

*Jarrell
Independent
School
District*



Demographic
Report
Fall 2015

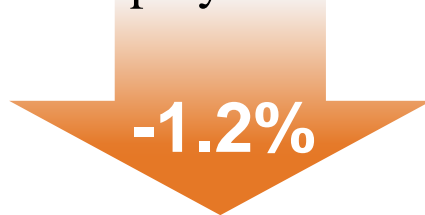
*Learn from Yesterday...
Understand Today...
Plan for Tomorrow*



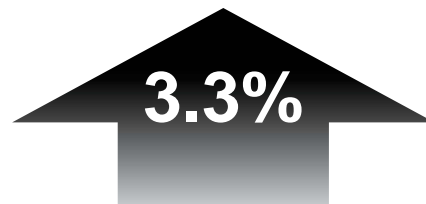
TEMPLETON
DEMOGRAPHICS

Economic Conditions – Austin MSA (August 2015)

Williamson County
Unemployment Rate



- U.S. 5.2%
- Texas 4.4%
- Austin-Round Rock-San Marcos 3.2%
- Williamson County 3.3%



Job Growth
Austin MSA

- 30,300 new jobs created in last 12 months



Annual Starts
Austin MSA

- Slightly less than the same period in 2014



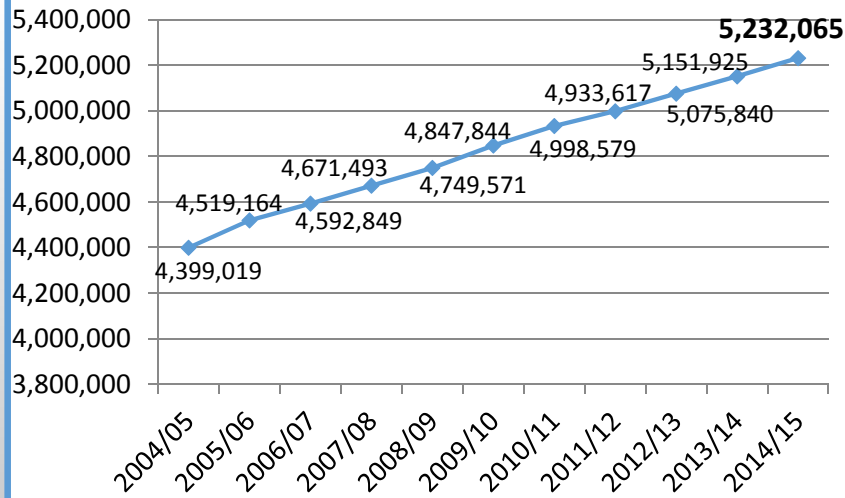


Texas Enrollment Trends

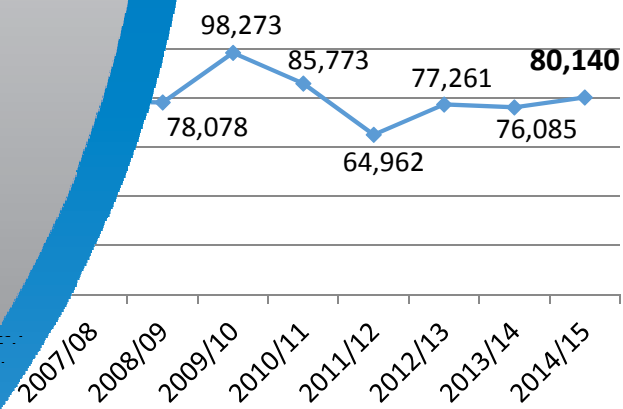
2014/15 State Enrollment

Total Enrollment	5,232,065
Total Growth	80,140

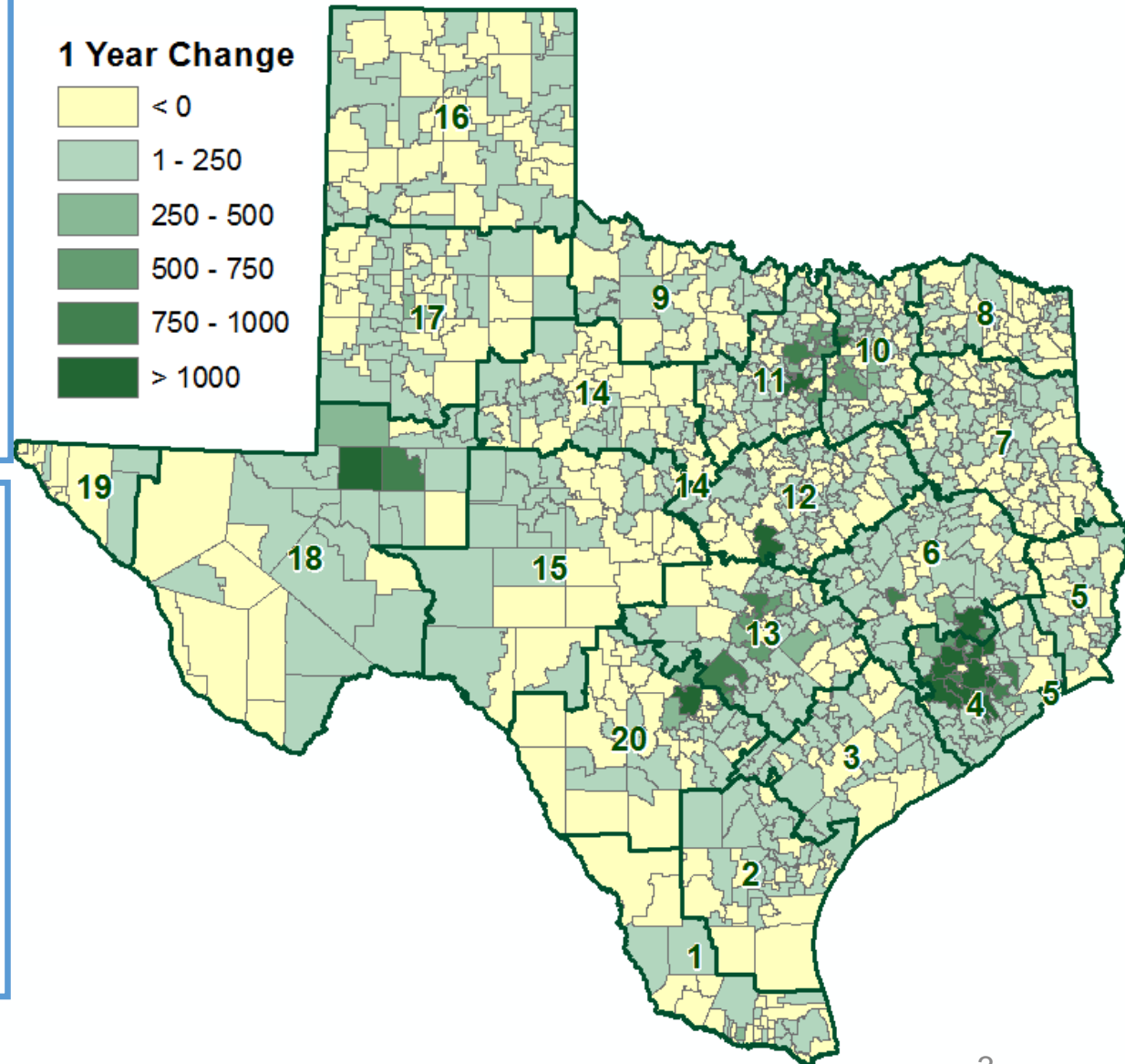
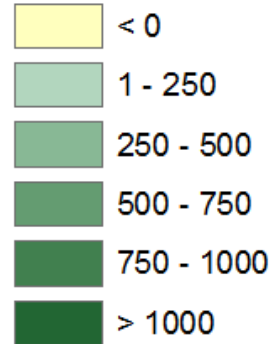
Total State Enrollment



1 Year Change



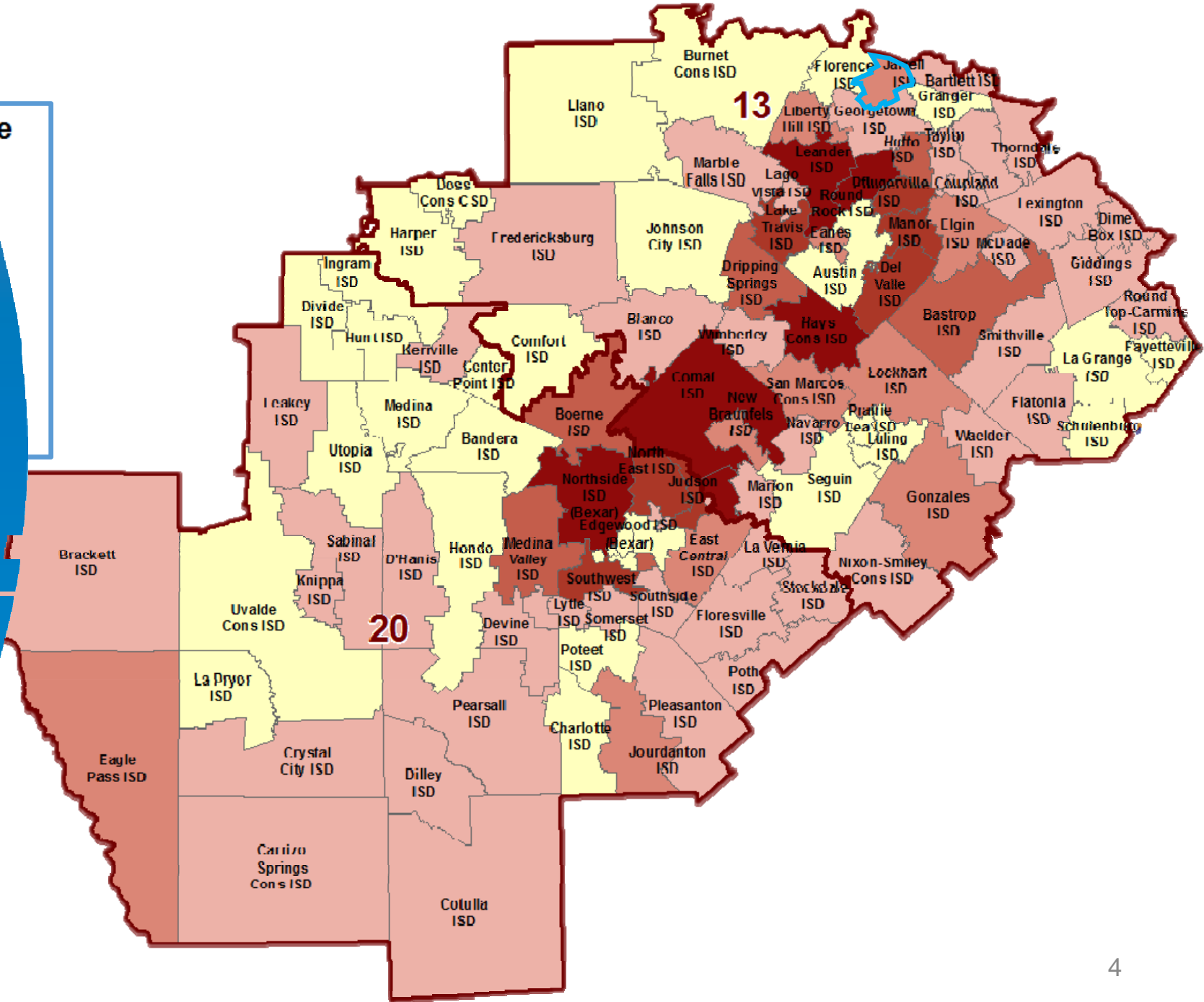
1 Year Change Legend





Region 10 & 11 Enrollment Trends

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Region 13 & 20 Enrollment Trends

Region 13

Rank	DISTRICT	2009/10 Enrollment	2014/15 Enrollment	5-YEAR Change (09/10-14/15)	5-YEAR PCT Growth (09/10-14/15)
1	Leander ISD	30,454	36,211	5,757	18.9%
2	Round Rock ISD	43,008	47,251	4,243	9.9%
3	Comal ISD	16,700	20,327	3,627	21.7%
4	Hays Cons ISD	14,649	17,947	3,298	22.5%
5	Lake Travis ISD	6,577	8,833	2,256	34.3%
6	Manor ISD	6,932	8,852	1,920	27.7%
7	Pflugerville ISD	22,060	23,948	1,888	8.6%
8	Del Valle ISD	10,158	11,727	1,569	15.4%
9	Dripping Springs ISD	4,331	5,421	1,090	25.2%
10	Hutto ISD	5,137	6,187	1,050	20.4%
11	Bastrop ISD	8,936	9,928	992	11.1%
12	Lockhart ISD	4,636	5,365	729	15.7%
13	Liberty Hill ISD	2,568	3,218	650	25.3%
14	New Braunfels ISD	7,856	8,463	607	7.7%
15	Eanes ISD	7,498	7,971	473	6.3%
16	Jarrell ISD	917	1,265	348	37.9%
17	San Marcos Cons ISD	7,434	7,755	321	4.3%
18	Elgin ISD	3,995	4,277	282	7.1%
19	Gonzales ISD	2,532	2,800	268	10.6%
20	Georgetown ISD	10,443	10,651	208	2.0%

Region 20

Rank	DISTRICT	2009/10 Enrollment	2014/15 Enrollment	5-YEAR Change (09/10-14/15)	5-YEAR PCT Growth (09/10-14/15)
1	Northside ISD (Bexar)	92,335	103,606	11,271	12.2%
2	Schertz-Cibolo-Universal City ISD	11,718	14,638	2,920	24.9%
3	North East ISD	65,498	67,971	2,473	3.8%
4	Southwest ISD	11,531	13,524	1,993	17.3%
5	Judson ISD	21,750	23,340	1,590	7.3%
6	Boerne ISD	6,392	7,493	1,101	17.2%
7	Medina Valley ISD	3,382	4,218	836	24.7%
8	Harlandale ISD	14,521	15,289	768	5.3%
9	Eagle Pass ISD	14,463	15,076	613	4.2%
10	East Central ISD	9,292	9,836	544	5.9%
11	Jourdanton ISD	1,276	1,638	362	28.4%
12	Somerset ISD	3,726	3,964	238	6.4%
13	La Vernia ISD	2,983	3,191	208	7.0%
14	Cotulla ISD	1,178	1,353	175	14.9%
15	Knippa ISD	239	404	165	69.0%
16	Floresville ISD	3,801	3,950	149	3.9%
17	Kerrville ISD	4,884	5,032	148	3.0%
18	Dilley ISD	917	1,048	131	14.3%
19	Pleasanton ISD	3,440	3,569	129	3.8%
20	Southside ISD	5,216	5,335	119	2.3%





Austin New Home Ranking Report

ISD Ranked by Annual Closings – 3Q15

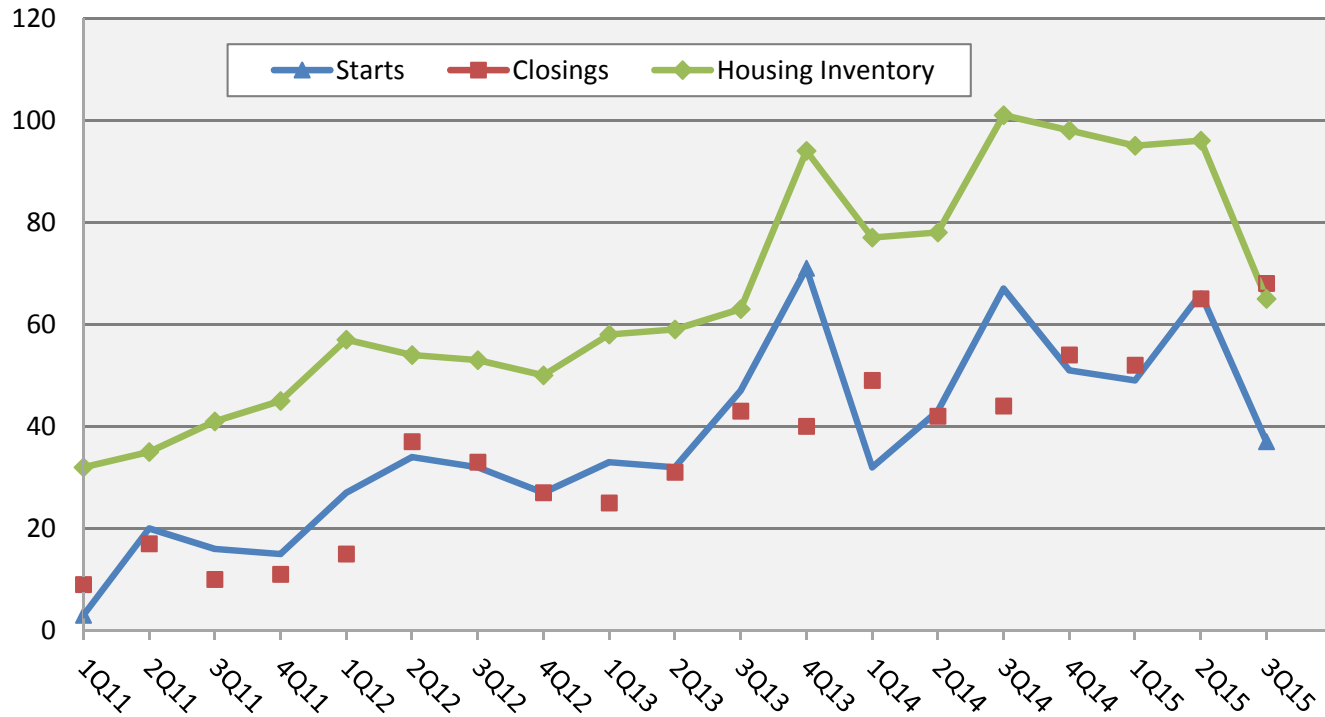
Rank	District Name	Annual Starts	Annual Closings	VDL	Future
1	Leander ISD	2,026	1,895	3,152	10,558
2	Hays CISD	1,257	1,188	1,578	13,112
3	Austin ISD	1,315	1,152	1,731	12,066
4	Round Rock ISD	1,204	1,107	1,525	3,267
5	Pflugerville ISD	1,155	1,007	1,297	16,393
6	Georgetown ISD	984	887	1,664	14,891
7	Lake Travis ISD	609	686	2,139	3,265
8	Hutto ISD	707	678	1,042	4,551
9	Manor ISD	603	589	890	16,430
10	Dripping Springs ISD	369	386	884	4,013
11	Liberty Hill ISD	405	255	1,272	6,629
12	Del Valle ISD	360	241	672	35,700
13	Jarrell ISD	203	239	158	7,534
14	Lockhart ISD	94	113	31	673
15	San Marcos ISD	104	112	113	6,776
16	Bastrop ISD	68	101	305	12,490
17	Elgin ISD	126	81	164	4,507
18	Eanes ISD	22	21	138	347
19	Taylor ISD	22	20	133	486
20	Lago Vista ISD	30	18	575	3,065





New Housing Activity

Jarrell ISD



Starts	2011	2012	2013	2014	2015
1Q	3	27	33	32	49
2Q	20	34	32	43	66
3Q	16	32	47	67	37
4Q	15	27	71	51	
Total	54	120	183	193	152

Closings	2011	2012	2013	2014	2015
1Q	9	15	25	49	52
2Q	17	37	31	42	65
3Q	10	33	43	44	68
4Q	11	27	40	54	
Total	47	112	139	189	185

- Year to date new home starts are up 10 units over the same period in 2014
- 3Q15 new home closings are over 60 units for the first time in more than 4 years, and the second straight quarter
- Jarrell ISD is on pace to have 220-240 new home closings in 2015
- New home inventory is slightly low to sustain the current closing rate

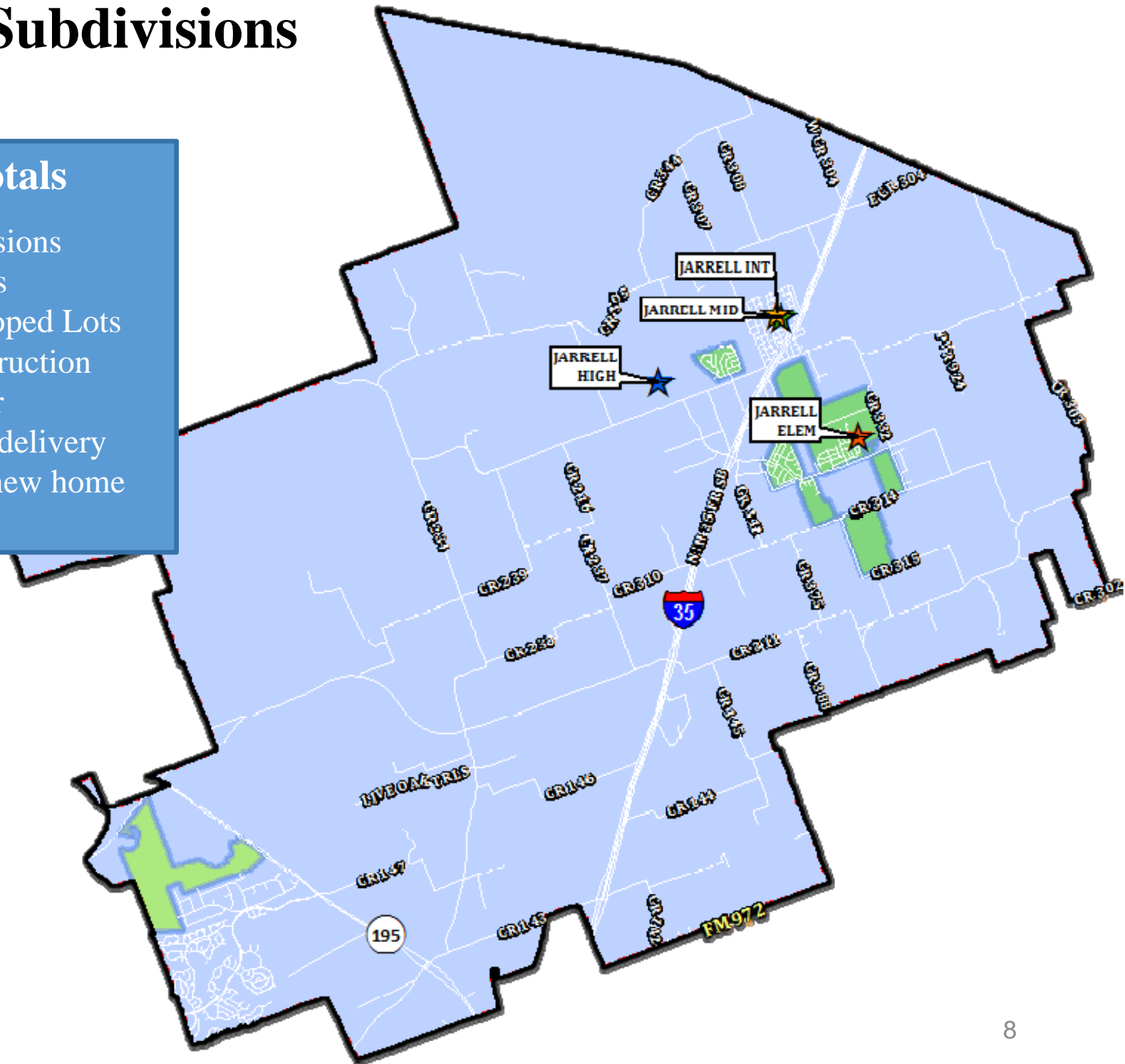




Active Subdivisions

District Totals

- 3 Active Subdivisions
- 5,800+ future lots
- 72 Vacant Developed Lots
- 166 Under Construction
- 1,200+ lots under development for delivery
- Could see 300+ new home starts in 2015



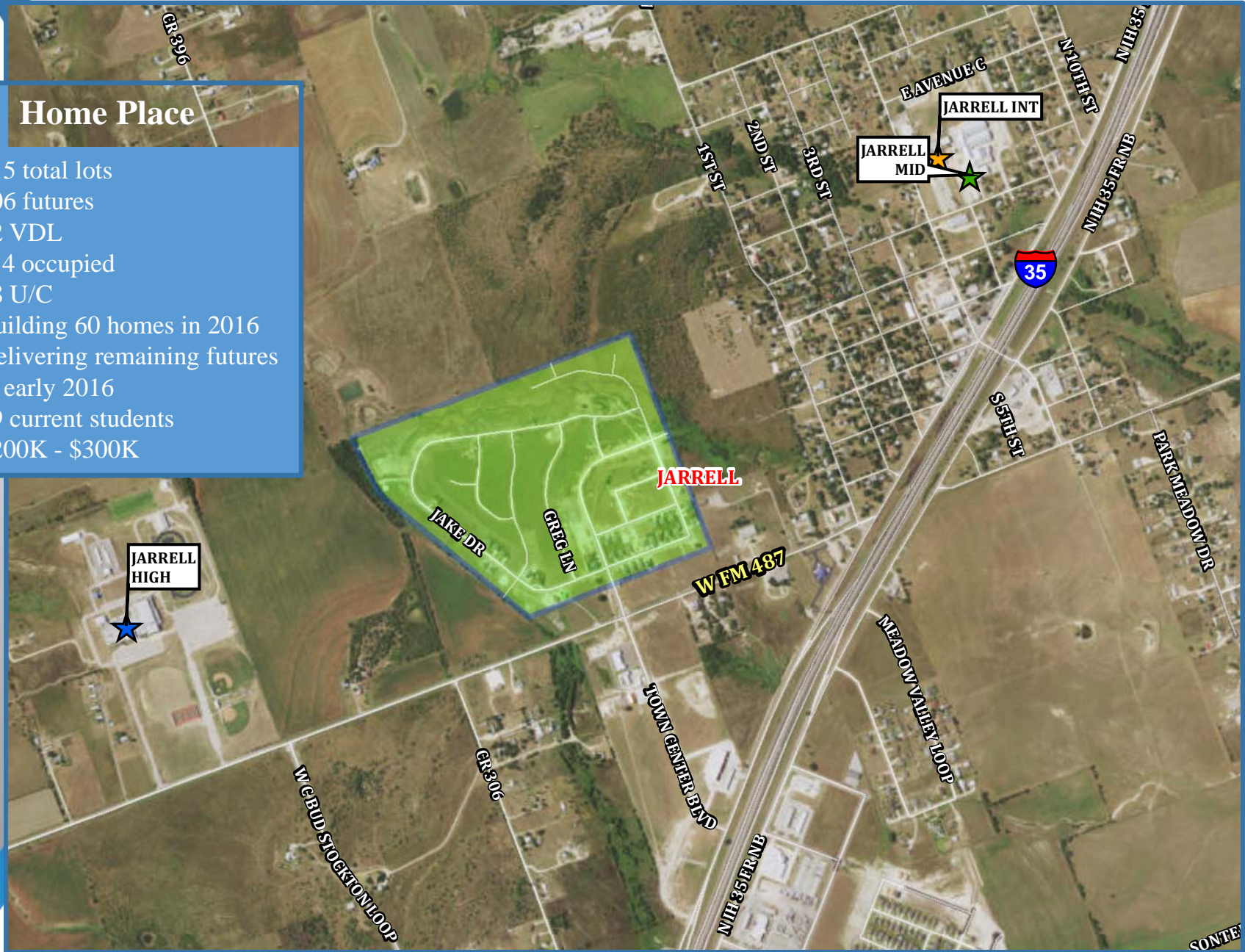


Active Subdivision

Home Place

Home Place

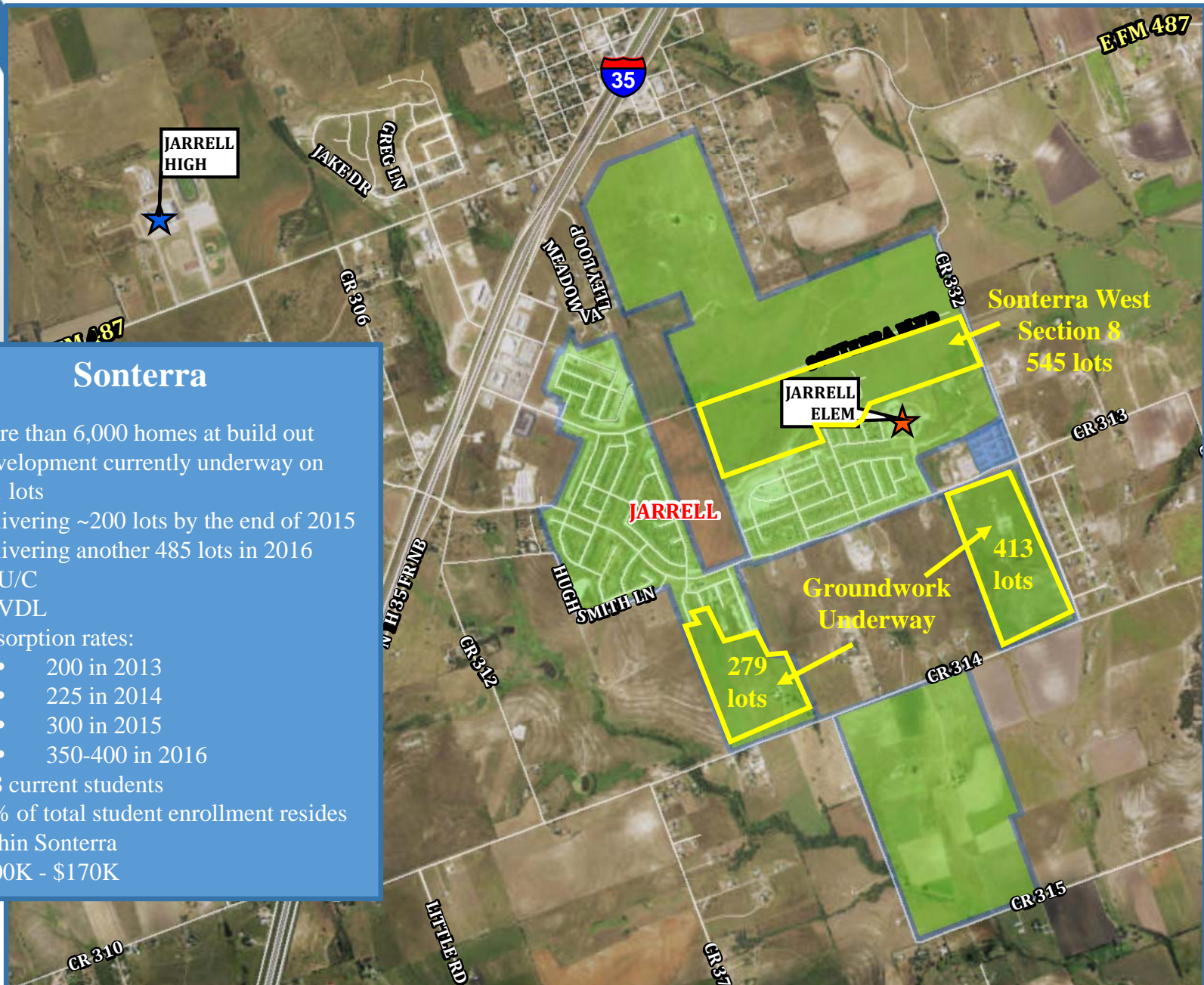
- 315 total lots
- 106 futures
- 62 VDL
- 114 occupied
- 18 U/C
- Building 60 homes in 2016
- Delivering remaining futures in early 2016
- 19 current students
- \$200K - \$300K





Active Development

Sonterra



Sonterra

- More than 6,000 homes at build out
- Development currently underway on 431 lots
- Delivering ~200 lots by the end of 2015
- Delivering another 485 lots in 2016
- 28 U/C
- 10 VDL
- Absorption rates:
 - 200 in 2013
 - 225 in 2014
 - 300 in 2015
 - 350-400 in 2016
- 718 current students
- 47% of total student enrollment resides within Sonterra
- \$100K - \$170K





Active Development

Sonterra Townhomes

Sonterra Townhomes

- 120 future townhouse units
- Phase 2 of the existing 160-unit Sonterra Apartment Complex
- First building open and leasing January 2016
- Construction complete by mid to late 2016
- 2-3 bedroom units
- 56 current students in the Sonterra Apartments





Future Development

Madison at Georgetown

Madison at Georgetown

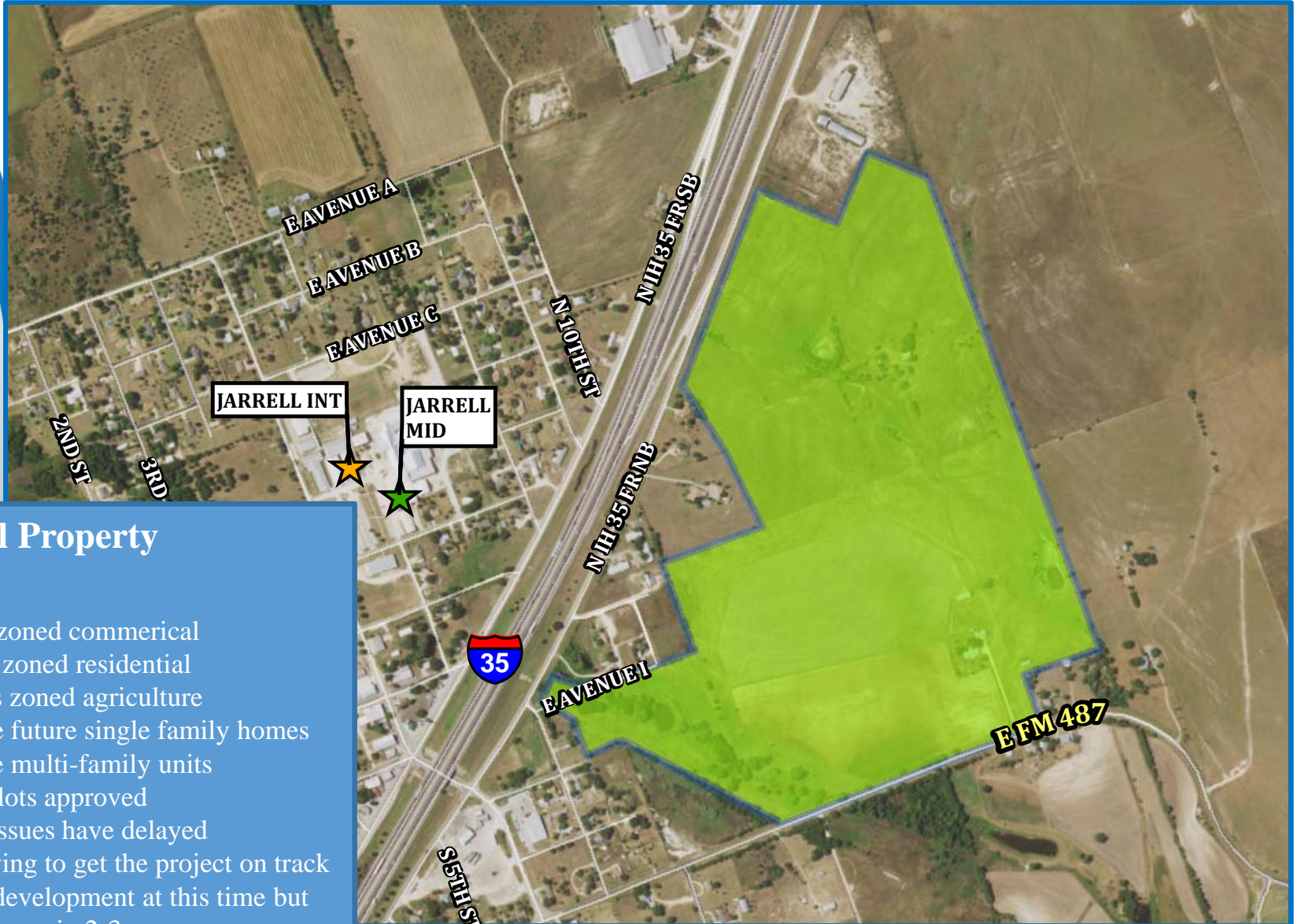
- 935 future SF lots
- 550 acres
 - 10.5 acre school site
 - 38 acres for MF units
 - 85 acres for commercial development
- Developing in 3 sections, all have preliminary plats and zoning approved
- Starting final platting processes
- Development not starting for 1-2 years
- No plans to make age restrictions at this time





Future Development

Hall Property



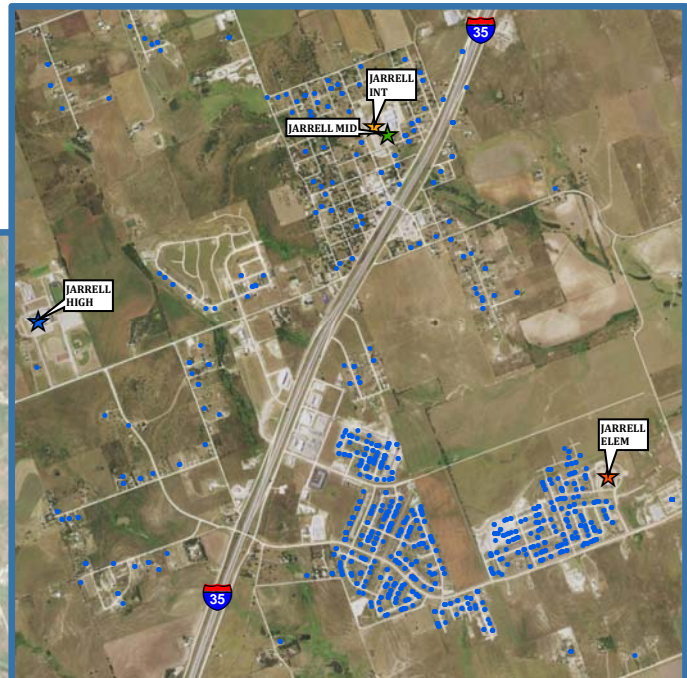
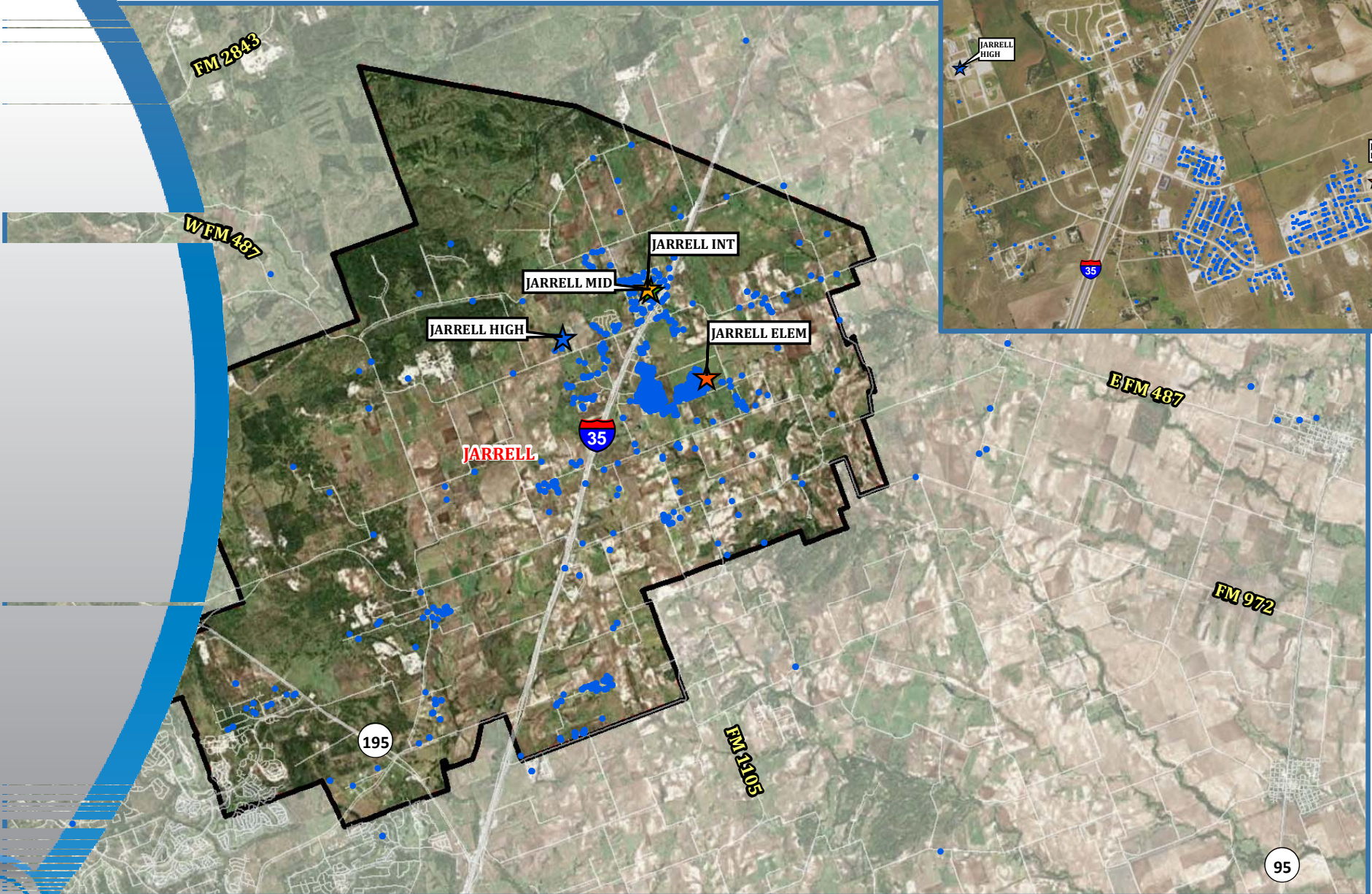
Hall Property

- 140 acres
 - 12 acres zoned commercial
 - 1.2 acres zoned residential
 - 127 acres zoned agriculture
- 450-500 possible future single family homes
- 150-300 possible multi-family units
- Phase 1 with 72 lots approved
- Administration issues have delayed development, trying to get the project on track
- No timeline for development at this time but will likely see homes in 2-3 years.





Student Density Map





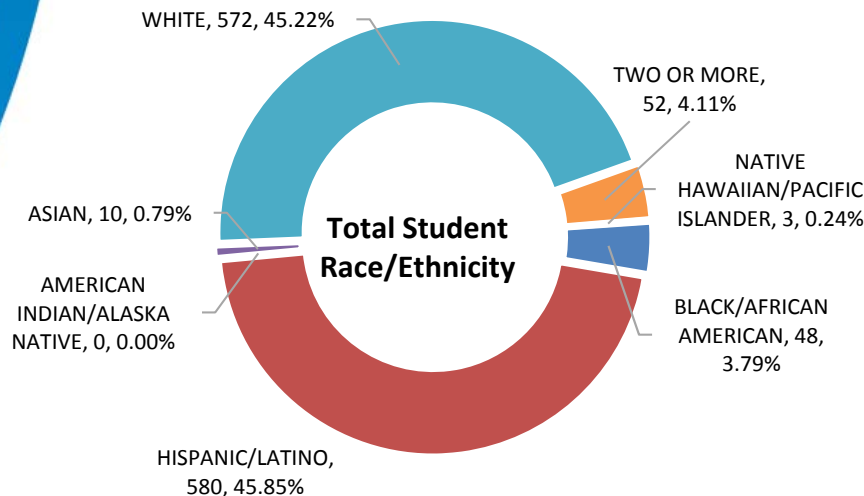
Enrollment History

Year (Oct.)	EE/PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2011/12	68	82	81	86	62	72	79	74	75	73	82	59	70	47	1,010		
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	112	108	120	108	109	104	102	92	94	114	101	96	83	1,424	159	12.6%

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

2014/15 Student Race/Ethnicity Totals

Year (Oct.)	Total	Black or African American	%	Hispanic	%	American Indian or Alaska Native	%	Asian	%	White	%	Two or more races	%	Native Hawaiian/ Other Pacific Islander	%
2011/12	1,010	29	2.9%	456	45.1%	2	0.2%	4	0.4%	484	47.9%	32	3.2%	3	0.3%
2012/13	1,080	31	2.9%	483	44.7%	2	0.2%	5	0.5%	517	47.9%	40	3.7%	2	0.2%
2013/14	1,140	35	3.1%	526	46.1%	0	0.0%	7	0.6%	525	46.1%	45	3.9%	2	0.2%
2014/15	1,265	48	3.8%	580	45.8%	0	0.0%	10	0.8%	572	45.2%	52	4.1%	3	0.2%



Year (Oct.)	Economically Disadvantaged	% ED
2011/12	600	59.4%
2012/13	665	61.6%
2013/14	711	62.4%
2014/15	738	58.3%





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
2011/12	68	82	81	86	62	72	79	74	75	73	82	59	70	47	1,010		
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	112	108	120	108	109	104	102	92	94	114	101	96	83	1,424	159	12.6%
2016/17	81	129	132	117	134	119	125	120	114	106	112	123	106	96	1,614	190	13.3%
2017/18	81	142	155	158	129	150	137	138	132	132	125	118	125	104	1,826	212	13.1%
2018/19	81	164	156	171	174	142	164	151	152	148	158	123	117	123	2,024	198	10.8%
2019/20	81	186	184	176	189	193	160	183	166	167	175	154	122	115	2,251	227	11.2%
2020/21	81	177	205	201	208	210	212	177	198	183	197	171	152	120	2,492	241	10.7%
2021/22	81	191	198	221	227	230	232	223	191	213	217	193	169	149	2,735	243	9.8%
2022/23	81	206	206	215	243	251	256	244	241	210	251	211	191	166	2,972	237	8.7%
2023/24	81	214	220	224	231	269	278	269	264	263	248	244	209	187	3,201	229	7.7%
2024/25	81	216	231	238	241	261	298	292	296	287	310	241	242	205	3,439	238	7.4%
2025/26	81	225	233	251	256	269	289	313	321	324	341	302	239	237	3,681	242	7.0%

*Yellow box = largest grade per year

*Green box = second largest grade per year

- Jarrell ISD will enroll more than 2,000 students by 2018
- 5 year growth = 1,068 students
- 2020/21 enrollment = 2,492
- 10 year growth = 2,257 students
- 2025/26 enrollment = 3,681



Ten Year Forecast

By Campus

Campus	HISTORY	Current	ENROLLMENT PROJECTIONS									
	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Jarrell Elementary	479	529	593	665	746	816	872	918	951	970	1,007	1,046
ELEMENTARY SCHOOL TOTAL	479	529	593	665	746	816	872	918	951	970	1,007	1,046
Elementary Absolute Change	47	50	64	72	81	70	56	46	33	19	37	39
Elementary Percent Change	10.88%	10.44%	12.10%	12.14%	12.18%	9.38%	6.86%	5.28%	3.59%	2.00%	3.81%	3.87%
Jarrell Intermediate School	181	213	244	287	306	353	422	462	507	547	559	558
INTERMEDIATE SCHOOL TOTAL	181	213	244	287	306	353	422	462	507	547	559	558
Intermed. Absolute Change	22	32	31	43	19	47	69	40	45	40	12	-1
Intermed. Percent Change		17.68%	14.55%	17.62%	6.62%	15.36%	19.55%	9.48%	9.74%	7.89%	2.19%	-0.18%
Jarrell Middle School	271	288	340	402	451	516	558	627	695	796	875	958
MIDDLE SCHOOL TOTAL	271	288	340	402	451	516	558	627	695	796	875	958
Middle School Absolute Change	-64	17	52	62	49	65	42	69	68	101	79	83
Middle School Percent Change	-19.10%	6.27%	18.06%	18.24%	12.19%	14.41%	8.14%	12.37%	10.85%	14.53%	9.92%	9.49%
Jarrell High School	332	392	435	470	519	564	638	726	817	886	996	1,117
HIGH SCHOOL TOTAL	332	392	435	470	519	564	638	726	817	886	996	1,117
High School Absolute Change	38	60	43	35	49	45	74	88	91	69	110	121
High School Percent Change	12.93%	18.07%	10.97%	8.05%	10.43%	8.67%	13.12%	13.79%	12.53%	8.45%	12.42%	12.15%
Williamson County JJAEP	2	2	2	2	2	2	2	2	2	2	2	2
ALTERNATIVE SCHOOL TOTAL	2	2	2	2	2	2	2	2	2	2	2	2
DISTRICT TOTALS	1,265	1,424	1,614	1,826	2,024	2,251	2,492	2,735	2,972	3,201	3,439	3,681
District Absolute Change	43	159	190	212	198	227	241	243	237	229	238	242
District Percent Change	3.52%	12.57%	13.34%	13.14%	10.84%	11.22%	10.71%	9.75%	8.67%	7.71%	7.44%	7.04%





Summary

- Austin will continue to be a leader in job and population growth due its strong housing market and its diverse economy.
- Jarrell ISD started nearly 200 units in 2014, and is on pace to have more than 250 new home closings in 2015.
- The district has more than 160 homes under construction.
- JISD can expect an increase of approximately 1,00 students during the next 5 years.
- 2020/21 enrollment projection= 2,492.
- Jarrell ISD is projected to have more than 3,600 students for the 2025/26 school year.