

EXECUTIVE SUMMARY



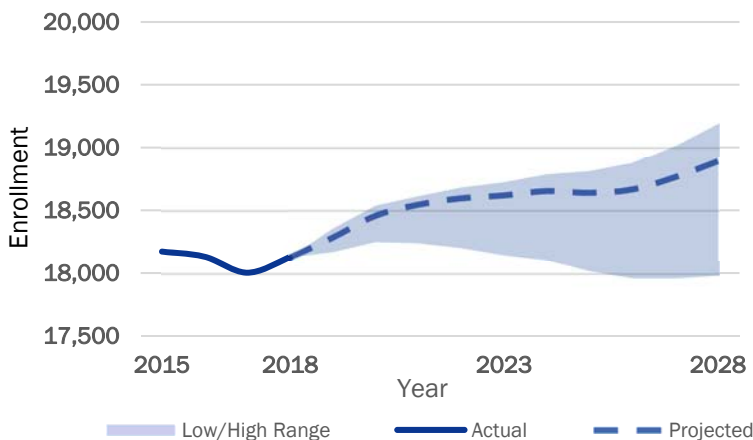
Population and Survey Analysts (PASA) has recently completed a Demographic Update for Tyler I.S.D., and the findings are summarized below. The Demographic Update included the study of current student locations, potential growth based on new housing, trends occurring in student relocation patterns throughout the District, and economic factors relevant to both the District and the nation. PASA projects student data for a school district by using forward-looking techniques and does not rely on past rates of change.

DISTRICTWIDE PROJECTIONS

After evaluating the current student population, recent trends in geo-coded students, projected additional housing occupancies and their resulting student yields, and the over-arching economic and employment concerns, PASA projects the following student population by grade group:

	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
EE-5th	9,342	9,506	9,567	9,639	9,782	9,831	9,859	9,892	9,968	10,009
6th-8th	4,107	4,093	3,985	3,899	3,795	3,813	3,863	3,986	3,986	4,010
9th-12th	4,838	4,860	4,994	5,058	5,042	5,009	4,917	4,788	4,810	4,871
Total:	18,287	18,459	18,546	18,596	18,619	18,653	18,639	18,666	18,764	18,890

THREE SCENARIOS OF GROWTH



PASA takes a conservative approach to projecting growth and develops a Low, Moderate, and High scenario of growth for each of the years in the projection period. These scenarios are shown graphically here, with supporting data and complete projections found in the attached Chapter 4.

UNIQUE CHARACTERISTICS OF T.I.S.D. THAT IMPACT GROWTH

In order to derive the three scenarios of growth, PASA needed to understand not only when and where new development might occur, but also the factors which are unique to the District, which might either accelerate or retard the potential development of new housing. These factors, discussed in depth throughout this report, include economic variables such as job availability, socioeconomic characteristics, quality of life indicators, housing construction, land development potential, charter and private school plans, and household size and age. The student projections developed in this study are based on a model that incorporates a number of these factors and others discussed throughout this report. In the case of Tyler I.S.D., it is important to note the following:

- The population of Tyler I.S.D. has been aging over the last ten years. The median age in 2017 was estimated at 35.7 year. In 2007, the Census Bureau estimated the median age at 33.9.
- Several large developments are in the very early stages of development including the Genecov/West Cumberland LLC tract (~440 acres) that has received approval for residential zoning in the last few months. This development is scheduled to begin in the next 1–3 years. Also, utilities are now being placed for a new 150-lot community, Lindsey Crossing, adjacent and west of Lindsey Park.
- Toll 49 has provided more accessibility to outer reaches of Smith County and will create more long-term development opportunities within T.I.S.D.
- The new Sanderson Farms processing facility has created 1,000 new jobs, with another 500 planned. As employee retention increases and new workers become settled into their new positions, housing demand is expected to steadily increase in northern areas of the District.

STUDENT POPULATION PROJECTIONS

PASA has generated projections of students living in each Planning Unit, to aid in long range planning, and has then aggregated the data from those Planning Unit into the 2018-19 attendance zones. It is important to note that the numbers included in this study represent the number of students projected to LIVE IN each attendance zone. These numbers do not account for students attending other campuses for various reason (magnetized programs, CT Center, Early College HS, etc.). These projections illustrate where the resident population is projected to change relative to the capacity of the zoned school for purposes of long-range planning. Transfers among campuses can be laid over this data for short-term planning.

Projected Resident EE-5th Grade Students

Elementary School	Capacity	Current	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Austin	571	397	391	392	403	399	406	401	394	387	382	376
Bell	515	382	379	373	348	348	331	332	328	323	323	319
Birdwell	569	357	345	334	321	312	302	303	303	303	303	303
Bonner	569	467	481	487	491	499	494	493	489	486	482	477
Clarkston	689	482	493	513	517	502	513	505	501	498	495	489
Dixie	531	668	690	733	755	777	799	805	807	809	813	817
Douglas	800	589	623	625	641	643	648	644	638	632	628	621
Griffin	723	760	802	823	816	815	818	824	827	831	839	839
Jack	800	711	724	733	764	778	812	846	874	906	946	988
Jones	800	394	390	403	410	427	455	466	477	492	512	530
Orr	417	837	845	868	880	873	857	865	868	871	877	879
Owens	800	726	716	720	713	715	721	719	719	720	723	729
Peete	780	459	478	494	504	493	495	493	492	490	491	489
Ramey	419	640	654	667	647	652	675	681	686	686	689	687
Rice	590	676	660	644	631	628	655	658	662	666	672	676
Woods	780	646	671	697	726	778	801	796	794	792	793	790
Total	800	9,191	9,342	9,506	9,567	9,639	9,782	9,831	9,859	9,892	9,968	10,009

Projected Resident 6th-8th Grade Students

Middle School	Capacity	Current	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Boulter	1,000	1,037	1,022	1,009	965	927	935	938	958	978	974	978
Hogg	430	437	477	516	486	445	438	425	420	408	410	409
Hubbard	900	786	794	805	785	775	706	722	740	803	800	796
Moore	1,000	921	898	839	835	839	835	827	835	832	820	819
Three Lakes	1,000	935	916	924	914	913	881	901	910	965	982	1,008
Total	4,330	4,116	4,107	4,093	3,985	3,899	3,795	3,813	3,863	3,986	3,986	4,010

Projected Resident 9th-12th Grade Students

High School	Capacity	Current	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Robert E Lee	2,750	2,422	2,403	2,385	2,434	2,506	2,515	2,505	2,461	2,401	2,414	2,444
John Tyler	2,750	2,403	2,435	2,475	2,560	2,552	2,527	2,504	2,456	2,387	2,396	2,427
Total	5,500	4,825	4,838	4,860	4,994	5,058	5,042	5,009	4,917	4,788	4,810	4,871

PROJECTED NEW HOUSING UNITS

PASA projects almost 9,000 new housing units could be occupied in the next ten years, with more than 50% of those housing units being single-family homes. These projections are based on interviews with land owners, real estate experts, commercial brokers, and city and county officials. These projections are only for the number of new housing units and are not necessarily a reflection of the total public school students expected in each development.

	Single Family	Multi-Family	Mixed Use	Age-Restricted Housing	Manufactured Homes	RVs	Grand Total
May 2019–Oct 2019	147	61	0	0	9	0	217
Oct 2019–Oct 2020	431	135	1	41	10	0	618
Oct 2020–Oct 2021	483	150	17	132	9	0	791
Oct 2021–Oct 2022	476	170	48	88	14	0	796
Oct 2022–Oct 2023	500	273	87	37	18	1	916
Oct 2023–Oct 2024	534	297	107	36	25	1	1,000
Oct 2024–Oct 2025	553	345	129	26	25	2	1,080
Oct 2025–Oct 2026	557	387	138	2	27	4	1,115
Oct 2026–Oct 2027	606	389	141	1	29	6	1,172
Oct 2027–Oct 2028	653	406	145	1	30	8	1,243
May 2019–Oct 2023	2,037	789	153	298	60	1	3,338
Oct 2023–Oct 2028	2,903	1,824	660	66	136	21	5,610
May 2019–Oct 2028	4,940	2,613	813	364	196	22	8,948

SINGLE-FAMILY HOUSING PROJECTIONS

In the short-term (the upcoming five years), three single-family developments, each projected to have over 100 new homes completed and occupied, will lead the District with the most new housing added. The Crossing, oriented to retirees with fewer student-oriented housing units, is projected to have 175 homes occupied by Fall 2023. Tyler I.S.D.'s newest neighborhood, Oak Creek, is projected to have 154 homes occupied by Fall 2023. As of May 2019, only 36 homes were occupied in Oak Creek with another 32 under construction or available for move-in. Rounding out the top three, Cumberland Gap is projected to have 106 homes occupied by Fall 2023 and will be almost completely built-out.

PU	Subdivision Names or Owner(s) Names	Projected New Housing Units		
		2019-2023	2023-2028	2019-2028
81A	West Cumberland	74	313	387
86D	The Crossing	175	107	282
86B	Oak Creek	154	75	229
12A	North Chase	33	160	193
86D	Potential: Multiple tracts S. of TX-155	36	137	173
32A	Cascades	46	115	161
86B	Oak Springs	15	130	145
87B	Cumberland Gap	106	27	133

MULTI-FAMILY HOUSING PROJECTIONS

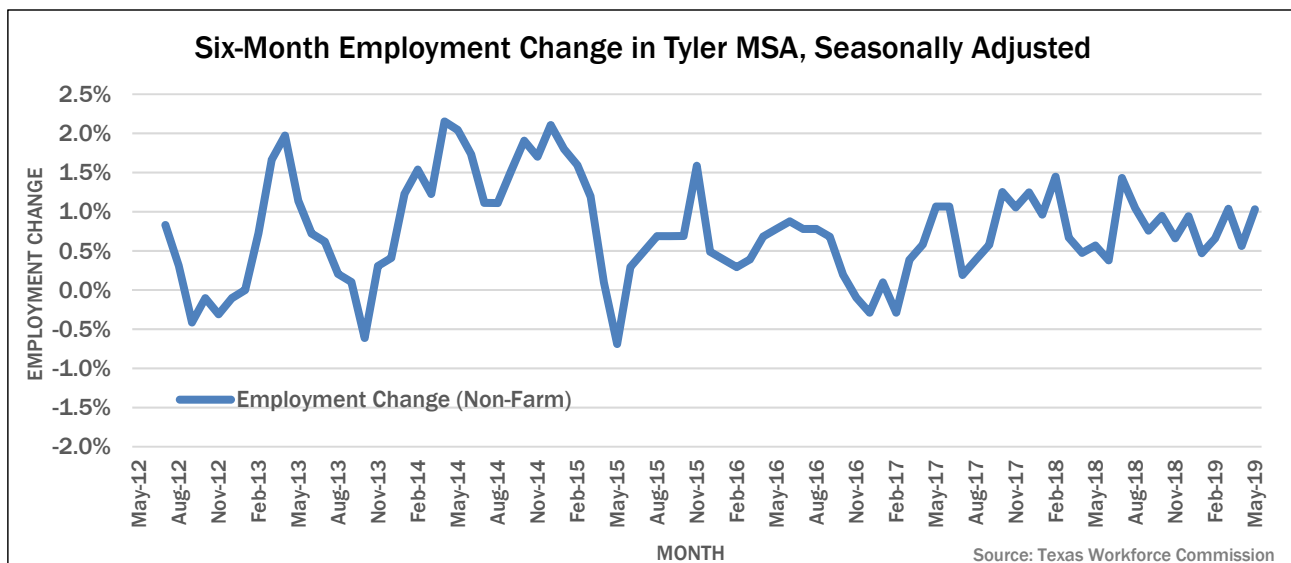
PU	Property Names or Owner(s) Names	Projected New Housing Units		
		2019-2023	2023-2028	2019-2028
34A	Potential MF	165	205	370
80A	Cumberland Park West	95	225	320
14C	13428 SH 31 W	130	120	250

STUDENTS PER HOUSING UNIT

The ratios of students per home in single-family subdivisions ranged from **0.00** to **1.55** in specific subdivisions, with a weighted average of **0.39** students per single family home districtwide. Only developments with 20 homes or more were included in this analysis, so as not to skew the data with small sample sizes.

In multi-family apartment complexes, the ratios of students per unit ranged from **0.00** to **1.50** in specific properties, and the weighted average throughout the District was **0.20** students per apartment unit. Complexes with an occupancy rate of less than 85% are excluded from this discussion. Approximately 8,159 units within the District are occupied, with 1,587 students residing in those apartments

ECONOMIC CONSIDERATIONS



FOOD PROCESSING AND DISTRIBUTION

Smith County is well-positioned as a distribution hub for major population centers in Texas and surrounding states. Food processing facilities and distribution centers require accessible highway and freight corridors, as well as a large workforce capable of absorbing low- to medium-wage jobs. Also important is accessibility to multiple, large markets in a region. The East Texas region is geographically positioned between the three major Texas metropolitan regions, as well as other locations outside the state including Shreveport, Kansas City, Oklahoma City, and St. Louis.

Sanderson Farms: The region's newest employment generator, Sanderson Farms, is located just outside Tyler I.S.D. along Interstate 20. The company completed its poultry processing facility and began operations in the first quarter of 2019 with 1,000 employees. The company plans to have 1,500 employees at the facility by August 2019. Housing demand is expected to increase slowly in the northern parts of T.I.S.D. and north central Smith County. In time, housing demand is expected to rise, leading to new housing in northern parts of T.I.S.D.

GG Distributing: Northeast Texas' wholesale beverage distributor recently completed a renovation to the former U.S. post office distribution center along FM 3311 near Interstate 20. An addition to the existing structure doubled the building's footprint to 219,000 square feet. The company is in the process of consolidating operations in Nacogdoches, Longview and Palestine at the new site northeast of T.I.S.D., creating 180 jobs in the area. The company also purchased an adjacent 11.8-acre tract for future expansions.

John Soules Foods: In 2018, a new production line was added at the meat packaging facility along FM 14. The Tyler Economic Development Council (TEDC) estimated 120 new jobs were added in 2018. TEDC also states that the company has increased wages amidst the nearby completion of Sanderson Farms' new processing facility.

MEDICAL AND HEALTHCARE

As a healthcare hub for the region, Tyler is also home to many medical care and research facilities serving the region. The two largest employers in Smith County are UT Health East Texas and CHRISTUS Trinity Mother Frances with 4,439 and 4,095 employees, respectively, per the 2018 Community Profile by the Tyler Economic Development Council. According to the report, UT Health Science Center is the ninth largest employer in Smith County with 1,108 employees. Along with these hospitals and research institutions, medical industry service providers are growing in the region. German-based Fresenius Medical Care opened the North American Business Center along Earl Campbell Pkwy. in 2018. The company employs nearly 300 with plans for up to 200 additional employees once fully staffed. Fresenius is the largest integrated provider of products and services for individuals undergoing kidney dialysis. Nearby Centene Corp. opened a 50,000-square foot facility in 2013. The Tyler office located along Earl Campbell Pkwy. processes Medicare and Medicaid claims and serves 19 states. With growth in the industry through the Affordable Care Act, the company is likely to expand its footprint in Smith County.