



Denton ISD Quarterly Economic and Housing Analysis 4Q11

Demographics and Planning for School Districts



TEMPLETON
DEMOGRAPHICS

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



Economic Conditions

- Texas gained 204,500 jobs between December 2010 and December 2011. Continuing to lead the nation in job growth.
- The state's unemployment rate has been at or below the national rate for 60 consecutive months.
- DFW 2nd in the nation with 57,300 new jobs as of Nov. 2011
- Unemployment rates - Texas Labor Market Review (Dec)
 - U.S. 8.3%
 - Texas 7.2%
 - DFW 7.1%
 - Denton County 6.3%
 - City of Denton 5.7%
- Denton ISD closed 212 homes in the 4th quarter 2011.
- National economic picture showing modest improvement ending the 1.6% Gross Domestic Product growth. Texas Domestic Product grew 2.4%

National Economic Overview

Top Job Growth Markets Ranked by Change in Emp. – November 2011

Rank	MSA	Total Employment	Job Gains	% Change
1	Houston-Baytown-Sugar Land TX	2,646,200	87,900	3.4%
2	Dallas-Fort Worth-Arlington TX	2,961,400	57,300	2.0%
3	Seattle-Tacoma-Bellevue WA	1,694,100	46,100	2.8%
4	Phoenix-Mesa-Glendale, AZ	1,741,000	33,400	2.0%
5	Miami-Fort Lauderdale-Miami Beach FL	2,230,200	30,200	1.4%
6	San Jose-Sunnyvale-Santa Clara CA	890,100	28,300	3.3%
7	Tampa-St. Petersburg-Clearwater FL	1,146,700	26,900	2.4%
8	San Diego-Carlsbad-San Marcos CA	1,257,300	26,600	2.2%
9	Los Angeles-Long Beach-Santa Ana CA	5,202,500	25,500	0.5%
10	Pittsburgh PA	1,164,400	23,400	2.1%
11	New York-Northern New Jersey-Long Isla	8,441,300	22,800	0.3%
12	Detroit-Warren-Livonia MI	1,777,600	22,700	1.3%
13	Chicago-Naperville-Joliet IL-IN-WI	4,320,400	22,300	0.5%
14	Riverside-San Bernardino-Ontario CA	1,137,000	19,100	1.7%
15	San Francisco-Oakland-Fremont CA	1,915,200	18,000	0.9%

Source: Metrostudy - MetroUSA

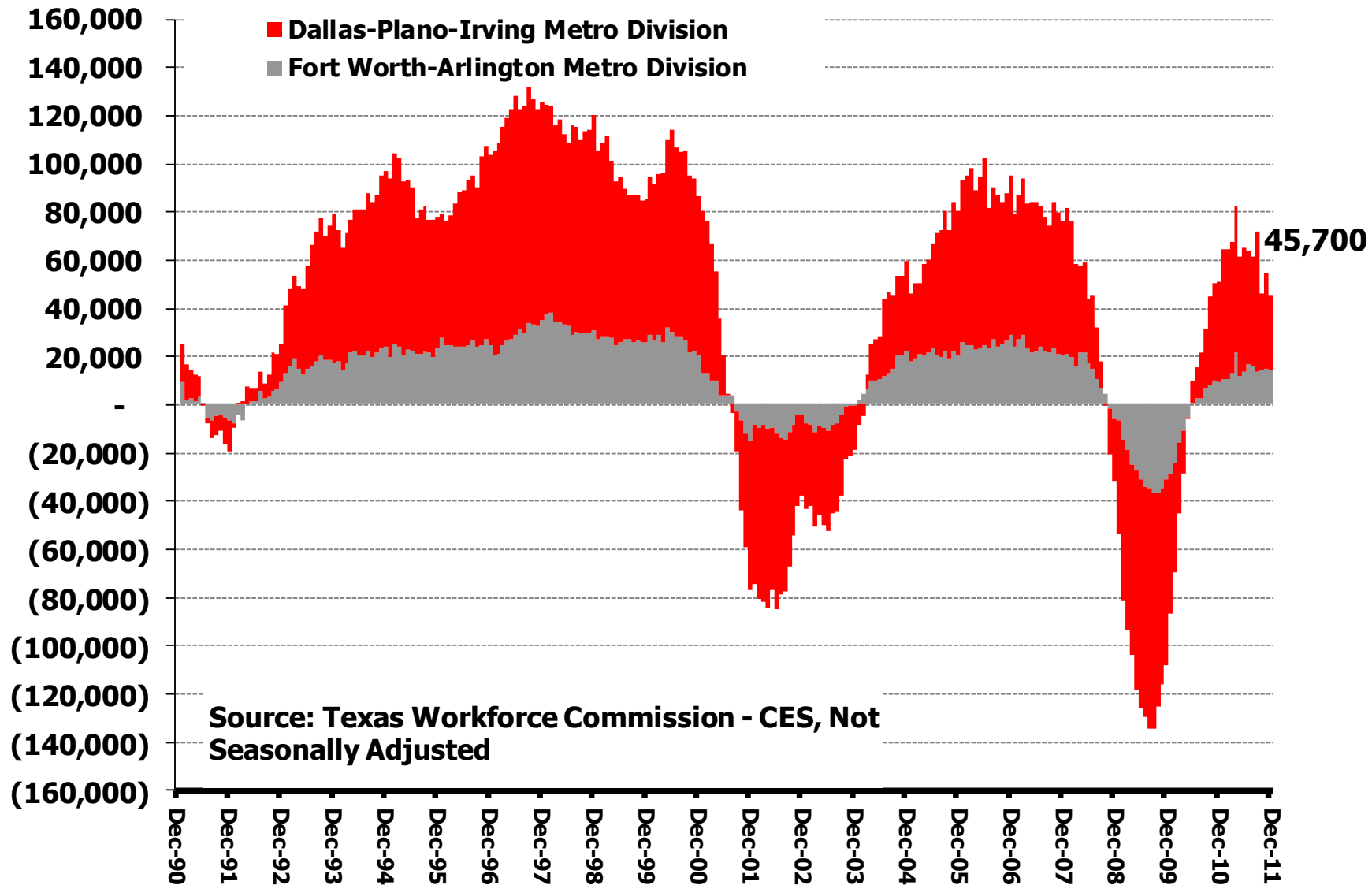
National Economic Overview Top 15 MSAs – Ranked by Ann. SF Permits on November 2011

Rank	MSA	Permits	Change
1	Houston-Baytown-Sugar Land TX	22,439	-121
2	Dallas-Fort Worth-Arlington TX	13,951	-745
3	Washington-Arlington-Alexandria DC-	9,201	-129
4	Phoenix-Mesa-Glendale, AZ	7,315	-432
5	Atlanta-Sandy Springs-Marietta GA	6,255	-133
6	Austin-Round Rock-San Marcos, TX	6,100	-43
7	Seattle-Tacoma-Bellevue WA	6,031	80
8	New York-Northern New Jersey-Long	5,931	-1,269
9	Philadelphia-Camden-Wilmington PA-NJ-	4,636	-497
10	Raleigh-Cary NC	4,561	-214
11	Charlotte-Gastonia-Rock Hill, NC-SC	4,516	-133
12	Orlando-Kissimmee-Sanford, FL	4,457	206
13	Tampa-St. Petersburg-Clearwater FL	4,377	0
14	San Antonio-New Braunfels, TX	4,328	-1,042
15	Los Angeles-Long Beach-Santa Ana CA	4,241	383

Source: Metrostudy - MetroUSA

Dallas Fort Worth Market

Annual Job Growth – 20 year history



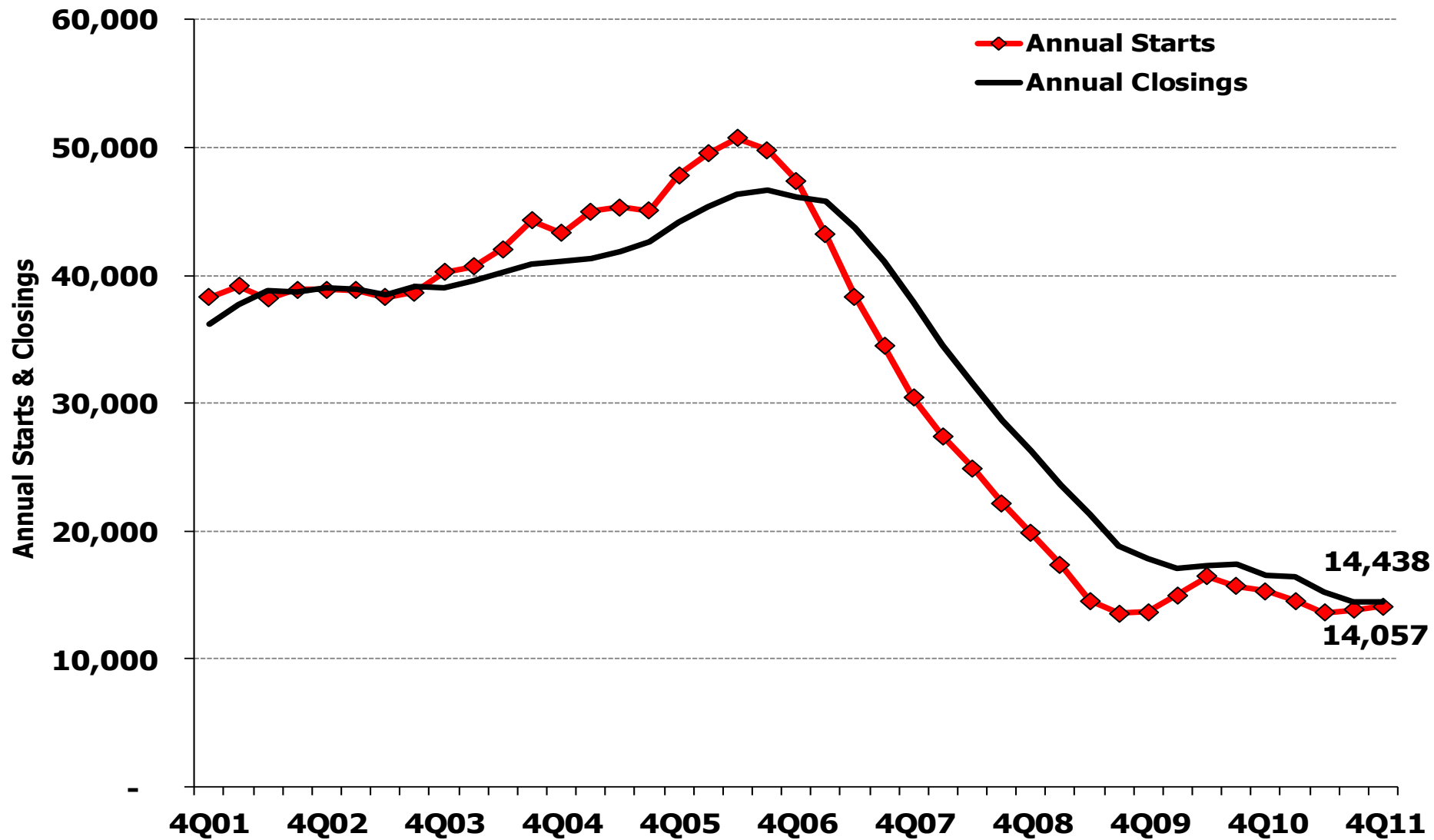
Dallas/Fort Worth Market

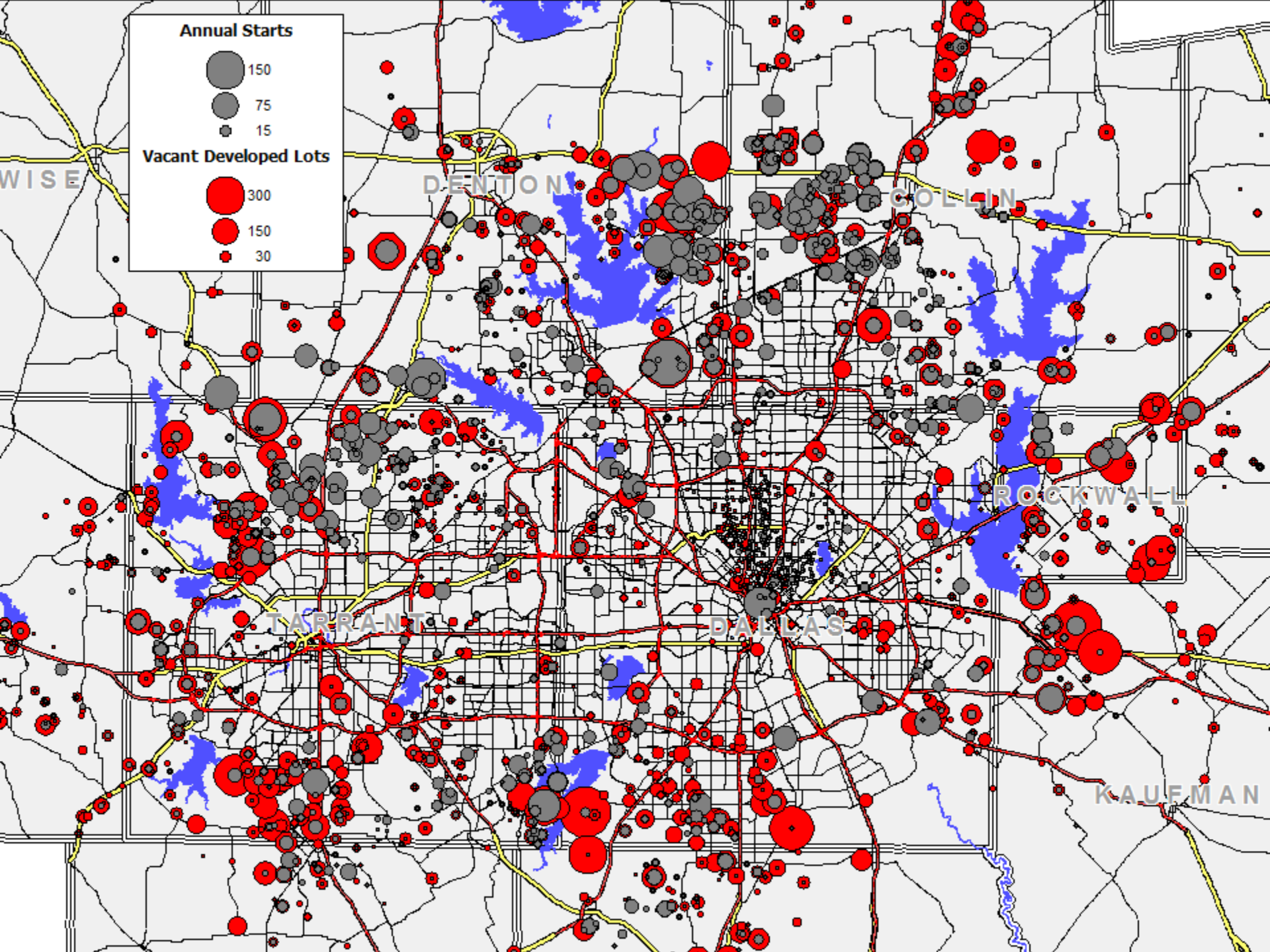
Apartment Market Summary

- Dallas-Fort Worth absorbed 15,240 apartments during 2011.
- Occupancy in DFW rose to 93% during 2011, up 2 percentage points in the year.
- Average rent in DFW rose 5%. High demand locations saw rent increases as much as 10%.
- 5,417 units were delivered during 2011. Approximately 8,000 units are currently under construction.

Dallas/Fort Worth Market

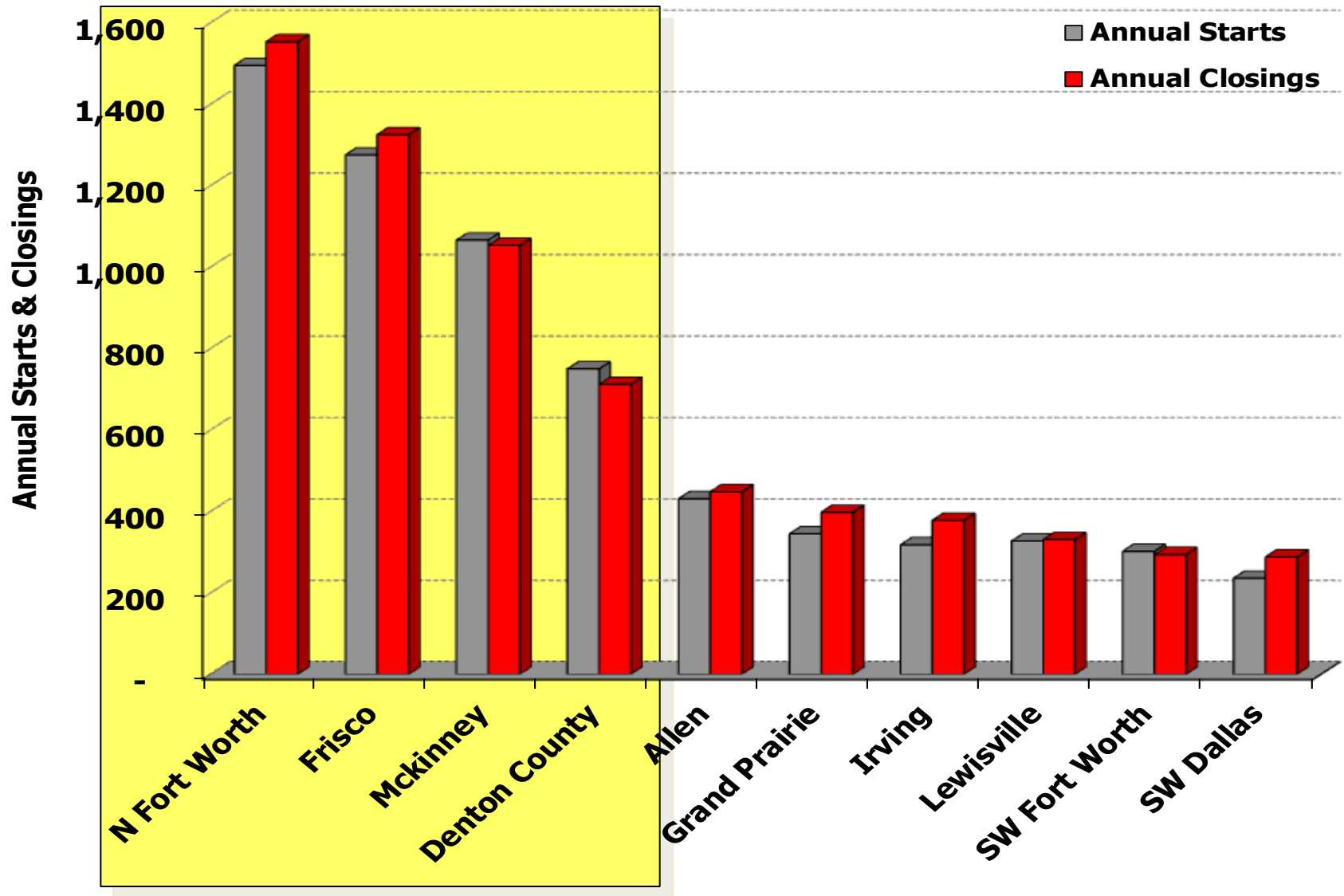
SFD-TH – Starts and Closings



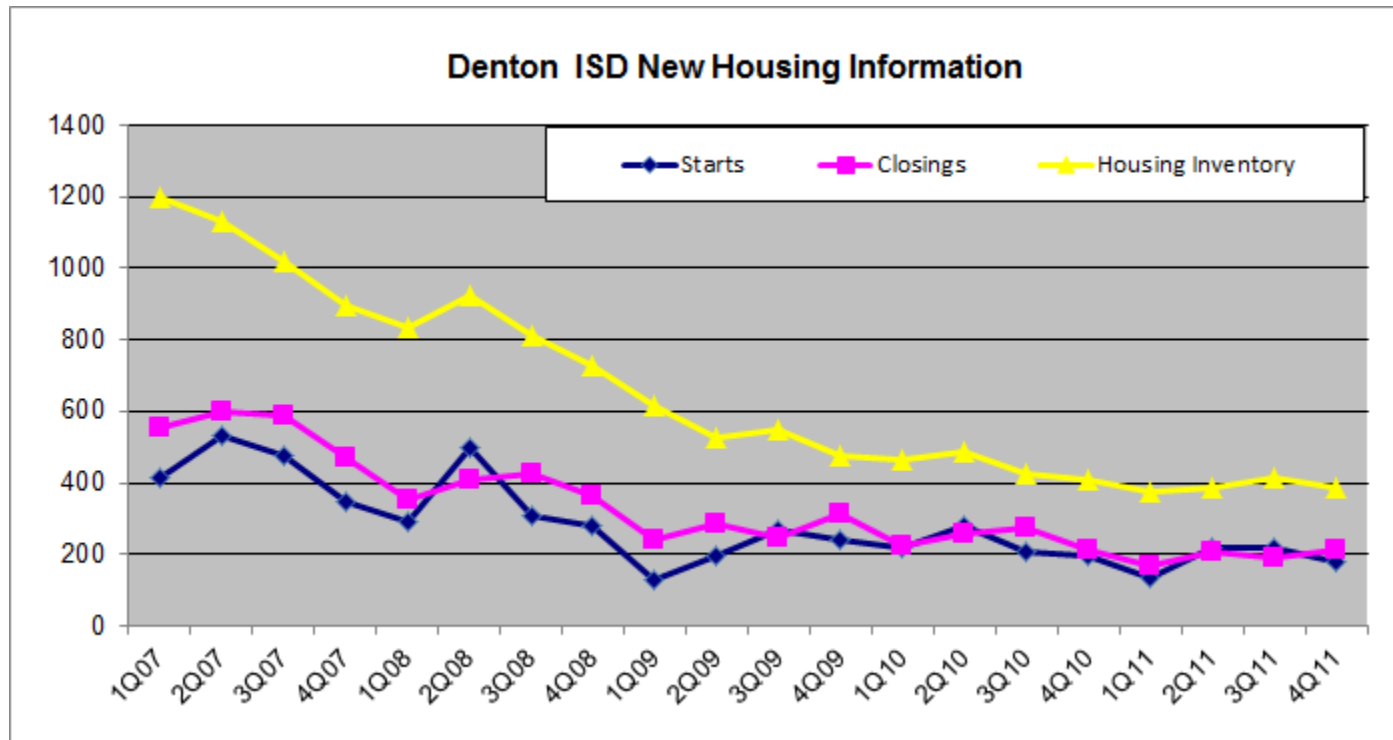


Dallas/Fort Worth Market

SFD-TH – Top Ten Submarkets by Closings



Denton ISD New Housing Activity



- Starts remained strong as builder confidence grows.
- Closings dropped slightly but should jump over 200 again in 4th quarter.

Starts	2007	2008	2009	2010	2011
1Q	415	289	128	219	133
2Q	532	500	195	279	223
3Q	475	310	271	206	216
4Q	348	282	239	196	181
Total	1770	1381	833	900	753

Closings	2007	2008	2009	2010	2011
1Q	553	351	242	226	168
2Q	598	410	286	256	210
3Q	586	426	249	272	189
4Q	472	362	315	210	212
Total	2209	1549	1092	964	779

Ten-Year Enrollment Projections

DENTON INDEPENDENT SCHOOL DISTRICT												
ELEMENTARY SCHOOL CAMPUS ENROLLMENT PROJECTIONS												
DENTON ISD	Capacity	Current	Projections									
Campus Name	Functional	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2020/22
Blanton Elementary School	740	657	686	702	686	678	671	686	692	699	707	714
Borman Elementary School	740	452	479	513	576	651	728	789	854	918	995	1,091
Cross Oaks Elementary School	740	428	446	470	503	536	570	613	667	731	791	857
E P Rayzor Elementary School	740	771	825	876	949	1,005	1,115	1,222	1,340	1,470	1,612	1,772
Evers Park Elementary School	740	573	585	592	620	665	705	755	797	835	888	944
Ginnings Elementary School	740	602	607	615	629	649	632	635	636	638	638	639
Hodge Elementary School	740	652	676	696	699	730	758	787	815	844	875	906
Houston Elementary School	740	611	599	587	577	569	562	568	576	584	590	603
Nelson Elementary School	740	621	636	638	650	650	668	670	666	667	667	663
Lee Elementary School	740	592	603	594	594	613	596	605	613	618	625	632
McNair Elementary School	740	567	565	554	558	557	558	566	576	579	584	587
Hawk Elementary School	740	727	709	691	680	671	681	686	693	697	697	699
Olive Stephens Elementary School	740	520	522	531	542	546	559	563	570	570	574	575
Paloma Creek Elementary School	740	691	774	858	939	1,014	1,092	1,158	1,233	1,295	1,350	1,377
Pecan Creek Elementary School	740	727	740	773	806	841	871	880	902	924	950	978
Providence Elementary School	740	520	526	532	539	533	545	571	603	626	645	665
Newton Rayzor Elementary School	740	650	706	751	766	795	797	787	785	782	786	793
Rivera Elementary School	740	472	474	476	477	475	474	478	485	500	506	510
Savannah Elementary School	740	527	554	573	625	679	750	822	893	967	1,053	1,132
Ryan Elementary School	740	545	586	616	614	642	659	656	660	652	646	645
Wilson Elementary School	740	661	656	664	668	683	694	695	695	699	705	711
Ann Windle School For Young Child	740	342	344	346	348	350	352	352	352	352	352	352
Gonzalez School For Young Child	740	351	351	351	351	351	351	351	351	351	351	351
	17,020											
Total Elementary		13,259	13,649	13,999	14,396	14,883	15,388	15,895	16,454	16,998	17,587	18,196
Elementary growth		396	390	350	397	487	505	507	559	544	589	609

Ten-Year Enrollment Projections

MIDDLE SCHOOL CAMPUS ENROLLMENT PROJECTIONS											
DENTON ISD	Current	Projections									
Campus Name	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Calhoun Middle School	851	868	860	881	913	962	1,010	1,089	1,128	1,156	1,181
McMath Middle School	823	841	878	913	934	959	993	1,061	1,128	1,188	1,211
Navo Middle School	829	896	978	1,021	1,174	1,254	1,368	1,417	1,534	1,639	1,773
Crownover Middle School	978	1,090	1,179	1,230	1,214	1,185	1,211	1,229	1,286	1,289	1,297
Strickland Middle School	885	905	974	1,023	988	1,027	1,038	1,119	1,118	1,139	1,154
Harpool Middle School	956	1,008	1,096	1,172	1,277	1,301	1,296	1,300	1,360	1,432	1,507
Total Middle School	5,322	5,608	5,965	6,240	6,500	6,688	6,916	7,215	7,554	7,843	8,123
Middle School Growth	206	286	357	275	260	188	228	299	339	289	280
HIGH SCHOOL CAMPUS ENROLLMENT PROJECTIONS											
DENTON ISD	Current	Projections									
Campus Name	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2020/22
Denton High School	1,842	1,915	1,922	1,946	1,964	2,071	2,159	2,222	2,361	2,476	2,608
Fred Moore High School	31	36	33	33	34	34	34	34	34	34	34
John Guyer High School	2,137	2,142	2,265	2,368	2,525	2,727	2,906	3,035	3,091	3,141	3,196
Ryan High School	2,185	2,276	2,379	2,486	2,588	2,741	2,889	2,989	3,132	3,271	3,416
Total High School	6,195	6,369	6,599	6,833	7,111	7,573	7,988	8,280	8,618	8,922	9,254
High School growth	222	174	231	234	278	461	415	292	338	304	332
Denton J J A E P	4	4	4	4	4	4	4	4	4	4	4
Juvenile Detention CTR	40	40	40	40	40	40	40	40	40	40	40
Lester Davis School	35	35	35	35	35	35	35	35	35	35	35
TOTAL	24,855	25,705	26,642	27,548	28,573	29,728	30,878	32,028	33,249	34,431	35,652
Student Growth	831	850	938	906	1,025	1,154	1,150	1,150	1,221	1,182	1,221
Percent Growth	3.5%	3.4%	3.6%	3.4%	3.7%	4.0%	3.9%	3.7%	3.8%	3.6%	3.5%

Summary

- Texas economy continuing to benefit from energy expansion.
- Texas job growth areas: (Texas Workforce Commission)
 - Professional and Business Services 53,000 new jobs in 2011
 - Trade, Transportation and Utilities 45,800 new jobs
 - Leisure and Hospitality 41,200 new jobs
 - Mining and Logging 40,700 new jobs (18.7% growth)
- DFW employment picture continuing to add jobs.
- Denton ISD closed 779 new homes in 2011.
- 2Q12 will be key quarter for the 2012 new housing season.
- District in position to add 850 additional students fall 2012 with district enrollment of 25,705.
- District could see enrollment growth of 4,873 students by 2016 with district enrollment of 29,728.