

*Jarrell  
Independent  
School  
District*



Demographic  
Report  
Fall 2018

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



TEMPLETON  
DEMOGRAPHICS

hanleywood | metrostudy



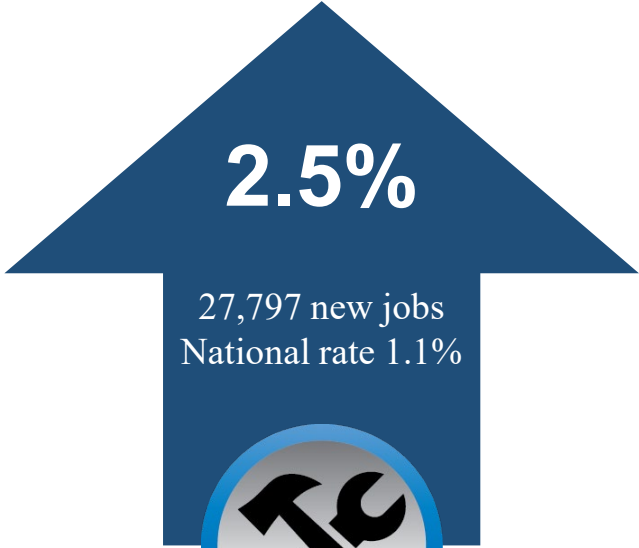
# Economic Conditions – Austin Area (September 2018)

## Unemployment Rate



U.S. 3.6%  
 Texas 3.7%  
 Austin MSA 2.9%  
 Williamson Co. 3.0%

**-0.1%**



## Job Growth

## Annual Home Starts



316 fewer home  
 Starts than 3Q17

**16,061**

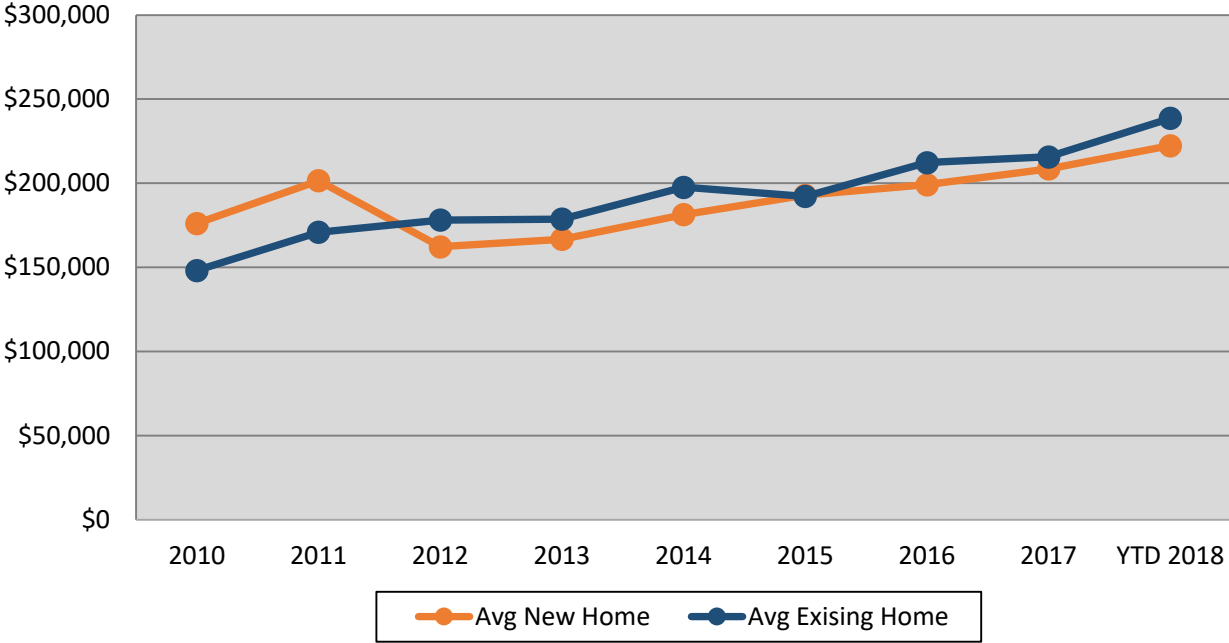




# Jarrell ISD Housing Price Analysis

New vs. Existing Homes 2010, YTD 2018

### Average New vs. Existing Sale Price, 2010-2017



	Avg New Home	Avg Existing Home
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
YTD 2018	\$222,324	\$238,627

- The average new home price has risen more than 26% since 2010, a price difference of \$46,121
- The average existing home price within JISD has risen 61% since 2010, a price change of \$90,421





# Austin New Home Ranking Report

## ISD Ranked by Annual Closings – 3Q18

Rank	District Name	Annual Starts	Annual Closings	VDL	Future
1	Leander ISD	2,241	2,345	3,030	14,003
2	Austin ISD	1,572	1,748	1,551	10,733
3	Pflugerville ISD	1,663	1,650	1,969	10,616
4	Round Rock ISD	1,451	1,596	1,358	5,877
5	Georgetown ISD	1,602	1,400	2,693	16,831
6	Hays CISD	1,398	1,302	1,862	22,496
7	Manor ISD	1,202	1,193	1,510	14,986
8	Del Valle ISD	891	889	578	26,644
9	Hutto ISD	984	884	1,075	4,669
10	Lake Travis ISD	767	782	1,581	5,148
11	Liberty Hill ISD	856	726	2,135	11,162
12	Dripping Springs ISD	634	646	1,528	5,635
13	Bastrop ISD	193	310	1,086	18,956
<b>14</b>	<b>Jarrell ISD*</b>	<b>325</b>	<b>301</b>	<b>197</b>	<b>9,014</b>
15	San Marcos CISD	265	221	670	8,007
16	Eanes ISD	112	85	133	154
17	Taylor ISD	62	61	65	1,044
18	Lago Vista ISD	61	44	642	3,585
19	Elgin ISD	79	43	231	5,859
20	Smithville ISD	2	3	103	412

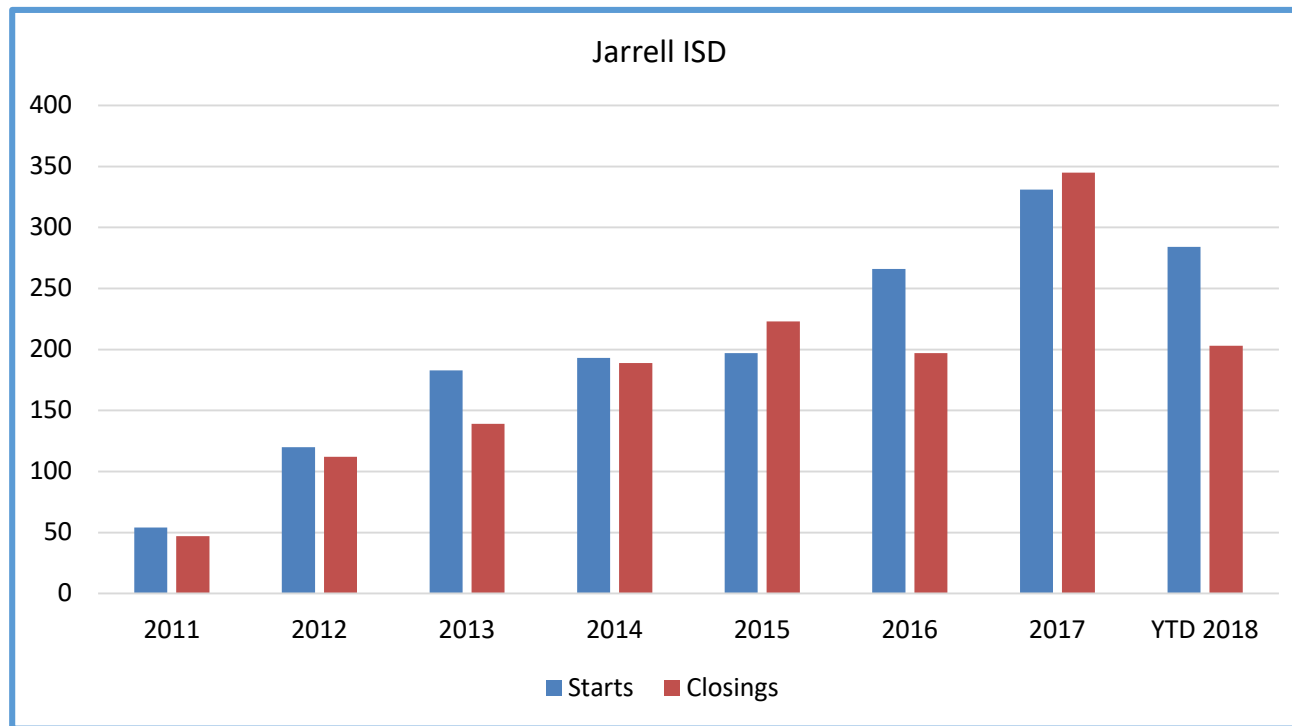
\*Totals adjusted based on additional TD research

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



# New Housing Activity

## Annual Starts and Closings, 2011-YTD 2018



Starts	2013	2014	2015	2016	2017	2018
1Q	33	32	49	36	44	51
2Q	32	43	66	62	111	121
3Q	47	67	37	82	103	112
4Q	71	51	45	86	73	
Total	183	193	197	266	331	284

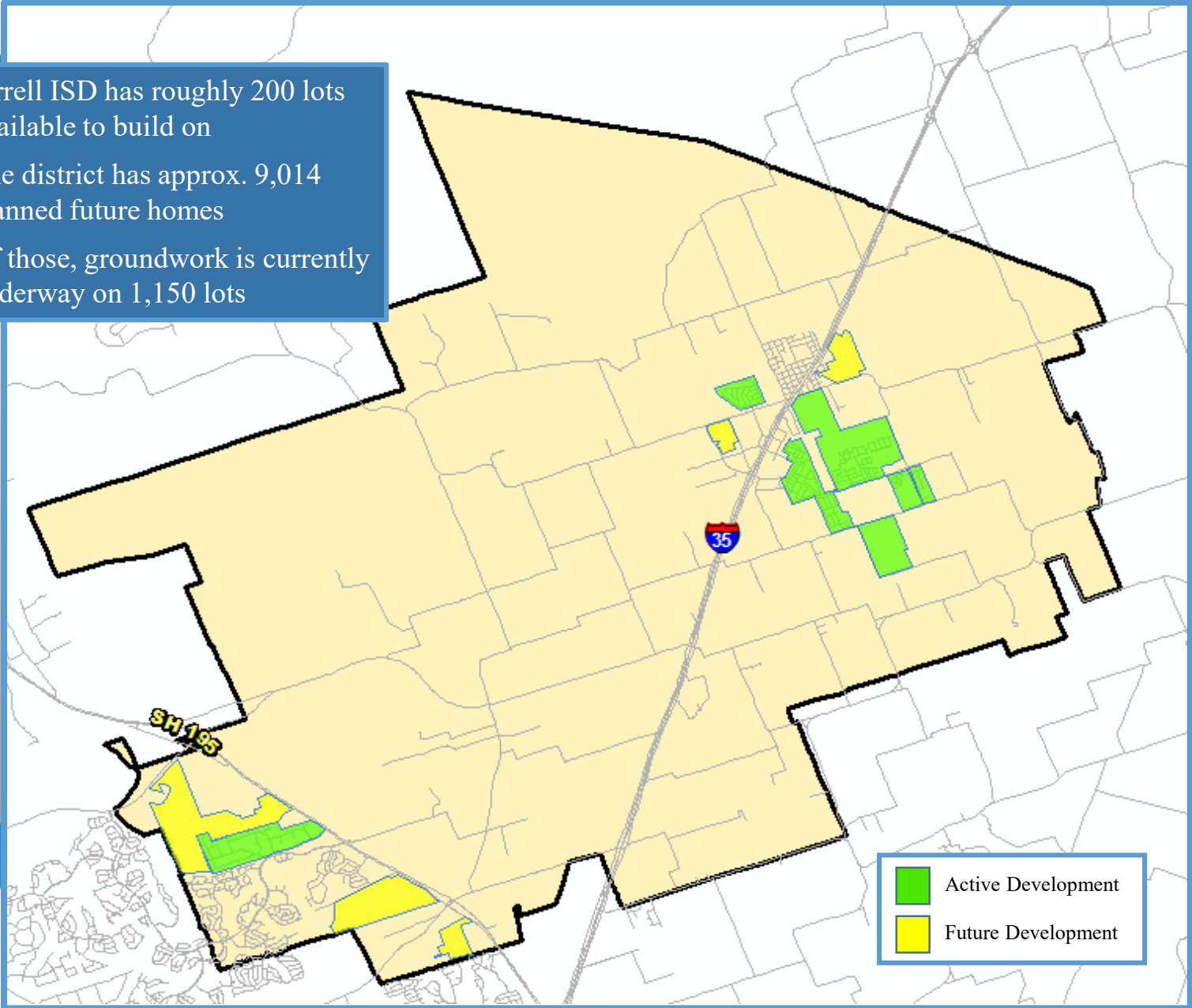
Closings	2013	2014	2015	2016	2017	2018
1Q	25	49	52	45	85	72
2Q	31	42	65	45	53	32
3Q	43	44	68	62	109	99
4Q	40	54	38	45	98	
Total	139	189	223	197	345	203

- In 3Q18 Jarrell started 112 homes, at this rate the district is on track to start nearly 380 homes this year
- Jarrell ISD has had 203 new home closings since the start of 2018, which is a slight decrease from the previous year



# Housing Activity Overview

- Jarrell ISD has roughly 200 lots available to build on
- The district has approx. 9,014 planned future homes
- Of those, groundwork is currently underway on 1,150 lots





# Active Subdivision



## Sonnera

- 5,599 total lots
- 3,660 future lots
- 1,725 occupied homes
- 68 VDL
- 91 homes under construction
- 269 homes closed in the last year
- 89 homes closed in 3Q18
- Planning to build 350 homes in 2018 and 400 homes in 2019
- Paving streets in 550-600 lots throughout sections 4, 7 & 8
- \$165K-\$250K



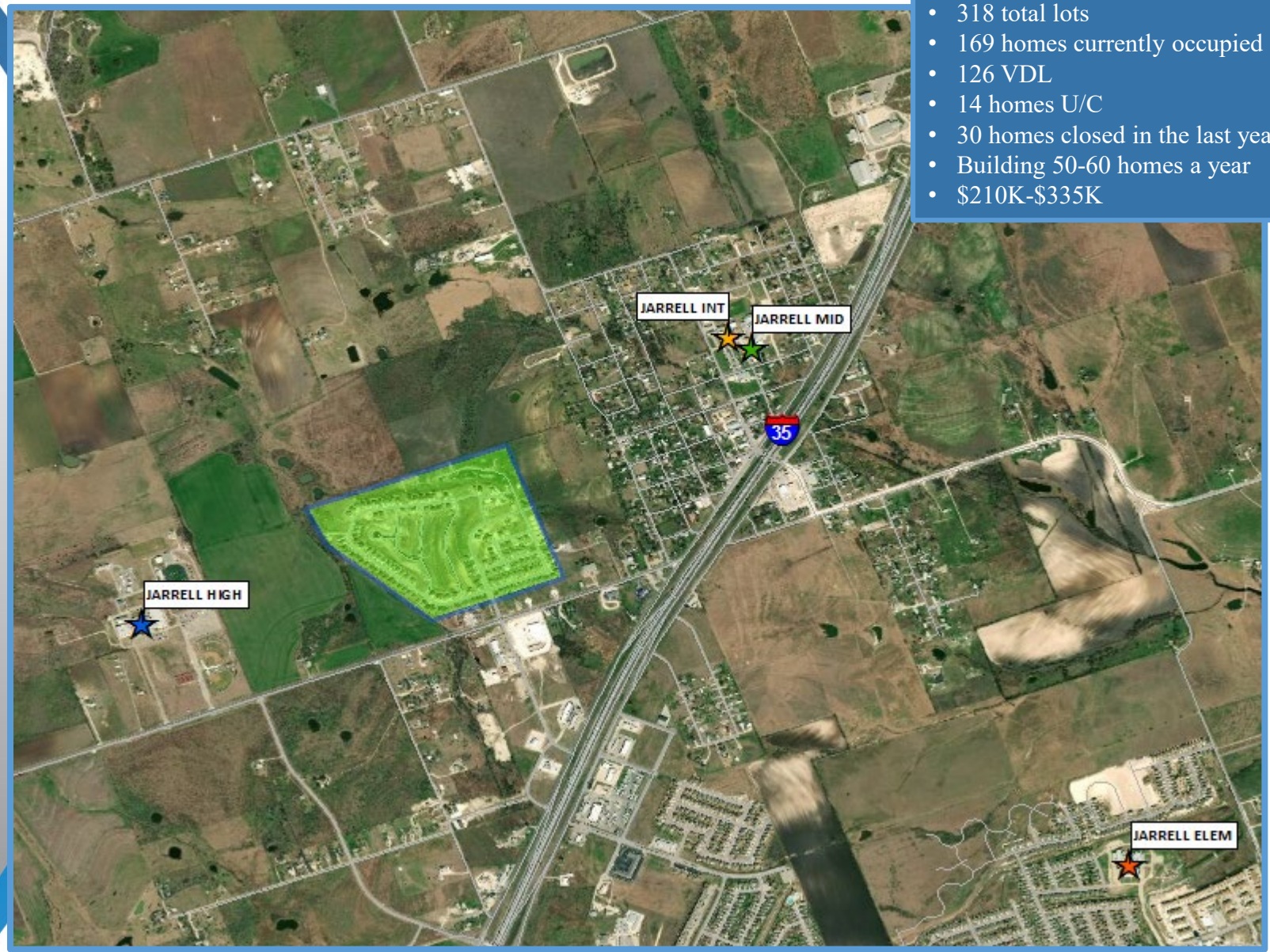


# Active Subdivision



## Home Place at Jarrell

- 318 total lots
- 169 homes currently occupied
- 126 VDL
- 14 homes U/C
- 30 homes closed in the last year
- Building 50-60 homes a year
- \$210K-\$335K





# Future Subdivision



## Calumet

- 220 single family homes planned
- 42 duplex units planned
- Groundwork began 4Q17
- Currently laying streets in subdivision
- Wastewater and utilities already complete
- Could start homebuilding by late 2019



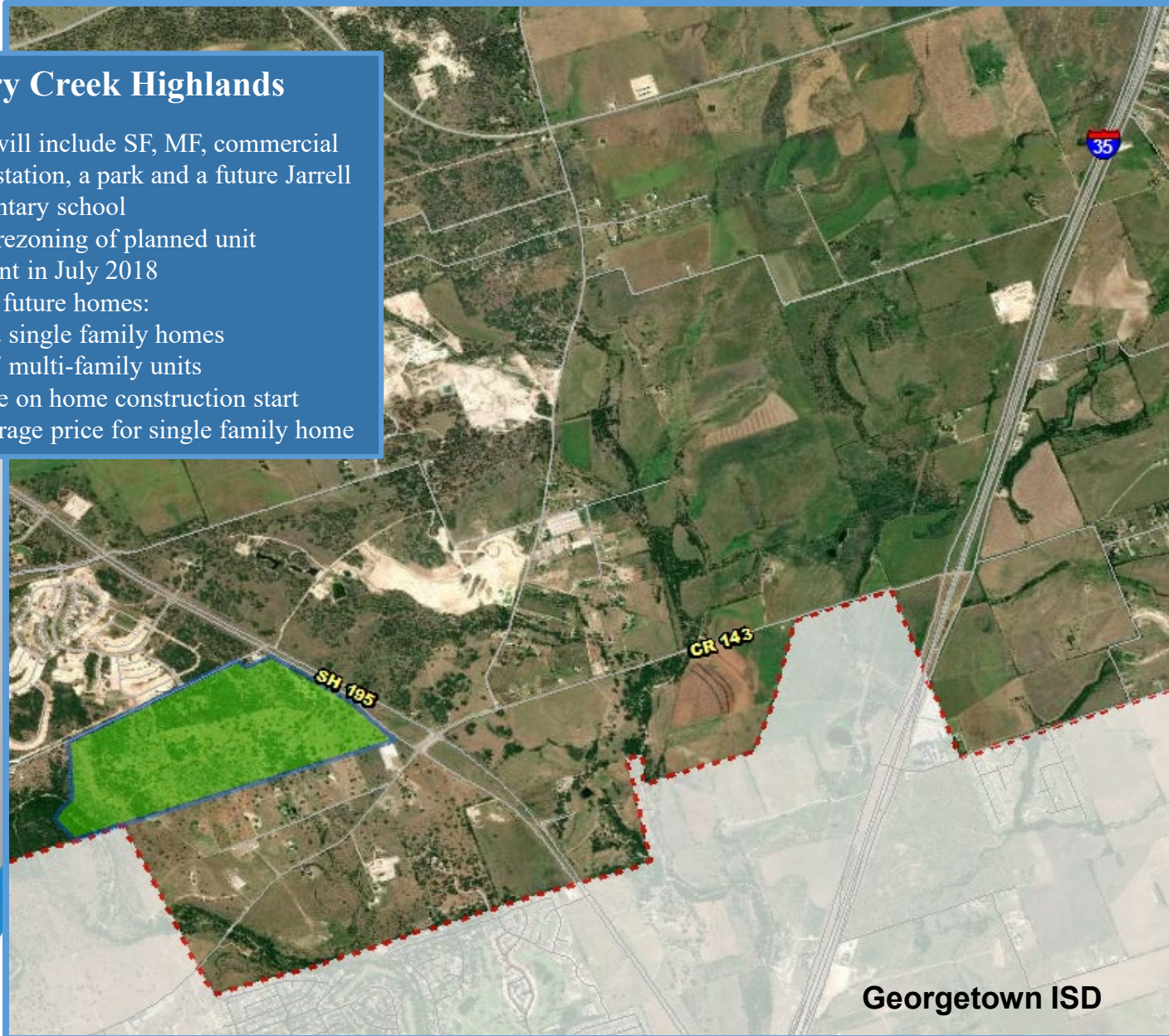




# Future Subdivision

## Berry Creek Highlands

- 314 acres will include SF, MF, commercial acres, fire station, a park and a future Jarrell ISD elementary school
- Approved rezoning of planned unit development in July 2018
- 1,489 total future homes:
  - 942 single family homes
  - 547 multi-family units
- No timeline on home construction start
- \$268K average price for single family home







# Active Development



### Manufactured Home Site

- Manufactured homes and RV home sites
- 200-250 lots at build out
- Approx. 70 homes as of 3Q18
- All lots available by the middle of 2019
- Homes estimated costs \$150K and under

Georgetown ISD





# Multi-Family Update



## Future Multi-Family

- The city anticipates development in the next few years and stated that land has already been cleared for multi-family development
- All plans still conceptual at this point no prelim plats or site maps available
- Plan for duplex units (no unit count), townhomes (approx. 44) and an apartment complex (no unit count)



# 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
2014/15	66	92	113	109	99	92	89	88	84	99	101	92	80	61	1,265		
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	103	142	153	154	138	144	146	141	129	142	136	126	122	121	1,897	194	11.4%
2019/20	103	170	170	165	159	152	156	161	155	142	178	144	127	120	2,102	205	10.8%
2020/21	103	207	205	186	168	170	167	173	174	171	177	180	145	124	2,350	248	11.8%
2021/22	103	209	245	221	201	180	179	179	187	187	214	179	182	142	2,608	258	11.0%
2022/23	103	240	250	265	231	221	193	195	193	206	224	210	181	178	2,890	282	10.8%
2023/24	103	264	287	271	278	240	245	212	211	211	254	220	208	177	3,181	291	10.1%
2024/25	103	267	315	310	287	306	257	266	233	230	259	249	218	204	3,504	323	10.2%
2025/26	103	278	294	340	335	316	327	281	290	250	281	254	247	214	3,810	306	8.7%
2026/27	103	292	306	318	347	350	342	357	306	315	307	275	251	242	4,111	301	7.9%
2027/28	103	302	330	331	335	375	376	373	389	331	386	301	272	246	4,450	339	8.2%
2028/29	103	314	335	357	348	360	403	411	407	421	406	378	298	267	4,808	358	8.0%

\*Yellow box = largest grade per year

\*Green box = second largest grade per year

- Jarrell ISD will enroll more than 2,100 students by 2019
- 5 year growth = 1,284 students
- 2023/24 enrollment = 3,181
- 10 year growth = 2,911 students
- 2028/29 enrollment = 4,808





# Ten Year Forecast

## By Campus

Campus	Capacity	HISTORY	Current	ENROLLMENT PROJECTIONS									
		2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Jarrell Elementary	700	502	552	608	701	778	858	925	995	1,015	1,019	1,066	1,109
<b>ELEMENTARY SCHOOL TOTAL</b>		502	552	608	701	778	858	925	995	1,015	1,019	1,066	1,109
Elementary Absolute Change		67	50	56	93	77	80	67	70	20	4	47	43
Elementary Percent Change		15.40%	9.96%	10.14%	15.30%	10.98%	10.28%	7.81%	7.57%	2.01%	0.39%	4.61%	4.03%
Jarrell Intermediate School	574	378	428	467	505	560	645	763	850	978	1,039	1,086	1,111
<b>INTERMEDIATE SCHOOL TOTAL</b>		378	428	467	505	560	645	763	850	978	1,039	1,086	1,111
Intermed. Absolute Change		40	50	39	38	55	85	118	87	128	61	47	25
Intermed. Percent Change		11.83%	13.23%	9.11%	8.14%	10.89%	15.18%	18.29%	11.40%	15.06%	6.24%	4.52%	2.30%
Jarrell Middle School	574	361	412	458	518	553	594	634	729	821	978	1,093	1,239
<b>MIDDLE SCHOOL TOTAL</b>		361	412	458	518	553	594	634	729	821	978	1,093	1,239
Middle School Absolute Change		48	51	46	60	35	41	40	95	92	157	115	146
Middle School Percent Change		15.34%	14.13%	11.17%	13.10%	6.76%	7.41%	6.73%	14.98%	12.62%	19.12%	11.76%	13.36%
Jarrell High School	776	461	505	569	626	717	793	859	930	996	1,075	1,205	1,349
<b>HIGH SCHOOL TOTAL</b>		461	505	569	626	717	793	859	930	996	1,075	1,205	1,349
High School Absolute Change		57	44	64	57	91	76	66	71	66	79	130	144
High School Percent Change		14.11%	9.54%	12.67%	10.02%	14.54%	10.60%	8.32%	8.27%	7.10%	7.93%	12.09%	11.95%
<b>DISTRICT TOTALS</b>		<b>1,703</b>	<b>1,897</b>	<b>2,102</b>	<b>2,350</b>	<b>2,608</b>	<b>2,890</b>	<b>3,181</b>	<b>3,504</b>	<b>3,810</b>	<b>4,111</b>	<b>4,450</b>	<b>4,808</b>
District Absolute Change		213	194	205	248	258	282	291	323	306	301	339	358
District Percent Change		14.30%	11.39%	10.81%	11.80%	10.98%	10.81%	10.07%	10.15%	8.73%	7.90%	8.25%	8.04%

\*Yellow box = exceeds enrollment capacity

- Jarrell Elementary will enroll more than 700 students by 2020
- Jarrell Intermediate will enroll more than 500 students by 2020 and more than 700 students by 2023
- The district is anticipated to grow over 10% next fall







# Summary

- Williamson County's unemployment rate is at 3%.
- Jarrell ISD is on pace to close roughly 270 homes in 2018.
- The district has more than 280 annual starts, with 91 homes under construction in Sonterra.
- Jarrell ISD will enroll more than 2,100 students by 2019.
- JISD can expect an increase more than 1,200 students during the next 5 years.
- 2023/24 enrollment projection = 3,181.
- Jarrell ISD is projected to enroll more than 4,800 students for the 2028/29 school year.