

*Jarrell
Independent
School
District*



Demographic
Report
Fall 2016

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



TEMPLETON
DEMOGRAPHICS



Economic Conditions- Austin-Round Rock MSA

Unemployment Rate

AUGUST 2016

5.0%

Texas

USA

3.6%

Williamson County

3.5%

Austin MSA



Annual Job Growth Rate

AUGUST 2016

1.6%

Texas

1.7%

USA

3.2%

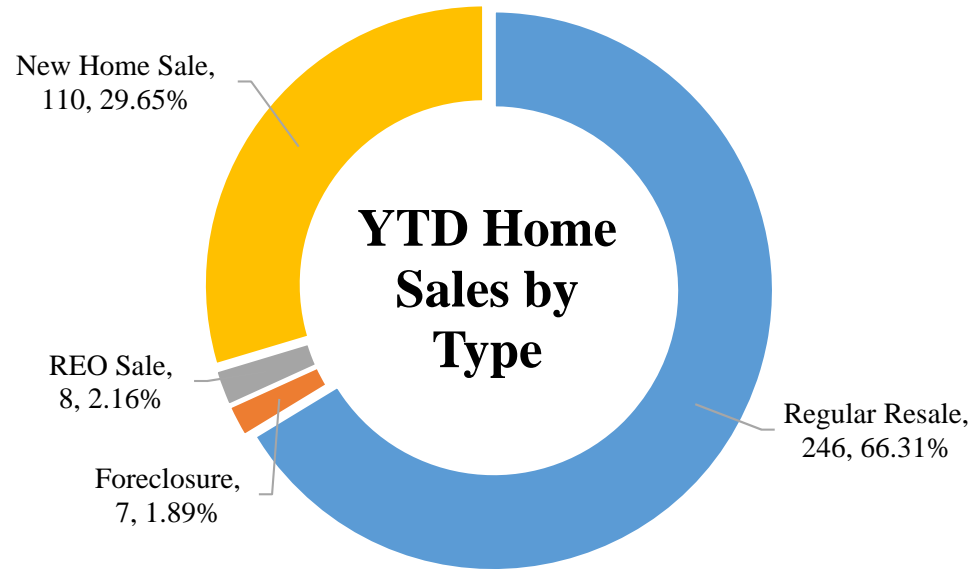
Austin MSA





Jarrell ISD Housing Activity

YTD 2016 Home Sales by Transaction Type



- Jarrell ISD had 371 home sales in 2016, and about 30% were of new home sales
- The average sale price for a new home in 2016 is \$227,181
- The average sale price for a resale home in 2016 is \$199,994





Austin New Home Ranking Report

ISD Ranked by Annual Closings – 2Q16

Rank	District Name	Annual Starts	Annual Closings	VDL	Future
1	Leander ISD	2,092	2,024	3,674	10,918
2	Hays CISD	1,673	1,471	1,463	19,849
3	Round Rock ISD	1,274	1,298	1,644	3,999
4	Austin ISD	1,831	1,279	1,505	11,341
5	Pflugerville ISD	1,123	1,013	1,954	12,068
6	Georgetown ISD	1,075	996	1,425	18,169
7	Hutto ISD	728	733	1,168	3,331
8	Lake Travis ISD	659	636	2,210	2,722
9	Manor ISD	761	636	745	16,355
10	Del Valle ISD	735	542	802	32,431
11	Liberty Hill ISD	385	370	1,550	5,280
12	Dripping Springs ISD	323	321	1,114	3,712
13	Jarrell ISD	173	196	222	7,795*
14	Elgin ISD	77	118	110	5,957
15	San Marcos ISD	150	112	95	8,595
16	Lockhart ISD	68	82	58	1,394
17	Bastrop ISD	73	75	1,439	17,789
18	Lago Vista ISD	52	57	539	3,273
19	Luling ISD	57	41	3	0
20	Taylor ISD	52	40	83	486

*Totals adjusted based on additional TD research

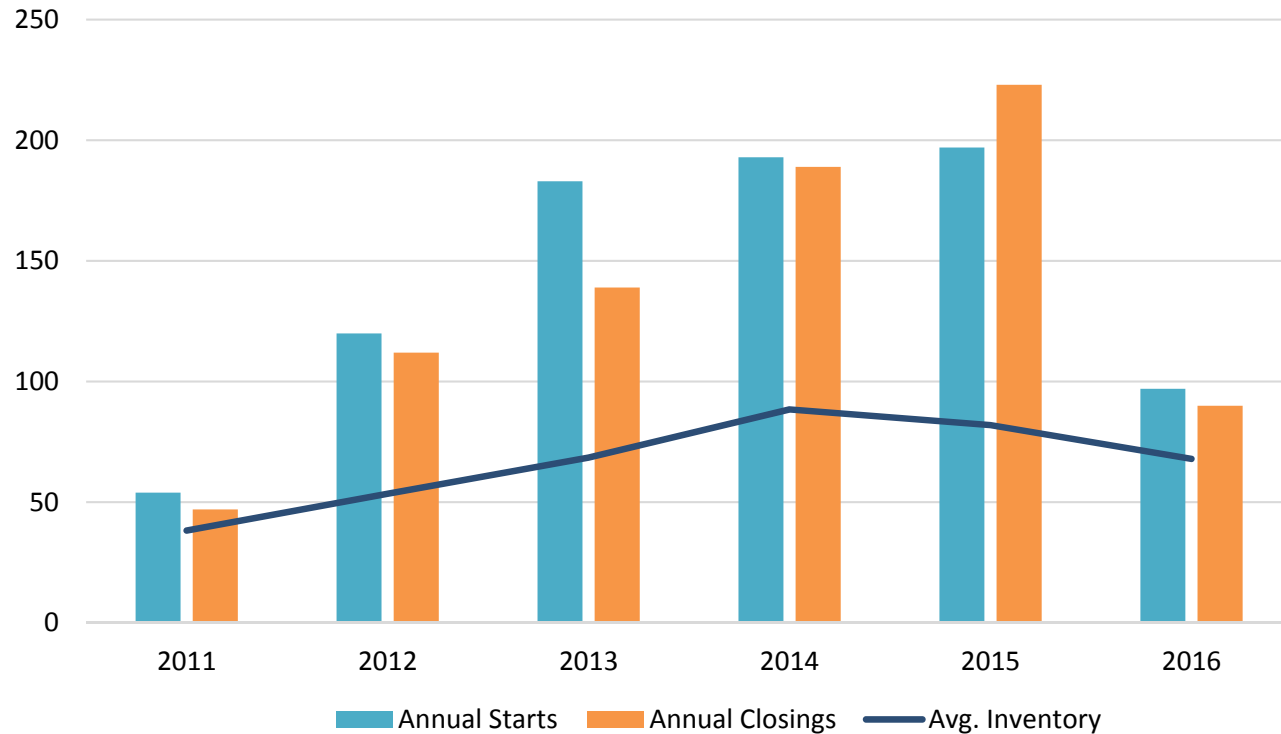
Source: Metrostudy





New Housing Activity

Jarrell ISD



Starts	2011	2012	2013	2014	2015	2016
1Q	3	27	33	32	49	36
2Q	20	34	32	43	66	61
3Q	16	32	47	67	37	
4Q	15	27	71	51	45	
Total	54	120	183	193	197	97

Closings	2011	2012	2013	2014	2015	2016
1Q	9	15	25	49	52	45
2Q	17	37	31	42	65	45
3Q	10	33	43	44	68	
4Q	11	27	40	54	38	
Total	47	112	139	189	223	90

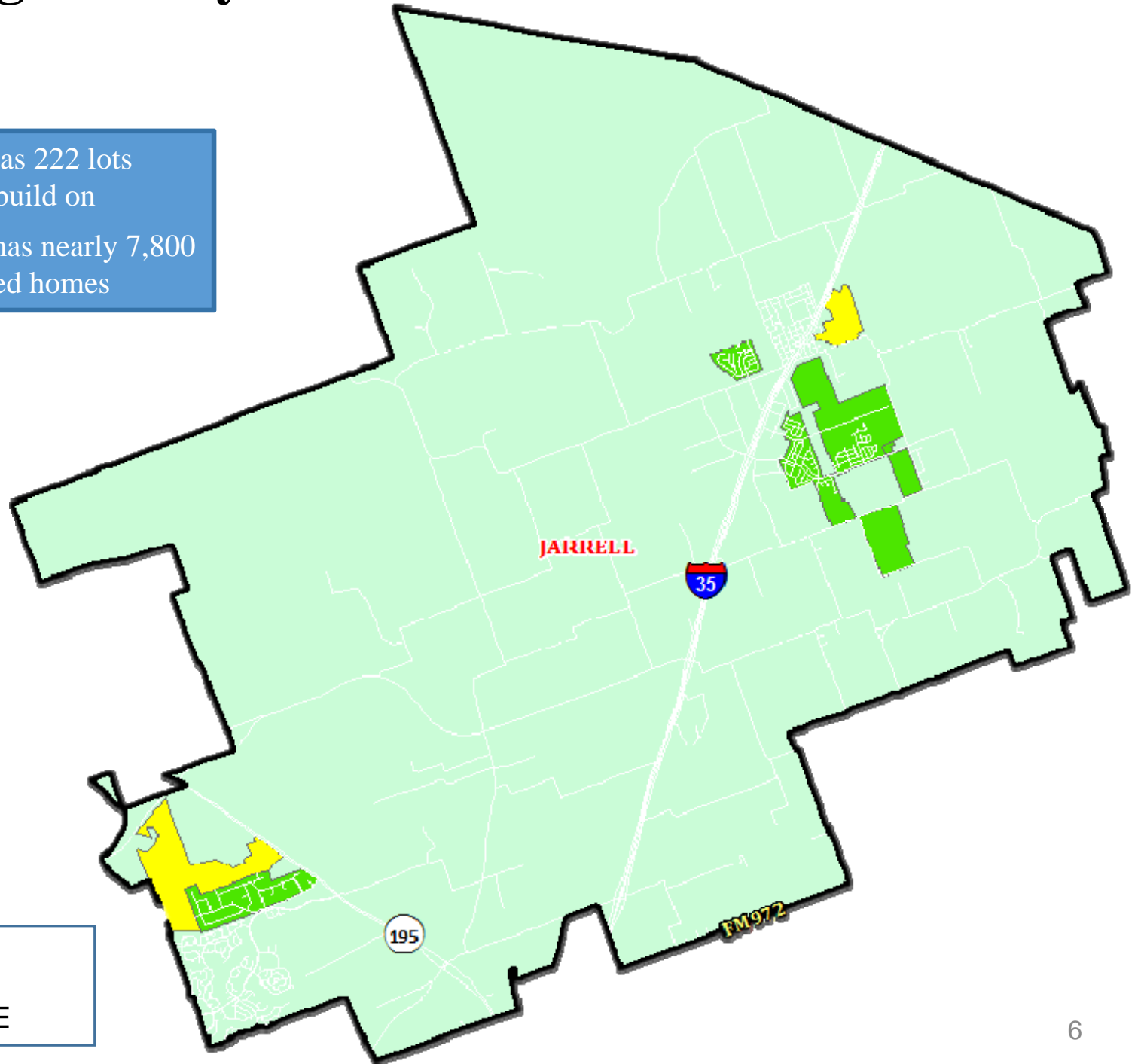
- Jarrell ISD nearly doubled its starts from 1Q16 to 2Q16
- The district closed 45 new homes in 2Q16
- New home inventory remains low at 4.5 month's supply





Housing Activity Overview

- Jarrell ISD has 222 lots available to build on
- The district has nearly 7,800 future planned homes



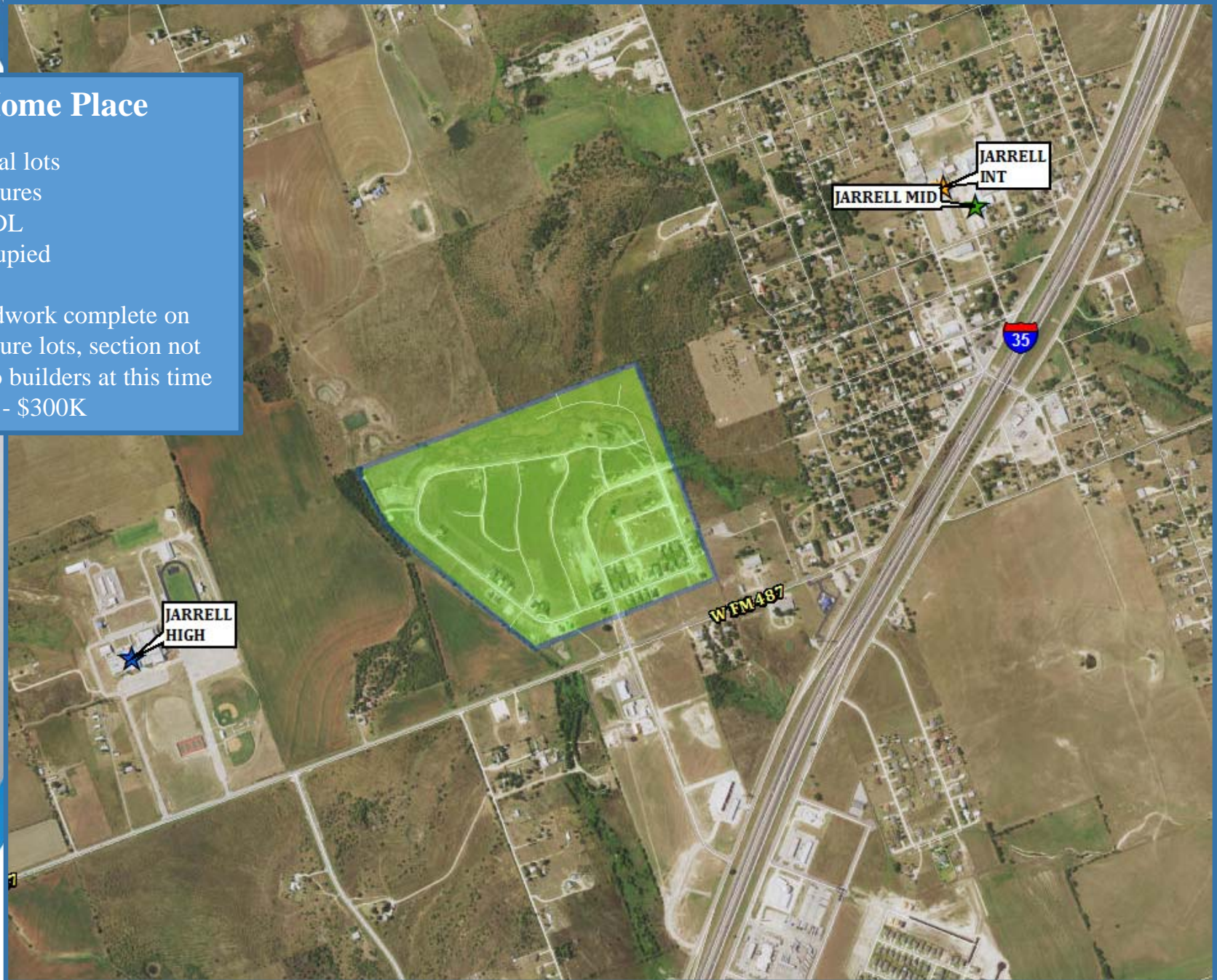


Active Subdivision

Home Place

Home Place

- 324 total lots
- 123 futures
- 102 VDL
- 88 occupied
- 4 U/C
- Groundwork complete on 123 future lots, section not open to builders at this time
- \$200K - \$300K





Active Development

Sonterra



Sonterra

- More than 6,000 homes at build out
- 25 U/C
- 149 VDL
- 241 lots delivering 2016
- Building 200 in 2016
- \$100K - \$170K



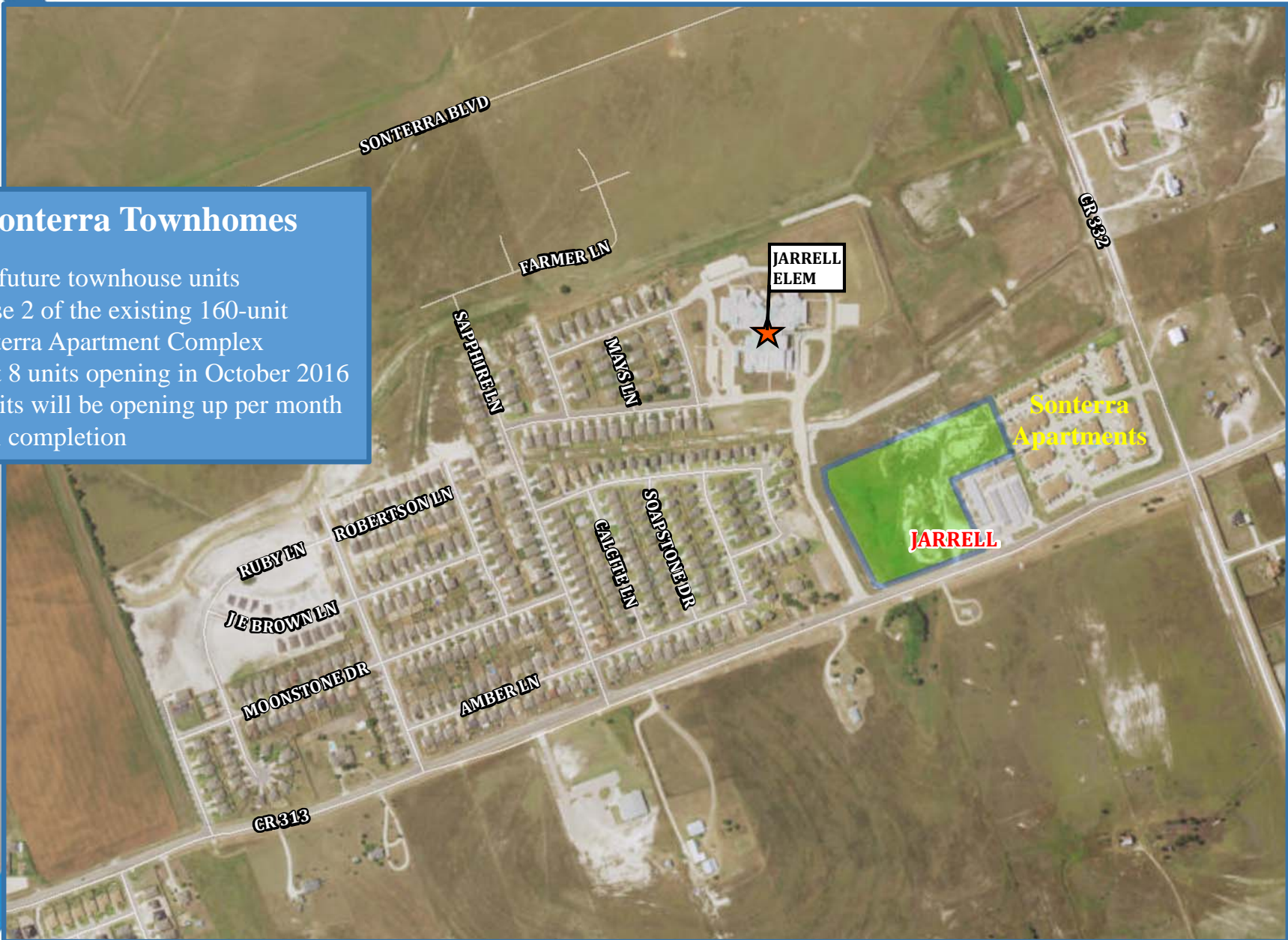


Active Multifamily Development

Sonterra Townhomes

Sonterra Townhomes

- 114 future townhouse units
- Phase 2 of the existing 160-unit Sonterra Apartment Complex
- First 8 units opening in October 2016
- 8 units will be opening up per month until completion





Future Development

Madison at Georgetown

Madison at Georgetown

- 608 future single family lots
- 550 acres
 - 10.5 acre school site
 - 38 acres for multi-family units
 - 85 acres for commercial development
- Working with the city in order to finalize plats for the residential sections
- Final plat approved and recorded for commercial section
- Single Family housing activity anticipated in 2019





Future Development

Meadows of Donahoe Creek



Meadows of Donahoe Creek

- 140 acres
 - 12 acres zoned commercial
 - 128 acres zoned agriculture
- 400 future single family homes
 - Phase 1 with 72 lots approved
- 150-300 possible multi-family units
- Development has been approved, but no timeline on when construction will begin





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
2012/13	67	93	87	85	74	78	75	82	80	84	82	66	59	68	1,080	70	6.9%
2013/14	67	92	99	83	91	77	82	75	87	92	92	81	64	58	1,140	60	5.6%
2014/15	66	92	113	109	99	92	89	88	84	99	101	92	80	61	1,265	125	11.0%
2015/16	81	111	109	122	108	109	105	103	92	94	114	101	94	83	1,426	161	12.7%
2016/17	83	118	115	116	114	115	112	114	99	99	107	111	104	89	1,496	70	4.9%
2017/18	83	130	142	132	124	125	132	123	122	114	115	114	113	102	1,671	175	11.7%
2018/19	83	146	146	156	145	136	136	145	135	137	135	115	113	111	1,839	168	10.1%
2019/20	83	160	164	161	161	158	148	149	160	149	159	134	114	111	2,011	172	9.4%
2020/21	83	173	184	179	172	176	174	163	161	176	174	157	133	112	2,217	206	10.2%
2021/22	83	190	208	199	191	188	192	186	176	173	206	172	155	130	2,449	232	10.5%
2022/23	83	205	213	226	210	209	206	205	201	194	202	202	170	152	2,678	229	9.4%
2023/24	83	213	230	231	241	230	229	220	221	219	226	198	200	167	2,908	230	8.6%
2024/25	83	215	239	249	246	272	252	245	242	241	256	221	196	196	3,153	245	8.4%
2025/26	83	224	241	259	264	272	298	270	270	265	284	251	219	192	3,392	239	7.6%
2026/27	83	231	251	261	275	293	298	319	297	295	313	278	248	215	3,657	265	7.8%

*Yellow box = largest grade per year

*Green box = second largest grade per year

- Jarrell ISD will enroll more than 2,000 students by 2019
- 5 year growth = 953 students
- 2021/22 enrollment = 2,449
- 10 year growth = 2,161 students
- 2026/27 enrollment = 3,657



Ten Year Forecast

By Campus

Campus	HISTORY	Current	ENROLLMENT PROJECTIONS									
	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
Jarrell Elementary	423	432	487	531	568	619	680	727	757	786	807	826
ELEMENTARY SCHOOL TOTAL	423	432	487	531	568	619	680	727	757	786	807	826
Elementary Absolute Change	43	9	55	44	37	51	61	47	30	29	21	19
Elementary Percent Change	11.32%	2.13%	12.73%	9.03%	6.97%	8.98%	9.85%	6.91%	4.13%	3.83%	2.67%	2.35%
Jarrell Intermediate School	214	341	381	417	467	522	571	625	700	770	834	866
INTERMEDIATE SCHOOL TOTAL	214	341	381	417	467	522	571	625	700	770	834	866
Intermed. Absolute Change	33	127	40	36	50	55	49	54	75	70	64	32
Intermed. Percent Change	18.23%	59.35%	11.73%	9.45%	11.99%	11.78%	9.39%	9.46%	12.00%	10.00%	8.31%	3.84%
Jarrell Middle School	288	312	359	417	458	500	535	600	660	728	805	911
MIDDLE SCHOOL TOTAL	288	312	359	417	458	500	535	600	660	728	805	911
Middle School Absolute Change	17	24	47	58	41	42	35	65	60	68	77	106
Middle School Percent Change	6.27%	8.33%	15.06%	16.16%	9.83%	9.17%	7.00%	12.15%	10.00%	10.30%	10.58%	13.17%
Jarrell High School	390	411	444	474	518	576	663	726	791	869	946	1,054
HIGH SCHOOL TOTAL	390	411	444	474	518	576	663	726	791	869	946	1,054
High School Absolute Change	58	21	33	30	44	58	87	63	65	78	77	108
High School Percent Change	17.47%	5.38%	8.03%	6.76%	9.28%	11.20%	15.10%	9.50%	8.95%	9.86%	8.86%	11.42%
DISTRICT TOTALS	1,318	1,496	1,671	1,839	2,011	2,217	2,449	2,678	2,908	3,153	3,392	3,657
District Absolute Change	152	178	175	168	172	206	232	229	230	245	239	265
District Percent Change	13.04%	13.51%	11.70%	10.05%	9.35%	10.24%	10.46%	9.35%	8.59%	8.43%	7.58%	7.81%

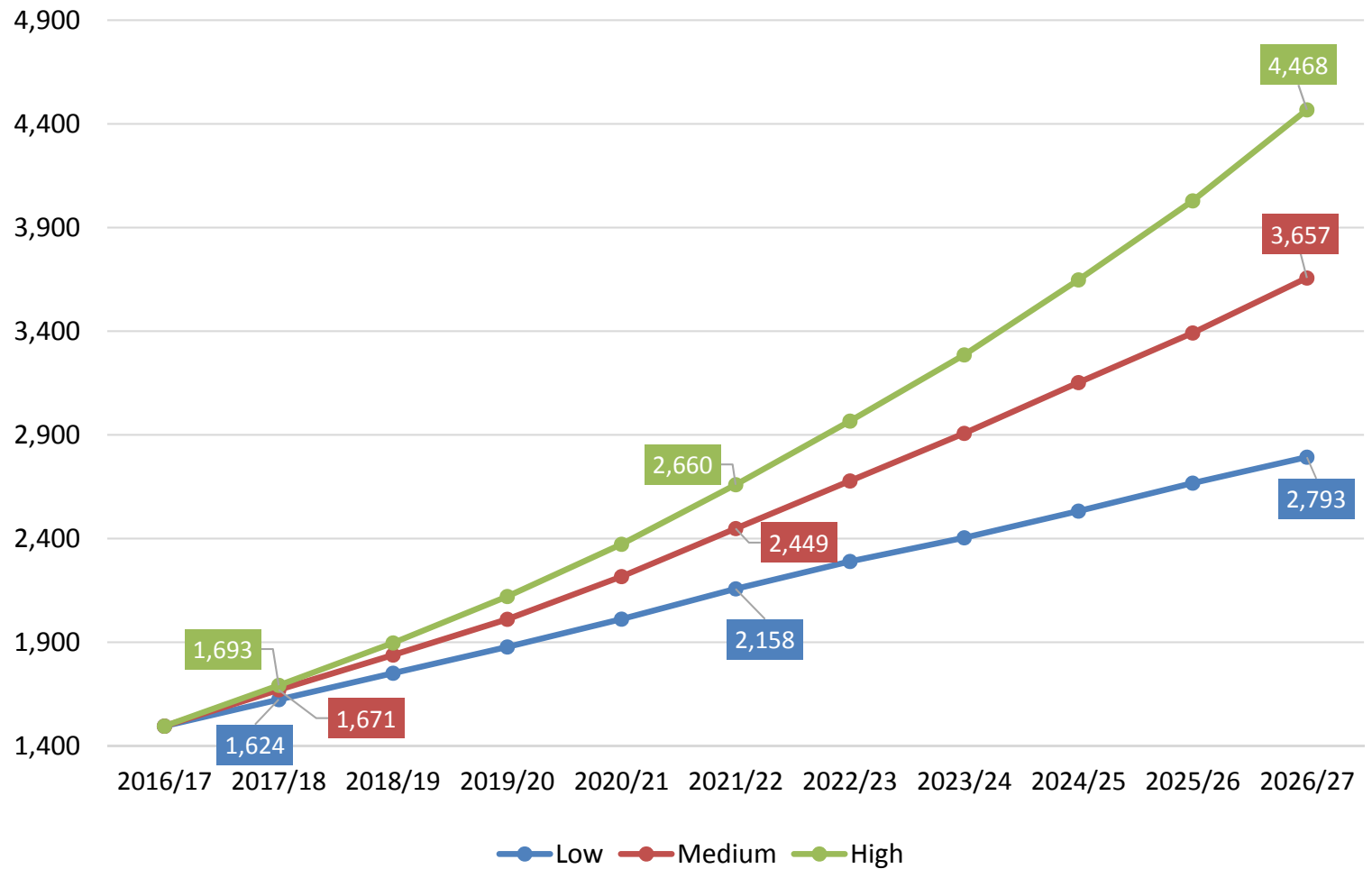
- Jarrell Elementary will enroll 600 students by 2020
- Jarrell Intermediate will enroll more than 500 students by 2020, and more than 600 by 2022
- Jarrell Middle School will enroll nearly 360 students next fall
- The district is anticipated to grow by nearly 12% next fall



Ten Year Forecast

Growth Scenario Comparison

Enrollment Projection Scenarios





Summary

- The Austin MSA is expanding rapidly, with a 3.2% annual job growth rate.
- Jarrell ISD had roughly 200 new home closings in the last 12 months.
- New home inventory in Jarrell ISD remains tight due to strong housing demand.
- The Sonterra Townhomes will complete their first building in October.
- Jarrell ISD has added 70 students this fall.
- JISD can expect an increase of approximately 950 students during the next 5 years if housing growth remains steady.
- 2021/22 enrollment projection= 2,449.
- Jarrell ISD is projected to have more than 3,650 students by the 2026/27 school year.