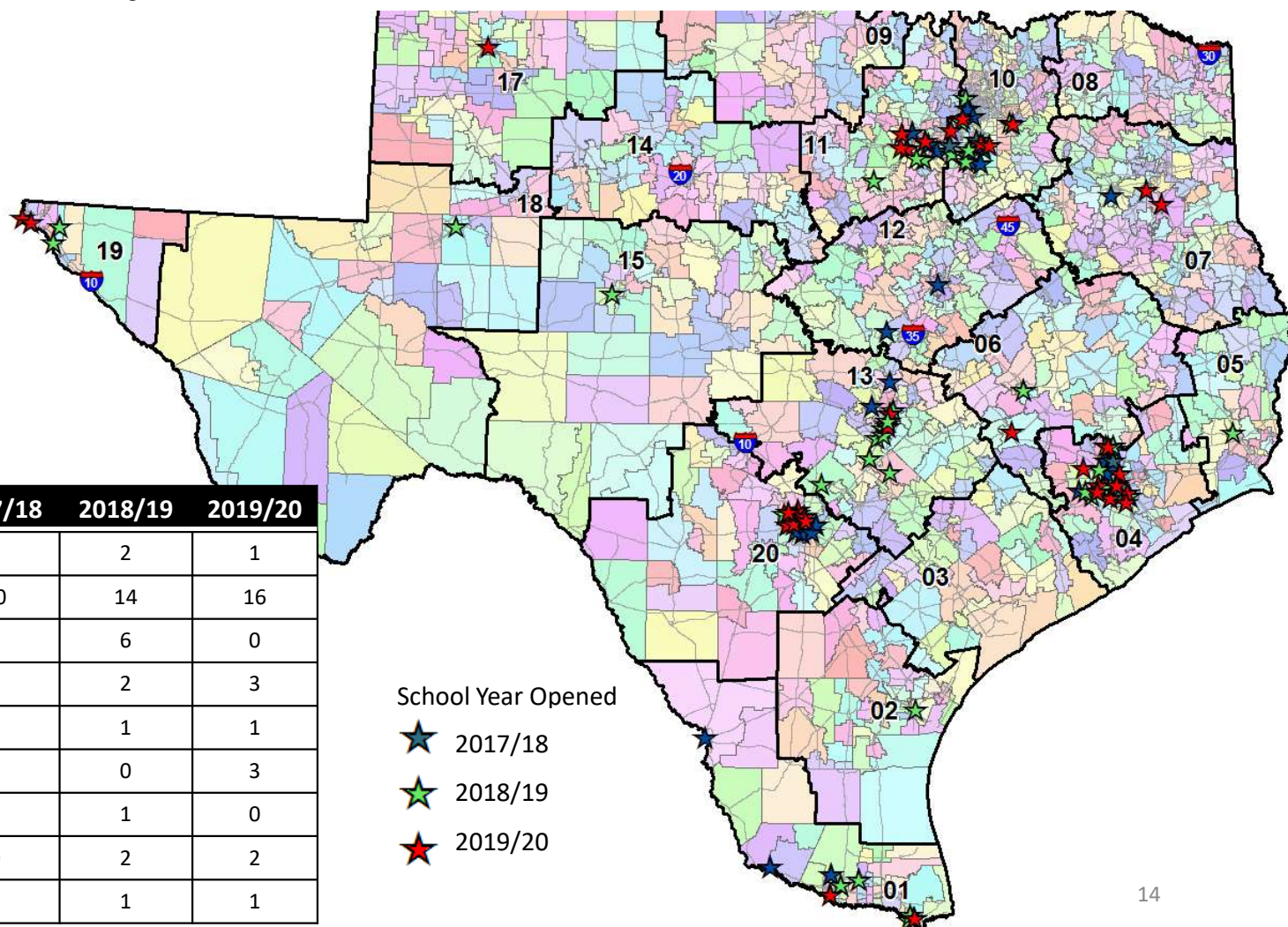


# New Campus Growth

New Campuses by Charter Organization & Region, 2017/18 – 2019/20

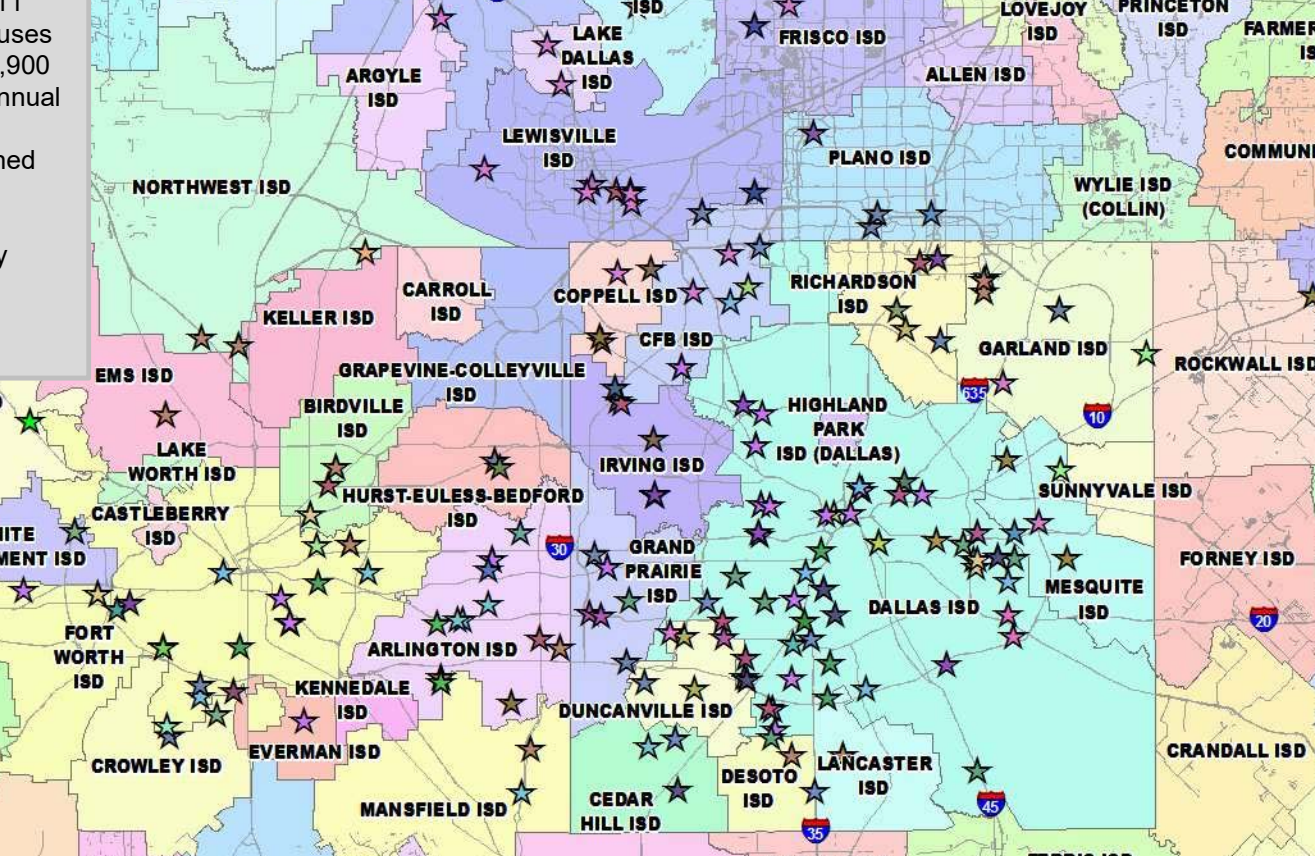
Region	2017/18	2018/19	2019/20
Region 1	7	6	4
Region 4	10	11	10
Region 10	10	6	5
Region 11	5	3	6
Region 13	3	11	4
Region 19	0	4	3
Region 20	9	4	9
<b>Total</b>	<b>44</b>	<b>45</b>	<b>41</b>

Charter Organization	2017/18	2018/19	2019/20
Harmony	6	2	1
IDEA	10	14	16
International Leadership of Texas	9	6	0
KIPP	3	2	3
Uplift	3	1	1
Jubilee	1	0	3
Premier High School	1	1	0
Texas College Prep Academies	0	2	2
YES Prep	1	1	1



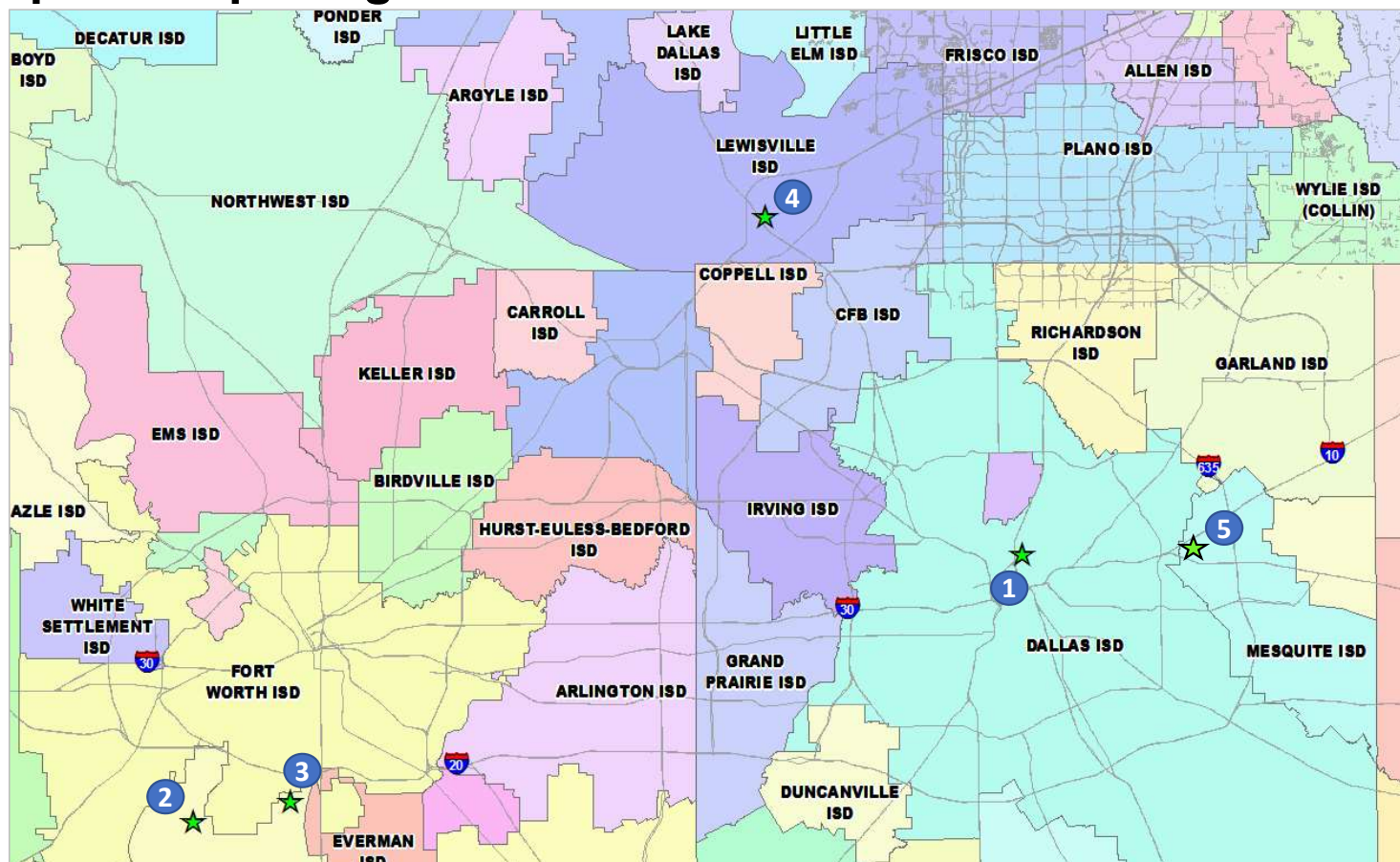




- Approx. 220 campuses operating in Regions 10 and 11. Of these campuses, more than 109,900 students experience roughly 5% annual growth. Campuses opened in 2019/2020 in the Fort Worth area increased by 1,600 students in 2018/19 and
- 
- The map displays the geographical distribution of 220 campuses across North Texas, specifically within Regions 10 and 11. Each campus is marked with a star, and the colors of the stars correspond to the campus type: blue for traditional, green for charter, orange for magnet, and purple for virtual. The map includes labels for numerous school districts, such as Ponder, Denton, Little Elm, Frisco, McKinney, Lovejoy, Princeton, Farmersville, Caddo Mills, Community, Wylie, Royse City, Quinlan, Rockwall, Terrell, Kaufman, Scurry-Rosser, Kemp, Ennis, Palmer, Waxahachie, Red Oak, Midlothian, Burleson, Alvarado, Venus, Godley, Joshua, Granbury, Aledo, Fort Worth, Crowley, Everman, Mansfield, Cedar Hill, Desoto, Lancaster, Ferris, and others. Major highways like I-35, I-45, I-20, I-10, and I-30 are also shown.



## New Campuses Opening in DFW in 2020/21



#	Charter School	Location	Grades	Notes
1	Universal Academy- Dallas	3919 Munger Ave, Dallas	PK – 7 <sup>th</sup>	Max capacity 1,300 students
2	Great Hearts Lakeside	7633 Harris Pkwy, Fort Worth	KG – 5 <sup>th</sup>	Initial enrollment 600 students; expanding to KG – 12 <sup>th</sup> with max capacity of 1,400 students
3	IDEA Edgecliff	6800 Crowley Rd, Fort Worth	KG – 1 <sup>st</sup> ; 5 <sup>th</sup> – 6 <sup>th</sup>	Initial enrollment 450 students
4	Lakeway Elementary	1800 Lakeway Dr, Lewisville	KG – 5 <sup>th</sup>	Located in the current high school building; initial enrollment 350 students
5	Trinity Basin Prep- Mesquite	2901 E Meadows Blvd, Mesquite	PK – 3 <sup>rd</sup> ; 6 <sup>th</sup>	Initial enrollment of 350 students; expanding to PK – 8 <sup>th</sup> with max capacity of 1,000 students





## 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
2015/16	108	225	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		
2016/17	124	235	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	22,043	1,067	5.1%
2017/18	159	287	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	23,142	1,099	5.0%
2018/19	172	335	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	24,120	978	4.2%
2019/20	192	388	1,797	1,888	1,963	1,895	1,933	1,961	1,969	2,024	1,936	2,014	1,927	1,710	1,495	25,092	972	4.0%
COVID 2020/21	189	383	1,899	1,896	2,009	2,036	1,986	2,022	2,029	2,046	2,031	2,124	1,978	1,790	1,558	25,976	884	3.5%
2020/21	192	388	1,924	1,921	2,034	2,061	2,012	2,046	2,051	2,068	2,054	2,146	1,998	1,808	1,574	26,277	1,185	4.7%
2021/22	192	388	2,043	2,035	2,056	2,168	2,200	2,135	2,146	2,142	2,143	2,282	2,118	1,846	1,664	27,558	1,281	4.9%
2022/23	192	388	1,944	2,239	2,176	2,189	2,315	2,316	2,245	2,241	2,233	2,367	2,269	1,958	1,678	28,750	1,192	4.3%
2023/24	192	388	2,063	2,127	2,397	2,319	2,338	2,441	2,412	2,330	2,341	2,466	2,334	2,099	1,779	30,026	1,276	4.4%
2024/25	192	388	2,177	2,261	2,262	2,528	2,463	2,459	2,556	2,517	2,426	2,581	2,432	2,158	1,906	31,306	1,280	4.3%
2025/26	192	388	2,283	2,365	2,386	2,388	2,667	2,577	2,590	2,684	2,638	2,674	2,545	2,249	1,960	32,586	1,280	4.1%
2026/27	192	388	2,397	2,478	2,499	2,527	2,525	2,795	2,714	2,735	2,825	2,899	2,636	2,355	2,041	34,006	1,420	4.4%
2027/28	192	388	2,506	2,599	2,613	2,622	2,655	2,633	2,950	2,853	2,875	3,102	2,859	2,487	2,180	35,514	1,508	4.4%
2028/29	192	388	2,624	2,708	2,725	2,750	2,754	2,773	2,770	3,104	3,011	3,137	3,007	2,699	2,300	36,942	1,428	4.0%
2029/30	192	388	2,733	2,843	2,838	2,857	2,893	2,871	2,910	2,915	3,251	3,186	3,032	2,840	2,497	38,246	1,304	3.5%

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



# One Year Covid-19 Impact Projections

Campus Name	Fall	2020/21 ENROLLMENT PROJECTIONS BY GRADE (OCTOBER)																	Original Projection
	2019/20	EE	PK	KG	1ST	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	TOTAL	Change	2020/21
Beck Elementary	805	6	0	113	119	133	162	132	137	0	0	0	0	0	0	0	801	-1	802
Clara Love Elementary	697	3	39	102	101	104	111	106	113	0	0	0	0	0	0	0	679	0	679
Cox Elementary	776	6	0	144	148	148	146	135	123	0	0	0	0	0	0	0	849	-13	862
Curtis Elementary	619	19	35	104	103	110	115	118	100	0	0	0	0	0	0	0	704	-27	731
Granger Elementary	792	5	0	128	133	117	146	130	123	0	0	0	0	0	0	0	782	0	782
Haslet Elementary	477	4	20	64	64	89	88	72	88	0	0	0	0	0	0	0	488	-7	495
Hatfield Elementary	401	2	0	69	71	74	69	81	82	0	0	0	0	0	0	0	448	-12	460
Hughes Elementary	680	18	41	115	113	113	111	87	106	0	0	0	0	0	0	0	704	0	704
Justin Elementary	576	16	31	96	99	89	91	109	93	0	0	0	0	0	0	0	622	-8	630
Lakeview Elementary	596	10	20	89	92	90	102	97	100	0	0	0	0	0	0	0	599	-1	600
Lance Elementary	347	7	16	84	80	55	59	67	58	0	0	0	0	0	0	0	426	-32	458
Nance Elementary	601	8	34	82	78	109	93	111	81	0	0	0	0	0	0	0	596	-8	604
Peterson Elementary	773	18	23	123	113	132	121	109	135	0	0	0	0	0	0	0	774	0	774
Prairie View Elementary	486	2	26	80	79	79	78	73	69	0	0	0	0	0	0	0	485	-1	486
Roanoke Elementary	642	15	34	96	97	104	90	112	97	0	0	0	0	0	0	0	645	0	645
Sendera Ranch Elementary*	640	6	0	95	84	111	100	103	126	0	0	0	0	0	0	0	625	0	625
Seven Hills Elementary	523	15	28	72	69	78	80	78	102	0	0	0	0	0	0	0	521	-1	522
Schluter Elementary	887	6	0	133	139	144	161	167	171	0	0	0	0	0	0	0	922	-26	948
Thompson Elementary*	699	23	38	111	115	132	114	100	119	0	0	0	0	0	0	0	753	-18	771
<b>ELEMENTARY TOTALS</b>	<b>12,017</b>	<b>189</b>	<b>383</b>	<b>1,899</b>	<b>1,896</b>	<b>2,009</b>	<b>2,036</b>	<b>1,986</b>	<b>2,022</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>12,421</b>	<b>-157</b>	<b>12,578</b>



# One Year Covid-19 Impact Projections

	Fall	2020/21 ENROLLMENT PROJECTIONS BY GRADE (OCTOBER)																	Original Projection 2020/21
Campus Name	2019/20	EE	PK	KG	1ST	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	TOTAL	Change	2020/21
Adams Middle School	1,353	0	0	0	0	0	0	0	0	480	490	463	0	0	0	0	1,433	-26	1,459
Chisholm Trail Middle School	489	0	0	0	0	0	0	0	0	182	165	186	0	0	0	0	533	0	533
Gene Pike Middle School	1,024	0	0	0	0	0	0	0	0	359	362	351	0	0	0	0	1,073	-22	1,095
Medlin Middle School	1,098	0	0	0	0	0	0	0	0	341	362	385	0	0	0	0	1,088	0	1,088
Tidwell Middle School	1,032	0	0	0	0	0	0	0	0	353	356	324	0	0	0	0	1,033	-6	1,039
Wilson Middle School	932	0	0	0	0	0	0	0	0	313	310	323	0	0	0	0	946	-12	958
<b>MIDDLE SCHOOL TOTALS</b>	<b>5,928</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2,029</b>	<b>2,046</b>	<b>2,031</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>6,106</b>	<b>-66</b>	<b>6,172</b>
Northwest High School	1,904	0	0	0	0	0	0	0	0	0	0	0	554	528	456	431	1,969	-30	1,996
Byron Nelson High School	2,475	0	0	0	0	0	0	0	0	0	0	0	728	661	632	543	2,564	-7	2,571
Eaton High School	2,542	0	0	0	0	0	0	0	0	0	0	0	779	721	651	527	2,676	-43	2,719
<b>HIGH SCHOOL TOTALS</b>	<b>6,921</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2,061</b>	<b>1,910</b>	<b>1,739</b>	<b>1,500</b>	<b>7,210</b>	<b>289</b>	<b>7,286</b>
Steele Accelerated High School	200	0	0	0	0	0	0	0	0	0	0	0	42	56	49	53	200	0	200
Denton County JJAEP	11	0	0	0	0	0	0	0	0	0	0	0	1	2	2	5	10	-1	11
Denton Creek	15	0	0	0	0	0	0	0	0	0	0	0	20	10	0	0	30	0	30
<b>ALTERNATIVE SCHOOL TOTALS</b>	<b>226</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>63</b>	<b>68</b>	<b>51</b>	<b>58</b>	<b>240</b>	<b>-1</b>	<b>241</b>
<b>TOTAL ENROLLMENT</b>	<b>25,092</b>	<b>189</b>	<b>383</b>	<b>1,899</b>	<b>1,896</b>	<b>2,009</b>	<b>2,036</b>	<b>1,986</b>	<b>2,022</b>	<b>2,029</b>	<b>2,046</b>	<b>2,031</b>	<b>2,124</b>	<b>1,978</b>	<b>1,790</b>	<b>1,558</b>	<b>25,976</b>	<b>-301</b>	<b>26,277</b>



## 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
- Northwest ISD's original 2020/21 enrollment projection was 26,277
- The district's Covid-19 2020/21 enrollment projection is 25,976



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