



Navarro
Independent
School District

Demographic Update 2020-21



TEMPLETON
DEMOGRAPHICS

hanleywood | metrostudy



Annual Enrollment Change

Year (Oct)	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2016/17	7	32	109	117	127	129	133	124	144	158	149	149	171	141	122	1,812		
2017/18	10	30	129	120	121	125	140	150	136	174	168	164	149	157	138	1,911	99	5.5%
2018/19	8	26	124	142	120	128	133	148	152	151	173	178	167	143	150	1,943	32	1.7%
2019/20	18	23	121	121	157	123	133	144	158	159	152	167	180	151	137	1,944	1	0.1%
2020/21	19	25	100	117	109	147	118	138	145	156	156	156	164	161	138	1,849	-95	-4.9%

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

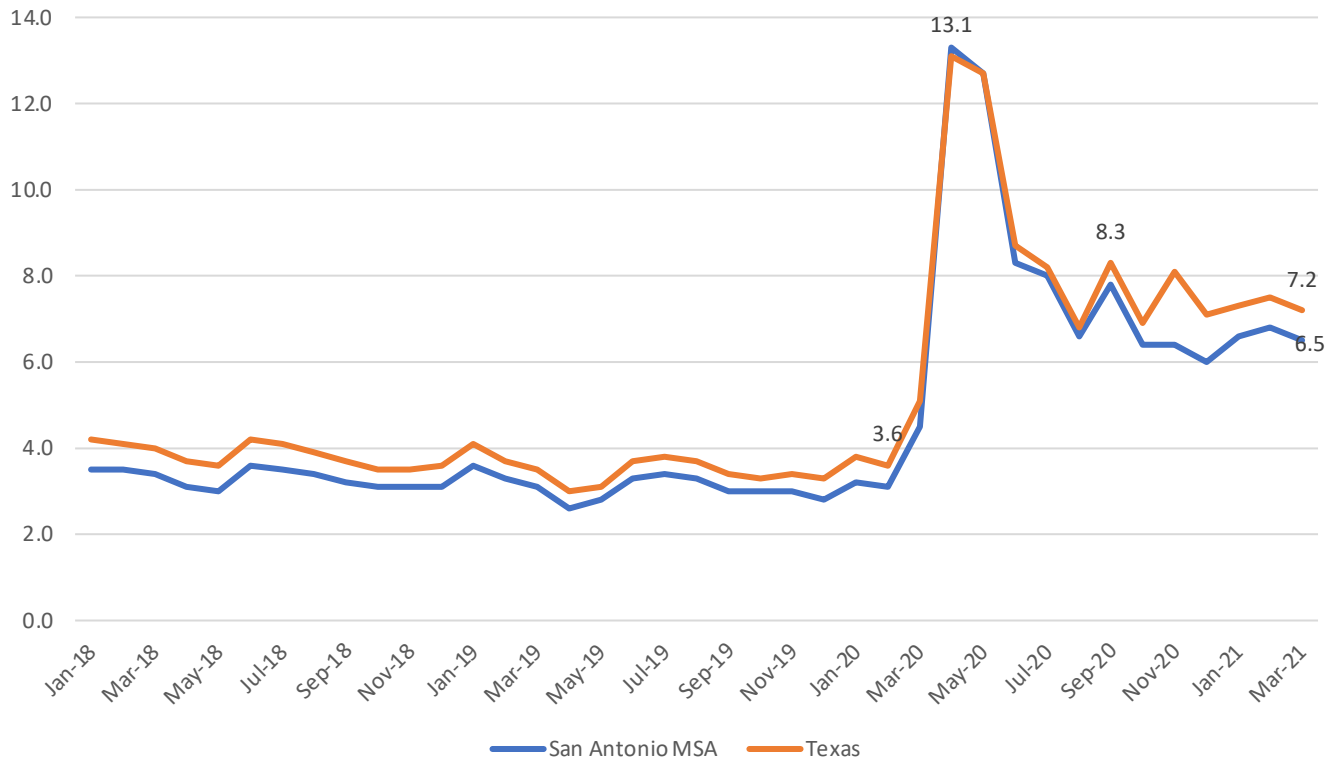
	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th
3 Year Avg.	0.921	1.015	1.002	1.006	1.021	1.059	1.029	1.048	0.994	1.017	1.004	0.919	0.942
2017/18	1.183	1.101	1.034	0.984	1.085	1.128	1.097	1.208	1.063	1.101	1.000	0.918	0.979
2018/19	0.961	1.101	1.000	1.058	1.064	1.057	1.013	1.110	0.994	1.060	1.018	0.960	0.955
2019/20	0.976	0.976	1.106	1.025	1.039	1.083	1.068	1.046	1.007	0.965	1.011	0.904	0.958
2020/21	0.826	0.967	0.901	0.936	0.959	1.038	1.007	0.987	0.981	1.026	0.982	0.894	0.914

- Navarro ISD declined 95 students in 2020/21, a loss of 4.9%
- The district had unusually low cohorts in KG-4th grades and 7th-8th

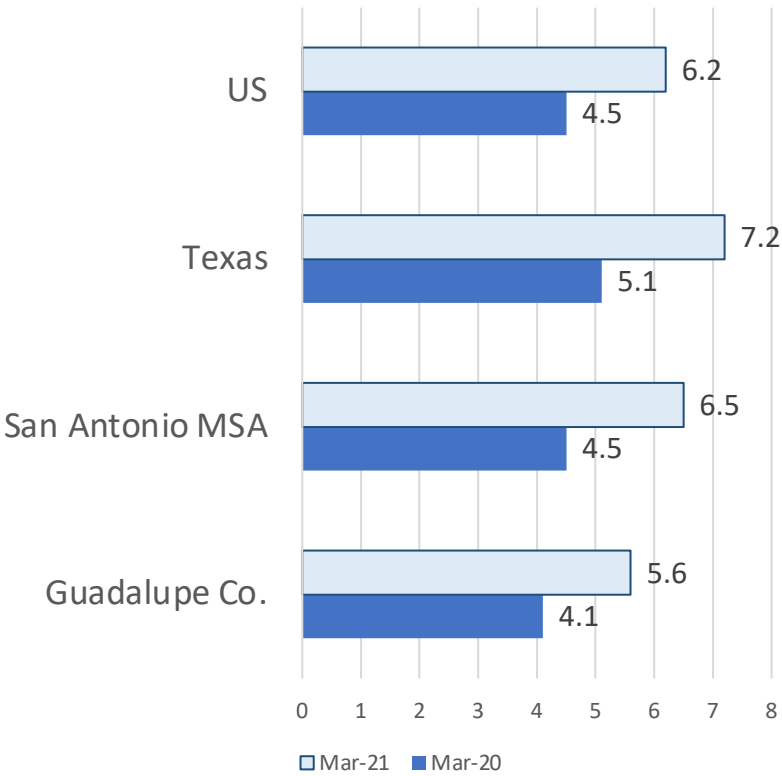


Guadalupe County Economic Update

Unemployment Rate, Jan 2018 - March 2021

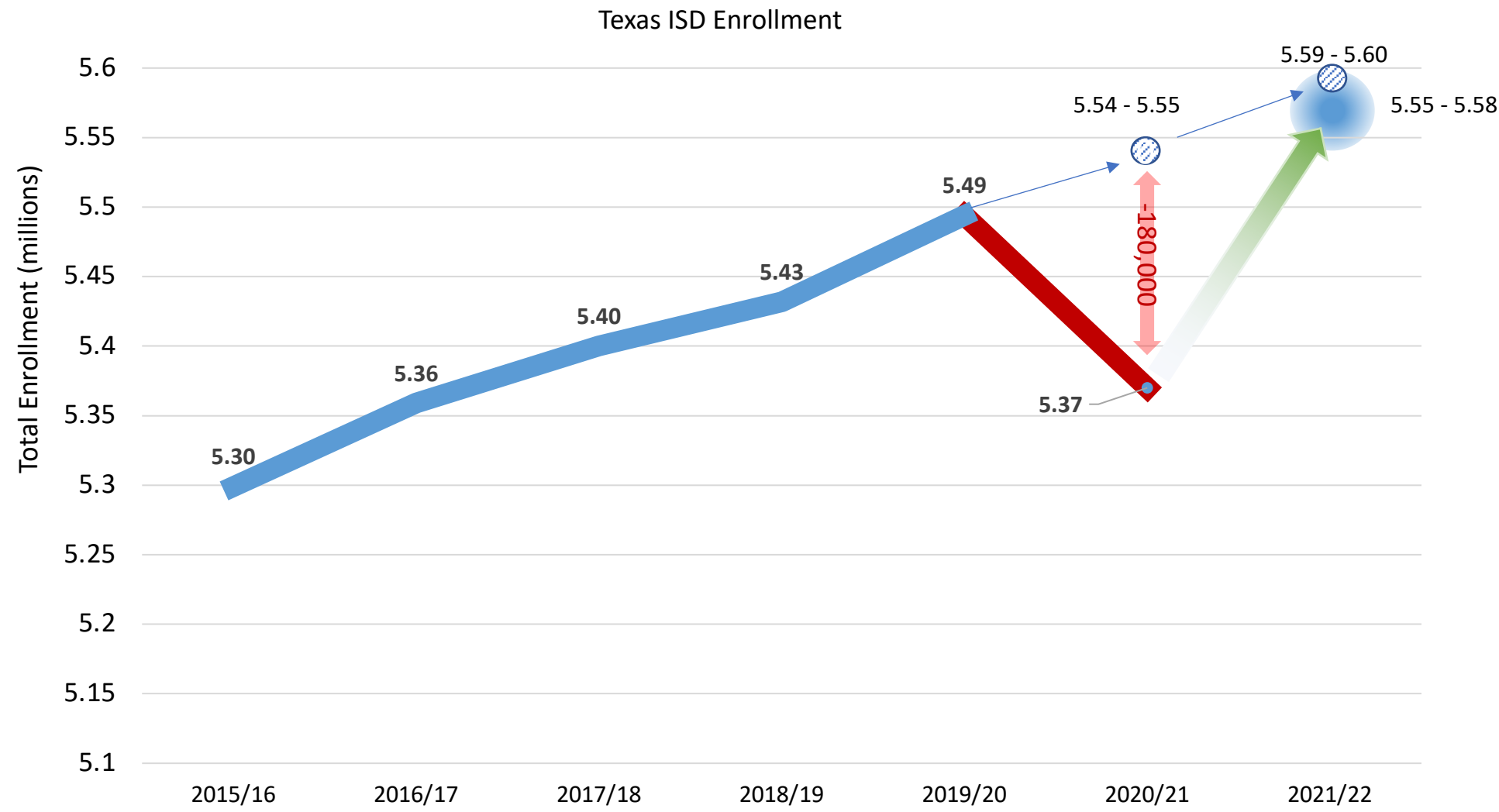


Unemployment Rate, Year Over Year



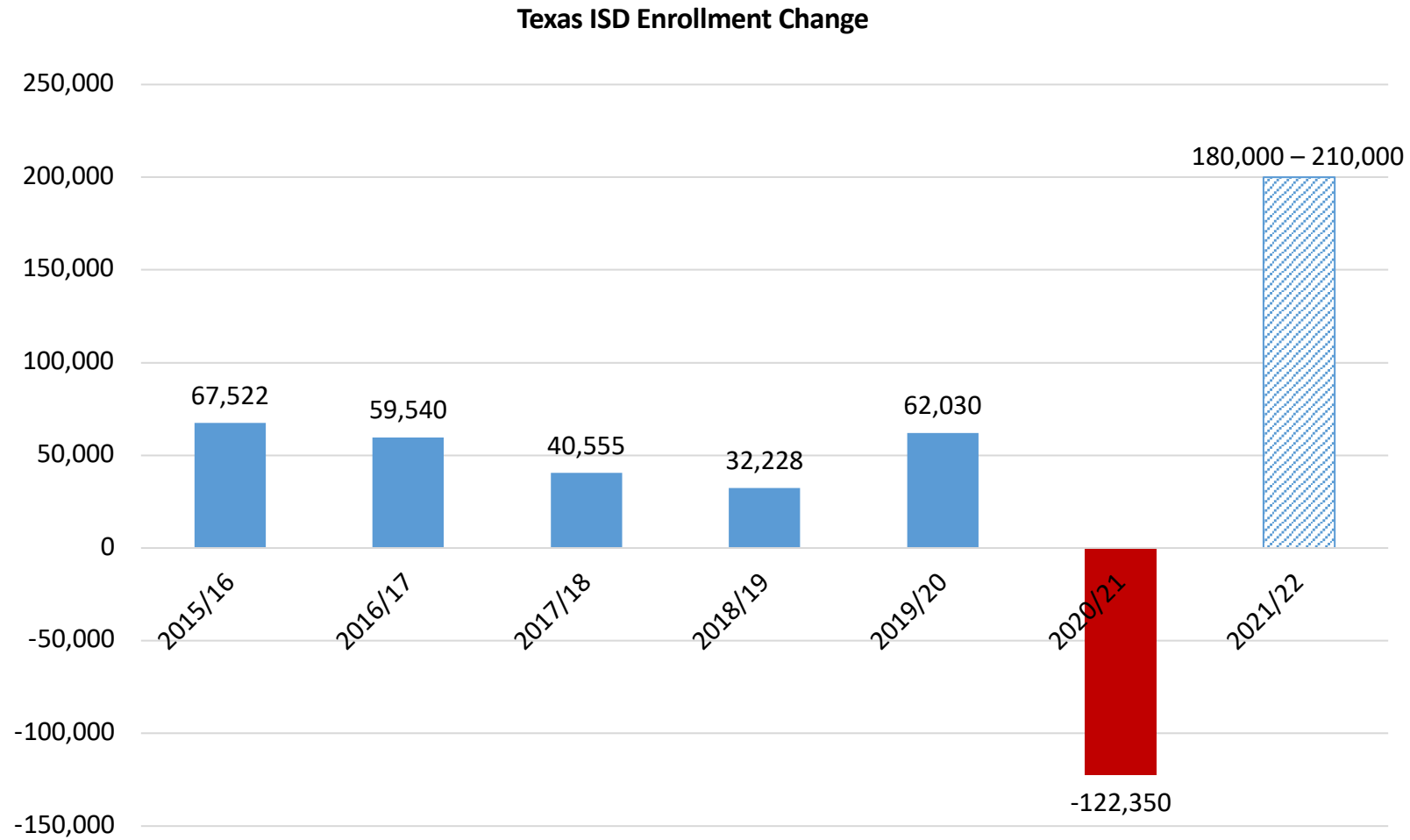


State Enrollment Trends



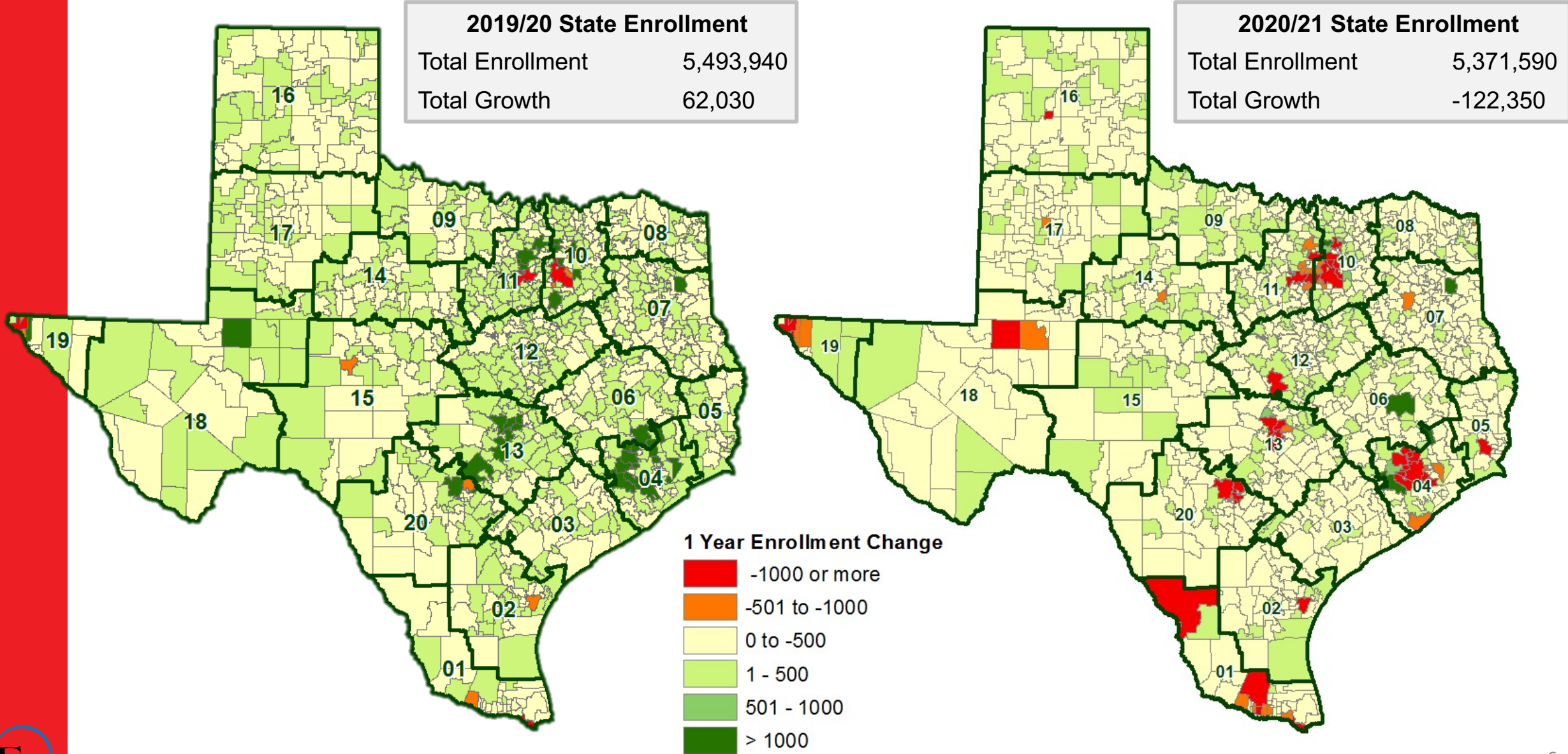


State Enrollment Trends



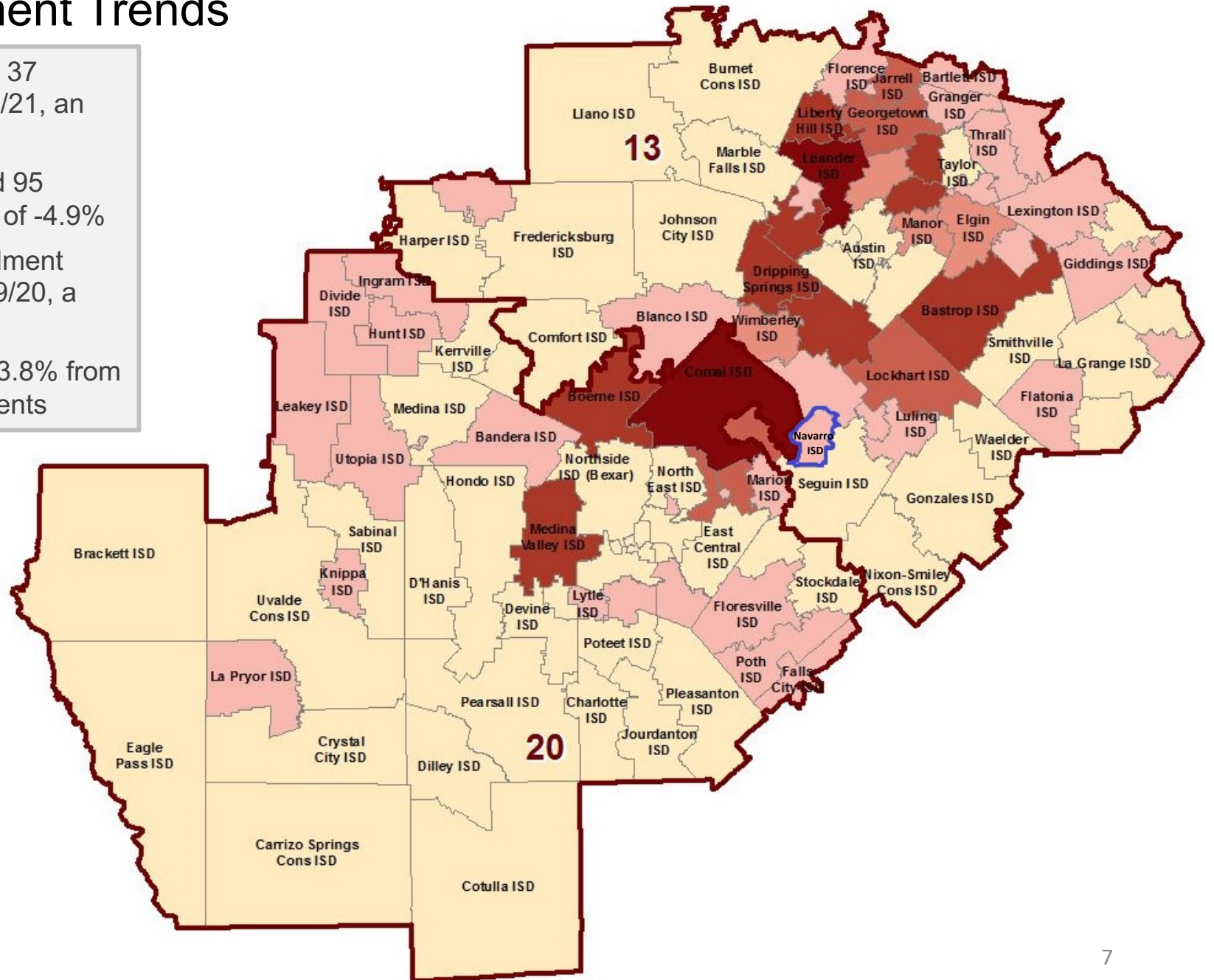


State Enrollment Trends





- ### 5 Yr Enrollment Change





Region 20 Enrollment Trends

Rank	DISTRICT	2015/16 Enrollment	2019/20 Enrollment	2020/21 Enrollment	5-YEAR CHANGE (15/16-20/21)	ANNUAL CHANGE (19/20-20/21)	5-YEAR PCT Growth	1-YEAR PCT Growth
1	Comal ISD	21,163	25,089	25,459	4,296	370	20.3%	1.5%
2	Boerne ISD	7,902	9,579	9,617	1,715	38	21.7%	0.4%
3	Medina Valley ISD	4,472	5,868	6,134	1,662	266	37.2%	4.5%
4	Schertz-Cibolo-Universal City ISD	15,116	15,972	15,673	557	-299	3.7%	-1.9%
5	Judson ISD	23,282	23,680	23,825	543	145	2.3%	0.6%
6	Lytle ISD	1,675	1,786	1,760	85	-26	5.1%	-1.5%
7	Randolph Field ISD	1,357	1,427	1,441	84	14	6.2%	1.0%
8	Falls City ISD	360	384	408	48	24	13.3%	6.3%
9	Marion ISD	1,446	1,538	1,483	37	-55	2.6%	-3.6%
10	Navarro ISD	1,812	1,944	1,849	37	-95	2.0%	-4.9%
11	Knippa ISD	421	448	456	35	8	8.3%	1.8%
12	La Pryor ISD	496	509	527	31	18	6.3%	3.5%
13	Hunt ISD	158	205	184	26	-21	16.5%	-10.2%
14	Ingram ISD	1,078	1,166	1,102	24	-64	2.2%	-5.5%
15	Somerset ISD	3,998	4,111	4,021	23	-90	0.6%	-2.2%
16	Alamo Heights ISD	4,824	4,944	4,846	22	-98	0.5%	-2.0%
17	Poth ISD	824	867	846	22	-21	2.7%	-2.4%
18	Leakey ISD	269	284	286	17	2	6.3%	0.7%
19	Southside ISD	5,582	5,781	5,595	13	-186	0.2%	-3.2%
20	Utopia ISD	196	229	206	10	-23	5.1%	-10.0%



San Antonio New Home Ranking Report

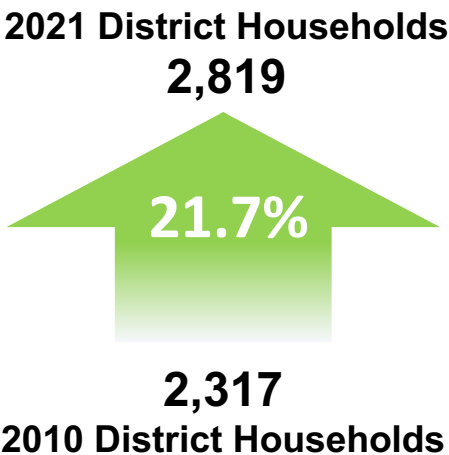
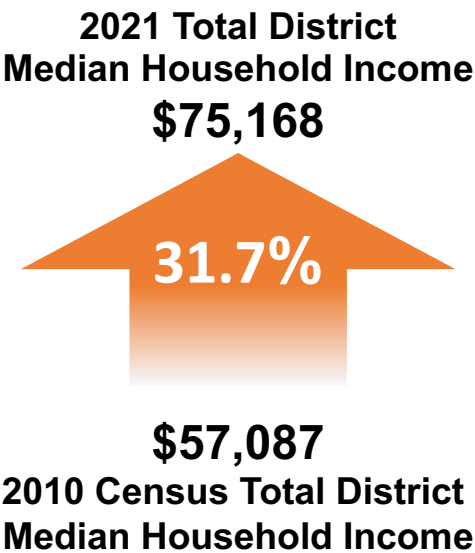
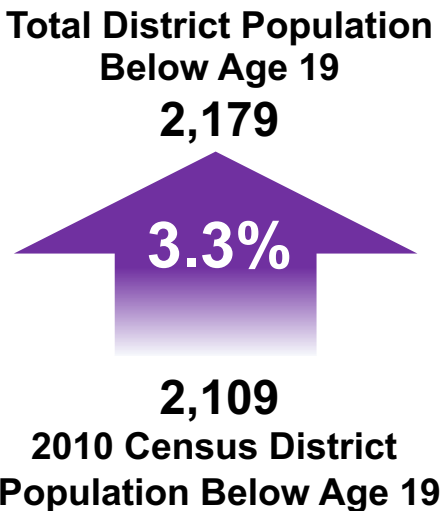
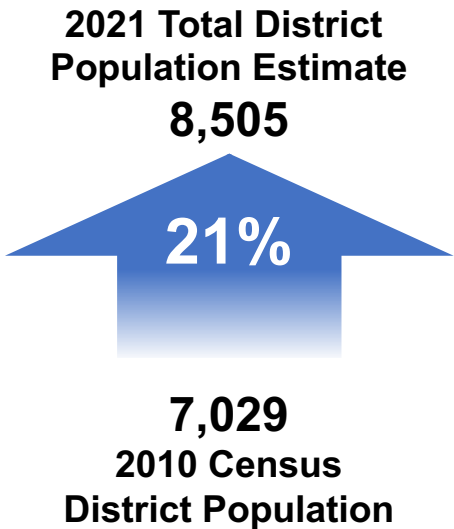
ISD Ranked by Annual Closings – 1Q21

Rank	District Name	Annual Starts	Annual Closings	Inventory	VDL	Future
1	Northside ISD	4,370	4,174	2,481	4,530	29,590
2	Comal ISD	2,854	2,790	1,586	3,755	26,476
3	Judson ISD	1,825	1,744	950	1,981	3,401
4	Medina Valley ISD	1,813	1,427	980	1,883	27,623
5	East Central ISD	1,484	1,161	822	1,569	17,662
6	Boerne ISD	956	947	565	1,494	9,899
7	Schertz-Cibolo U City ISD	984	937	573	1,378	8,370
8	New Braunfels ISD	917	750	587	930	7,725
9	Southwest ISD	524	556	220	1,019	8,812
10	North East ISD	616	528	431	881	6,223
11	San Antonio ISD	186	207	198	406	1,521
12	South San Antonio ISD	123	187	64	216	601
13	Southside ISD	175	159	90	407	8,100
14	Seguin ISD	227	114	148	825	3,464
15	Navarro ISD*	208	103	134	536	8,148
16	Edgewood ISD	14	80	1	0	32
17	Alamo Heights ISD	47	34	58	84	42
18	Marion ISD	37	32	26	35	228
19	Harlandale ISD	9	14	4	140	0
20	Pleasanton ISD	8	10	4	19	0

* Based on additional Templeton Demographics housing research



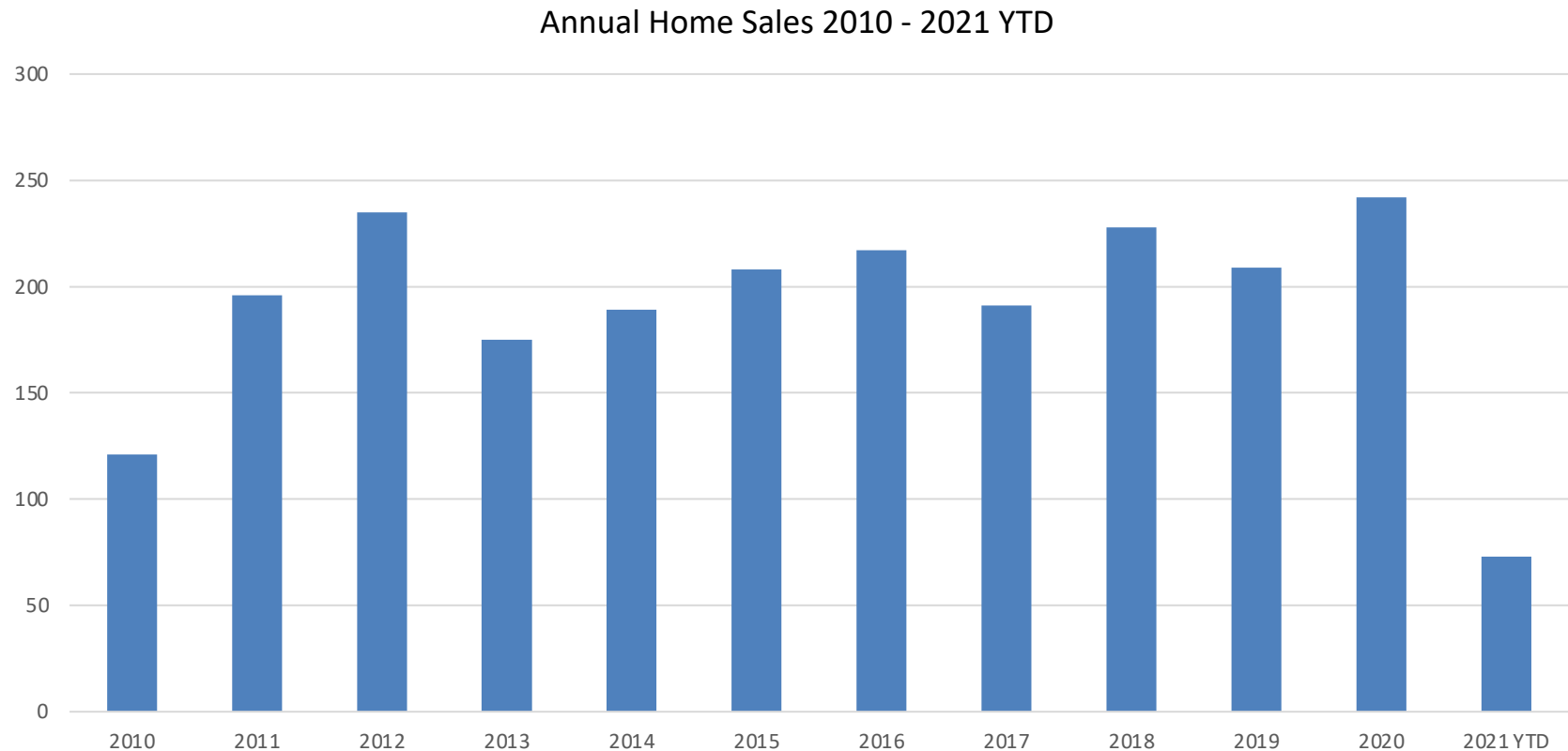
District Demographic Snapshot





Navarro ISD Housing Market Analysis

Home Sales 2010 - 2021 YTD



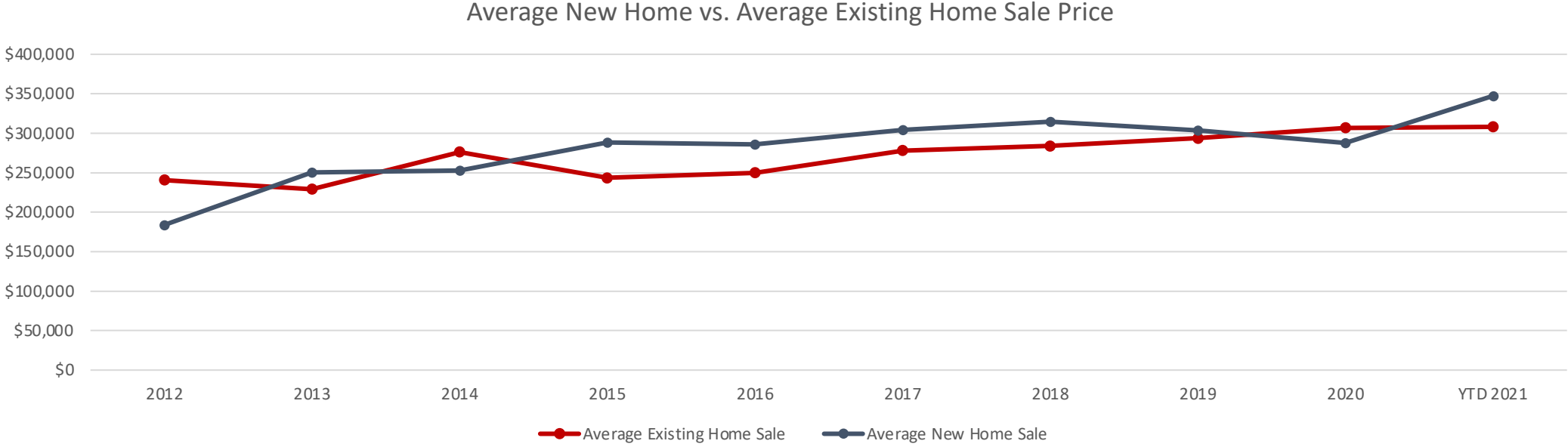
- From 2010 - 2020, homes sales within the district have doubled
- Navarro ISD had more than 242 home sales in 2020, and roughly 34% were new homes





Navarro ISD Housing Market

Average New vs. Existing Home Sale Price, 2012 – YTD 2021



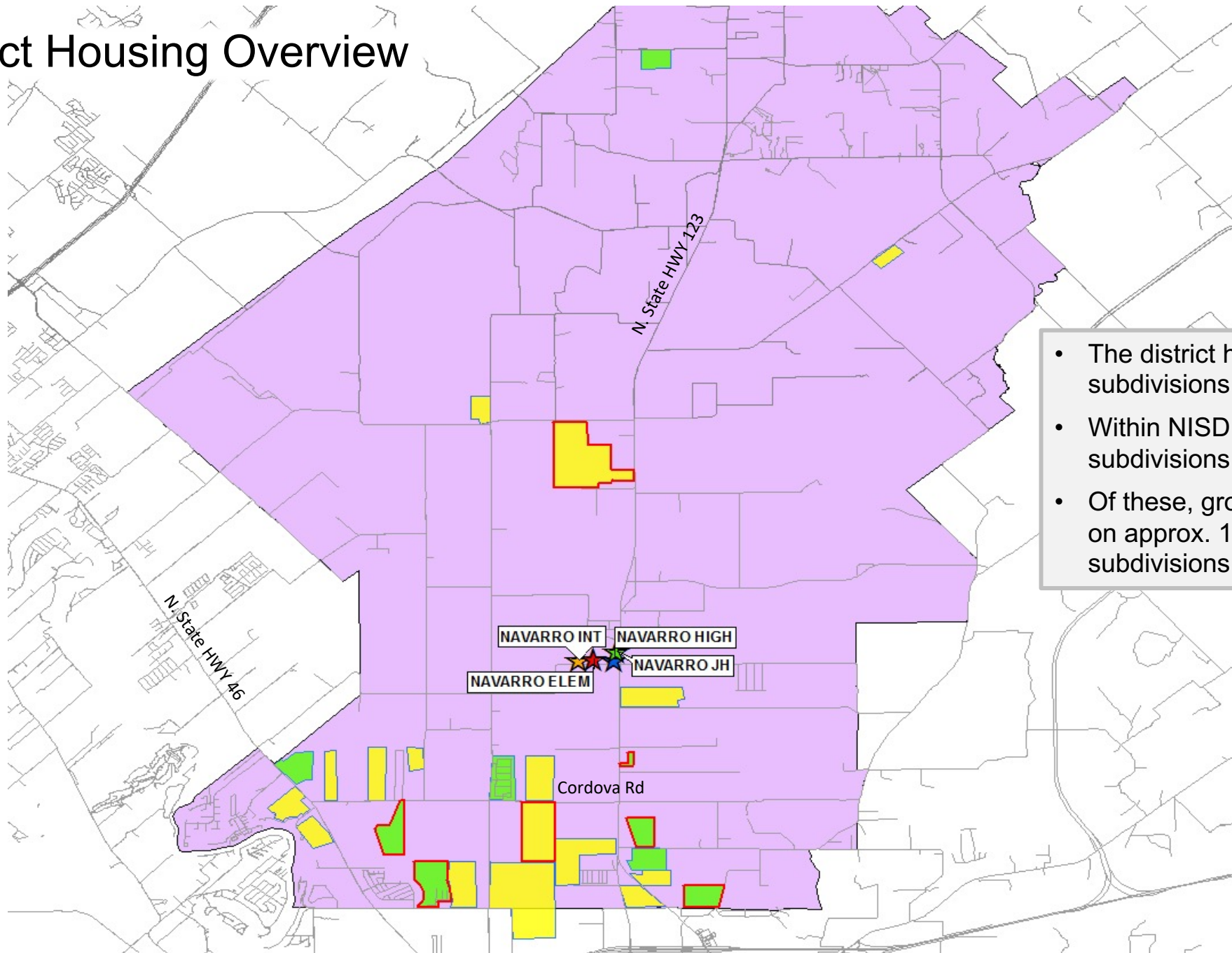
	Average New Home Price	Average Existing Home Price
2012	\$183,821	\$240,740
2013	\$250,286	\$229,075
2014	\$253,097	\$276,098
2015	\$288,024	\$243,427
2016	\$285,855	\$249,971
2017	\$304,219	\$277,927
2018	\$314,426	\$284,015
2019	\$303,589	\$293,799
2020	\$288,001	\$306,749
YTD 2021	\$347,365	\$308,110

- Since 2012, the average new home price in the district has increased by \$163,544, or 89%
- The average existing home price within the district has increased by 28%, or roughly \$67,370 since 2012





District Housing Overview



- The district has 9 actively building subdivisions
- Within NISD there are 12 future subdivisions in the planning stages
- Of these, groundwork is underway on approx. 1,293 lots within 7 subdivisions

Subdivisions

-  ACTIVE
-  FUTURE
-  Groundwork Underway



Residential Activity

Woodside Farms

- 235 total lots
- 151 VDL
- Groundwork underway for 82 futures
- KB Homes
- PP \$225-270k

Navarro Crossing

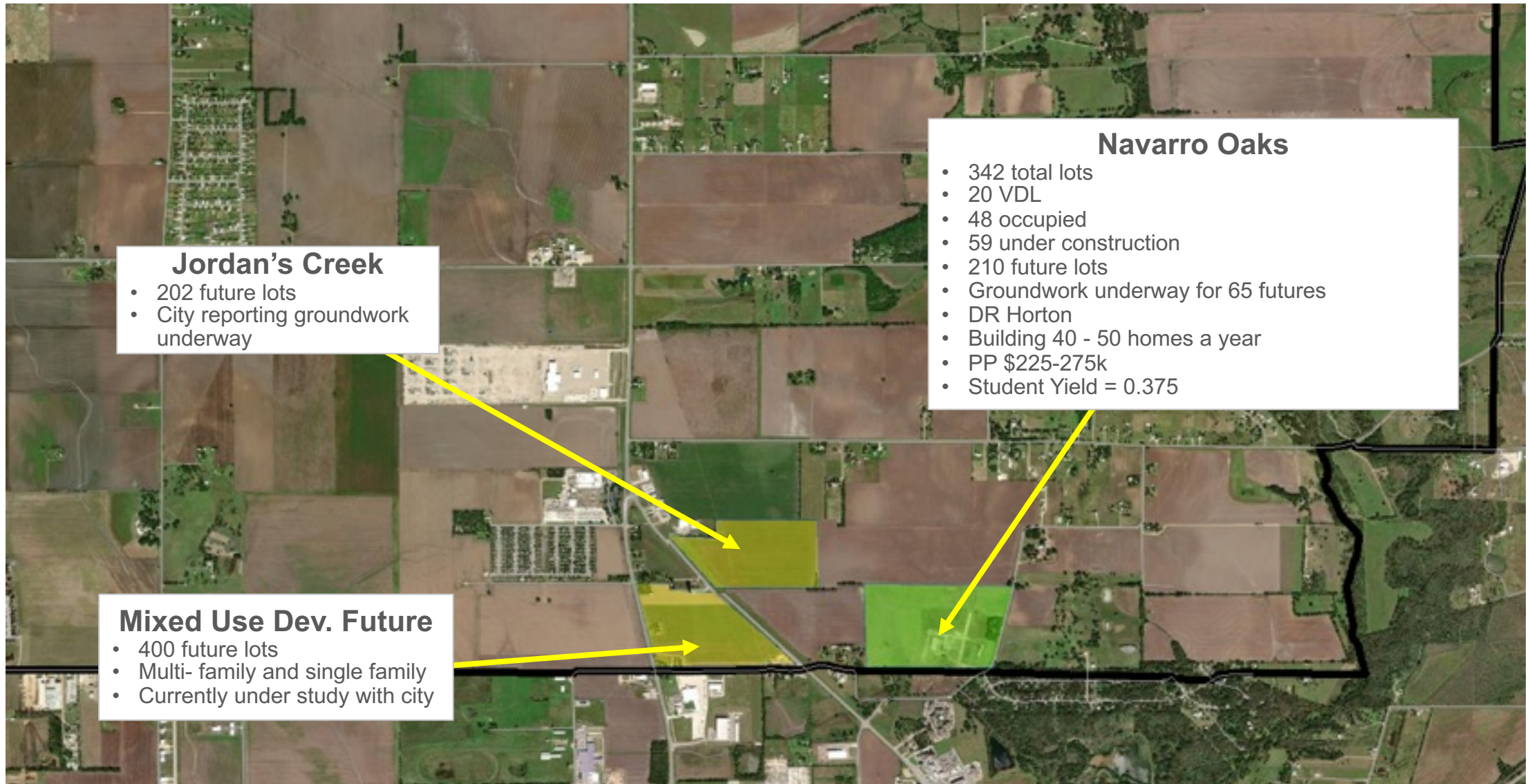
- 58 total duplexes (26 lots)
- 22 occupied
- 34 future lots
- Groundwork underway for remaining futures
- Est. 3-5 duplexes per year
- PP \$180-200k
- Student Yield = 0.682

Hannah Heights

- 288 total lots
- 139 VDL
- 2 under construction
- 147 future lots
- Triple H Development

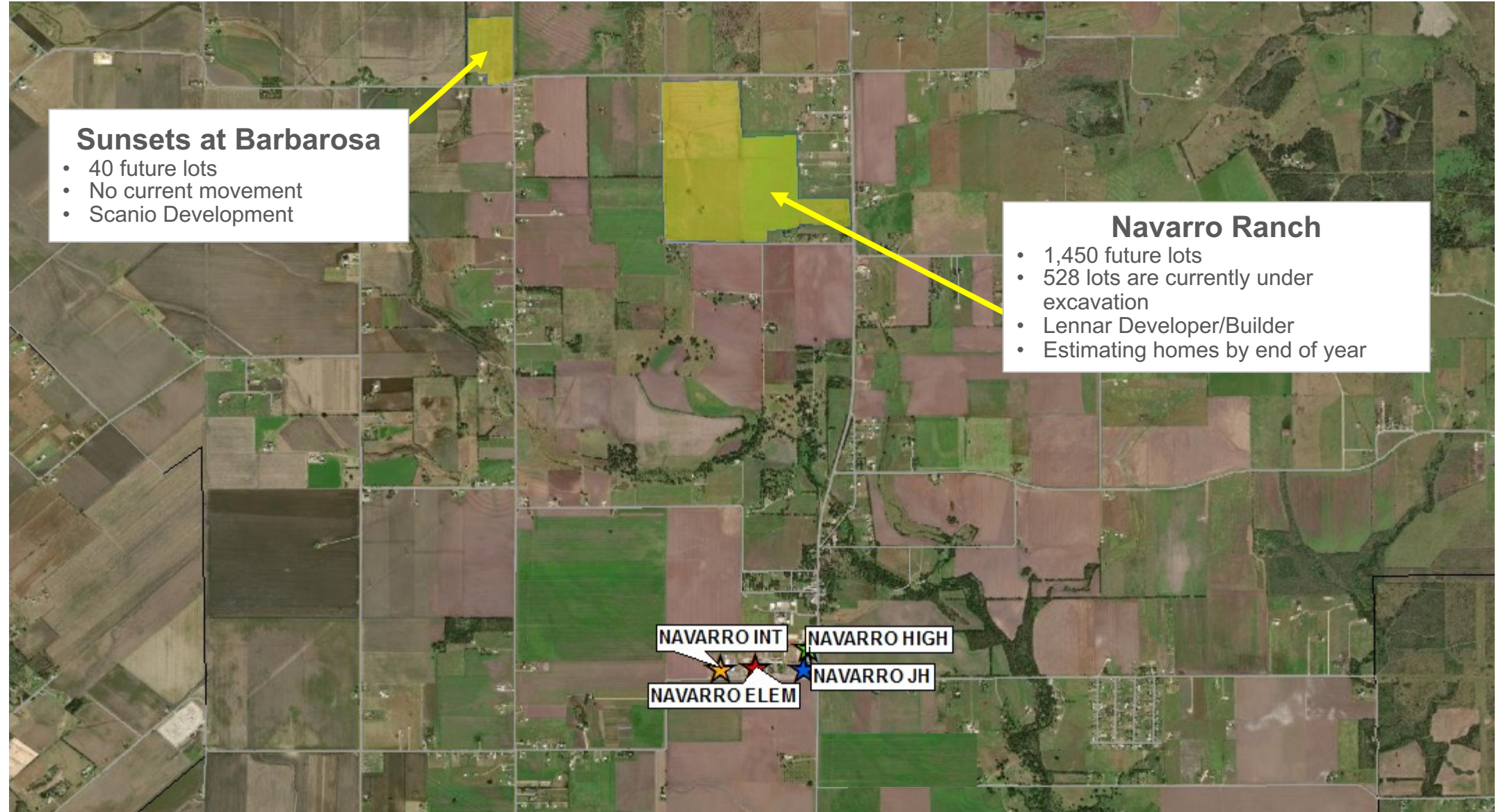


Residential Activity





Residential Activity





Residential Activity

Summit at Cordova

- 154 total lots
- 148 occupied
- 5 VDL
- PP \$350-409k
- Student Yield = 0.818

Cordova Trails

- 425 future lots
- Concept plan approved at city
- Groundwork is underway

Swenson Heights

- 838 future lots
- 375 have groundwork underway
- Castle Rock Communities

N. State HWY 123



Residential Activity

Walnut Springs

- 1,302 total lots
- 1,000 future lots in Navarro ISD
- 302 lots in Seguin ISD

Fords Landing

- 500 future lots
- No movement with city

Seguin ISD

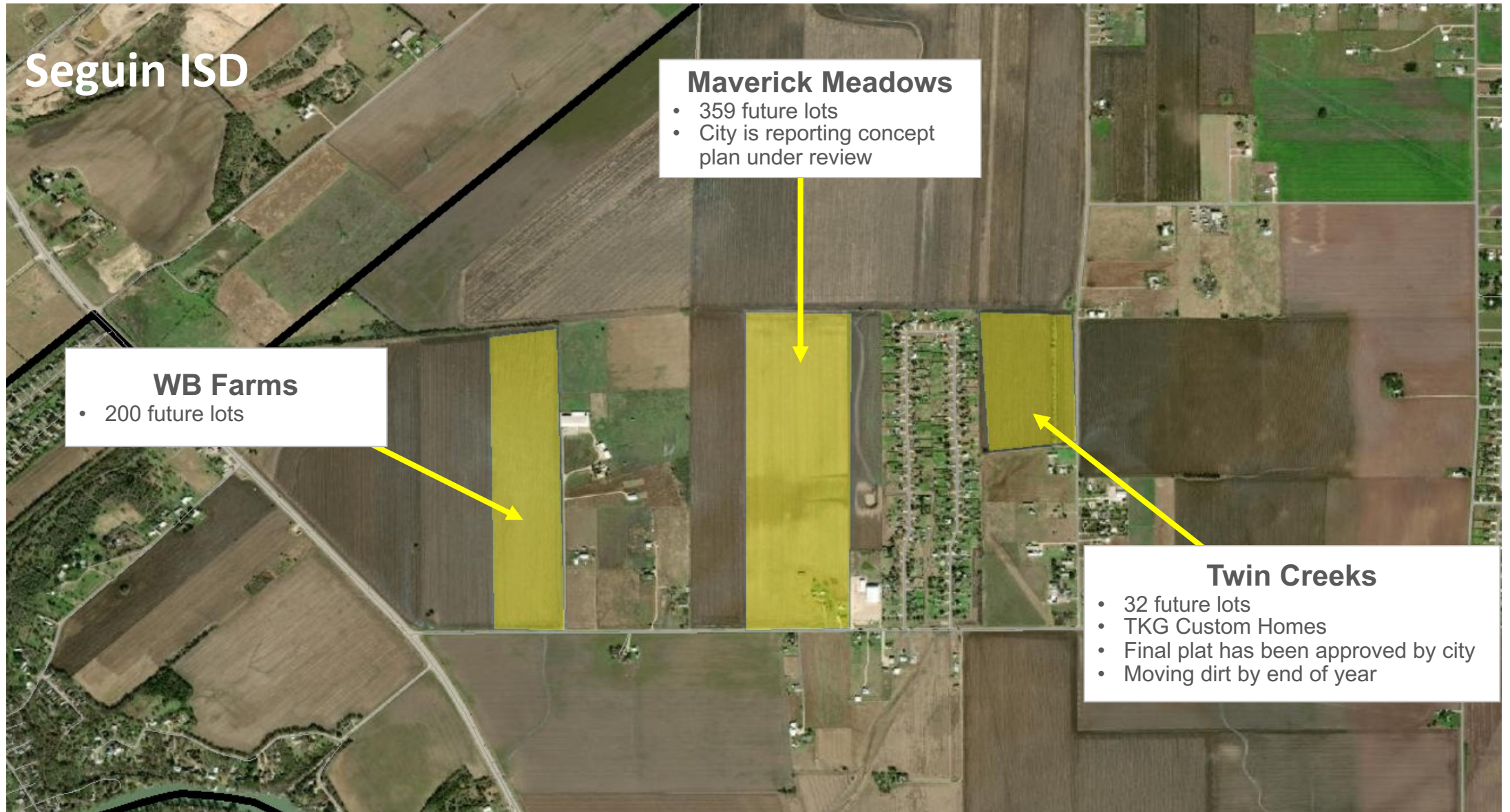


Residential Activity





Residential Activity





Residential Activity



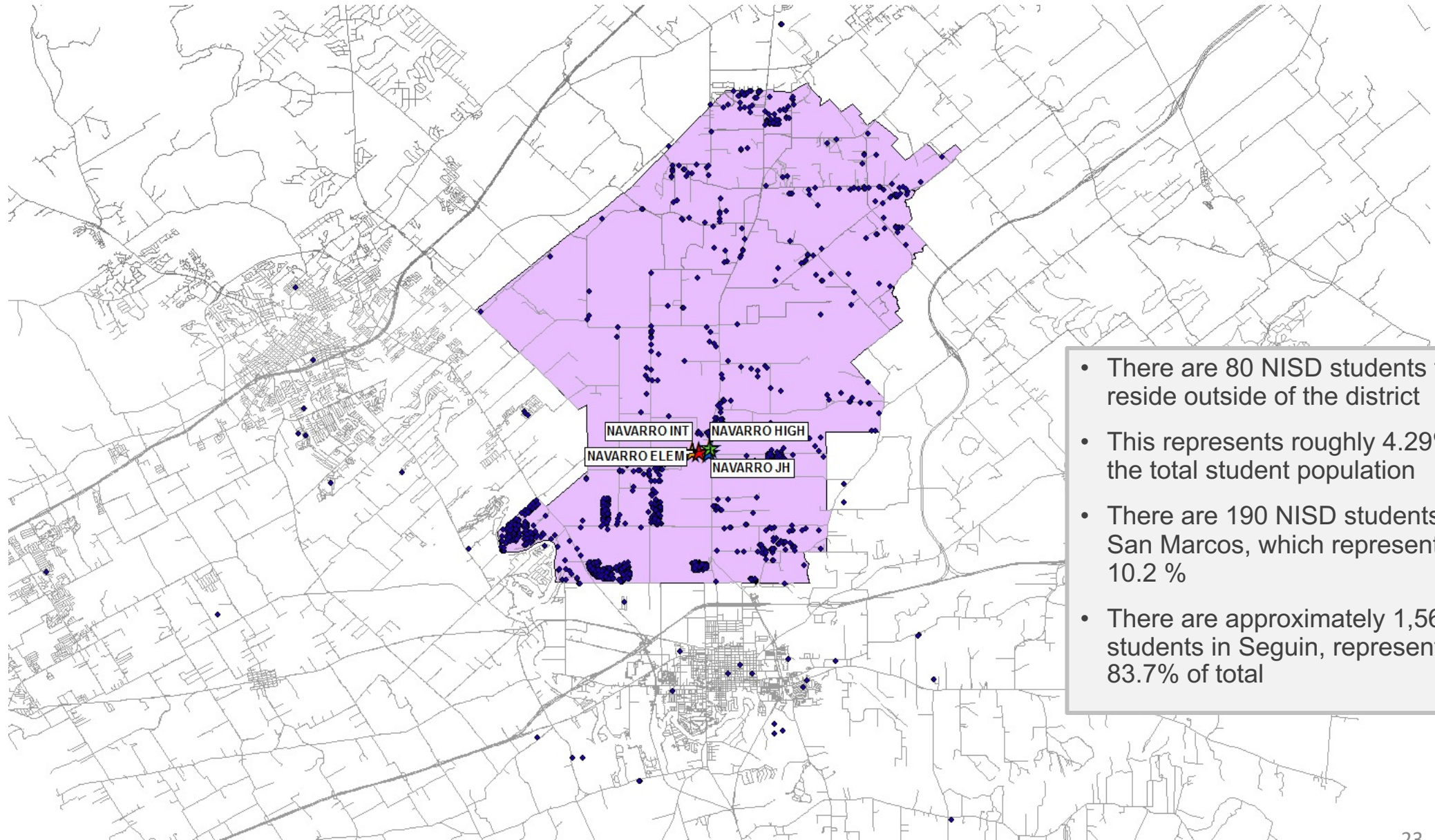


Residential Activity





Student Density & District Yields



- There are 80 NISD students that reside outside of the district
- This represents roughly 4.29% of the total student population
- There are 190 NISD students in San Marcos, which represents 10.2 %
- There are approximately 1,561 students in Seguin, representing 83.7% of total



TEA Transfer Report

Transfers In From	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	5 Year Change
Comal ISD	7	6	3	10	11	3	-4
New Braunfels ISD	10	9	3	3	11	3	-7
San Marcos CISD	10	7	3	3	3	3	-7
Seguin ISD	59	53	42	37	42	33	-26
Total Transfers In*	96	84	67	65	71	51	-45

Transfers Out To	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	5 Year Change
Comal ISD	6	5	3	3	3	3	-3
New Braunfels ISD	3	3	3	3	3	3	0
San Marcos CISD	3	3	3	3	3	3	0
Seguin ISD	17	10	3	0	0	3	-14
Premier High Schools	3	3	3	3	3	3	0
Southwest Preparatory School	0	0	3	3	10	3	3
Texas College Preparatory Academie	0	3	3	0	3	3	3
Total Transfers Out*	42	33	34	31	47	42	0

*Totals include additional districts per TEA rounding rules



Ten Year Forecast by Grade Level (500-600 Homes per Year)

Year (Oct)	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2016/17	7	32	109	117	127	129	133	124	144	158	149	149	171	141	122	1,812		
2017/18	10	30	129	120	121	125	140	150	136	174	168	164	149	157	138	1,911	99	5.5%
2018/19	8	26	124	142	120	128	133	148	152	151	173	178	167	143	150	1,943	32	1.7%
2019/20	18	23	121	121	157	123	133	144	158	159	152	167	180	151	137	1,944	1	0.1%
2020/21	19	25	100	117	109	147	118	138	145	156	156	156	164	161	138	1,849	-95	-4.9%
2021/22	14	30	128	125	135	122	162	136	155	167	175	172	159	151	155	1,986	137	7.4%
2022/23	17	33	145	160	144	149	140	186	154	178	187	193	175	147	143	2,151	165	8.3%
2023/24	22	38	171	174	179	158	171	161	214	176	198	206	194	160	140	2,362	211	9.8%
2024/25	28	46	202	208	197	197	182	192	180	240	190	222	209	175	153	2,620	259	10.9%
2025/26	32	55	236	244	234	216	220	206	211	202	252	209	225	191	166	2,899	279	10.6%
2026/27	32	58	253	276	264	250	230	247	227	229	208	279	211	204	182	3,150	251	8.6%
2027/28	35	62	273	288	298	282	278	259	267	242	236	231	282	191	194	3,418	269	8.5%
2028/29	38	66	289	322	311	319	309	300	283	291	251	261	234	256	182	3,712	293	8.6%
2029/30	40	70	306	338	348	333	348	343	327	306	300	278	264	212	244	4,057	346	9.3%
2030/31	43	75	326	356	365	372	366	384	373	353	316	332	281	240	202	4,383	326	8.0%

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



Ten Year Forecast by Campus (500-600 Homes per Year)

	Est.	HISTORY	Current	ENROLLMENT PROJECTIONS									
Campus	Capacity	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31
Navarro Elementary	700	563	517	554	648	742	877	1,017	1,133	1,238	1,345	1,435	1,536
ELEMENTARY TOTAL		563	517	554	648	742	877	1,017	1,133	1,238	1,345	1,435	1,536
Elementary Absolute Change		14	-46	37	94	94	136	140	116	106	106	91	101
Elementary Percent Change		2.55%	-8.17%	7.21%	16.87%	14.52%	18.28%	15.90%	11.37%	9.32%	8.60%	6.74%	7.04%
Navarro Intermediate	700	435	401	453	480	546	554	637	704	804	892	1018	1123
INTERMEDIATE SCHOOL TOTAL		435	401	453	480	546	554	637	704	804	892	1018	1123
Intermediate Absolute Change		2	-34	52	27	66	8	83	67	100	88	126	105
Intermediate Percent Change		0.46%	-7.82%	12.97%	5.96%	13.75%	1.47%	14.98%	10.52%	14.20%	10.95%	14.13%	10.31%
Navarro Junior High School	450	311	312	342	365	374	430	454	437	478	542	606	669
JUNIOR HIGH SCHOOL TOTAL		311	312	342	365	374	430	454	437	478	542	606	669
Junior High School Absolute Change		-13	1	30	23	9	56	24	-17	41	64	64	63
Junior High School Percent Change		-4.01%	0.32%	9.62%	6.73%	2.47%	14.97%	5.58%	-3.74%	9.38%	13.39%	11.81%	10.40%
Navarro High School	650	635	619	637	658	700	759	791	876	898	933	998	1,055
HIGH SCHOOL TOTAL		635	619	637	658	700	759	791	876	898	933	998	1,055
High School Absolute Change		-3	-16	18	21	42	59	32	85	22	35	65	57
High School Percent Change		-0.47%	-2.52%	2.91%	3.30%	6.38%	8.43%	4.22%	10.75%	2.51%	3.90%	6.97%	5.71%
DISTRICT TOTALS		1,944	1,849	1,986	2,151	2,362	2,620	2,899	3,150	3,418	3,712	4,057	4,383
District Absolute Change		0	-95	137	165	211	259	279	251	269	293	346	326
District Percent Change		0.00%	-4.89%	7.42%	8.28%	9.81%	10.95%	10.63%	8.65%	8.53%	8.58%	9.31%	8.03%

Yellow box exceeds estimated capacity



Ten Year Forecast by Grade Level (250-350 Homes per Year)

Year (Oct)	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2016/17	7	32	109	117	127	129	133	124	144	158	149	149	171	141	122	1,812		
2017/18	10	30	129	120	121	125	140	150	136	174	168	164	149	157	138	1,911	99	5.5%
2018/19	8	26	124	142	120	128	133	148	152	151	173	178	167	143	150	1,943	32	1.7%
2019/20	18	23	121	121	157	123	133	144	158	159	152	167	180	151	137	1,944	1	0.1%
2020/21	19	25	100	117	109	147	118	138	145	156	156	156	164	161	138	1,849	-95	-4.9%
2021/22	14	30	128	125	135	122	162	136	155	167	175	172	159	151	155	1,986	137	7.4%
2022/23	17	32	141	147	135	146	140	186	154	172	187	193	175	147	143	2,114	128	6.5%
2023/24	19	34	152	162	162	146	168	161	214	169	191	206	194	160	140	2,278	164	7.7%
2024/25	23	38	167	175	178	175	168	188	180	233	183	214	209	175	153	2,459	181	7.9%
2025/26	25	42	180	187	189	190	195	190	207	198	245	201	216	191	166	2,621	163	6.6%
2026/27	24	44	193	211	202	202	202	219	209	225	204	271	203	196	182	2,787	166	6.3%
2027/28	26	46	201	220	228	216	224	227	237	223	232	226	274	184	187	2,951	163	5.9%
2028/29	28	48	213	237	238	244	237	242	248	259	231	256	229	249	175	3,134	184	6.2%
2029/30	30	52	226	249	256	255	266	263	264	268	267	256	259	208	237	3,355	221	7.1%
2030/31	32	55	241	263	269	269	280	294	286	285	277	296	259	235	198	3,539	183	5.5%

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



Ten Year Forecast by Campus (250-350 Homes per Year)

		HISTORY	Current	ENROLLMENT PROJECTIONS									
Campus	Capacity	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31
Navarro Elementary	700	563	517	554	617	675	756	812	876	937	1,008	1,067	1,129
ELEMENTARY TOTAL		563	517	554	617	675	756	812	876	937	1,008	1,067	1,129
Elementary Absolute Change		14	-46	37	63	58	81	57	64	60	72	59	61
Elementary Percent Change		2.55%	-8.17%	7.21%	11.39%	9.36%	11.92%	7.49%	7.88%	6.87%	7.67%	5.86%	5.74%
Navarro Intermediate	700	435	401	453	480	543	536	592	630	688	727	793	860
INTERMEDIATE SCHOOL TOTAL		435	401	453	480	543	536	592	630	688	727	793	860
Intermediate Absolute Change		2	-34	52	27	63	-7	56	38	58	39	66	67
Intermediate Percent Change		0.46%	-7.82%	12.97%	5.96%	13.13%	-1.29%	10.45%	6.42%	9.21%	5.67%	9.08%	8.45%
Navarro Junior High School	450	311	312	342	359	360	416	443	429	455	490	535	562
JUNIOR HIGH SCHOOL TOTAL		311	312	342	359	360	416	443	429	455	490	535	562
Junior High School Absolute Change		-13	1	30	17	1	56	27	-14	26	35	45	27
Junior High School Percent Change		-4.01%	0.32%	9.62%	4.97%	0.28%	15.56%	6.49%	-3.16%	6.06%	7.69%	9.18%	5.05%
Navarro High School	650	635	619	637	658	700	751	774	852	871	909	960	988
HIGH SCHOOL TOTAL		635	619	637	658	700	751	774	852	871	909	960	988
High School Absolute Change		-3	-16	18	21	42	51	23	78	19	38	51	28
High School Percent Change		-0.47%	-2.52%	2.91%	3.30%	6.38%	7.29%	3.06%	10.08%	2.23%	4.36%	5.61%	2.92%
DISTRICT TOTALS		1,944	1,849	1,986	2,114	2,278	2,459	2,621	2,787	2,951	3,134	3,355	3,539
District Absolute Change			-95	137	128	164	181	163	166	163	184	221	183
District Percent Change			-4.89%	7.42%	6.45%	7.75%	7.92%	6.61%	6.33%	5.85%	6.23%	7.05%	5.46%

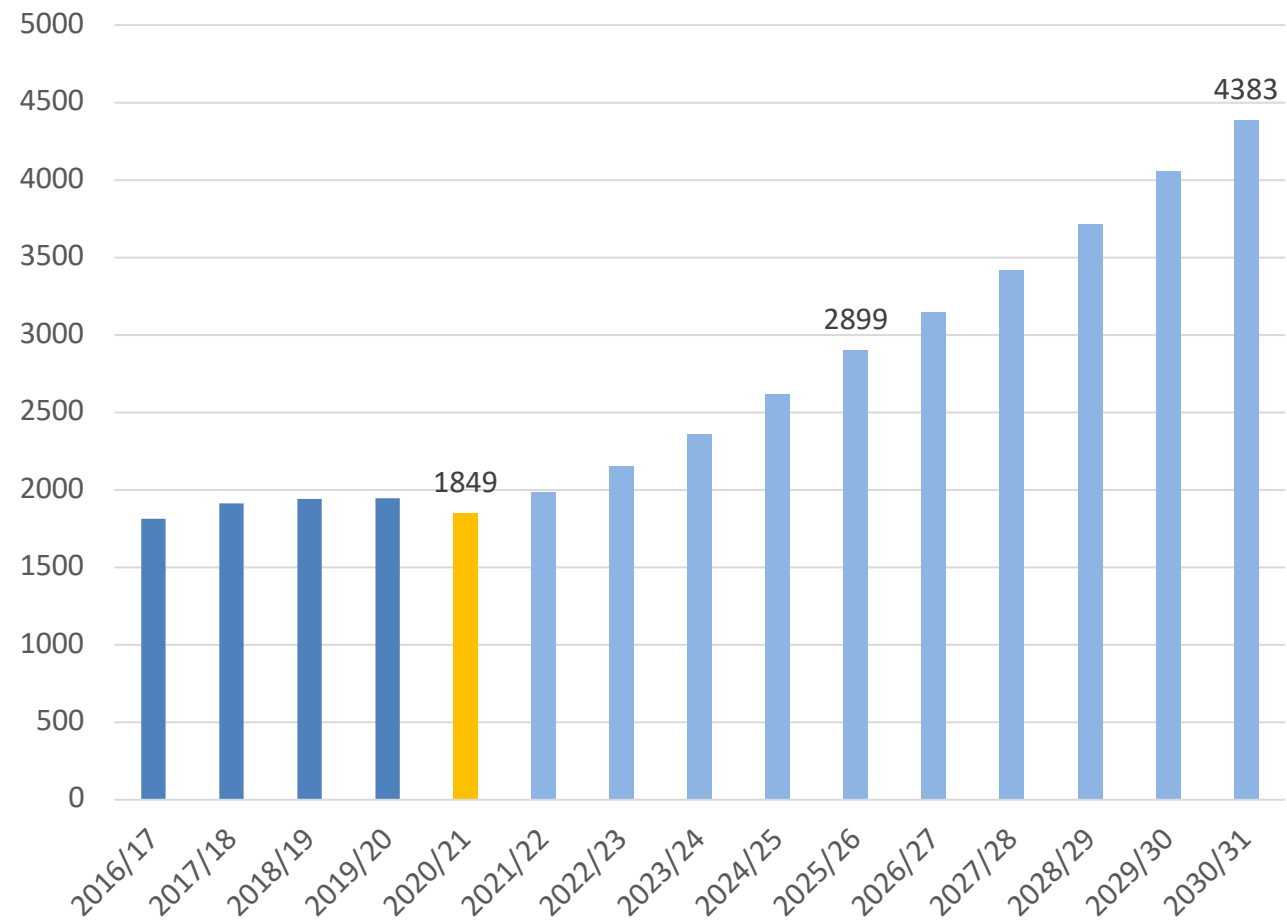
Yellow box exceeds estimated capacity



Key Takeaways



Enrollment Forecast



- Navarro ISD will likely build 350-500 homes a year for the next 3 to 5 years
- There are approximately 1,300 lots under development to be delivered in the next 12 to 18 months
- The district will likely grow an estimated 1,000 students in the next 5 years to enroll almost 2,900 students
- Navarro ISD will enroll almost 4,400 students by 2030/31