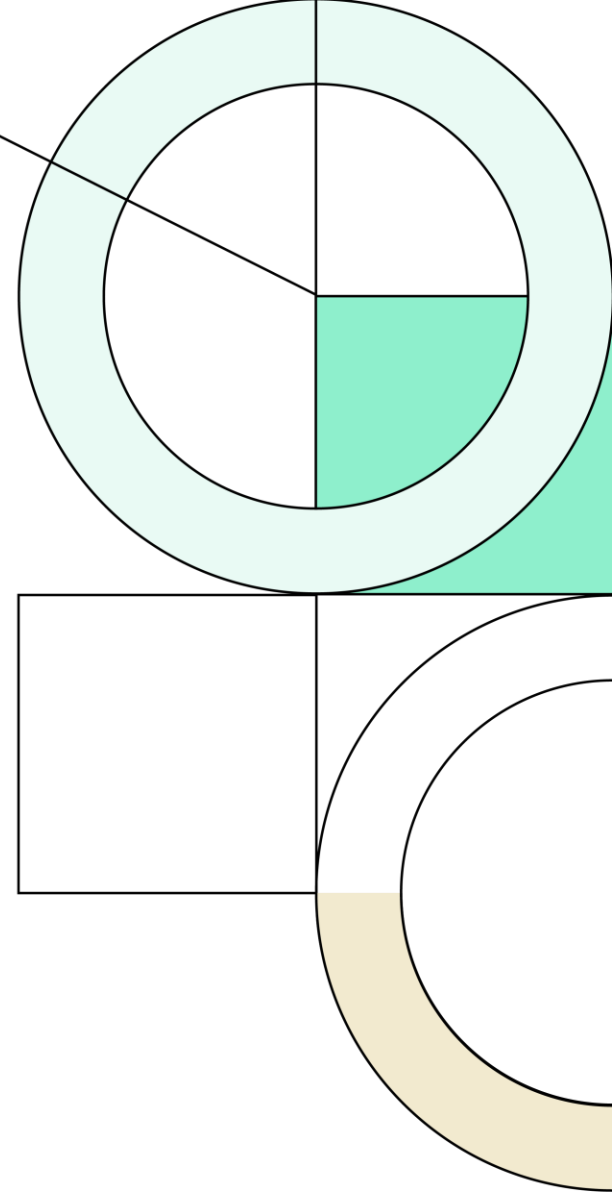


**Jarrell
Independent
School
District**

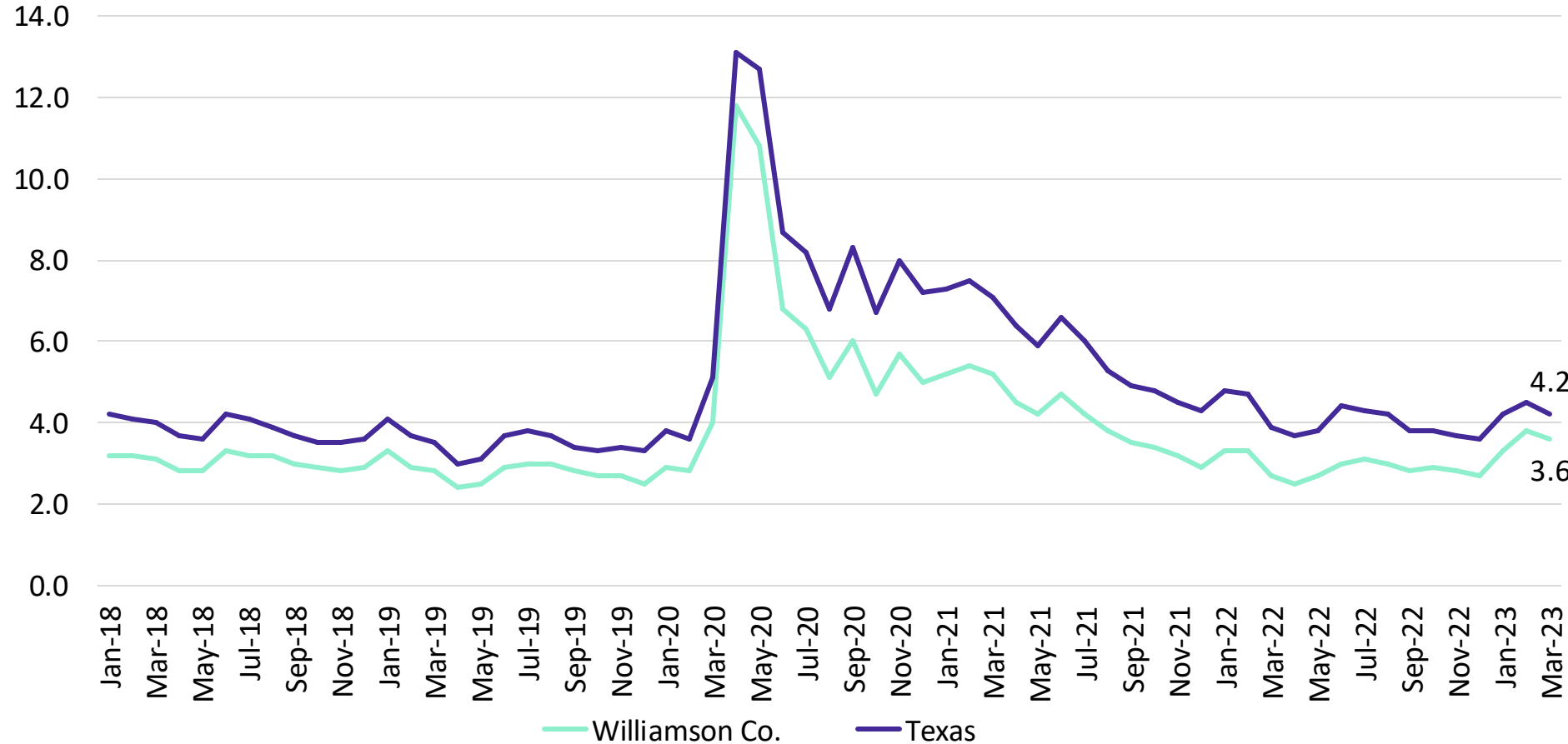
2Q23

Demographic Report



Local Economic Conditions

Unemployment Rates, Jan. 2018 - Mar. 2023



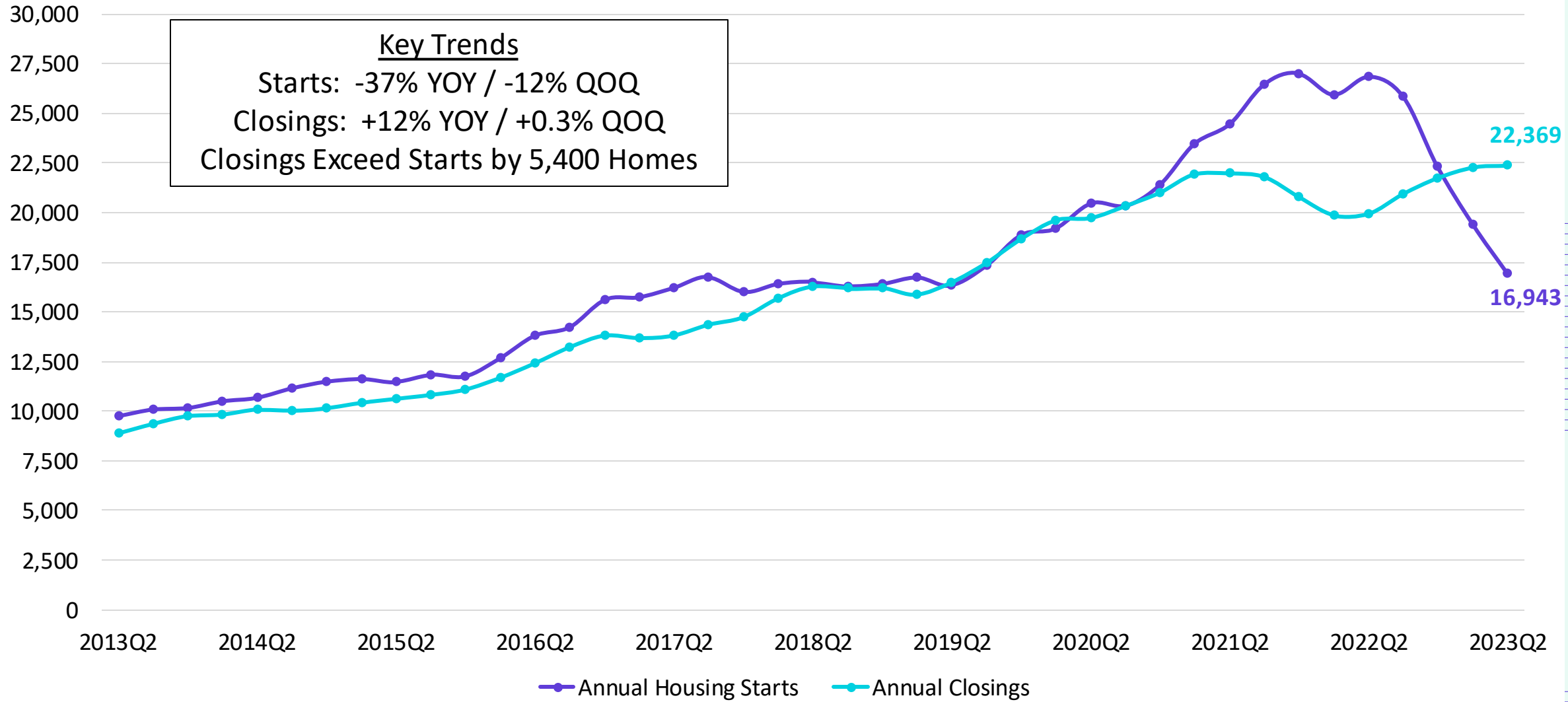
Unemployment Rate, Year-Over-Year





Austin New Home Closings

Annual Housing Starts vs. Annual Closings





Austin New Home Ranking Report

ISD Ranked by Annual Closings – 2Q23

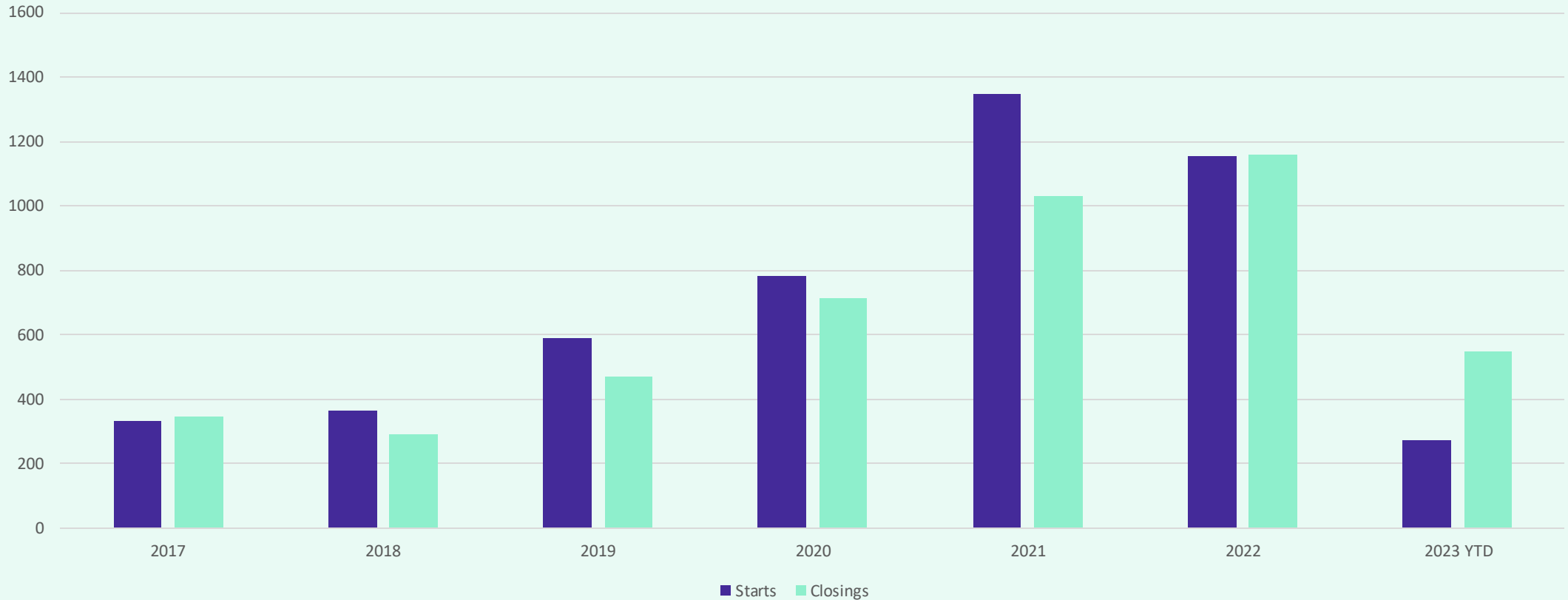
Rank	District Name	Annual Starts	Annual Closings	Inventory	VDL	Future
1	GEORGETOWN ISD	1,731	2,718	1,378	3,516	15,809
2	HAYS CISD	2,430	2,614	2,374	6,344	39,485
3	LEANDER ISD	1,374	2,174	1,150	2,503	5,266
4	LIBERTY HILL ISD	1,358	2,083	1,071	3,421	8,371
5	HUTTO ISD	1,347	1,690	795	1,439	10,610
6	AUSTIN ISD	1,942	1,614	2,844	1,290	9,689
7	MANOR ISD	1,072	1,394	858	1,387	15,272
8	JARRELL ISD	701	1,098	379	2,094	9,573
9	PFLUGERVILLE ISD	597	1,048	444	630	6,228
10	DEL VALLE ISD	692	929	640	2,295	20,967
11	SAN MARCOS CISD	618	912	461	1,040	7,244
12	DRIPPING SPRINGS ISD	504	845	495	1,150	7,332
13	ROUND ROCK ISD	389	790	358	1,068	5,231
14	BASTROP ISD	606	746	521	2,650	15,597
15	LAKE TRAVIS ISD	348	567	501	1,170	3,885
16	ELGIN ISD	568	486	372	649	8,737
17	LAGO VISTA ISD	80	228	102	377	3,101
18	TAYLOR ISD	121	199	62	220	1,101
19	LOCKHART ISD	393	126	326	870	19,430
20	SMITHVILLE ISD	3	46	2	48	471

* Based on additional research by Zonda Education

** Totals **DO NOT** include age-restricted communities



District New Home Starts and Closings by Quarter

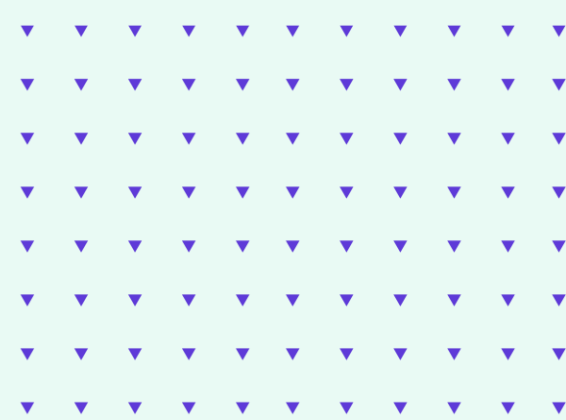


Starts	2017	2018	2019	2020	2021	2022	2023
1Q	44	51	55	155	313	327	93
2Q	111	121	129	135	339	413	180
3Q	103	112	248	241	288	324	
4Q	73	81	160	251	406	92	
Total	331	365	592	782	1,346	1,156	273



Closings	2017	2018	2019	2020	2021	2022	2023
1Q	85	72	85	129	244	230	308
2Q	53	32	97	195	263	409	240
3Q	109	99	107	166	342	267	
4Q	98	88	180	223	180	253	
Total	345	291	469	713	1,029	1,159	548

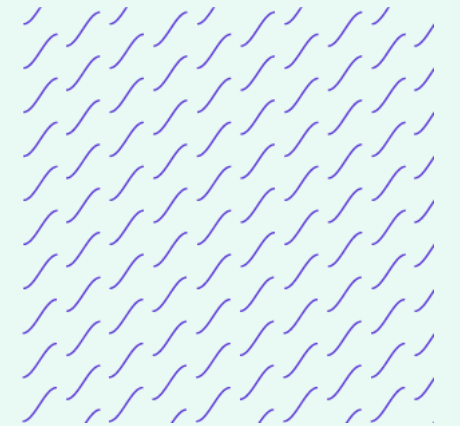


District Housing Overview by Elementary Zone



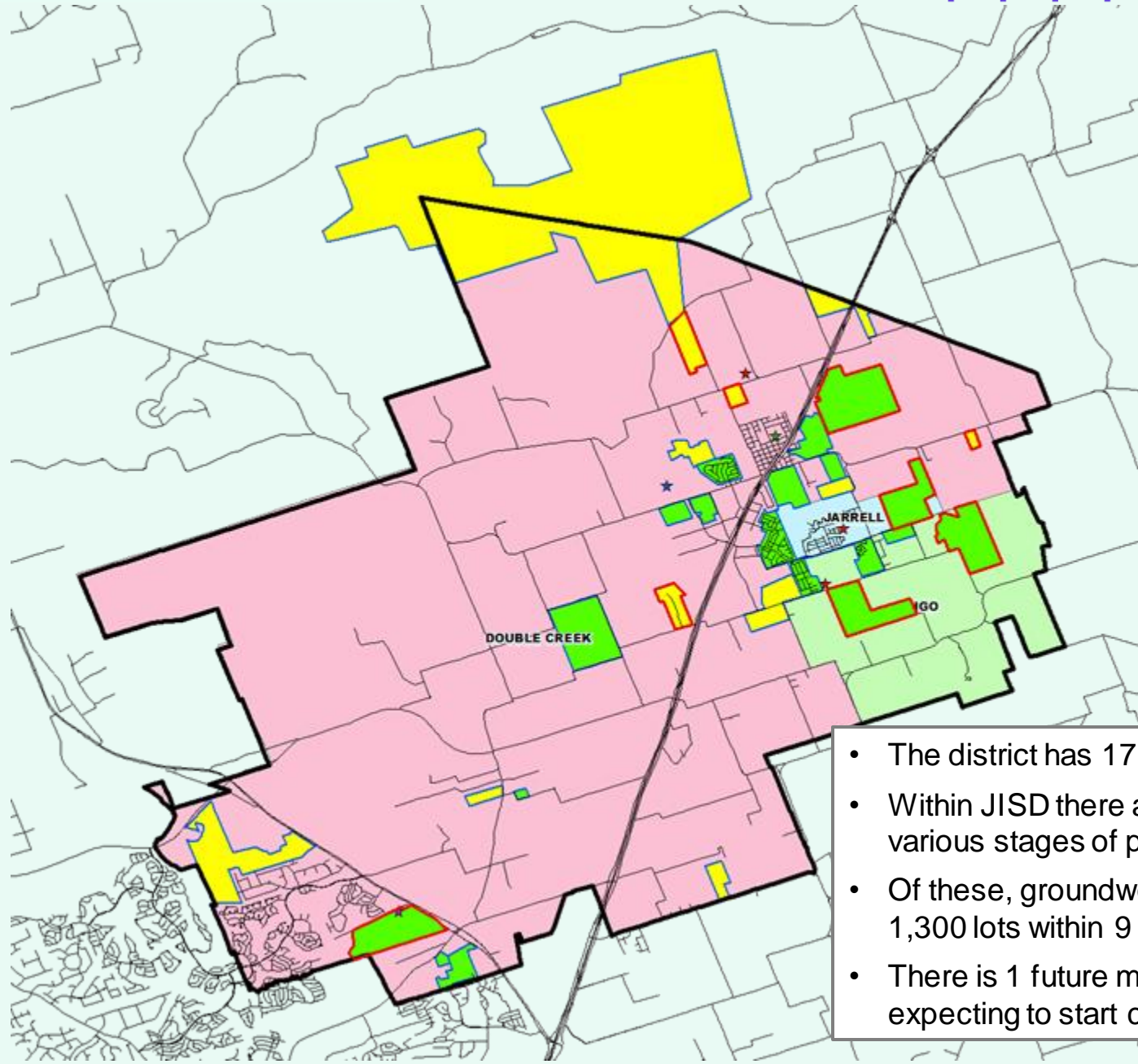
Elementary	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Under Const.	Inventory	Vacant Dev. Lots	Future
IGO	307	86	364	120	108	192	686	8,536
DOUBLE CREEK	372	74	721	120	103	167	1,293	629
JARRELL	22	20	13	0	20	20	115	408
Grand Total	701	180	1,098	240	231	379	2,094	9,573

 Highest activity in the category
 2nd highest activity in the category





District Housing Overview




Multi-Family Developments

 FUTURE

Subdivisions

 ACTIVE

 FUTURE

 Groundwork Underway

- The district has 17 actively building subdivisions
- Within JISD there are 12 future subdivisions in various stages of planning
- Of these, groundwork is underway on more than 1,300 lots within 9 subdivisions
- There is 1 future multi-family development, expecting to start construction in Nov. 2023



2Q23 Housing activity



Subdivision Name	Sub Area	Status	Lot Size	Price Range	Qtr Starts	Ann Starts	Qtr Clos	Ann Clos	Occ	2023			VDL	Future	Total
										Mod	Fin Vac	U/C			
Sonterra/Eastwood	N-Jarl	Act 2Q21	40'-50'	\$223-\$436	28	193	64	454	575	5	15	30	586	0	1,211
Sonterra/Cool Water	N-Jarl	Act 1Q21	40'-50'	\$220-\$375	37	128	33	90	254	0	24	62	652	409	1,401
Rancho Del Cielo	N-Jarl	Act 3Q22	40'	\$255-\$300	54	109	42	42	42	1	21	45	113	687	909
Berry Creek Highlands	N-GtwnW	Act 3Q21	45'-60'	\$355-\$499	12	73	23	37	37	2	16	27	120	656	858
Sonterra/Rio Lobo	N-Jarl	Act 3Q21	45'	\$260-\$381	9	50	23	174	186	1	15	10	25	0	237
Stonebridge Crossing	N-Jarl	Act 4Q20	45'	\$290-\$360	0	50	17	125	429	1	9	0	0	0	439
Calumet/Single Family	N-Jarl	Act 1Q19	50'	\$229-\$405	9	32	8	19	76	2	1	16	29	100	224
Villages at Schwertner Ranch	N-Jarl	Act 3Q20	50'	\$260-\$349	20	22	0	11	279	0	0	20	115	408	822
Enclave at Hidden Oaks	N-GtwnW	Act 1Q21	45'	\$350-\$420	0	15	8	14	15	2	15	7	25	0	64
Hidden Oaks at Berry Creek	N-GtwnW	Act 3Q20	45'-100'	\$419-\$760	1	14	10	53	95	0	2	1	15	88	201
Eastern Wells	N-Jarl	Act 2Q22	50'	\$271-\$271	10	10	0	0	0	0	0	10	222	477	709
Home Place at Jarrell	N-Jarl	Act 1Q13	70'	\$212-\$333	0	3	12	26	288	0	4	2	21	0	315
Balcones	N-Jarl	Future	50'	\$300-\$417	0	1	0	47	91	0	0	0	0	109	200



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
2018/19	13	89	142	153	154	138	144	146	141	129	142	136	126	122	121	1,896		
2019/20	5	113	174	164	171	161	168	159	159	169	143	172	125	120	104	2,107	211	11.1%
2020/21	4	87	182	198	181	171	170	184	167	170	176	183	177	137	118	2,305	198	9.4%
2021/22	6	151	224	241	244	222	219	209	208	209	193	221	192	205	141	2,885	580	25.2%
2022/23	18	173	263	271	267	264	255	248	263	240	238	229	236	202	197	3,364	479	16.6%
2023/24	19	200	301	317	302	299	301	293	287	302	273	281	240	247	198	3,860	496	14.7%
2024/25	19	240	333	350	352	335	338	341	332	330	347	322	288	238	242	4,407	547	14.2%
2025/26	19	290	381	410	404	409	387	393	409	398	396	409	330	285	233	5,153	746	16.9%
2026/27	19	320	428	461	461	466	471	443	452	470	458	467	419	327	279	5,941	788	15.3%
2027/28	19	360	478	514	520	520	530	530	509	520	541	540	458	415	320	6,774	833	14.0%
2028/29	19	380	532	560	573	591	590	602	597	585	598	622	535	453	407	7,644	870	12.8%
2029/30	19	400	589	629	622	646	669	668	649	669	673	674	621	530	444	8,502	858	11.2%
2030/31	19	400	645	677	688	687	718	746	753	727	769	758	667	615	519	9,388	886	10.4%
2031/32	19	400	692	729	735	757	759	793	804	843	814	889	752	660	603	10,249	861	9.2%
2032/33	19	400	741	794	788	804	832	834	855	884	927	941	883	744	647	11,093	844	8.2%

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



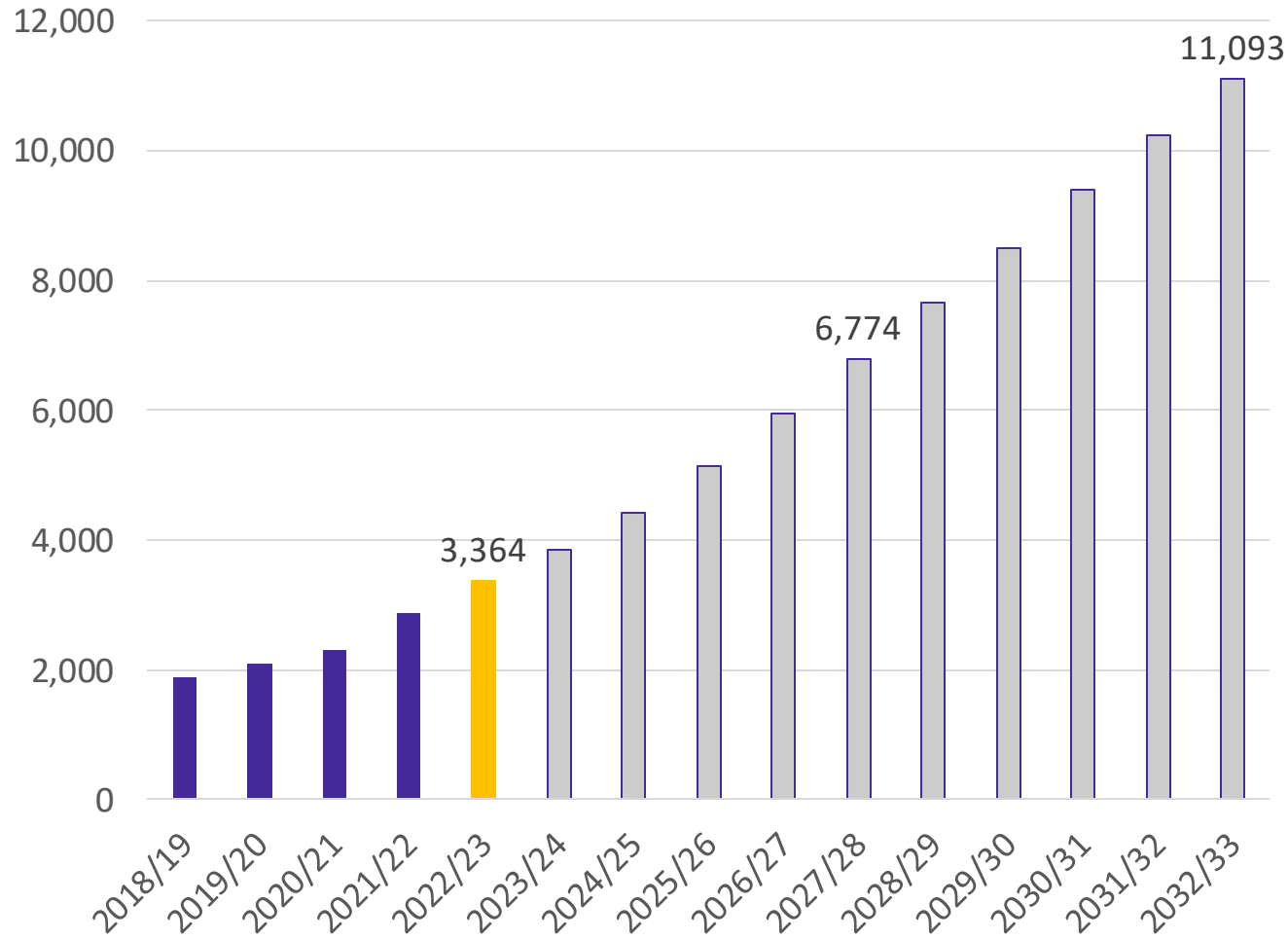
Ten Year Forecast by Campus

Campus	Capacity	2021/22	Fall	ENROLLMENT PROJECTIONS									
			2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33
Igo Elementary	800	845	975	645	779	955	1,091	1,253	1,387	1,509	1,588	1,649	1,709
Jarrell Elementary	608	671	784	652	676	740	790	834	857	870	871	871	874
Double Creek Elementary	900			735	853	998	1,188	1,384	1,603	1,863	2,121	2,364	2,629
ELEMENTARY SCHOOL TOTAL	2,308	1,516	1,759	2,032	2,308	2,693	3,069	3,471	3,847	4,242	4,580	4,884	5,212
Elementary Absolute Change		339	243	273	276	385	376	402	376	395	338	304	328
Elementary Percent Change		28.80%	16.03%	15.52%	13.58%	16.68%	13.96%	13.10%	10.83%	10.27%	7.97%	6.64%	6.72%
Jarrell Middle School	764/1,004	610	741	862	1,009	1,203	1,380	1,570	1,780	1,991	2,249	2,461	2,666
MIDDLE SCHOOL TOTAL		610	741	862	1,009	1,203	1,380	1,570	1,780	1,991	2,249	2,461	2,666
Middle School Absolute Change		97	131	121	147	194	177	190	210	211	258	212	205
Middle School Percent Change		18.91%	21.48%	16.33%	17.05%	19.23%	14.71%	13.77%	13.38%	11.85%	12.96%	9.43%	8.33%
Jarrell High School	995/1,258	759	864	966	1,090	1,257	1,492	1,733	2,017	2,269	2,559	2,904	3,215
HIGH SCHOOL TOTAL		759	864	966	1,090	1,257	1,492	1,733	2,017	2,269	2,559	2,904	3,215
High School Absolute Change		144	105	102	124	167	235	241	284	252	290	345	311
High School Percent Change		23.41%	13.83%	11.81%	12.84%	15.32%	18.70%	16.15%	16.39%	12.49%	12.78%	13.48%	10.71%
DISTRICT TOTALS		2,885	3,364	3,860	4,407	5,153	5,941	6,774	7,644	8,502	9,388	10,249	11,093
District Absolute Change		580	479	496	547	746	788	833	870	858	886	861	844
District Percent Change		25.16%	16.60%	14.74%	14.17%	16.93%	15.29%	14.02%	12.84%	11.22%	10.42%	9.17%	8.23%



Key Takeaways

Enrollment Forecast



- District enrollment is tracking slightly below projections (3,632)
- Enrollment likely to get close to projections by mid-year
- Developers full steam ahead with groundwork underway on more than 1,300 lots within 9 subdivisions
- Will have next round of projections ready by mid October