

*Jarrell
Independent
School
District*



Demographic
Report
Fall 2017

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



TEMPLETON
DEMOGRAPHICS



Economic Conditions – Austin Area (August 2017)

1.4%

15,661 new jobs
National rate 1.2%



Job Growth

16,061

2,654 more starts than 2Q16



Annual Home Starts

0.1%

U.S. 4.5%
Texas 4.5%
Austin MSA 3.4%
Williamson Co. 3.5%



Unemployment Rate





Austin New Home Ranking Report

ISD Ranked by Annual Closings – 2Q17

| Rank | District Name | Annual Starts | Annual Closings | VDL | Future |
|-----------|----------------------|---------------|-----------------|------------|---------------|
| 1 | Leander ISD | 2,503 | 2,219 | 3,301 | 12,660 |
| 2 | Austin ISD | 2,049 | 1,365 | 1,428 | 9,971 |
| 3 | Hays CISD | 1,439 | 1,343 | 1,576 | 16,926 |
| 4 | Pflugerville ISD | 1,471 | 1,321 | 1,954 | 11,361 |
| 5 | Round Rock ISD | 1,396 | 1,121 | 2,131 | 6,328 |
| 6 | Georgetown ISD | 1,160 | 1,098 | 2,215 | 17,374 |
| 7 | Hutto ISD | 1,050 | 979 | 1,129 | 4,902 |
| 8 | Del Valle ISD | 929 | 877 | 1,145 | 27,062 |
| 9 | Lake Travis ISD | 878 | 818 | 1,859 | 4,996 |
| 10 | Manor ISD | 954 | 769 | 1,831 | 15,115 |
| 11 | Liberty Hill ISD | 753 | 514 | 1,478 | 11,927 |
| 12 | Dripping Springs ISD | 555 | 417 | 1,290 | 6,882 |
| 13 | Jarrell ISD** | 323 | 245 | 272 | 9,456* |
| 14 | San Marcos CISD | 218 | 194 | 238 | 8,154 |
| 15 | Bastrop ISD | 144 | 96 | 1,381 | 18,321 |
| 16 | Lockhart ISD | 44 | 85 | 15 | 1,394 |
| 17 | Taylor ISD | 61 | 64 | 107 | 279 |
| 18 | Elgin ISD | 31 | 52 | 50 | 5,958 |
| 19 | Lago Vista ISD | 41 | 48 | 549 | 3,511 |
| 20 | Eanes ISD | 54 | 23 | 145 | 87 |

*Totals adjusted based on additional TD research

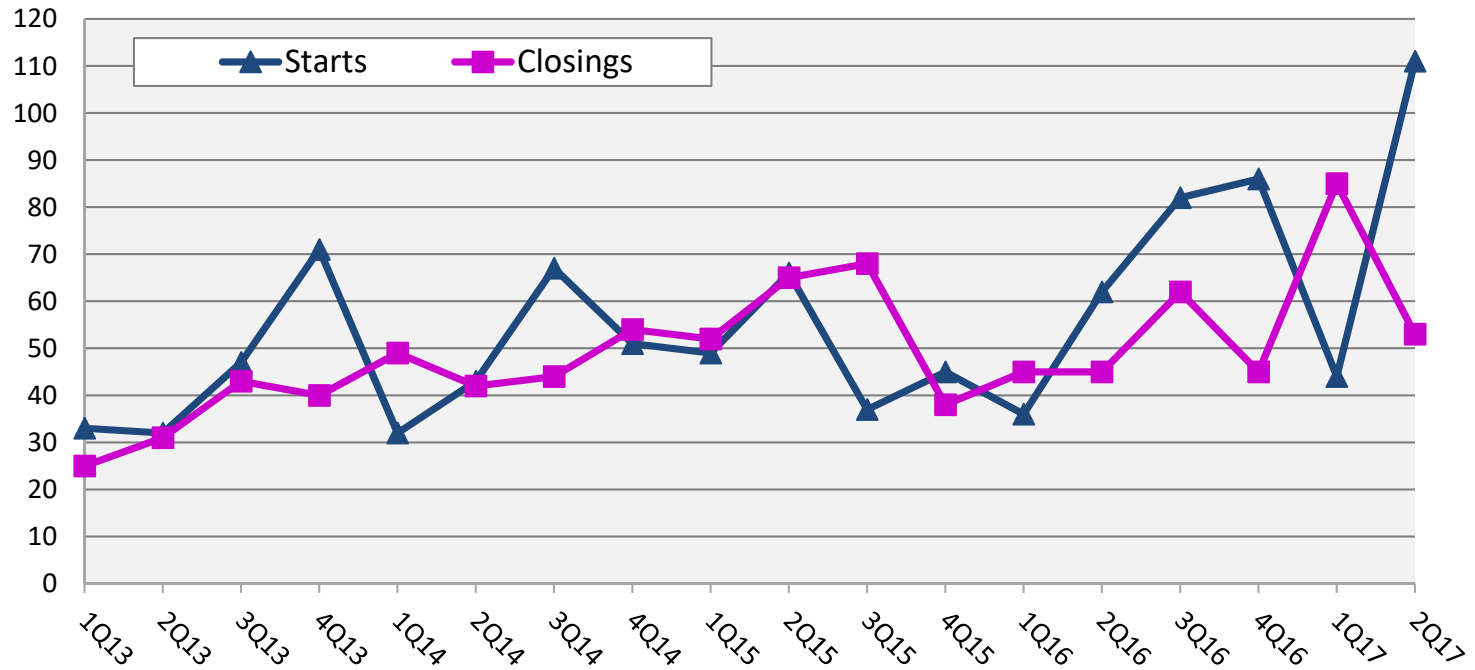
**Table DOES NOT include age restricted communities such as Sun City





New Housing Activity

Jarrell ISD



| Starts | 2013 | 2014 | 2015 | 2016 | 2017 |
|--------|------|------|------|------|------|
| 1Q | 33 | 32 | 49 | 36 | 44 |
| 2Q | 32 | 43 | 66 | 62 | 111 |
| 3Q | 47 | 67 | 37 | 82 | |
| 4Q | 71 | 51 | 45 | 86 | |
| Total | 183 | 193 | 197 | 266 | 155 |

| Closings | 2013 | 2014 | 2015 | 2016 | 2017 |
|----------|------|------|------|------|------|
| 1Q | 25 | 49 | 52 | 45 | 85 |
| 2Q | 31 | 42 | 65 | 45 | 53 |
| 3Q | 43 | 44 | 68 | 62 | |
| 4Q | 40 | 54 | 38 | 45 | |
| Total | 139 | 189 | 223 | 197 | 138 |

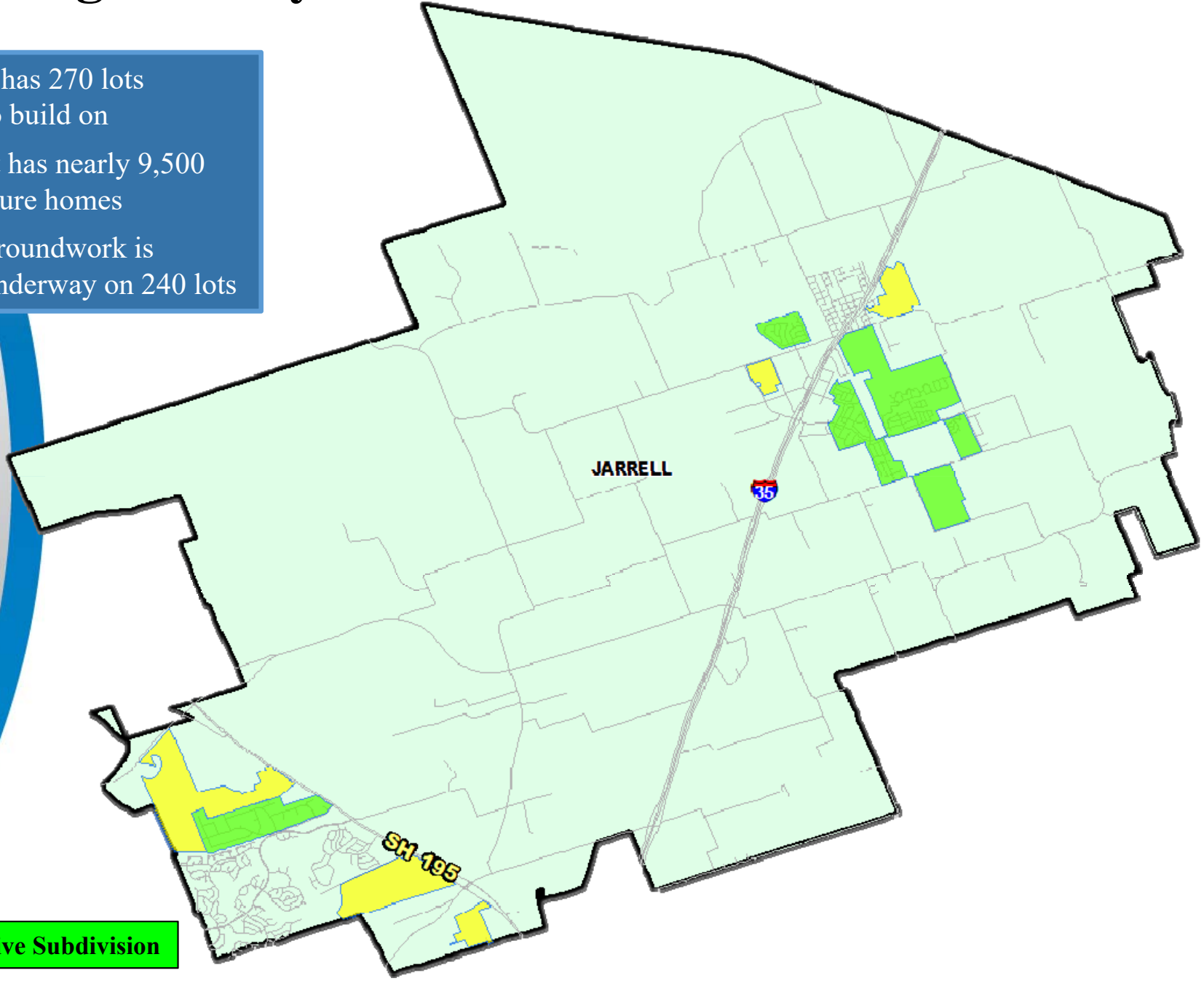
- In 2Q17, Jarrell ISD had the most new starts in over 5 years
- Jarrell ISD has had 138 year to date closings, a rise of more than 53% over the first half of 2016
- New home inventory is healthy at 152, a 7.4 month's supply





Housing Activity Overview

- Jarrell ISD has 270 lots available to build on
- The district has nearly 9,500 planned future homes
- Of those, groundwork is currently underway on 240 lots



Active Subdivision

Future Subdivision





Active Subdivision

Home Place



Home Place at Jarrell

- 318 total lots
- 173 VDL
- 128 occupied
- 10 U/C
- All lots delivered to builders, building 40-50 homes a year
- \$210K - \$330K
- Current student yield = 0.40

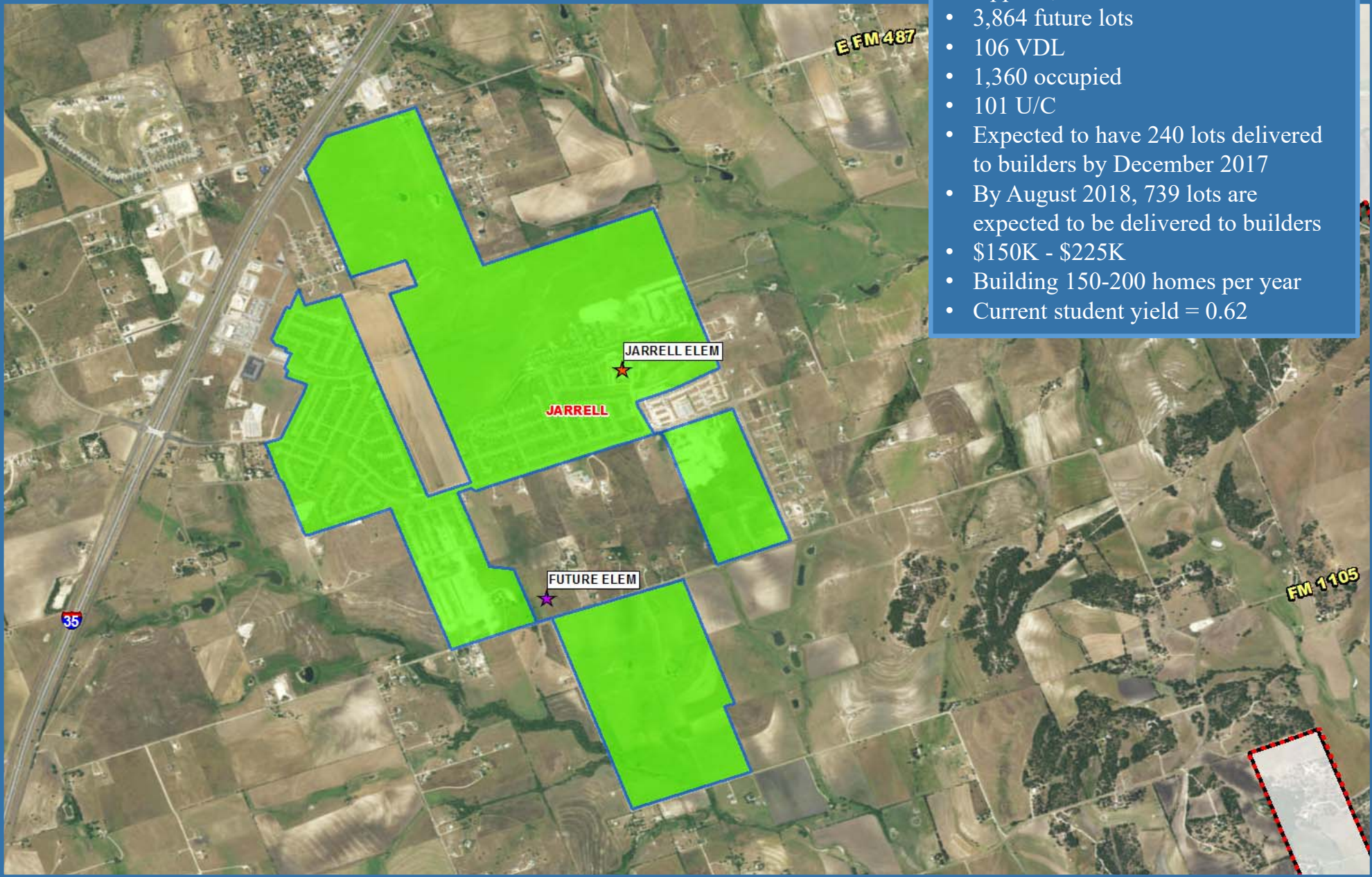




Active Development

Sonterra

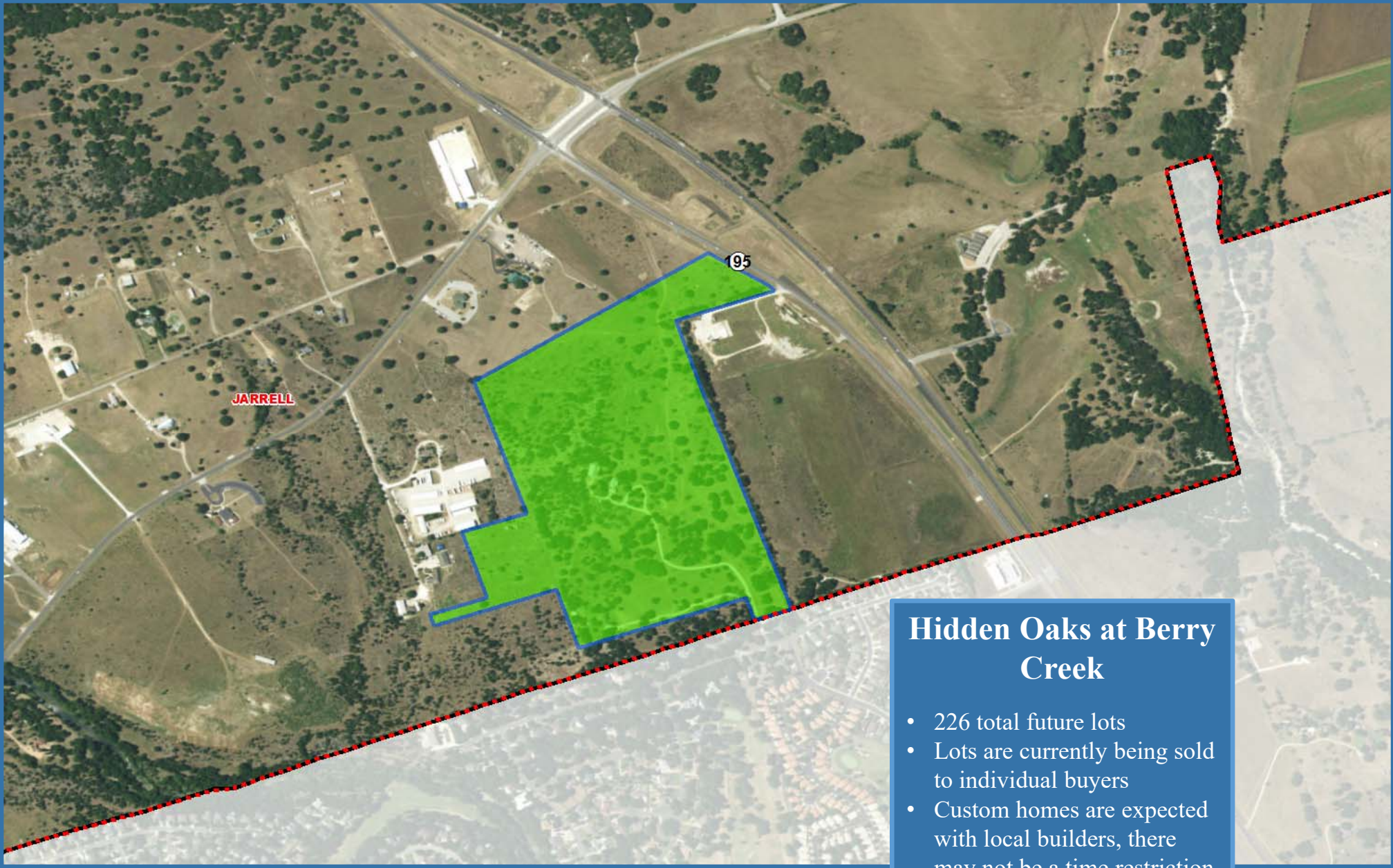
- ### Sonterra
- Appx. 6,000 homes at build out
 - 3,864 future lots
 - 106 VDL
 - 1,360 occupied
 - 101 U/C
 - Expected to have 240 lots delivered to builders by December 2017
 - By August 2018, 739 lots are expected to be delivered to builders
 - \$150K - \$225K
 - Building 150-200 homes per year
 - Current student yield = 0.62





Future Development

Hidden Oaks at Berry Creek



Hidden Oaks at Berry Creek

- 226 total future lots
- Lots are currently being sold to individual buyers
- Custom homes are expected with local builders, there may not be a time restriction on construction



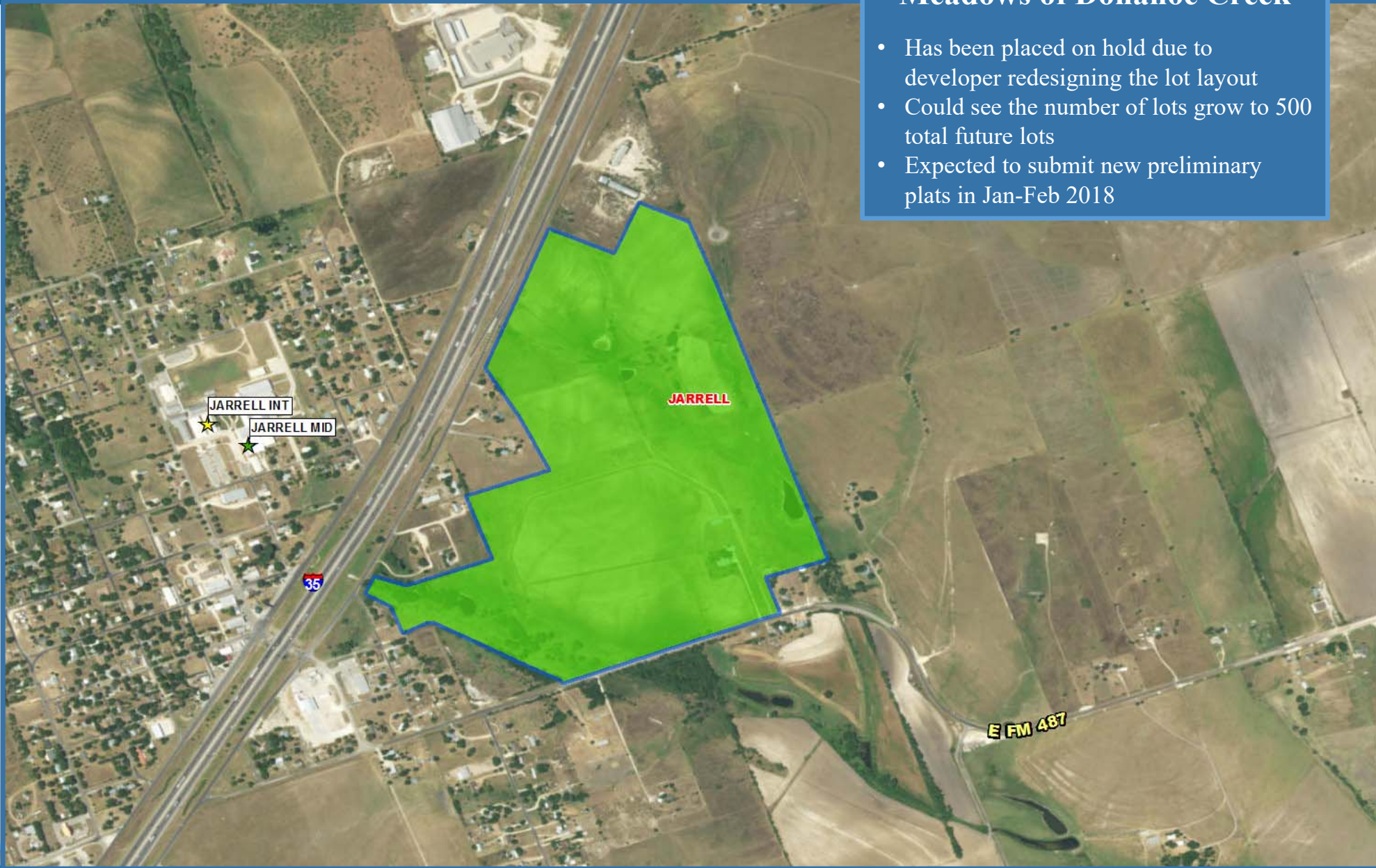


Future Development

Meadows of Donahoe Creek

Meadows of Donahoe Creek

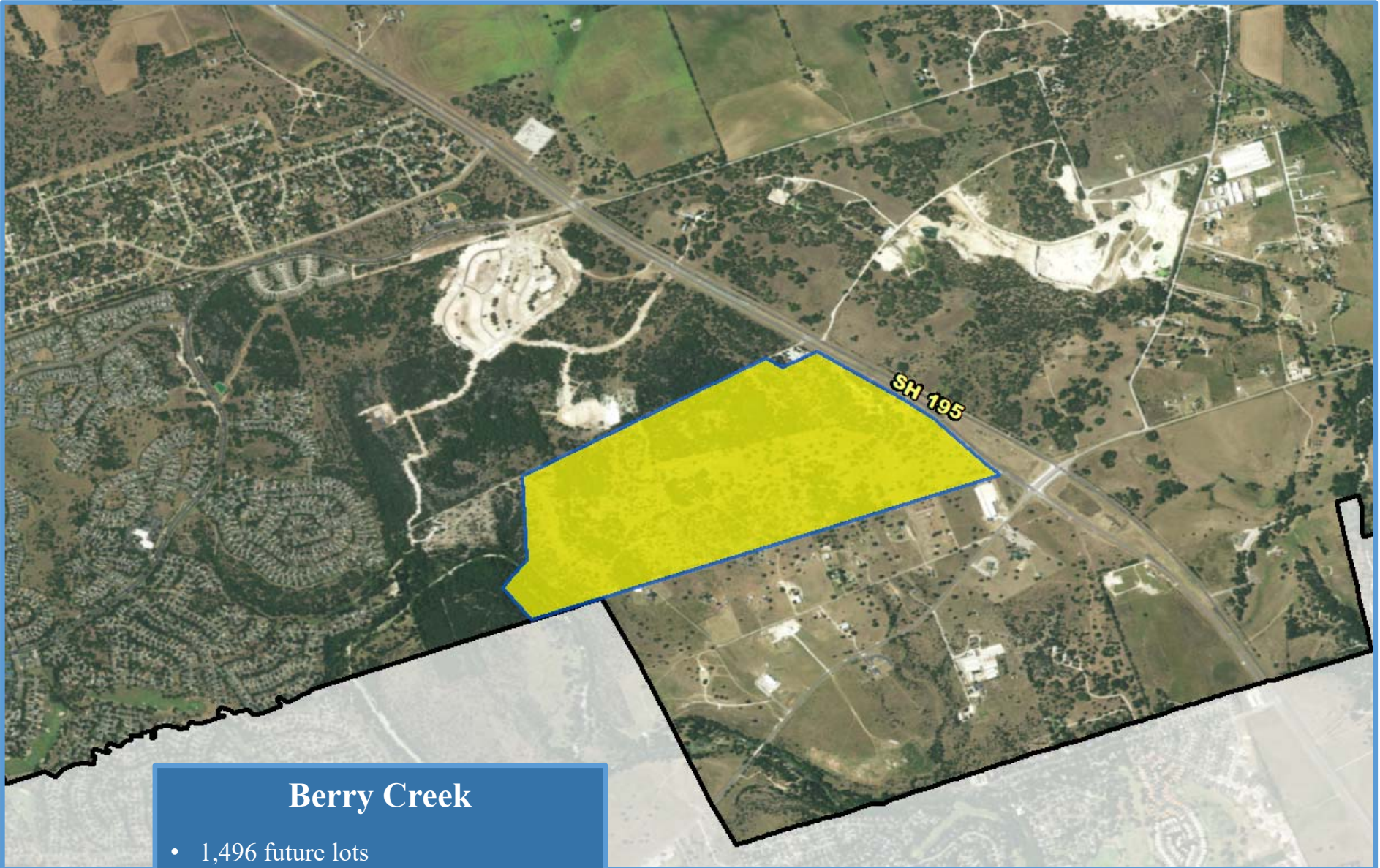
- Has been placed on hold due to developer redesigning the lot layout
- Could see the number of lots grow to 500 total future lots
- Expected to submit new preliminary plats in Jan-Feb 2018





Future Development

Berry Creek



Berry Creek

- 1,496 future lots
- Currently still in the planning stages
- Groundwork and home construction estimated to begin in 1-2 years





Future Development

Calumet



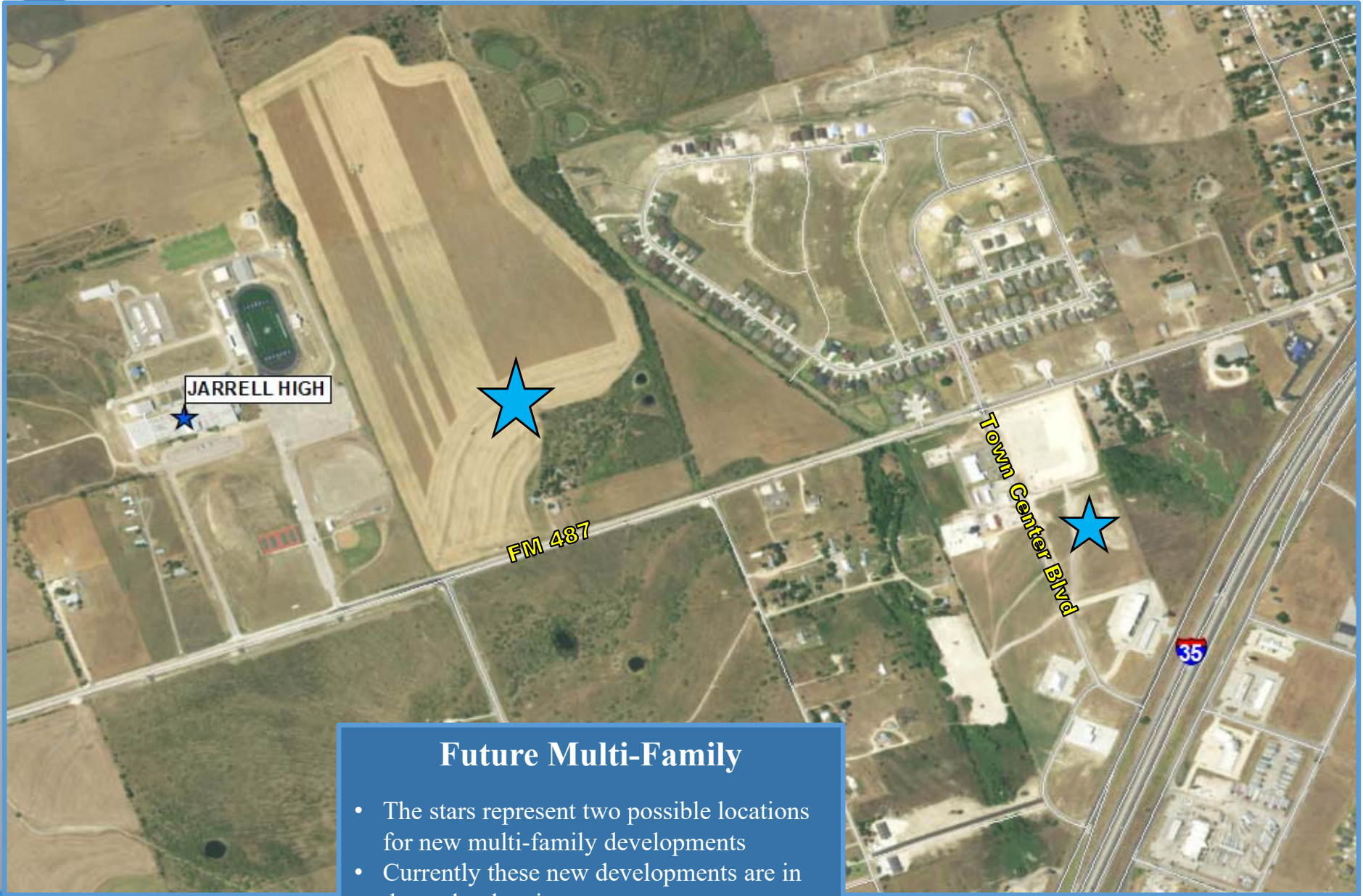
Calumet

- 220 total single family lots
- 42 future duplex units
- Groundwork is expected to begin by November 2017, with home construction anticipated spring 2018
- First phase will be 60 lots





Multi-Family Update



JARRELL HIGH

FM 487

Town Center Blvd

35

Future Multi-Family

- The stars represent two possible locations for new multi-family developments
- Currently these new developments are in the early planning stages
- No plats/plans submitted at this time





Multi-Family Update

Manufactured Home Site



Manufactured Home Site

- 135-150 approx. total lots
- 18 occupied
- 18 VDL
- A new pressure station has stalled the development for about 6 months
- Development is expected to continue summer 2018
- Current student yield =





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 |
|-------------|-------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|------|------|------|-------|--------------|----------|
| 2013/14 | 67 | 92 | 99 | 83 | 91 | 77 | 82 | 75 | 87 | 92 | 92 | 81 | 64 | 58 | 1,140 | | |
| 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 | 89 | 115 | 116 | 115 | 113 | 112 | 113 | 114 | 99 | 100 | 107 | 109 | 102 | 86 | 1,490 | 64 | 4.5% |
| 2017/18 | 90 | 133 | 146 | 133 | 127 | 131 | 120 | 119 | 135 | 108 | 124 | 124 | 113 | 100 | 1,703 | 213 | 14.3% |
| 2018/19 | 90 | 150 | 153 | 158 | 141 | 135 | 141 | 132 | 132 | 150 | 127 | 124 | 123 | 111 | 1,867 | 164 | 9.6% |
| 2019/20 | 90 | 179 | 168 | 165 | 162 | 149 | 143 | 152 | 146 | 144 | 178 | 126 | 123 | 121 | 2,046 | 179 | 9.6% |
| 2020/21 | 90 | 218 | 197 | 181 | 168 | 173 | 164 | 154 | 165 | 160 | 173 | 176 | 125 | 121 | 2,265 | 219 | 10.7% |
| 2021/22 | 90 | 226 | 240 | 213 | 187 | 180 | 182 | 175 | 167 | 176 | 190 | 171 | 174 | 123 | 2,494 | 229 | 10.1% |
| 2022/23 | 90 | 244 | 253 | 260 | 219 | 196 | 193 | 195 | 190 | 183 | 210 | 186 | 169 | 171 | 2,759 | 265 | 10.6% |
| 2023/24 | 90 | 254 | 273 | 274 | 267 | 228 | 210 | 207 | 212 | 206 | 219 | 206 | 184 | 166 | 2,996 | 237 | 8.6% |
| 2024/25 | 90 | 257 | 284 | 295 | 282 | 276 | 244 | 225 | 229 | 230 | 246 | 215 | 204 | 180 | 3,257 | 261 | 8.7% |
| 2025/26 | 90 | 283 | 288 | 308 | 303 | 293 | 295 | 261 | 249 | 249 | 271 | 241 | 213 | 200 | 3,544 | 287 | 8.8% |
| 2026/27 | 90 | 297 | 317 | 312 | 317 | 317 | 314 | 316 | 288 | 271 | 294 | 266 | 239 | 209 | 3,847 | 303 | 8.5% |
| 2027/28 | 90 | 313 | 333 | 343 | 321 | 330 | 339 | 336 | 348 | 313 | 320 | 288 | 263 | 234 | 4,171 | 324 | 8.4% |

*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 = 1,056 students
- 2022/23 enrollment = 2,759
- 10 year growth = 2,468 students
- 2027/28 enrollment = 4,171



Ten Year Forecast

By Campus

| Campus | HISTORY | | | ENROLLMENT PROJECTIONS | | | | | | | | | |
|----------------------------------|----------|--------------|--------------------|------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| | Capacity | 2016/17 | Current 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 2023/24 | 2024/25 | 2025/26 | 2026/27 | 2027/28 |
| Jarrell Elementary | 700 | 435 | 502 | 551 | 602 | 686 | 769 | 847 | 891 | 926 | 969 | 1,016 | 1,079 |
| ELEMENTARY SCHOOL TOTAL | | 435 | 502 | 551 | 602 | 686 | 769 | 847 | 891 | 926 | 969 | 1,016 | 1,079 |
| Elementary Absolute Change | | 12 | 67 | 49 | 51 | 84 | 83 | 78 | 44 | 35 | 43 | 47 | 63 |
| Elementary Percent Change | | 2.84% | 15.40% | 9.76% | 9.26% | 13.95% | 12.10% | 10.14% | 5.19% | 3.93% | 4.64% | 4.85% | 6.20% |
| Jarrell Intermediate School | 574 | 338 | 378 | 417 | 454 | 505 | 549 | 608 | 705 | 802 | 891 | 948 | 990 |
| INTERMEDIATE SCHOOL TOTAL | | 338 | 378 | 417 | 454 | 505 | 549 | 608 | 705 | 802 | 891 | 948 | 990 |
| Intermed. Absolute Change | | 124 | 40 | 39 | 37 | 51 | 44 | 59 | 97 | 97 | 89 | 57 | 42 |
| Intermed. Percent Change | | 57.94% | 11.83% | 10.32% | 8.87% | 11.23% | 8.71% | 10.75% | 15.95% | 13.76% | 11.10% | 6.40% | 4.43% |
| Jarrell Middle School | 574 | 313 | 361 | 413 | 441 | 478 | 517 | 567 | 624 | 683 | 758 | 874 | 997 |
| MIDDLE SCHOOL TOTAL | | 313 | 361 | 413 | 441 | 478 | 517 | 567 | 624 | 683 | 758 | 874 | 997 |
| Middle School Absolute Change | | 25 | 48 | 52 | 28 | 37 | 39 | 50 | 57 | 59 | 75 | 116 | 123 |
| Middle School Percent Change | | 8.68% | 15.34% | 14.40% | 6.78% | 8.39% | 8.16% | 9.67% | 10.05% | 9.46% | 10.98% | 15.30% | 14.07% |
| Jarrell High School | 776 | 404 | 461 | 485 | 548 | 595 | 658 | 736 | 775 | 845 | 925 | 1,008 | 1,105 |
| HIGH SCHOOL TOTAL | | 404 | 461 | 485 | 548 | 595 | 658 | 736 | 775 | 845 | 925 | 1,008 | 1,105 |
| High School Absolute Change | | 14 | 57 | 24 | 63 | 47 | 63 | 78 | 39 | 70 | 80 | 83 | 97 |
| High School Percent Change | | 3.59% | 14.11% | 5.21% | 12.99% | 8.58% | 10.59% | 11.85% | 5.30% | 9.03% | 9.47% | 8.97% | 9.62% |
| DISTRICT TOTALS | | 1,490 | 1,703 | 1,867 | 2,046 | 2,265 | 2,494 | 2,759 | 2,996 | 3,257 | 3,544 | 3,847 | 4,172 |
| District Absolute Change | | 172 | 213 | 164 | 179 | 219 | 229 | 265 | 237 | 261 | 287 | 303 | 325 |
| District Percent Change | | 13.05% | 14.30% | 9.63% | 9.59% | 10.70% | 10.11% | 10.63% | 8.59% | 8.71% | 8.81% | 8.55% | 8.45% |

- Jarrell Elementary will enroll 600 students by 2020, and more than 700 by 2022
- Jarrell Intermediate will enroll more than 500 students by 2020, and more than 600 by 2022
- The district is anticipated to grow by 10% next fall



Summary

- Williamson County's unemployment rate is below 4%.
- Jarrell ISD is on pace to close roughly 250 homes in 2017.
- The district has more than 300 annual starts, with 101 homes under construction in Sonterra.
- Jarrell ISD will enroll more than 2,000 students by 2019.
- JISD can expect an increase more than 1,000 students during the next 5 years.
- 2022/23 enrollment projection= 2,759.
- Jarrell ISD is projected to have more than 4,172 students by the 2027/28 school year.