

Jarrell
Independent
School
District

Fall 2020 Report



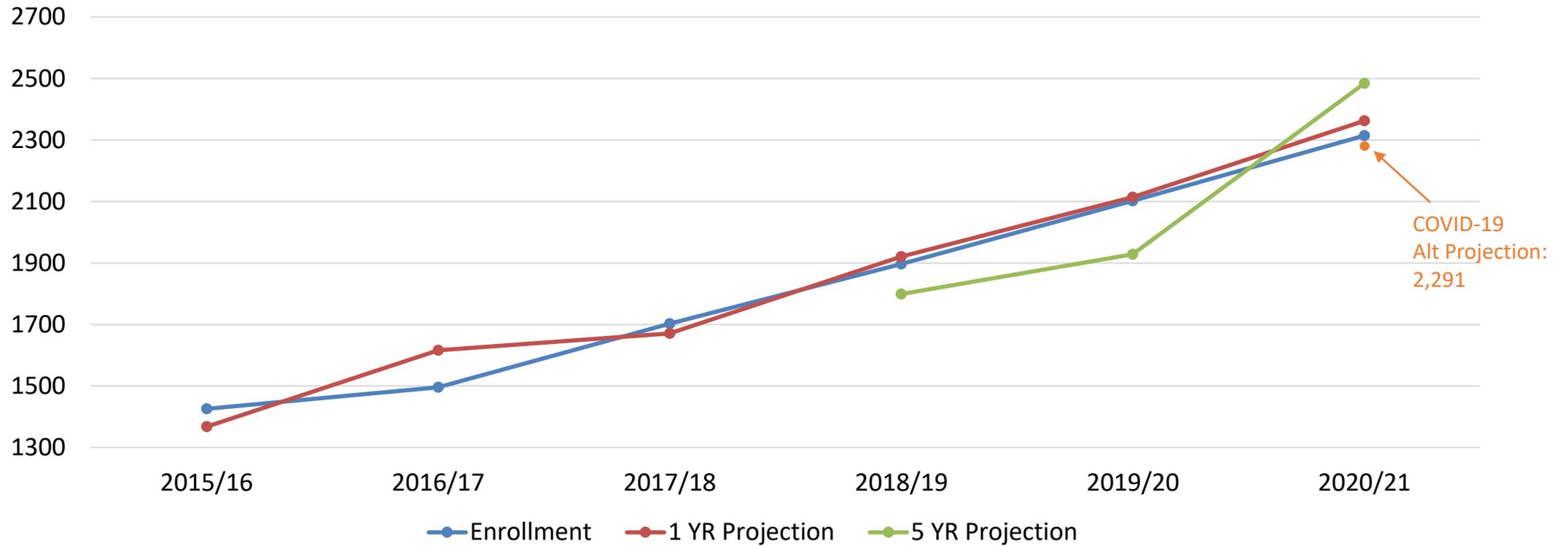
TEMPLETON
DEMOGRAPHICS

hanleywood | metrostudy



TD Enrollment Projections

Projection History



	Enrollment	1 YR Projection	5 YR Projection	1 YR Difference
2015/16	1426	1368		-58
2016/17	1496	1616		120
2017/18	1703	1671		-32
2018/19	1897	1921	1799	24
2019/20	2102	2114	1928	12
2020/21	2314	2362	2484	48





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	9	80	115	116	115	113	112	113	114	99	100	107	109	102	86	1,490		
2017/18	10	80	133	146	133	127	131	120	119	135	108	124	124	113	100	1,703	213	14.3%
2018/19	13	90	142	153	154	138	144	146	141	129	142	136	126	122	121	1,897	194	11.4%
2019/20	5	108	174	164	171	161	168	159	159	169	143	172	125	120	104	2,102	205	10.8%
2020/21	4	87	178	198	183	171	171	182	170	172	177	186	178	139	118	2,314	212	10.1%

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

Year	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Elem	MS	HS
3 year avg	0.828	1.044	1.105	1.148	1.096	1.028	1.138	1.101	1.111	1.121	1.069	1.257	0.990	1.016	0.969	1.103	1.101	1.058
2017/18	1.111	1.000	1.157	1.270	1.147	1.104	1.159	1.071	1.053	1.184	1.091	1.240	1.159	1.037	0.980	1.151	1.109	1.104
2018/19	1.300	1.125	1.068	1.150	1.055	1.038	1.134	1.115	1.175	1.084	1.052	1.259	1.016	0.984	1.071	1.093	1.104	1.083
2019/20	0.385	1.200	1.225	1.155	1.118	1.045	1.217	1.104	1.089	1.199	1.109	1.211	0.919	0.952	0.852	1.144	1.132	0.984
2020/21	0.800	0.806	1.023	1.138	1.116	1.000	1.062	1.083	1.069	1.082	1.047	1.301	1.035	1.112	0.983	1.070	1.066	1.108

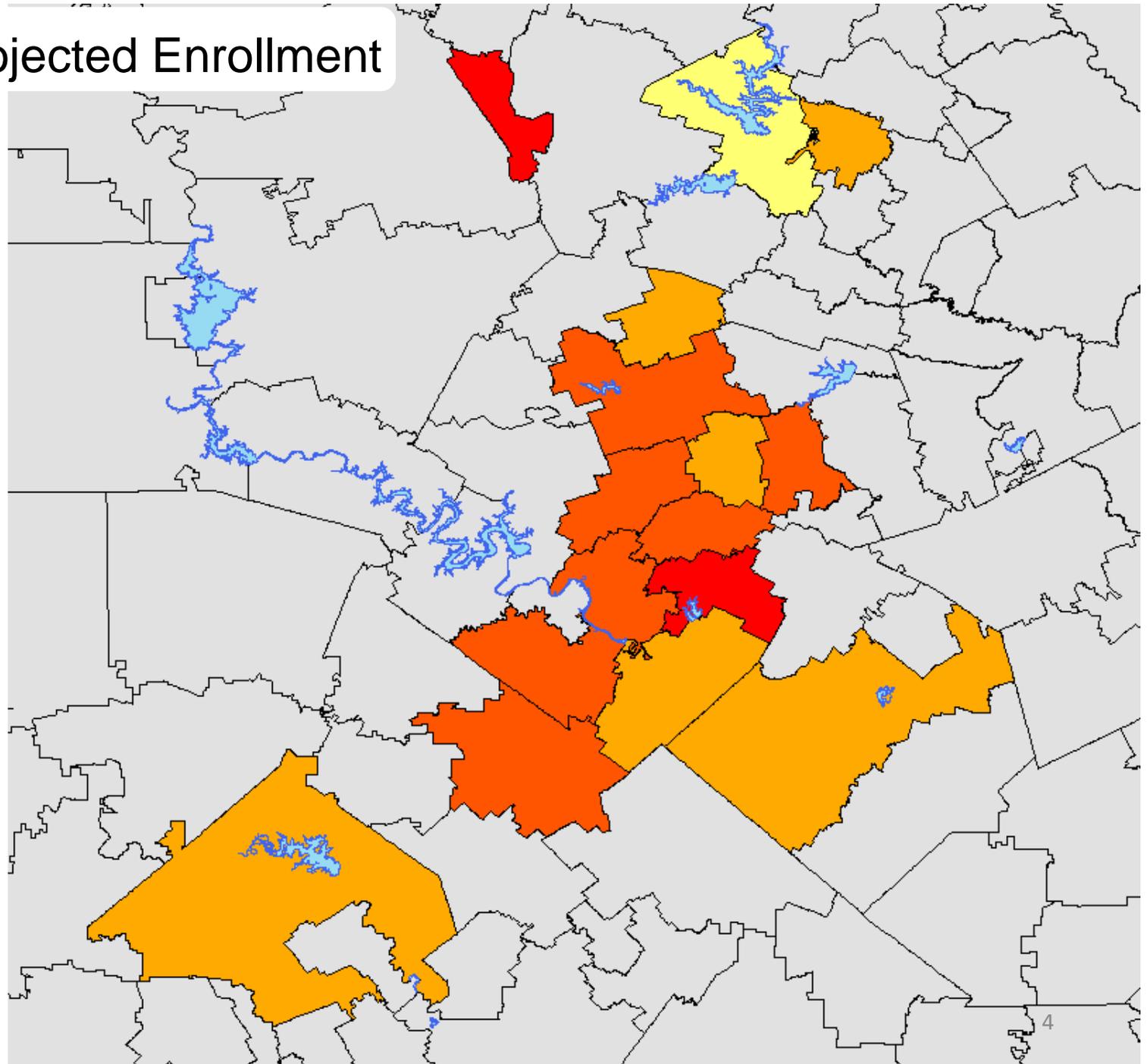
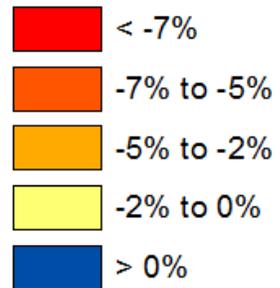
- Jarrell ISD added 212 students this fall for a 10.1% growth rate
- JISD is 2.3% below forecasted enrollment due to COVID-19 impact
- Most districts in Austin have been 5%-6% under student enrollment forecasts



Percent Difference from Projected Enrollment

- Only 1 district in central Texas has closely matched their forecasted student enrollment in 2020/21
- The average district is down 4.5% from projected enrollment, and year over year enrollment is down roughly 2%

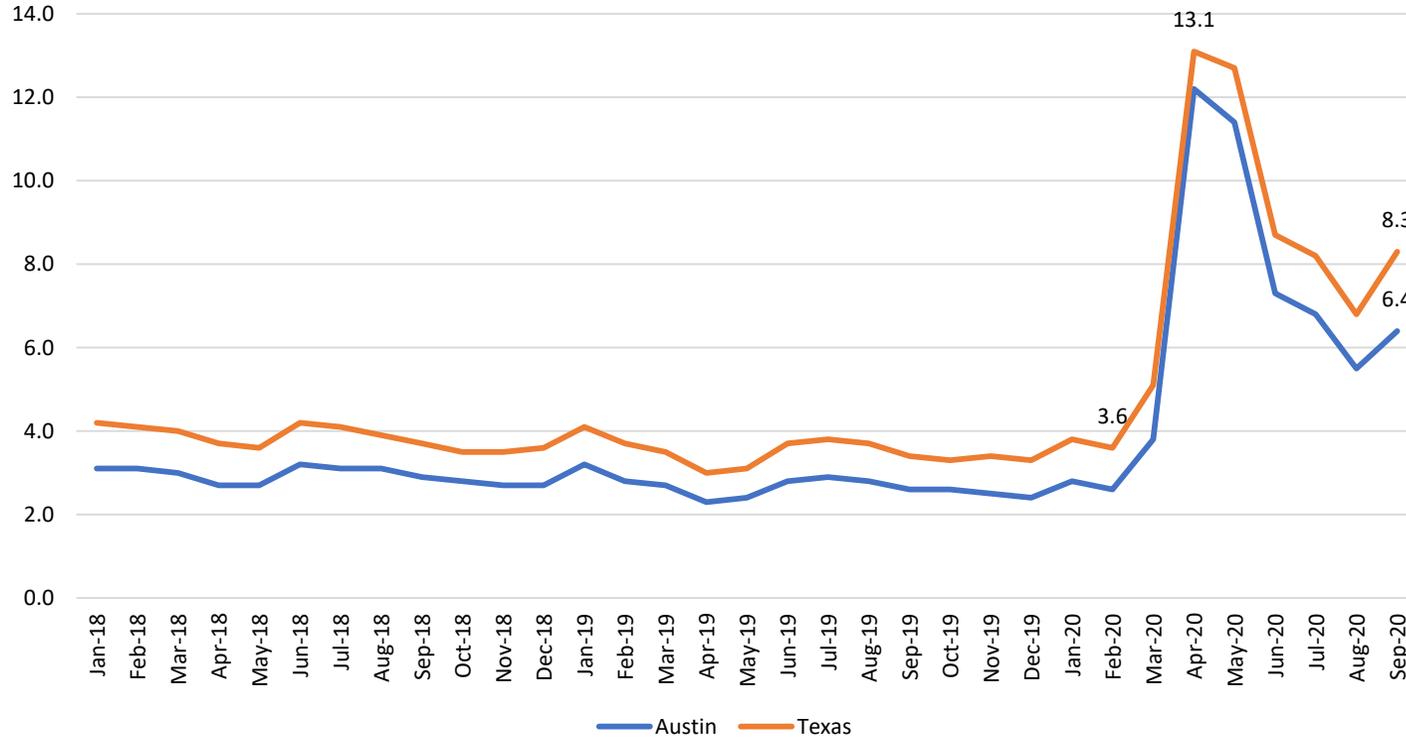
Difference from Forecasted Enrollment



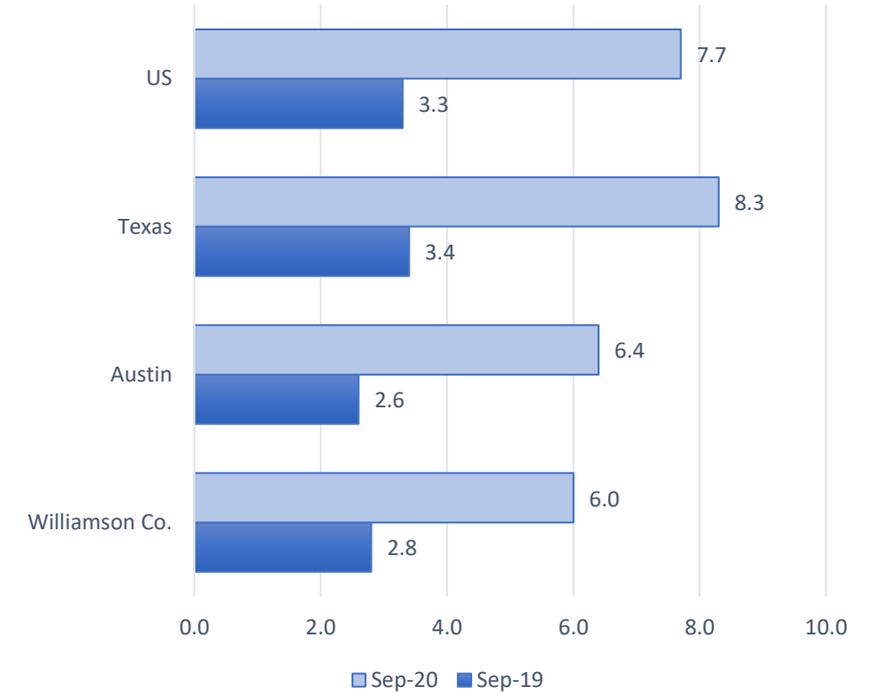


Austin MSA Economic Update

Unemployment Rates, Jan 2018 - Sept 2020



Unemployment Rates, Year Over Year





Austin New Home Ranking Report

ISD Ranked by Annual Closings – 3Q20

Rank	District Name	Annual Starts	Annual Closings	Inventory	VDL	Future
1	Leander ISD	2,510	2,648	1,290	3,600	10,775
2	Austin ISD	1,637	1,951	1,543	1,267	10,937
3	Georgetown ISD	2,170	1,934	1,164	3,297	17,553
4	Pflugerville ISD	1,821	1,883	906	1,750	8,776
5	Hays CISD	1,943	1,832	939	2,441	39,526
6	Manor ISD	1,550	1,629	622	1,269	15,384
7	Liberty Hill ISD	1,622	1,619	789	3,061	11,408
8	Hutto ISD	1,330	1,312	614	1,019	8,766
9	Round Rock ISD	1,022	1,205	580	666	5,925
10	Del Valle ISD	1,323	1,194	608	1,781	31,588
11	Dripping Springs ISD	882	786	489	1,372	6,596
12	Lake Travis ISD	615	665	519	1,936	4,244
13	Jarrell ISD*	690	664	327	887	13,614
14	San Marcos CISD	464	380	280	802	6,890
15	Bastrop ISD	278	216	197	1,535	19,206
16	Taylor ISD	103	119	68	131	986
17	Lago Vista ISD	135	119	82	625	4,111
18	Elgin ISD	204	83	162	389	9,199
19	Eanes ISD	15	48	10	64	114
20	Lockhart ISD	47	35	21	94	15,834

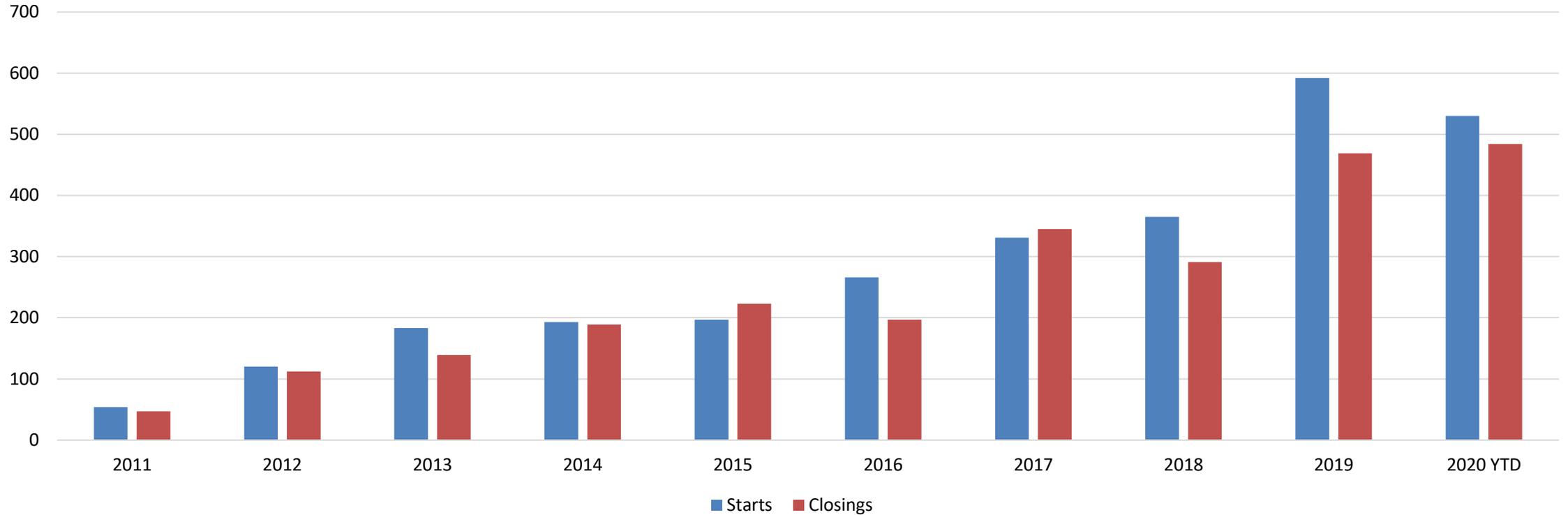
*Adjusted based on additional research by Templeton Demographics staff





JISD New Home Starts and Closings

New Home Starts and Closings



Starts	2015	2016	2017	2018	2019	2020
1Q	49	36	44	51	55	155
2Q	66	62	111	121	129	135
3Q	37	82	103	112	248	240
4Q	45	86	73	81	160	-
Total	197	266	331	365	592	530

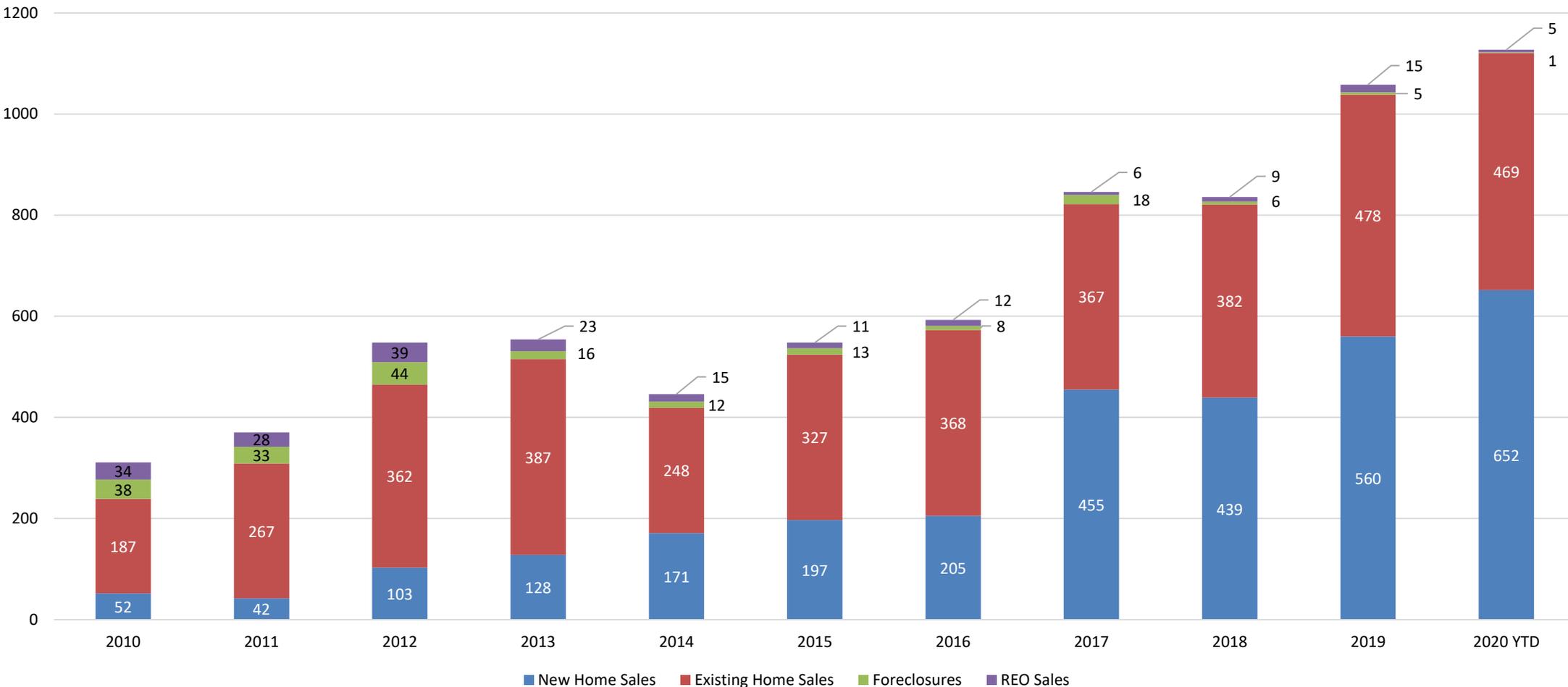
Closings	2015	2016	2017	2018	2019	2020
1Q	52	45	85	72	85	126
2Q	65	45	53	32	97	192
3Q	68	62	109	99	107	166
4Q	38	45	98	88	180	-
Total	223	197	345	291	469	484





Annual Home Sales by Transaction Type

Annual District Home Sales



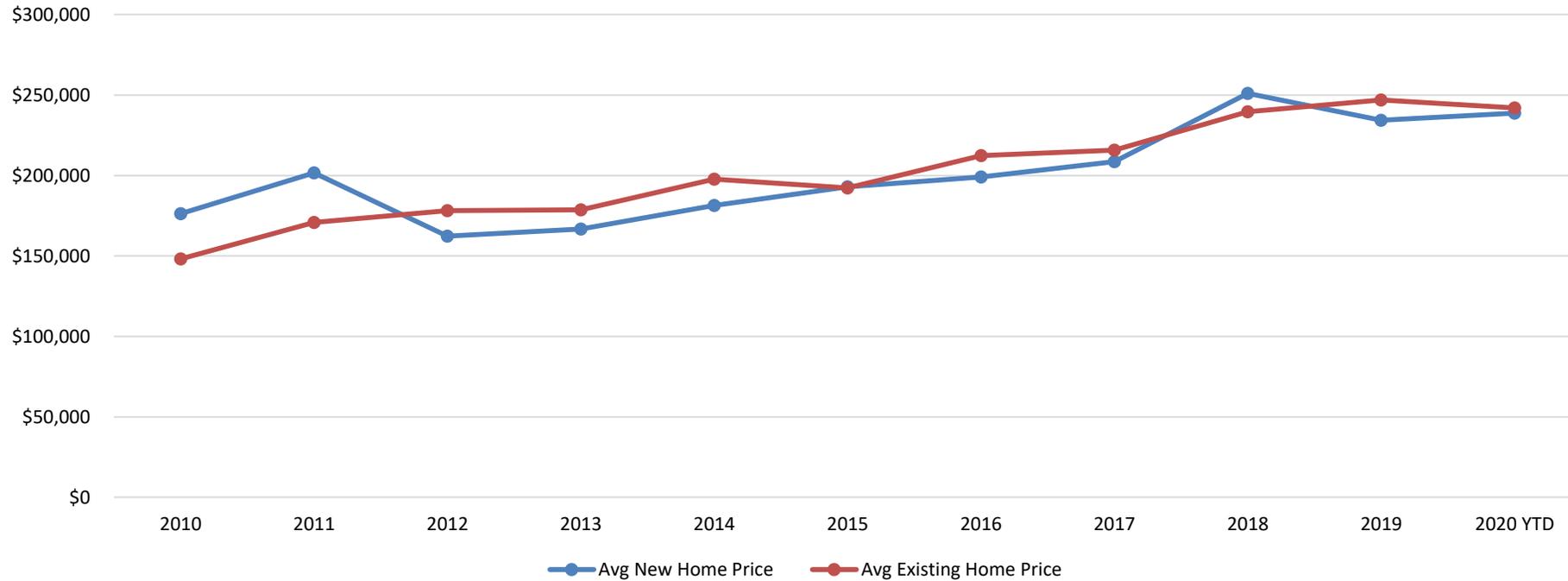
- The number of New Home Sales has increased by more than 12x over the last 10 years
- Existing Home Sales have tripled in that same time period





Average District Home Sale Prices

Average District New vs Existing Home Sale Price, 2010 - 2020 YTD



	Avg New Home Price	Avg Existing Home Price
2010	\$176,203	\$148,206
2011	\$201,547	\$170,897
2012	\$162,264	\$178,128
2013	\$166,792	\$178,718
2014	\$181,398	\$197,676
2015	\$192,883	\$192,272
2016	\$199,152	\$212,268
2017	\$208,578	\$215,709
2018	\$251,055	\$239,558
2019	\$234,325	\$246,839
2020 YTD	\$238,765	\$241,907

- Since 2010, new home prices have increased by \$62,562, or 30.5%
- Existing home prices have increased by 63.2%, or \$93,701, since 2010



New Housing Activity by Elementary Zone

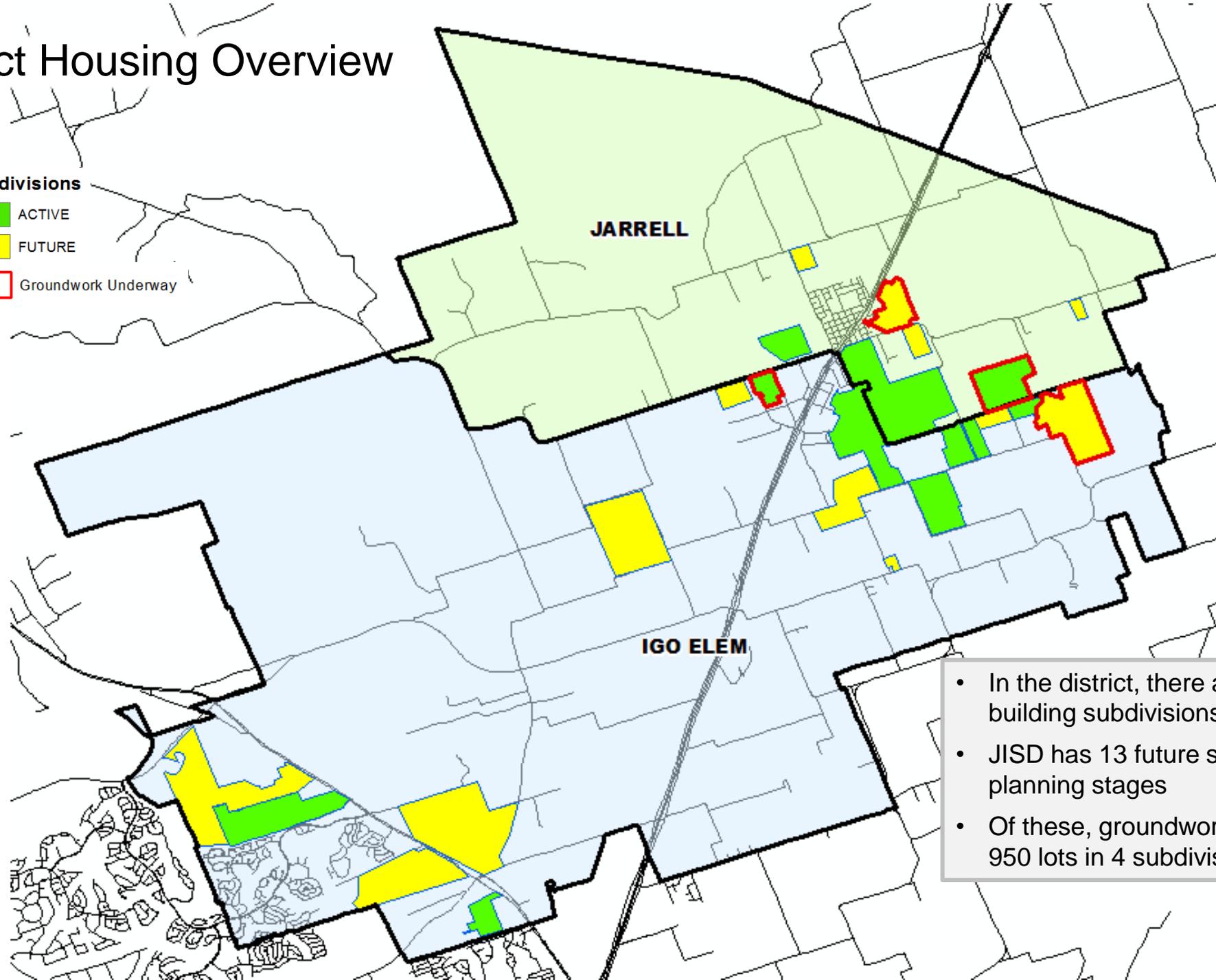
Elementary	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Under Construction	Inventory	Vacant Dev. Lots	Futures
IGO	421	100	512	120	103	140	285	10,731
JARRELL	269	140	152	46	141	187	602	2,883
Grand Total	690	240	664	166	244	327	887	13,614



District Housing Overview

Subdivisions

- ACTIVE
- FUTURE
- Groundwork Underway

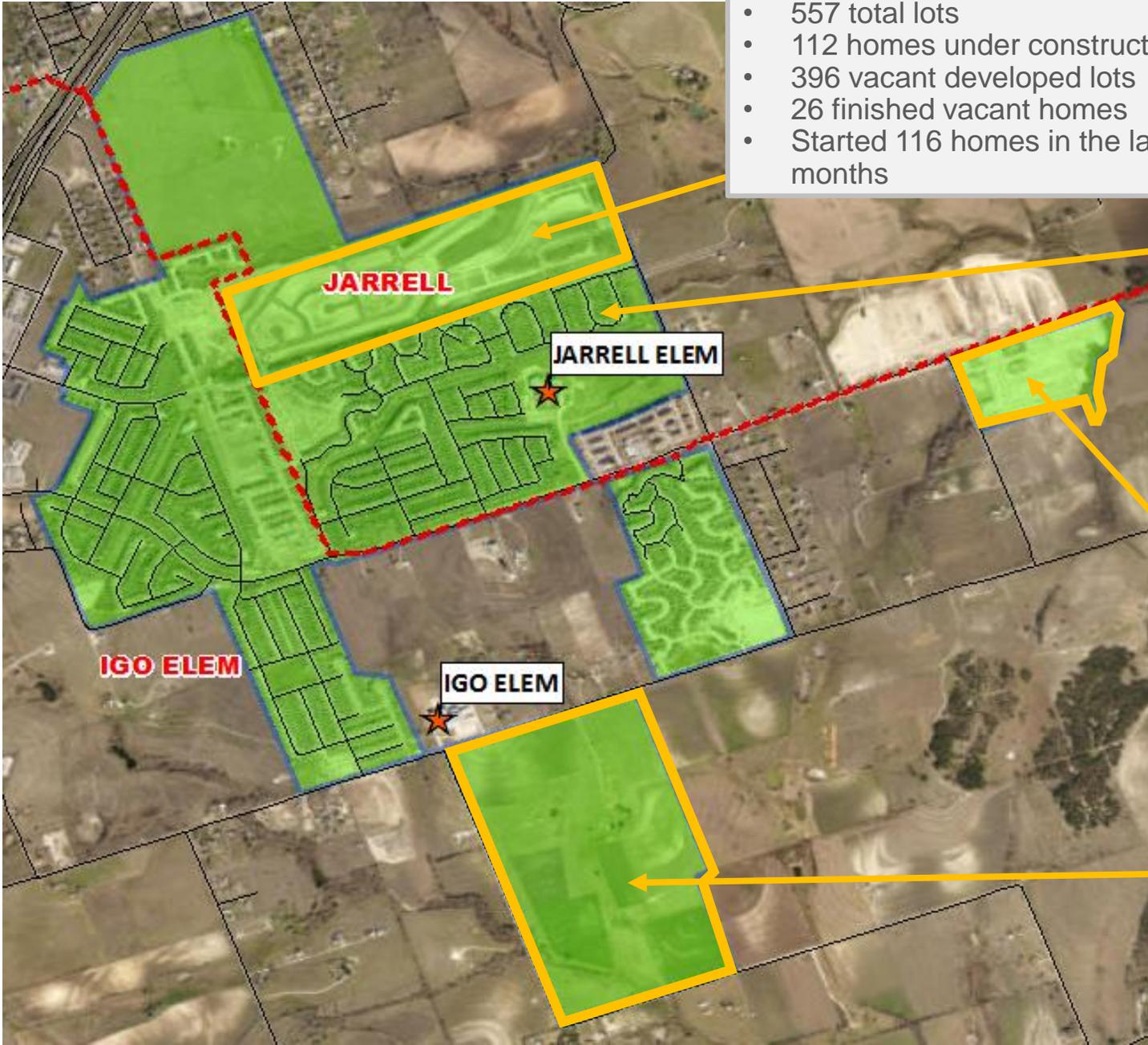


- In the district, there are 7 actively building subdivisions
- JISD has 13 future subdivisions in the planning stages
- Of these, groundwork is underway on 950 lots in 4 subdivisions





District Housing Activity



- Sonterra/ Bailey Park**
- 557 total lots
 - 112 homes under construction
 - 396 vacant developed lots
 - 26 finished vacant homes
 - Started 116 homes in the last 12 months

- Sonterra/ West Single Family Igo Elementary**
- 2,976 total lots
 - 1,662 occupied homes
 - 59 homes under construction
 - 29 vacant developed lots
 - 1,194 future lots
 - Started 372 homes and closed 501 homes in the last 12 months
- Jarrell Elementary**
- 2,217 total lots
 - 973 occupied homes
 - 15 homes under construction
 - 20 vacant developed lots
 - 1,194 future lots
 - Started 75 homes and closed 105 homes in the last 12 months

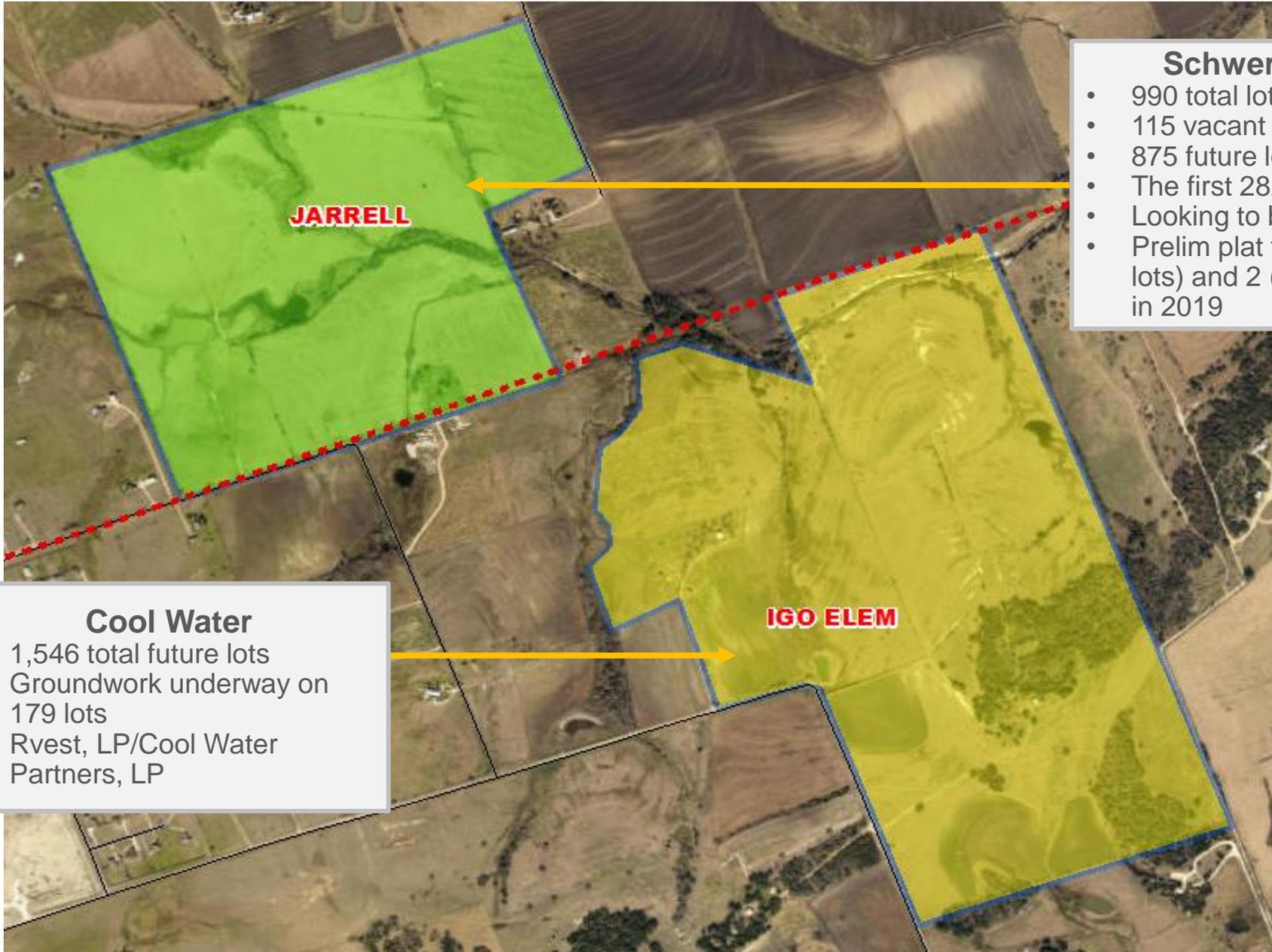
- Sonterra/ Enclave**
- 138 total lots
 - 33 homes under construction
 - 105 vacant developed lots
 - FKA Sonterra Section 13
 - All lots delivered 3Q20

- Sonterra/Eastwood**
- 1,290 future lots
 - Groundwork expected to begin in the next 12 months





District Housing Activity



Schwertner Ranch

- 990 total lots
- 115 vacant developed lots
- 875 future lots
- The first 282 lots underway
- Looking to build 100+ per year
- Prelim plat for Phase 1 (115 lots) and 2 (167 lots) approved in 2019

Cool Water

- 1,546 total future lots
- Groundwork underway on 179 lots
- Rvest, LP/Cool Water Partners, LP





District Housing Activity



Stoneridge Crossing

- 449 total lots
- Groundwork underway on all lots
- Streets being put in
- LGI Homes
- Expected build out is 3 to 5 years

The Stone Crown

- 115-125 future lots
- Platting process is underway
- Centauro Homes





District Housing Activity

Home Place at Jarrell

- 316 total lots
- 230 occupied homes
- 71 vacant developed lots
- 14 homes under construction
- Started 33 and closed 28 homes in the last 12 months

JARRELL

JARRELL HIGH

Calumet

- 222 total lots
- 10 occupied homes
- 35 vacant developed lots
- 10 homes under construction
- Started 15 and closed 10 homes in the last 12 months

IGO ELEM





District Housing Activity



Rancho de Cielo

- 941 total future lots
- Groundwork is expected to begin 1Q21
- Sonterra Developer

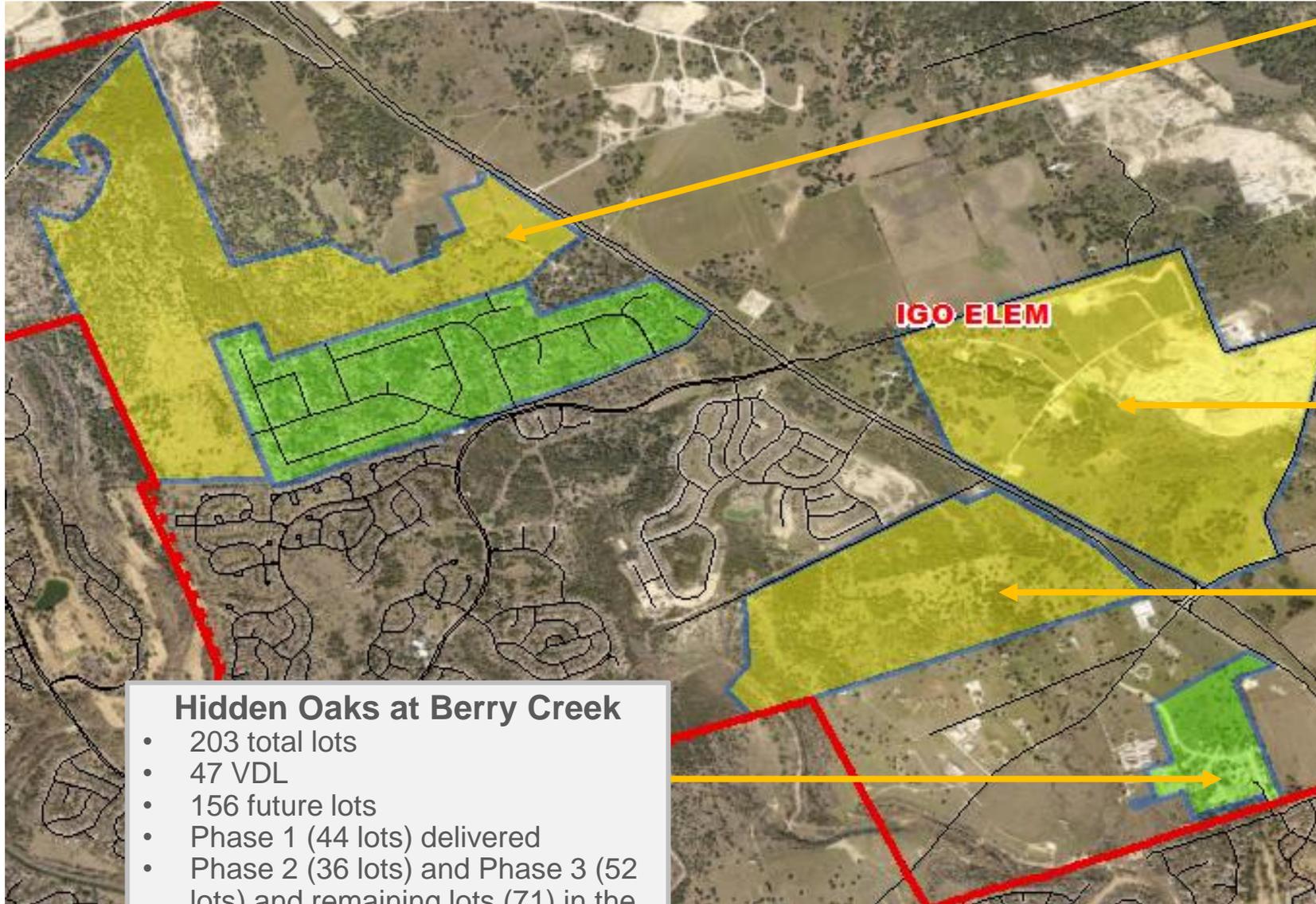
Rio Cresta

- Approx. 420 total future lots
- SonWest Co.
- Preliminary platting approved Feb 2020
- Final plat undergoing approval process





District Housing Activity



Madison at Georgetown

- 936 total future lots
- Still working with city of Georgetown in order to finalize plats and replats for the residential sections
- Includes commercial sections

Goodwater Texas

- 2,500 total future lots
- 600 acres containing hotel, mixed-use, retail and town centers
- 2,500 homes, lofts, and town homes with parks
- Presented to Georgetown City Council and P&Z in 2007, no movement made since

Berry Creek Highlands

- 1,169 total future lots
- 314 acres
- Austin approved PUD and rezoning
- Plan includes fire station, park, future Elementary school, and commercial areas
- Developer has agreed to contribute money for wastewater line extensions, elevated water storage tank and improvements on Shell Rd and SH 195

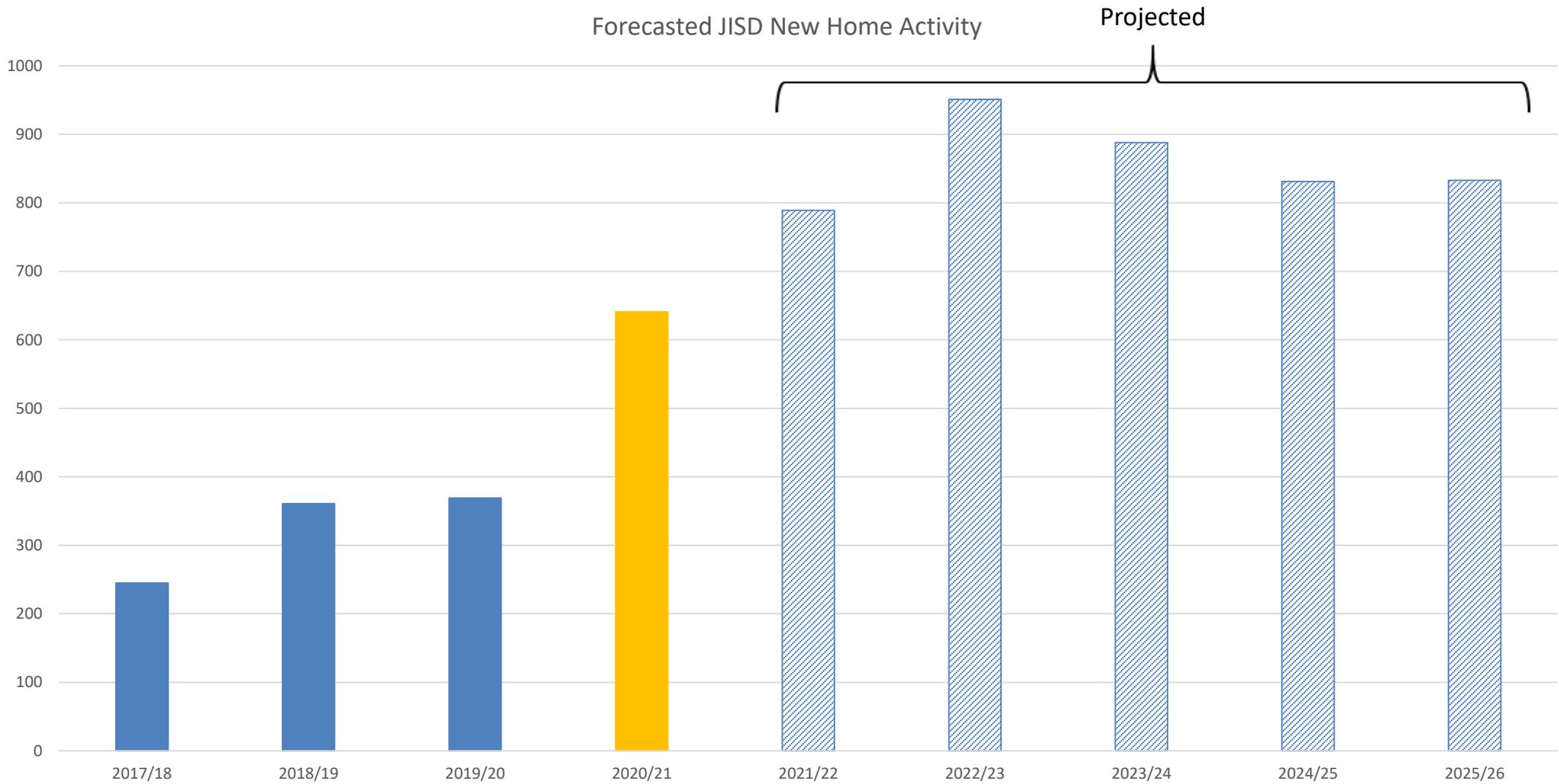
Hidden Oaks at Berry Creek

- 203 total lots
- 47 VDL
- 156 future lots
- Phase 1 (44 lots) delivered
- Phase 2 (36 lots) and Phase 3 (52 lots) and remaining lots (71) in the planning stages





Forecasted JISD New Home Activity



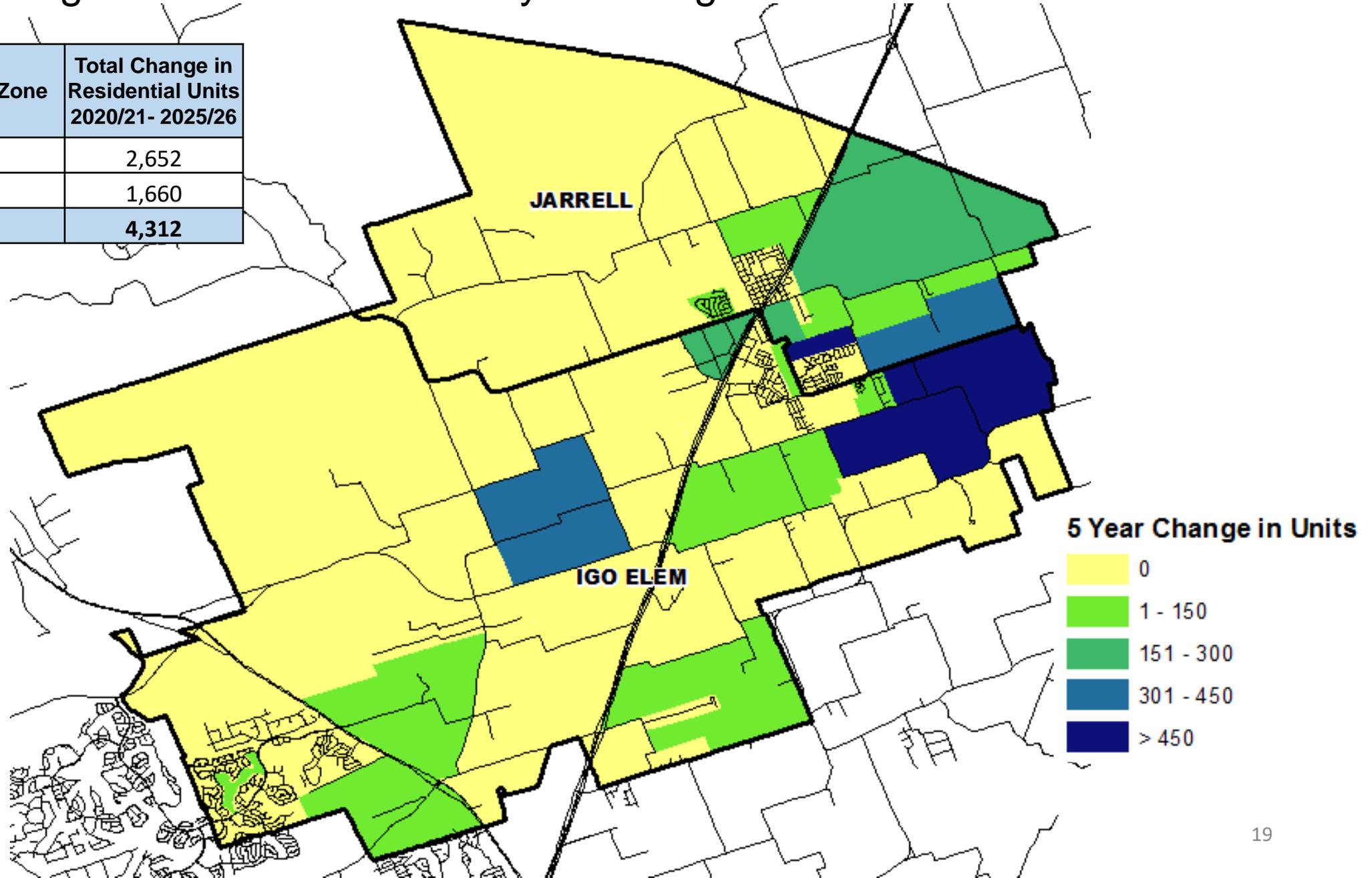
Jarrell ISD is forecasted to close roughly 750-950 new homes annually for the next 3-5 years





5 Year Change in Residential Units by Planning Area

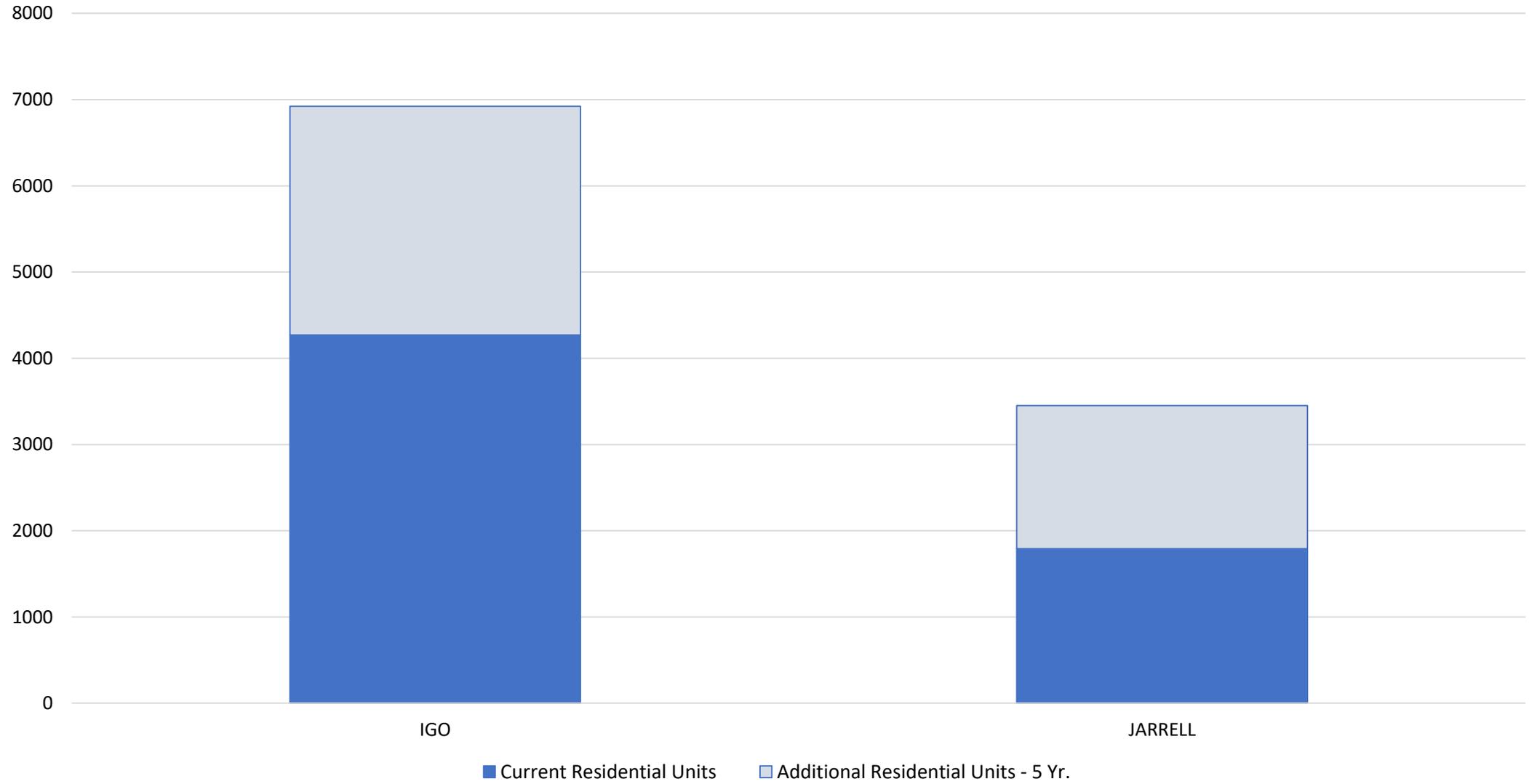
Elementary Zone	Total Change in Residential Units 2020/21- 2025/26
IGO	2,652
JARRELL	1,660
Grand Total	4,312





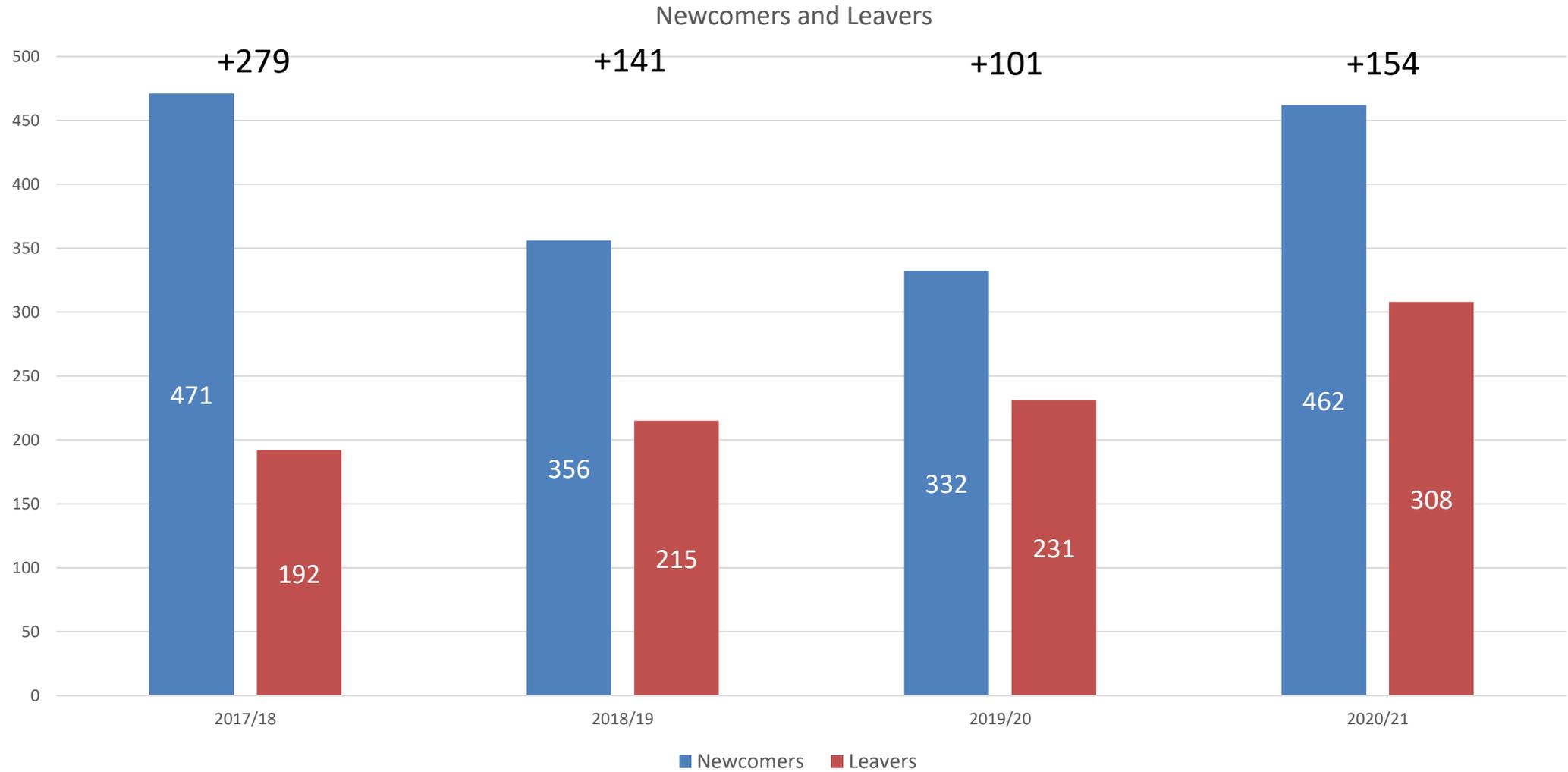
Total Residential Units by Elementary Zone, 2020/21-2025/26

Total Residential Units by Zone





Newcomer and Leaver Analysis

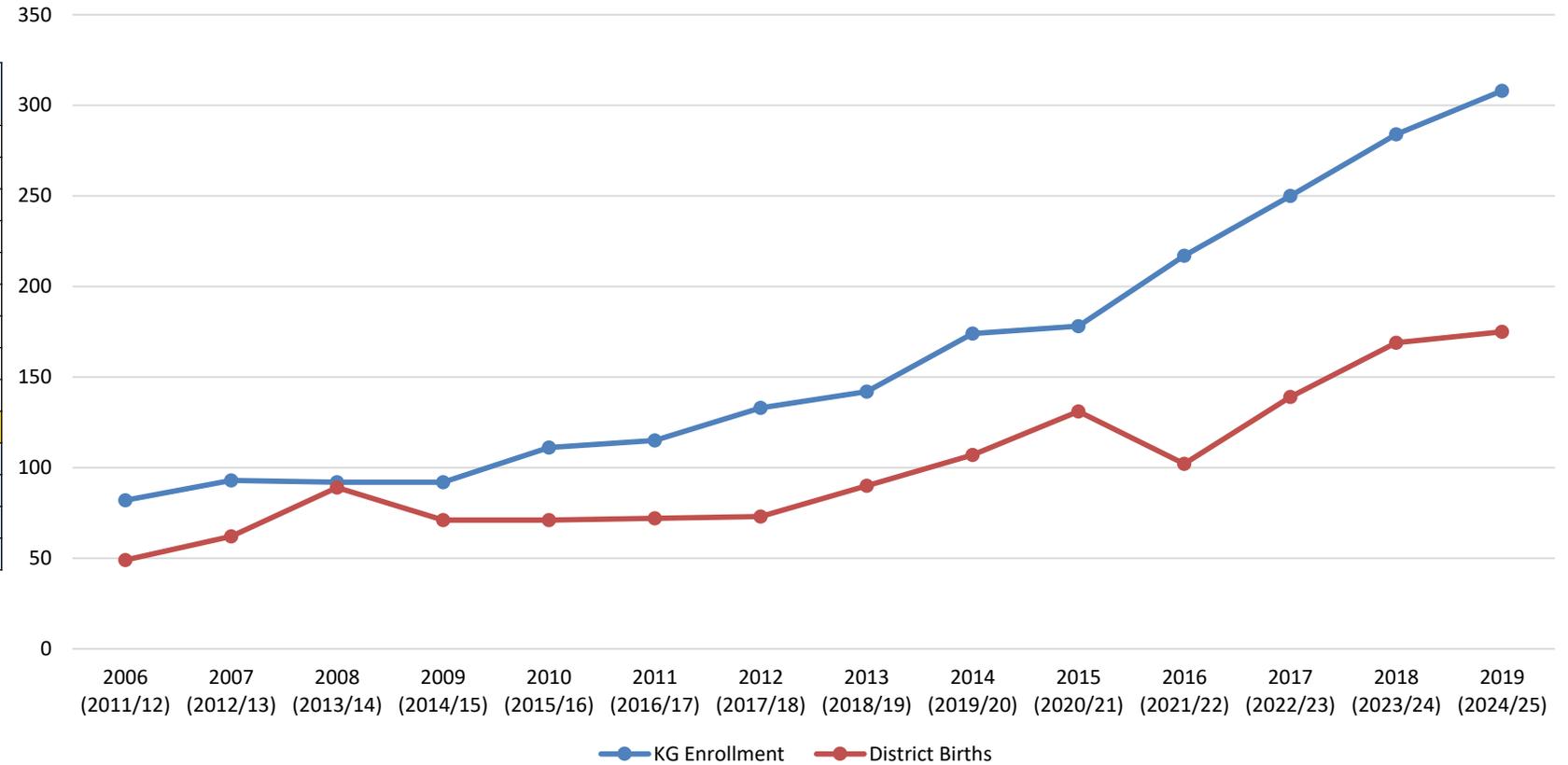




Birth Rate Analysis

Jarrell ISD KG Enrollment v. District Births

	KG Enrollment	District Births	Ratio
2006 (2011/12)	82	49	1.67
2007 (2012/13)	93	62	1.50
2008 (2013/14)	92	89	1.03
2009 (2014/15)	92	71	1.30
2010 (2015/16)	111	71	1.56
2011 (2016/17)	115	72	1.60
2012 (2017/18)	133	73	1.82
2013 (2018/19)	142	90	1.58
2014 (2019/20)	174	107	1.63
2015 (2020/21)	178	131	1.36
2016 (2021/22)	217	102	2.13
2017 (2022/23)	250	139	1.80
2018 (2023/24)	284	169	1.68
2019 (2024/25)	308	175	1.76





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
2016/17	9	80	115	116	115	113	112	113	114	99	100	107	109	102	86	1,490		
2017/18	10	80	133	146	133	127	131	120	119	135	108	124	124	113	100	1,703	213	14.3%
2018/19	13	90	142	153	154	138	144	146	141	129	142	136	126	122	121	1,897	194	11.4%
2019/20	5	108	174	164	171	161	168	159	159	169	143	172	125	120	104	2,102	205	10.8%
2020/21	4	87	178	198	183	171	171	182	170	172	177	186	178	139	118	2,314	212	10.1%
2021/22	10	125	217	232	218	203	186	189	214	193	185	223	191	176	136	2,698	384	16.6%
2022/23	21	165	250	263	269	251	234	220	227	257	222	241	229	189	172	3,210	512	19.0%
2023/24	23	180	284	295	293	304	279	266	254	261	283	285	247	227	185	3,666	456	14.2%
2024/25	23	180	308	332	318	319	334	309	308	290	284	363	292	245	222	4,127	461	12.6%
2025/26	23	180	338	348	356	349	351	364	337	352	312	366	372	289	240	4,577	450	10.9%
2026/27	23	180	367	388	373	387	385	383	397	371	382	401	375	368	283	5,063	486	10.6%
2027/28	23	180	396	417	407	394	410	415	412	433	402	458	393	371	361	5,472	409	8.1%
2028/29	23	180	422	449	430	426	417	442	446	449	468	506	472	389	364	5,883	411	7.5%
2029/30	23	180	444	475	464	451	458	449	475	486	486	584	512	467	381	6,335	452	7.7%
2030/31	23	180	468	500	491	486	477	494	483	518	526	600	588	507	458	6,799	464	7.3%

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



Ten Year Forecast by Campus

Campus	Capacity	History	Fall	Enrollment Projections									
		2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31
Igo Elementary	800	659	715	844	1,028	1,195	1,334	1,465	1,587	1,692	1,785	1,892	2,005
Jarrell Elementary	608	451	459	536	645	729	789	844	899	950	1,004	1,052	1,114
ELEMENTARY SCHOOL TOTAL		1,110	1,174	1,380	1,673	1,924	2,123	2,309	2,486	2,642	2,789	2,944	3,119
Elementary Absolute Change		558	64	206	293	251	199	186	177	156	147	155	175
Elementary Percent Change		101.09%	5.77%	17.55%	21.23%	15.00%	10.34%	8.76%	7.67%	6.28%	5.56%	5.56%	5.94%
Jarrell Middle School	764	471	519	592	706	798	882	1,001	1,150	1,247	1,363	1,447	1,527
MIDDLE SCHOOL TOTAL		471	519	592	706	798	882	1,001	1,150	1,247	1,363	1,447	1,527
Middle School Absolute Change		59	48	73	114	92	84	119	149	97	116	84	80
Middle School Percent Change		14.32%	10.19%	14.07%	19.26%	13.03%	10.53%	13.49%	14.89%	8.43%	9.30%	6.16%	5.53%
Jarrell High School	995	521	621	726	831	944	1,122	1,267	1,427	1,583	1,731	1,944	2,153
HIGH SCHOOL TOTAL		521	621	726	831	944	1,122	1,267	1,427	1,583	1,731	1,944	2,153
High School Absolute Change		16	100	105	105	113	178	145	160	156	148	213	209
High School Percent Change		3.17%	19.19%	16.91%	14.46%	13.60%	18.86%	12.92%	12.63%	10.93%	9.35%	12.31%	10.75%
DISTRICT TOTALS		2,102	2,314	2,698	3,210	3,666	4,127	4,577	5,063	5,472	5,883	6,335	6,799
District Absolute Change		205	212	384	512	456	461	450	486	409	411	452	464
District Percent Change		10.81%	10.09%	16.59%	18.98%	14.21%	12.58%	10.90%	10.62%	8.08%	7.51%	7.68%	7.32%

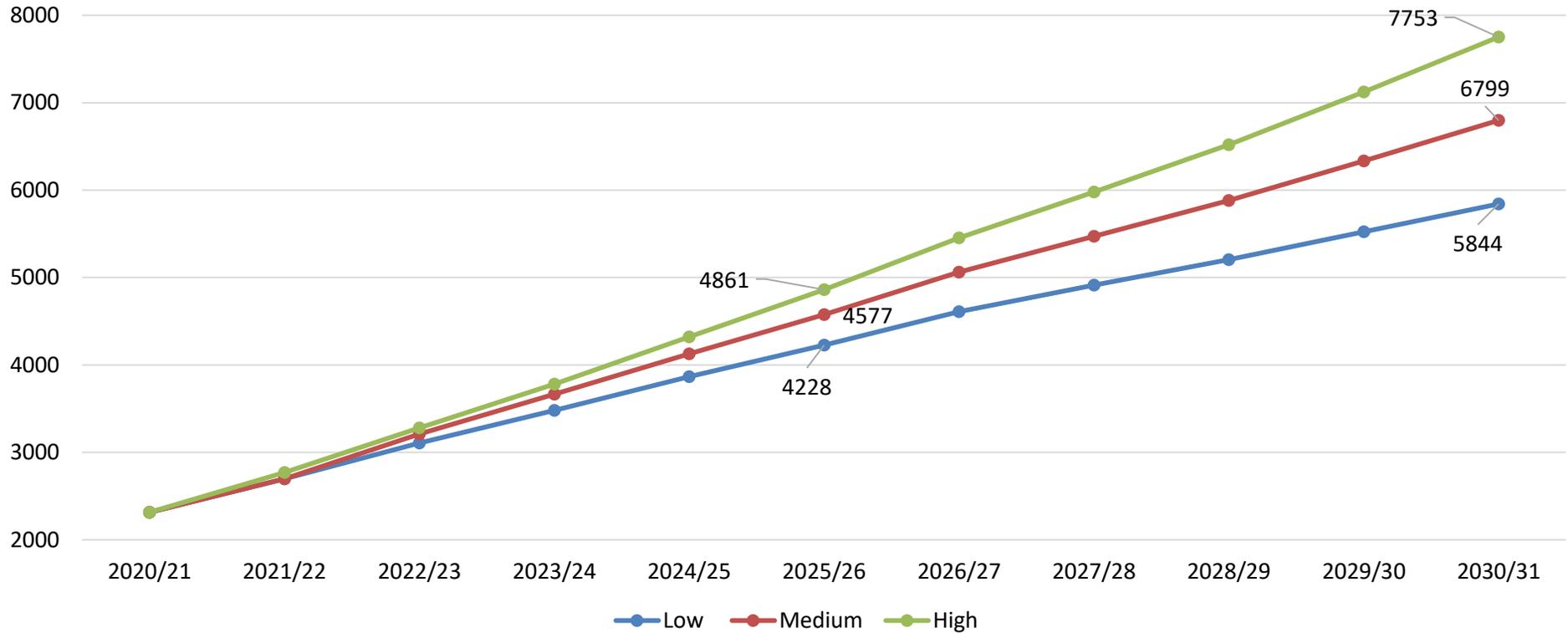
Green box = within 5% of capacity
 Yellow box = over 100% capacity



Key Takeaways



Jarrell ISD Enrollment Projection Forecast



- Most districts in Austin have been 5%-6% under student enrollment forecasts, but JISD has experienced only a 2% deficit to forecast and an overall growth of 10.1%
- Jarrell ISD is expected to add 750-900 homes annually for the next 3-5 years
- JISD will enroll more than 4,500 students for the 2025/26 school year, and more than 6,700 by 2030/31