

4Q21

Demographic Report



Local Economic Update- DFW

Top 10

Corporate Relocations and Expansions

- More than 30 companies relocated to or had major expansions in DFW
- These moves created almost 12,000 new jobs

Rank	# Jobs, Estimated	Transaction Name	Description
1	3,000	Texas Instruments	Expansion
2	2,000	ThredUp	Expansion
3	1,200	AECOM	Relocation
4	750	Crayon	Expansion
5	650	Likewise	Relocation
6	590	Trax	Relocation
7	500	Raytheon Intelligence & Space	Expansion
8	400	Misfits Market	Expansion
9	250	Wallbox	Expansion
9	250	Schumacher Electric Corporation	Relocation

Source: Dallas Business Journal & Dallas Morning News



Local Economic Update- Dallas

AECOM

The multinational infrastructure consulting firm working on the high-speed rail between Dallas and Houston and Texas' hyperloop project is moving their headquarters to Dallas. This move will bring about 1,200 jobs to the area.



MD7 LLC

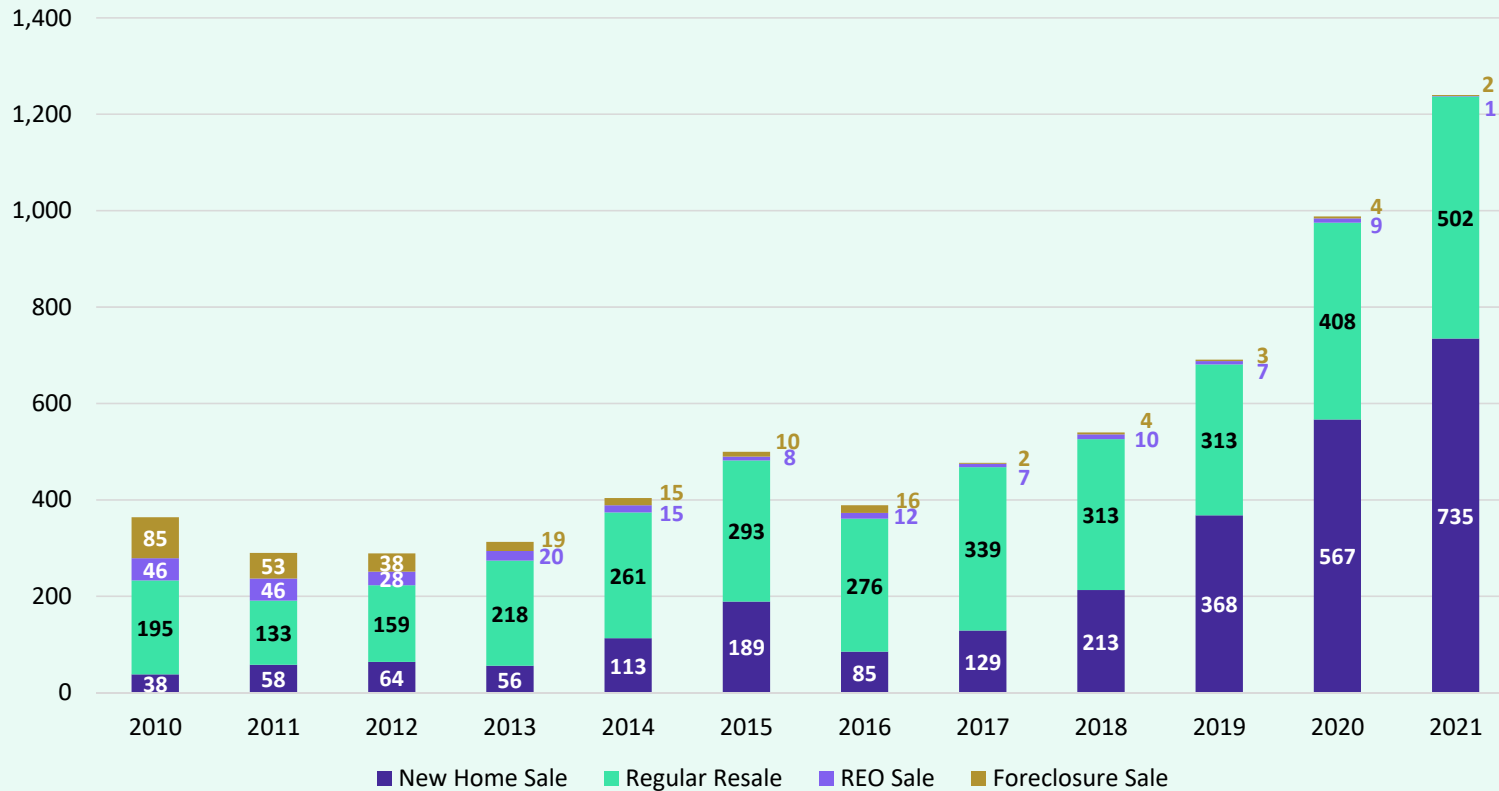


California mobile infrastructure consultancy **MD7 LLC** is one of the newest transplants from the West Coast to announce an HQ relocation to DFW. The global firm is moving its US headquarters from San Diego to Allen. The move creates nearly 220 jobs and more than \$6.8 million in capital investment. The company provides help around the wireless industry as 5G becomes an increasingly important part of the sector's future. Its services are around development and management along with consulting.



Celina ISD Housing Market Analysis

Average New vs. Existing Home Sale Price, 2010 – 2021

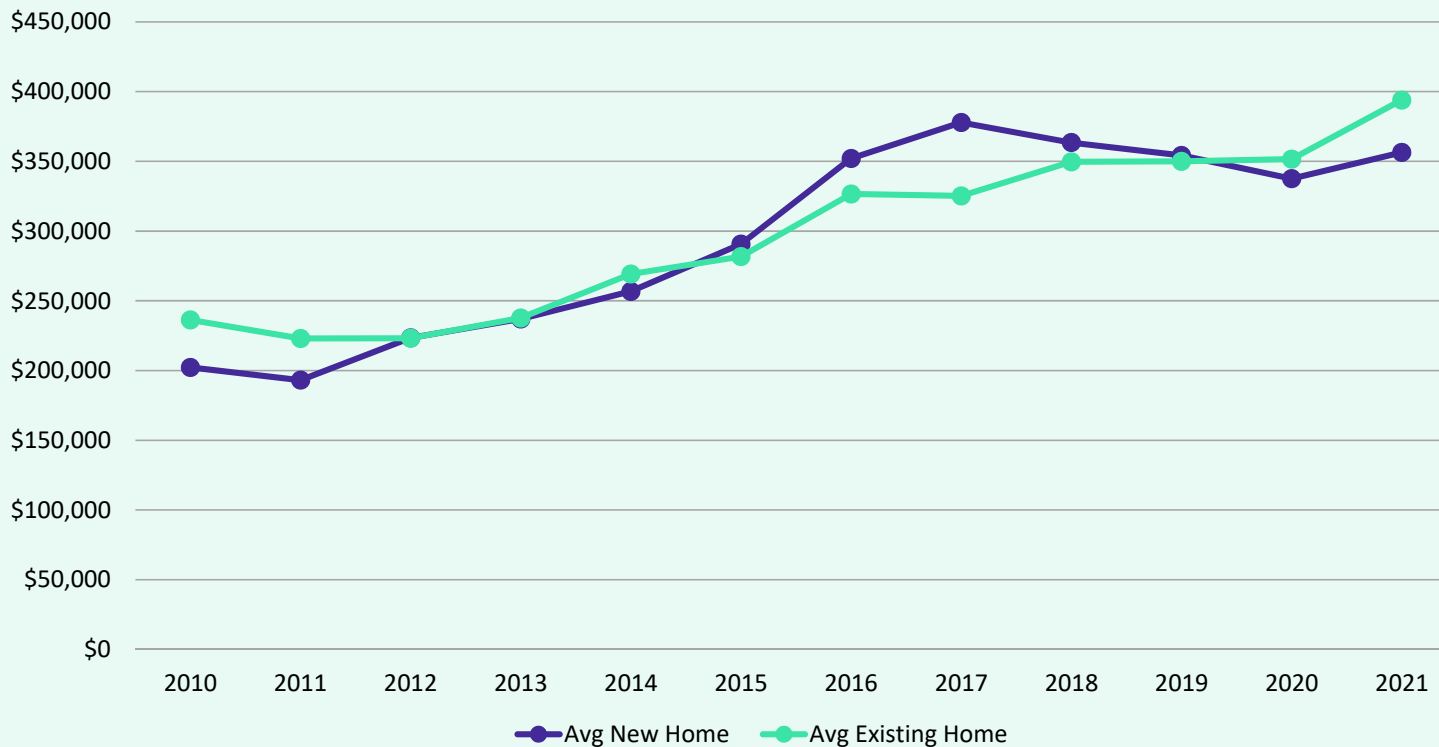


- Total home sales in CIRD rose 25% over 2020 totals, with new home sales rising nearly 30% over 2020 totals
- Distressed property sales continue to decline, down nearly 98% since 2010
- New home sales within the district account for nearly 60% of all 2021 sales



Celina ISD Housing Market Analysis

Average New vs. Existing Home Sale Price, 2010 - 2021



- Since 2010, the average new home price in CISD has increased roughly 76%, a rise of nearly \$154,150
- The average existing home price within the district has increased by 66%, or roughly \$157,750 since 2010

	Avg New Home	Avg Existing Home
2010	\$202,264	\$236,246
2011	\$193,113	\$223,029
2012	\$223,393	\$223,176
2013	\$237,006	\$237,728
2014	\$256,770	\$269,222
2015	\$290,648	\$281,776
2016	\$352,114	\$326,573
2017	\$377,894	\$325,204
2018	\$363,491	\$349,657
2019	\$354,289	\$350,007
2020	\$337,653	\$351,601
2021	\$356,404	\$393,989



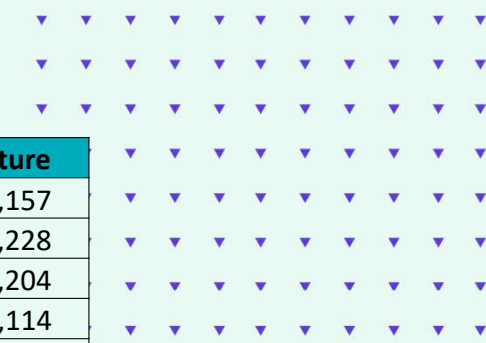
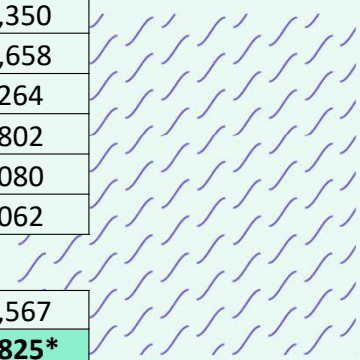
DFW New Home Ranking Report

ISD Ranked by Annual Closings – 4Q21

Rank	District Name	Annual Starts	Annual Closings	Inventory	VDL	Future
1	Northwest ISD	4,590	3,669	2,451	3,144	41,157
2	Denton ISD	3,546	2,946	2,109	2,927	18,228
3	Forney ISD	3,401	2,645	1,765	1,929	28,204
4	Prosper ISD	3,459	2,589	2,269	2,694	22,114
5	Frisco ISD	2,064	2,037	1,327	1,598	8,154
6	Dallas ISD	1,952	1,636	1,798	2,359	6,354
7	Eagle Mt.-Saginaw ISD	1,194	1,462	535	1,372	20,504
8	Princeton ISD	2,054	1,423	1,167	1,872	6,356
9	Royse City ISD	1,753	1,416	1,014	1,824	8,411
10	Crandall ISD	1,281	1,216	507	1,483	7,420
11	Crowley ISD	1,389	1,172	582	1,702	17,416
12	Rockwall ISD	1,208	1,166	731	2,483	9,617
13	Anna ISD	1,270	1,046	661	981	5,690
14	Aubrey ISD	951	998	468	921	5,179
15	McKinney ISD	1,369	991	851	1,620	13,350
16	Midlothian ISD	1,337	989	908	1,632	16,658
17	Mansfield ISD	1,149	930	854	1,988	6,264
18	Community ISD	1,175	918	664	1,125	6,802
19	Fort Worth ISD	961	879	487	1,598	5,080
20	Lewisville ISD	1,191	879	873	1,807	2,062

- Celina ISD is 26th in DFW in annual closings, up 2 spots from 3rd quarter 2021
- The district is 12th in DFW in annual starts, up 5 spots from 3rd quarter 2021

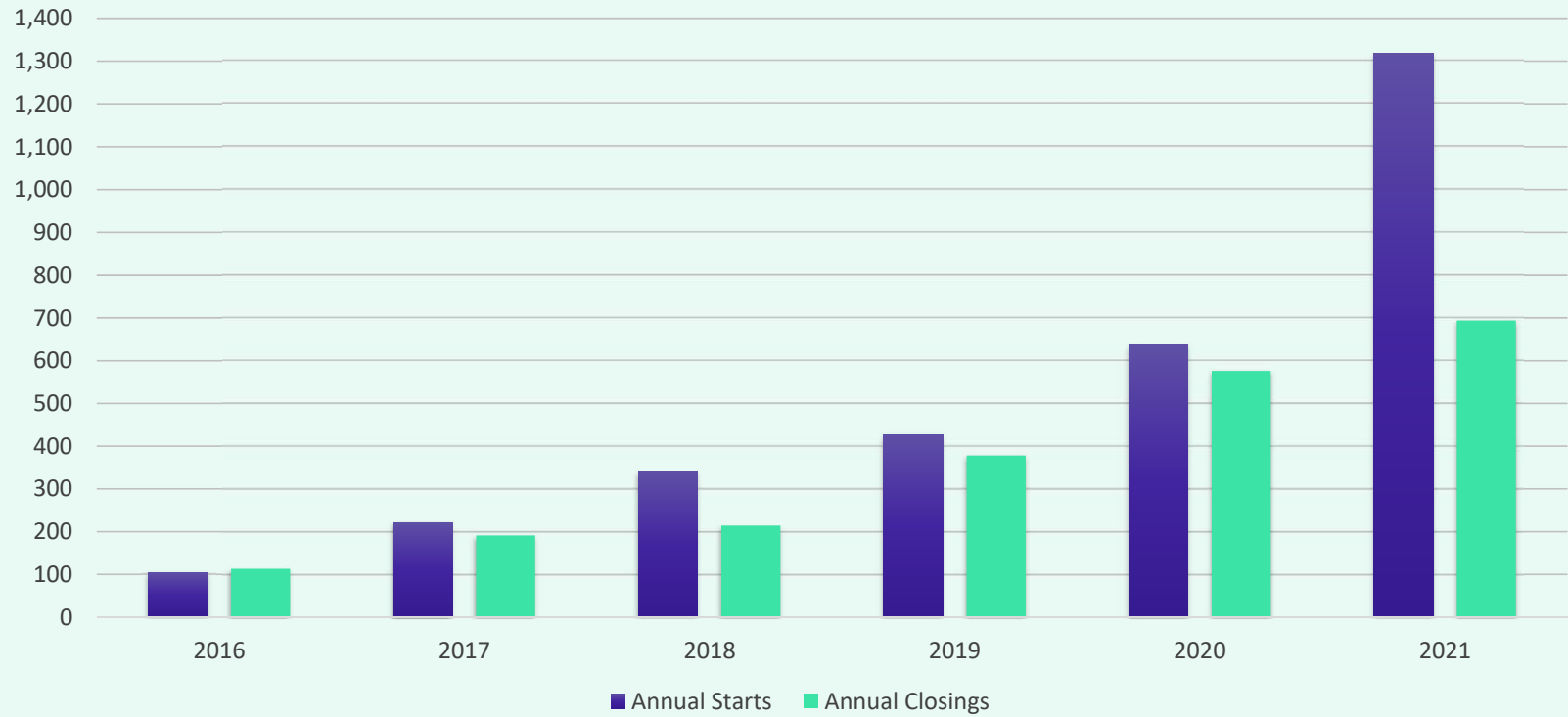
25	Aledo ISD	904	700	613	906	19,567
26	Celina ISD	1,317	694	962	1,164	34,825*
27	Red Oak ISD	602	681	245	1,049	1,666



* Based on additional Zonda Education housing research



District New Home Starts and Closings



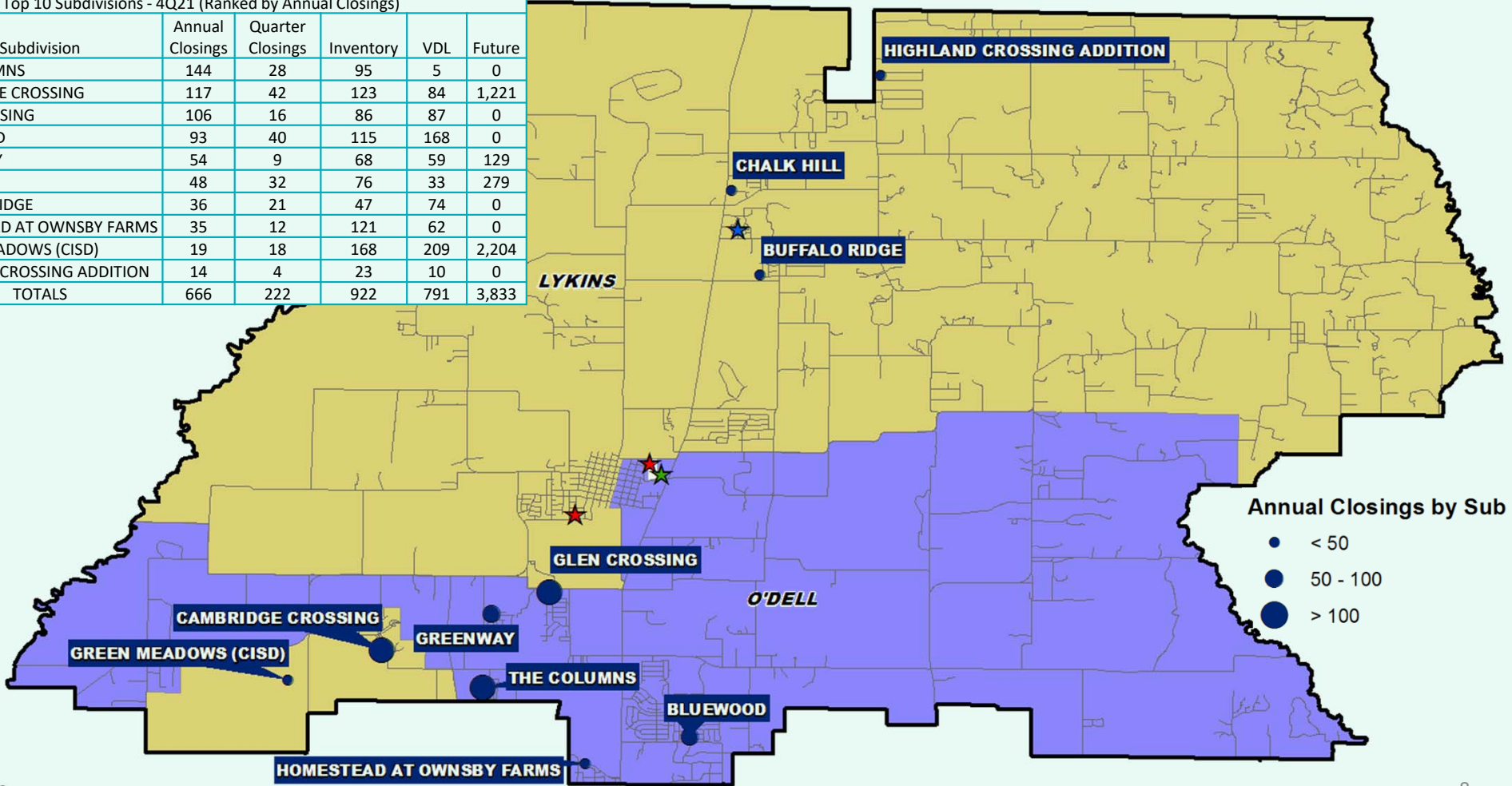
Starts	2016	2017	2018	2019	2020	2021
1Q	37	46	72	91	120	181
2Q	15	66	93	81	180	386
3Q	29	50	91	121	178	474
4Q	23	60	83	134	158	276
Total	104	222	339	427	636	1,317

Closings	2016	2017	2018	2019	2020	2021
1Q	28	24	32	59	107	161
2Q	34	33	31	109	146	160
3Q	26	67	70	110	175	147
4Q	25	67	81	100	148	226
Total	113	191	214	378	576	694



Annual Closing Distribution

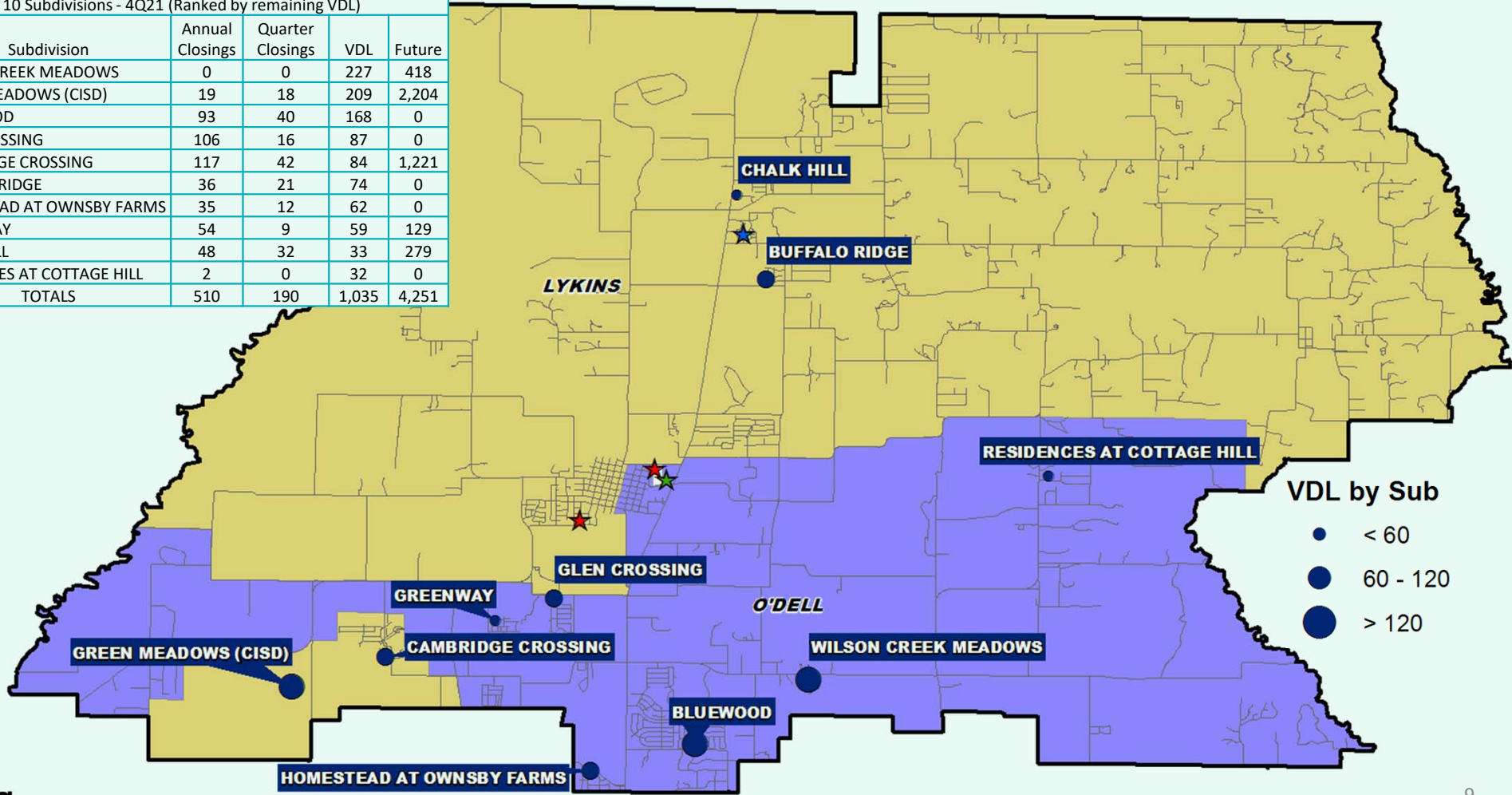
Top 10 Subdivisions - 4Q21 (Ranked by Annual Closings)						
Rank	Subdivision	Annual Closings	Quarter Closings	Inventory	VDL	Future
1	THE COLUMNS	144	28	95	5	0
2	CAMBRIDGE CROSSING	117	42	123	84	1,221
3	GLEN CROSSING	106	16	86	87	0
4	BLUEWOOD	93	40	115	168	0
5	GREENWAY	54	9	68	59	129
6	CHALK HILL	48	32	76	33	279
7	BUFFALO RIDGE	36	21	47	74	0
8	HOMESTEAD AT OWNSBY FARMS	35	12	121	62	0
9	GREEN MEADOWS (CISD)	19	18	168	209	2,204
10	HIGHLAND CROSSING ADDITION	14	4	23	10	0
TOTALS		666	222	922	791	3,833





VDL Distribution

Top 10 Subdivisions - 4Q21 (Ranked by remaining VDL)					
Rank	Subdivision	Annual Closings	Quarter Closings	VDL	Future
1	WILSON CREEK MEADOWS	0	0	227	418
2	GREEN MEADOWS (CISD)	19	18	209	2,204
3	BLUEWOOD	93	40	168	0
4	GLEN CROSSING	106	16	87	0
5	CAMBRIDGE CROSSING	117	42	84	1,221
6	BUFFALO RIDGE	36	21	74	0
7	HOMESTEAD AT OWNSBY FARMS	35	12	62	0
8	GREENWAY	54	9	59	129
9	CHALK HILL	48	32	33	279
10	RESIDENCES AT COTTAGE HILL	2	0	32	0
TOTALS		510	190	1,035	4,251

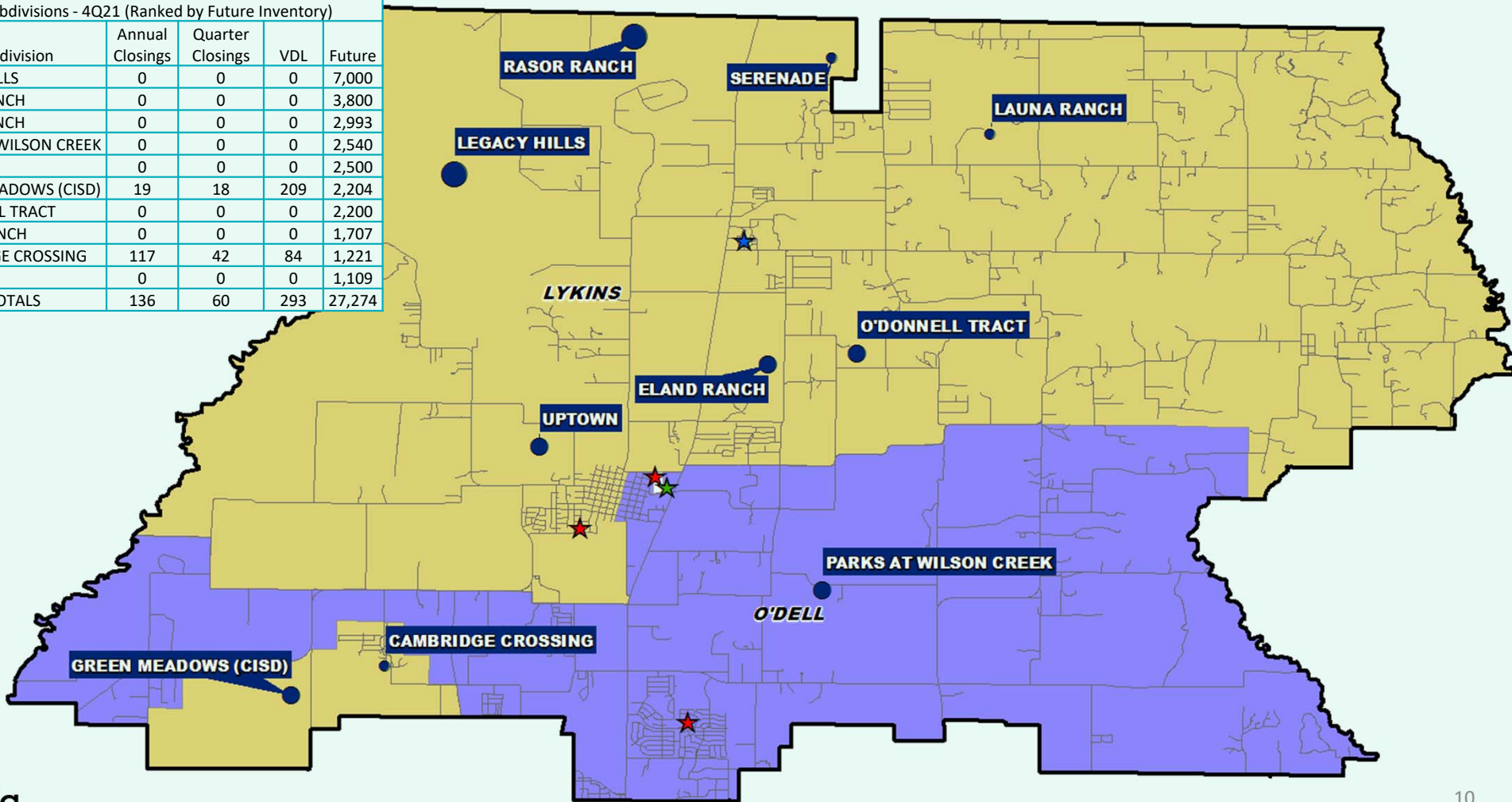




Futures Distribution

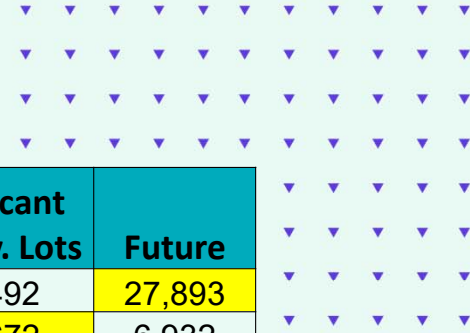
Top 10 Subdivisions - 4Q21 (Ranked by Future Inventory)

Rank	Subdivision	Annual Closings	Quarter Closings	VDL	Future
1	LEGACY HILLS	0	0	0	7,000
2	RASOR RANCH	0	0	0	3,800
3	ELAND RANCH	0	0	0	2,993
4	PARKS AT WILSON CREEK	0	0	0	2,540
5	UPTOWN	0	0	0	2,500
6	GREEN MEADOWS (CISD)	19	18	209	2,204
7	O'DONNELL TRACT	0	0	0	2,200
8	LAUNA RANCH	0	0	0	1,707
9	CAMBRIDGE CROSSING	117	42	84	1,221
10	SERENADE	0	0	0	1,109
TOTALS		136	60	293	27,274




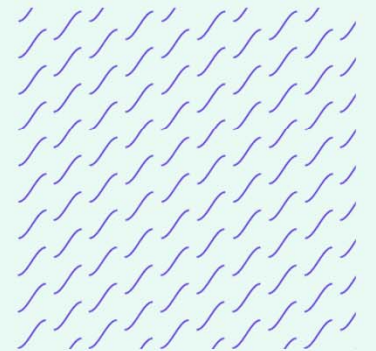


District Housing Overview by Elementary Zone



Elementary	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Under Const.	Inventory	Vacant Dev. Lots	Future
LYKINS	638	120	259	121	399	464	492	27,893
O'DELL	679	156	435	105	383	498	672	6,932
Grand Total	1,317	276	694	226	782	962	1,164	34,825

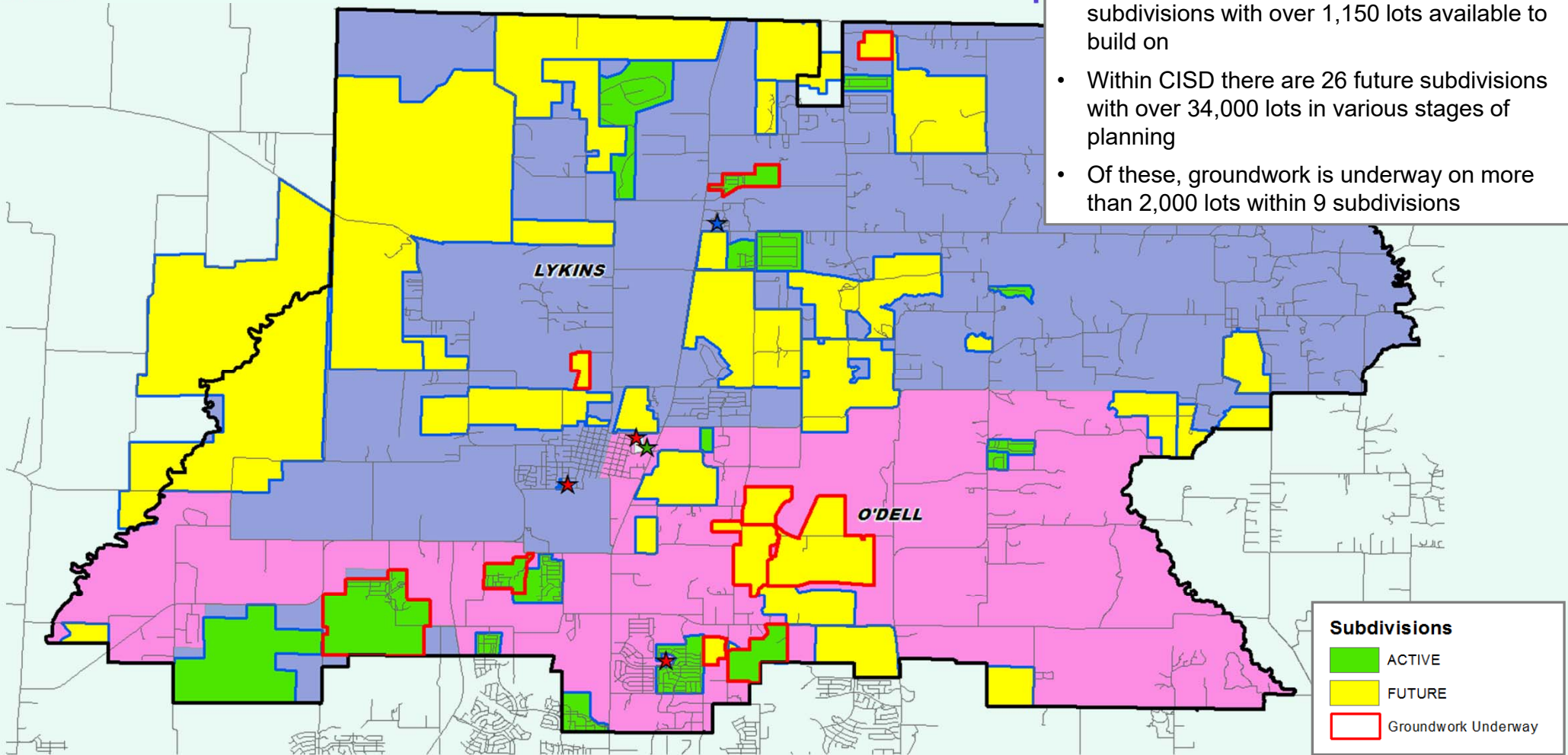
 Highest activity in the category





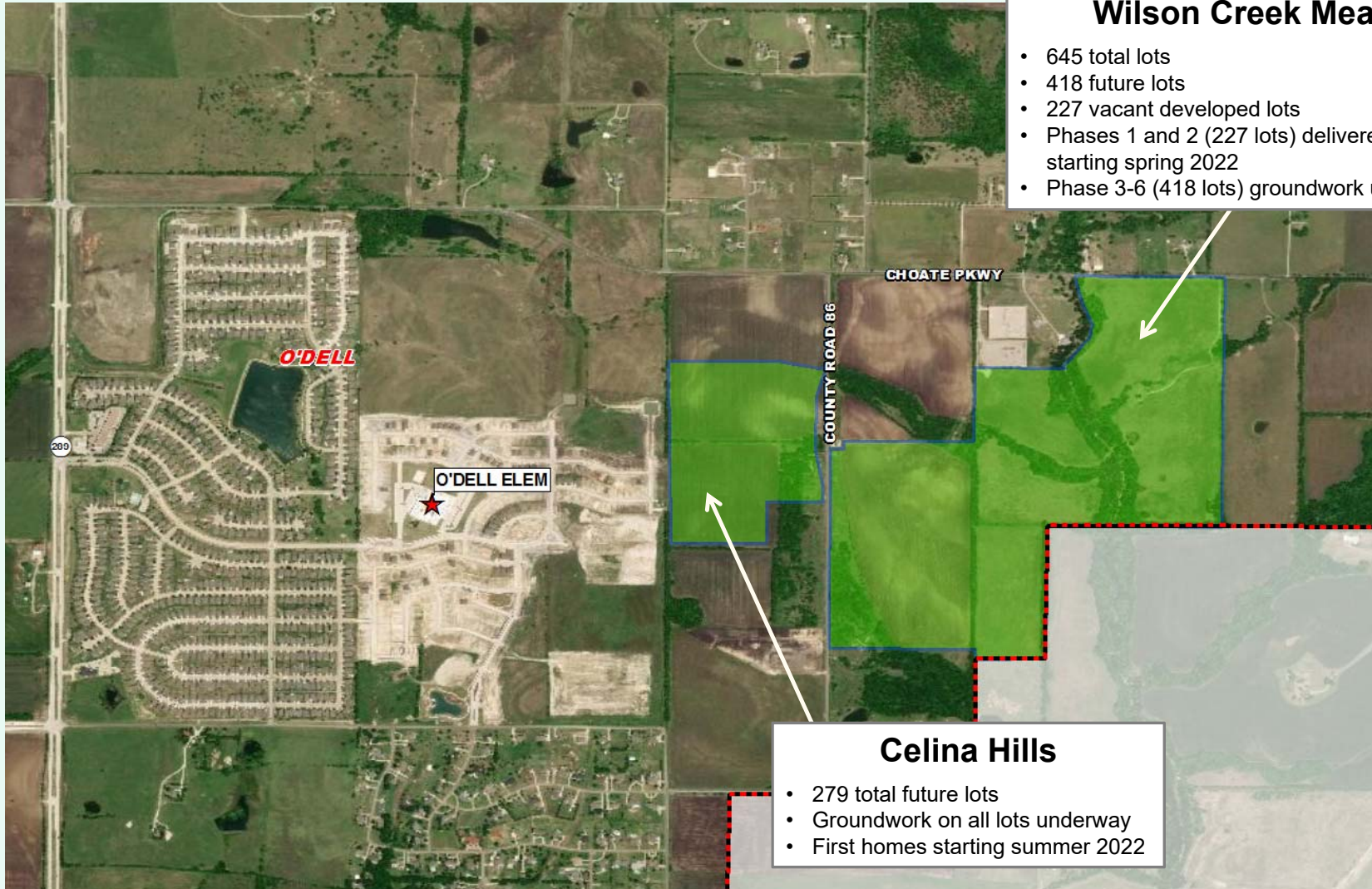
District Housing Overview

- The district has 23 actively building subdivisions with over 1,150 lots available to build on
- Within CISD there are 26 future subdivisions with over 34,000 lots in various stages of planning
- Of these, groundwork is underway on more than 2,000 lots within 9 subdivisions





Residential Activity



Wilson Creek Meadows

- 645 total lots
- 418 future lots
- 227 vacant developed lots
- Phases 1 and 2 (227 lots) delivered 4Q21, homes starting spring 2022
- Phase 3-6 (418 lots) groundwork underway

Celina Hills

- 279 total future lots
- Groundwork on all lots underway
- First homes starting summer 2022



Residential Activity

Cross Creek Meadows

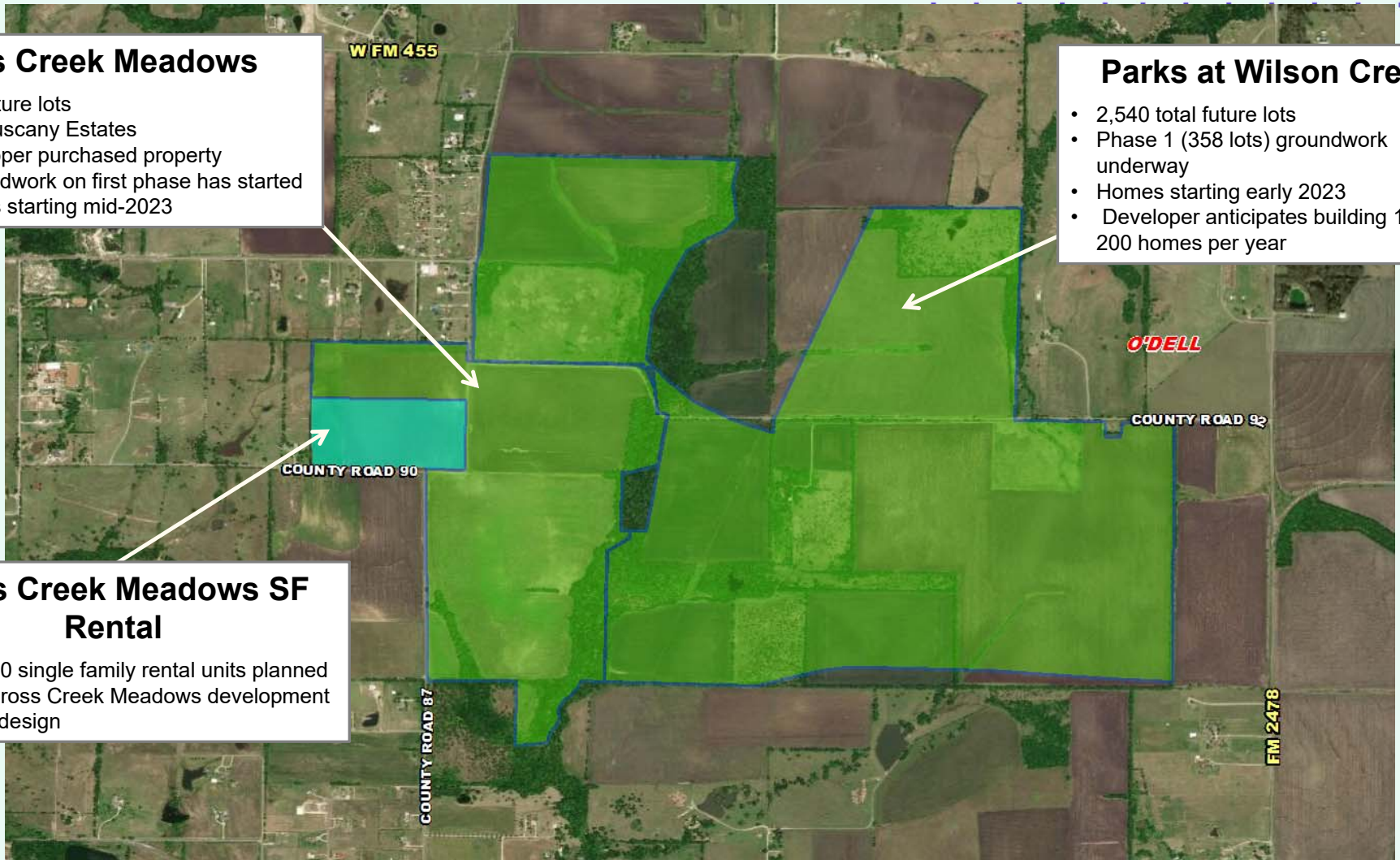
- 790 total future lots
- Formerly Tuscany Estates
- New developer purchased property
- Initial groundwork on first phase has started
- First homes starting mid-2023

Parks at Wilson Creek

- 2,540 total future lots
- Phase 1 (358 lots) groundwork underway
- Homes starting early 2023
- Developer anticipates building 150-200 homes per year

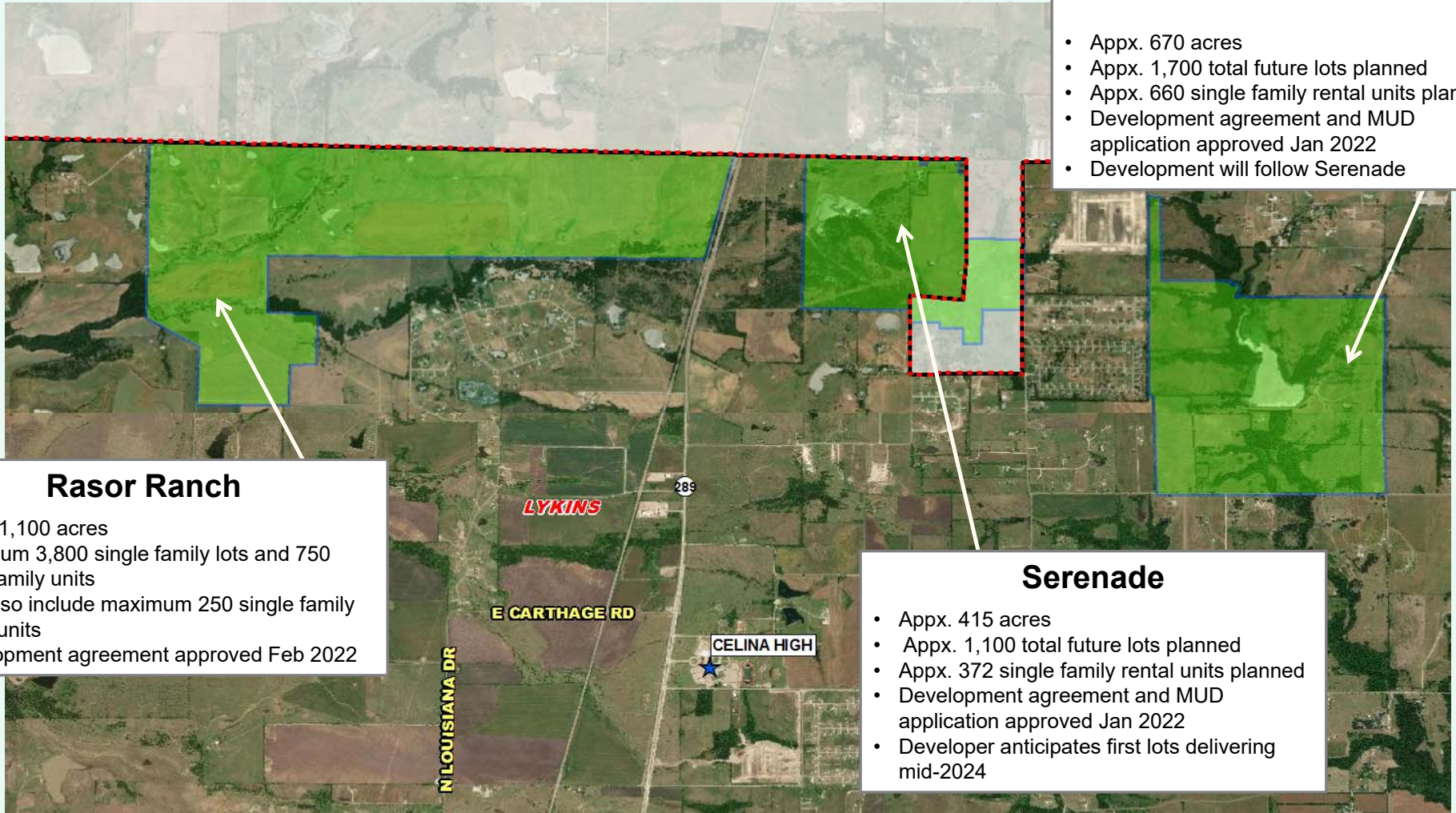
Cross Creek Meadows SF Rental

- Appx. 300 single family rental units planned
- Part of Cross Creek Meadows development
- Plans in design





Residential Activity



Launa Ranch

- Appx. 670 acres
- Appx. 1,700 total future lots planned
- Appx. 660 single family rental units planned
- Development agreement and MUD application approved Jan 2022
- Development will follow Serenade

Rasor Ranch

- Appx. 1,100 acres
- Maximum 3,800 single family lots and 750 multi-family units
- May also include maximum 250 single family rental units
- Development agreement approved Feb 2022

Serenade

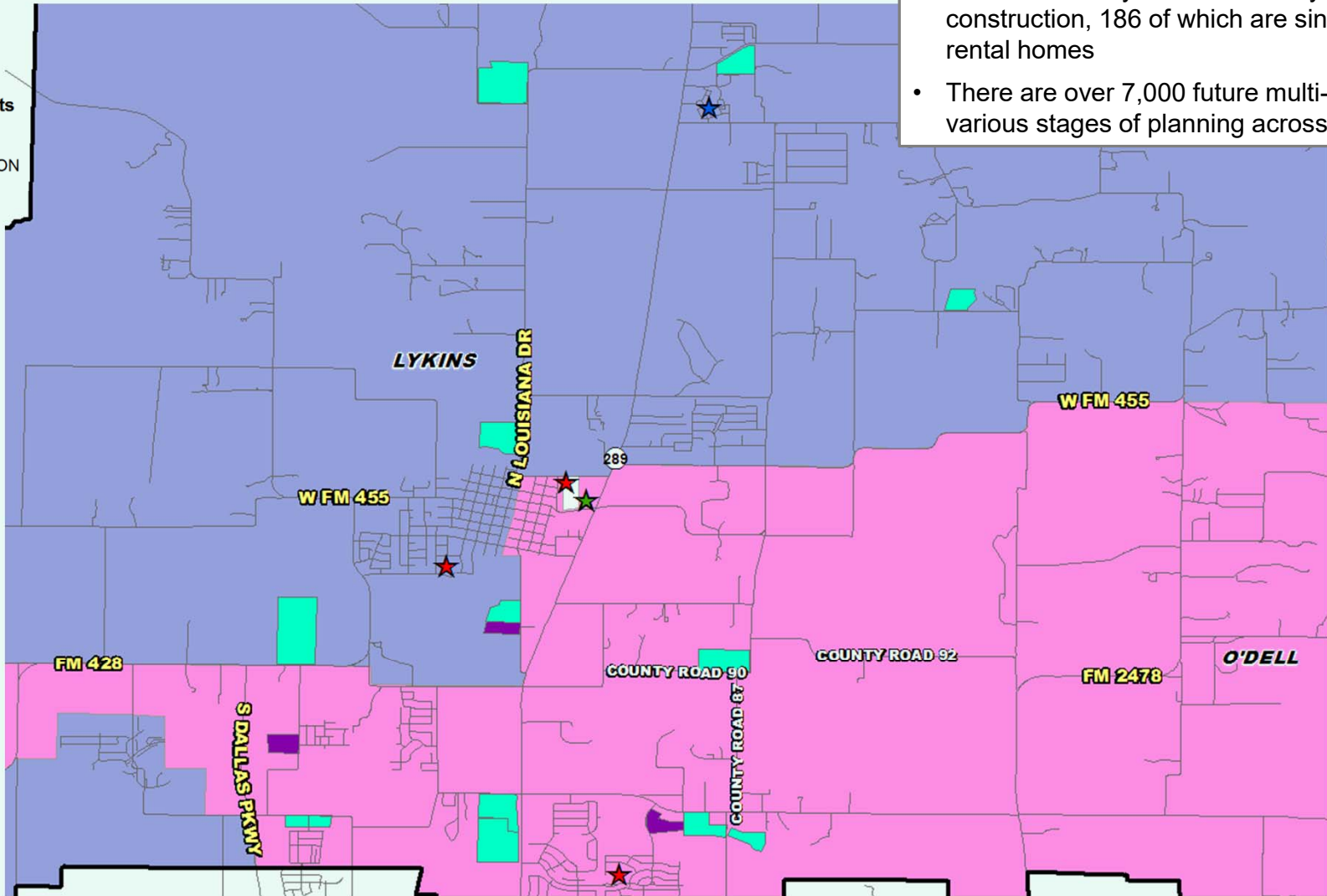
- Appx. 415 acres
- Appx. 1,100 total future lots planned
- Appx. 372 single family rental units planned
- Development agreement and MUD application approved Jan 2022
- Developer anticipates first lots delivering mid-2024

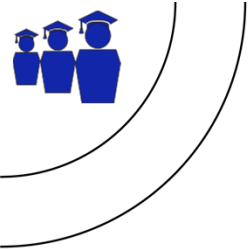


District Multi-Family Overview

- There are nearly 700 multi-family units under construction, 186 of which are single family rental homes
- There are over 7,000 future multi-family units in various stages of planning across the district

Multi-Family Developments
FUTURE
UNDER CONSTRUCTION





District Yields



Single Family Yield
0.622

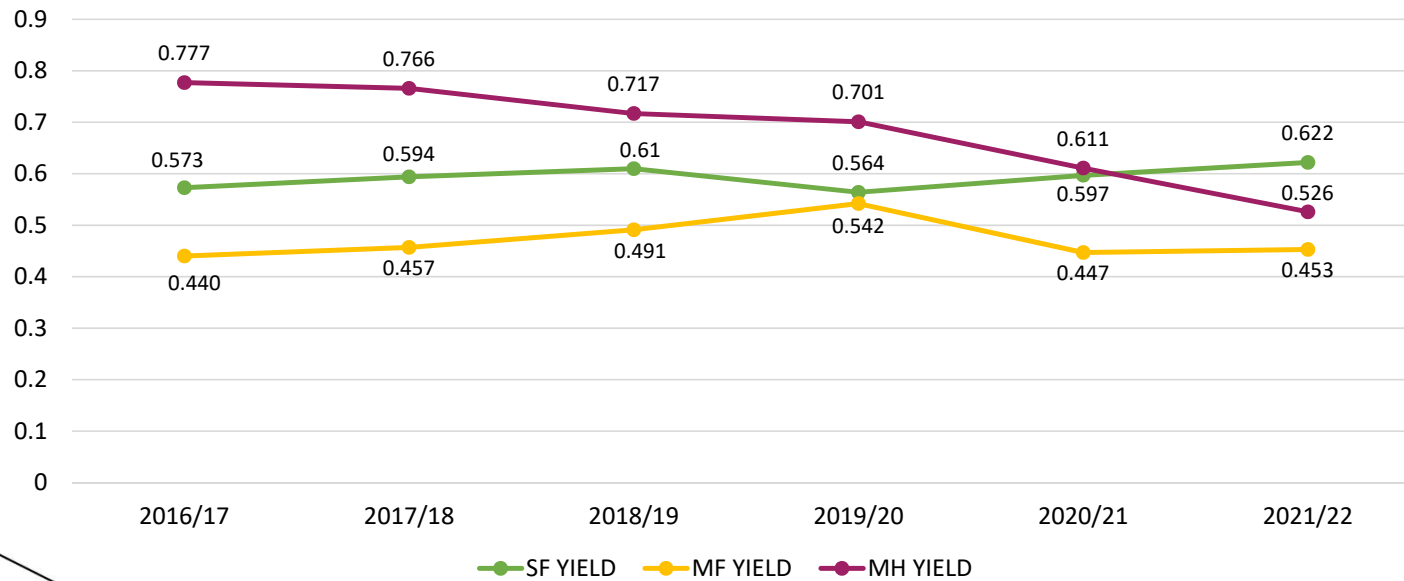


Multi-Family Yield
0.453



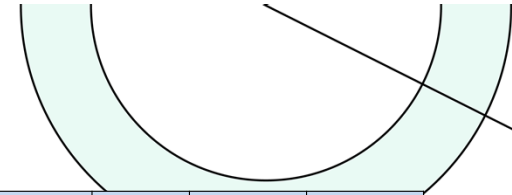
Manufactured Home Yield
0.526

CISD Student Yields by Housing Type





Ten Year Forecast by Grade Level

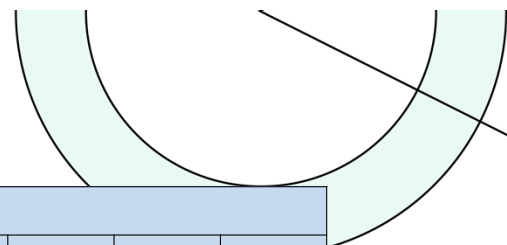


Year (Oct)	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2017/18	7	39	177	194	195	173	189	184	208	203	215	213	215	205	159	2,576		
2018/19	11	42	188	200	201	203	192	199	202	229	211	218	221	205	200	2,722	146	5.7%
2019/20	13	47	201	215	201	217	213	206	206	217	245	212	223	214	200	2,830	108	4.0%
2020/21	16	40	190	214	212	211	235	232	227	230	241	268	220	219	207	2,962	132	4.7%
2021/22	4	59	247	237	248	266	251	275	265	257	247	271	280	220	227	3,354	392	13.2%
2022/23	4	70	290	309	303	317	339	320	336	323	314	272	283	282	224	3,986	632	18.8%
2023/24	4	87	348	370	394	387	403	432	390	410	394	345	283	285	288	4,820	834	20.9%
2024/25	4	96	397	422	449	481	471	486	516	464	459	437	362	284	281	5,609	789	16.4%
2025/26	4	111	453	479	515	537	575	565	559	609	520	506	456	354	275	6,518	908	16.2%
2026/27	4	134	544	551	575	630	654	699	633	669	702	574	522	446	347	7,684	1,166	17.9%
2027/28	4	151	620	651	662	692	760	790	804	728	757	776	592	515	436	8,938	1,255	16.3%
2028/29	4	170	694	715	752	766	801	883	877	892	808	818	803	581	503	10,067	1,128	12.6%
2029/30	4	187	763	790	815	858	876	918	971	965	981	873	844	789	568	11,202	1,135	11.3%
2030/31	4	205	839	846	877	906	955	977	991	1,049	1,042	1,050	891	831	771	12,234	1,032	9.2%
2031/32	4	226	923	921	930	966	999	1055	1,036	1,060	1,122	1,094	1,083	876	812	13,107	873	7.1%

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



Ten Year Forecast by Campus



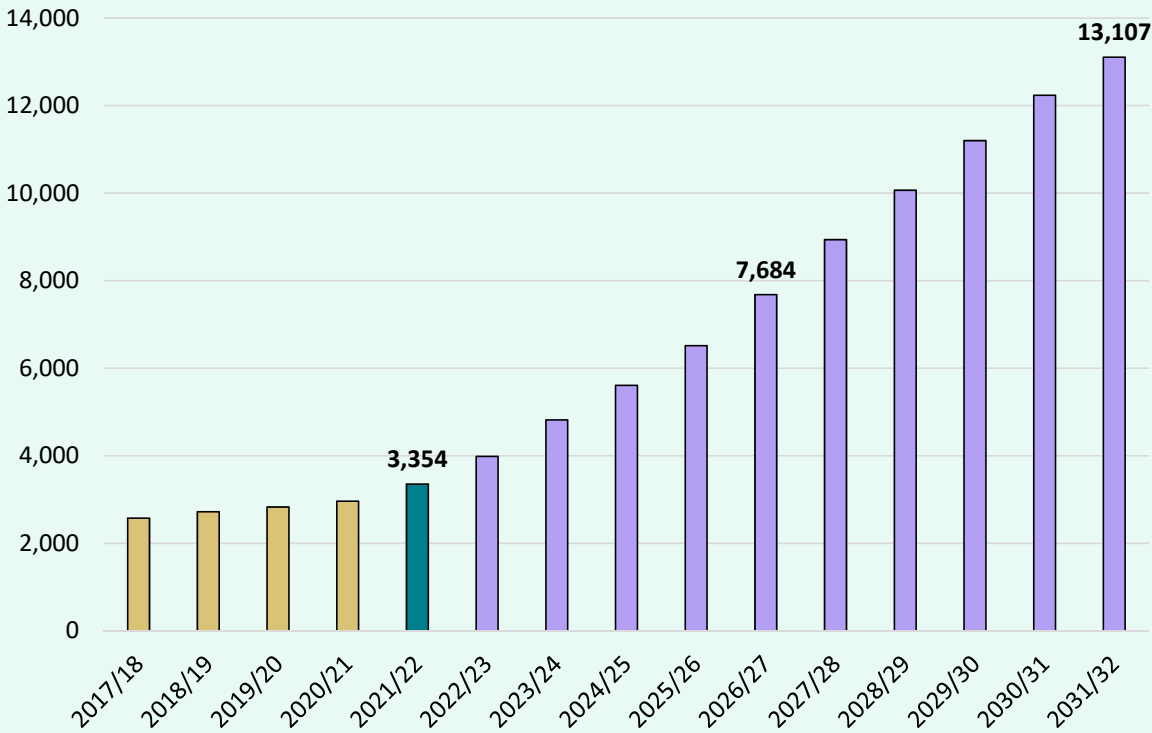
Campus	Capacity	ENROLLMENT PROJECTIONS											
		2020/21	Fall 2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32
CELINA PRIMARY SCHOOL	400	246	310	364	439	497	568	682	775	868	954	1,048	1,153
LYKINS ELEMENTARY SCHOOL	750	558	634	756	951	1,160	1,432	1,696	1,966	2,143	2,296	2,447	2,626
O'DELL ELEMENTARY SCHOOL	750	546	643	832	1,035	1,149	1,239	1,413	1,589	1,774	1,961	2,114	2,245
ELEMENTARY TOTAL	1,900	1,350	1,587	1,952	2,425	2,806	3,239	3,791	4,330	4,785	5,211	5,609	6,024
Elementary Absolute Change		37	237	365	473	381	432	552	540	454	426	398	415
Elementary Percent Change		2.82%	17.56%	22.97%	24.26%	15.73%	15.40%	17.04%	14.24%	10.49%	8.90%	7.65%	7.39%
CELINA MIDDLE SCHOOL	1,500	698	769	973	1,194	1,439	1,688	2,004	2,289	2,577	2,917	3,082	3,218
MIDDLE SCHOOL TOTAL	1500	698	769	973	1,194	1,439	1,688	2,004	2,289	2,577	2,917	3,082	3,218
Middle School Absolute Change		236	71	204	221	245	249	316	285	288	340	165	136
Middle School Percent Change		51.08%	10.17%	26.53%	22.71%	20.52%	17.30%	18.72%	14.22%	12.58%	13.19%	5.66%	4.41%
CELINA HIGH SCHOOL	1,500	914	997	1,060	1,200	1,363	1,590	1,888	2,318	2,704	3,073	3,542	3,864
HIGH SCHOOL TOTAL	1,500	914	997	1,060	1,200	1,363	1,590	1,888	2,318	2,704	3,073	3,542	3,864
High School Absolute Change		65	83	63	140	163	227	298	430	386	369	469	322
High School Percent Change		7.66%	9.08%	6.32%	13.21%	13.58%	16.65%	18.74%	22.78%	16.65%	13.65%	15.26%	9.09%
COLLIN COUNTY JJAEP		2	1	1	1	1	1	1	1	1	1	1	1
DISTRICT TOTALS	4,900	2,964	3,354	3,986	4,820	5,609	6,518	7,684	8,938	10,067	11,202	12,234	13,107
District Absolute Change			390	632	834	789	908	1,166	1,255	1,128	1,135	1,032	873
District Percent Change			13.16%	18.83%	20.94%	16.38%	16.19%	17.89%	16.33%	12.62%	11.27%	9.22%	7.13%

Yellow = over stated capacity



Key Takeaways

Enrollment Forecast



- Celina ISD saw a record number of home sales in 2021, up 25% from 2020 totals, with new homes accounting for nearly 60% of the total sales in 2021
- New home starts within CISD more than doubled, but home closings have lagged behind due to supply issues lengthening build times
- The district has 23 actively building subdivisions with over 1,150 lots available to build on
- CISD has 26 future subdivisions with over 34,000 lots in the planning stages
- Groundwork is underway on more than 2,000 lots within 9 subdivisions
- Celina ISD is forecasted to enroll nearly 7,700 students by 2026/27 and more than 13,000 by 2031/32