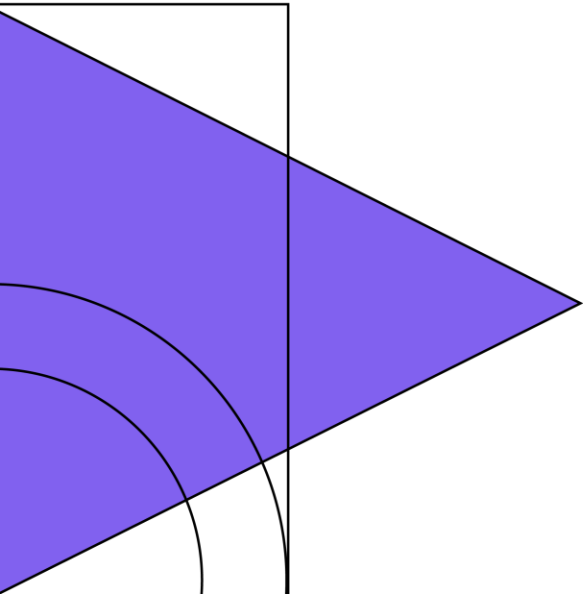
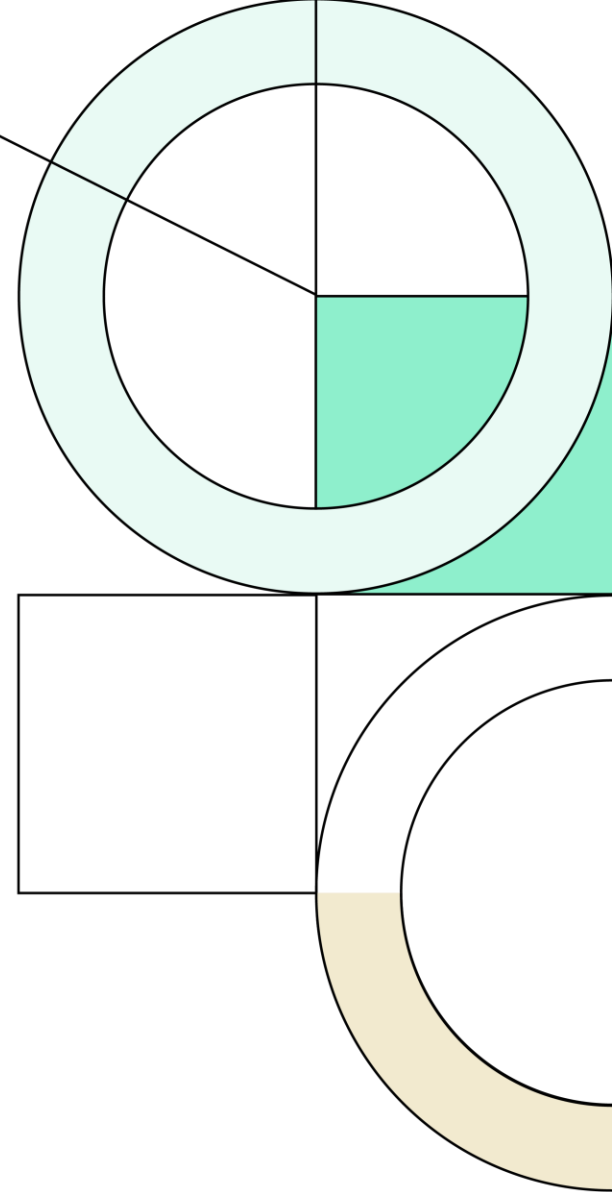


**Jarrell
Independent
School
District**

3Q22

Demographic Report





Annual Enrollment Change

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%

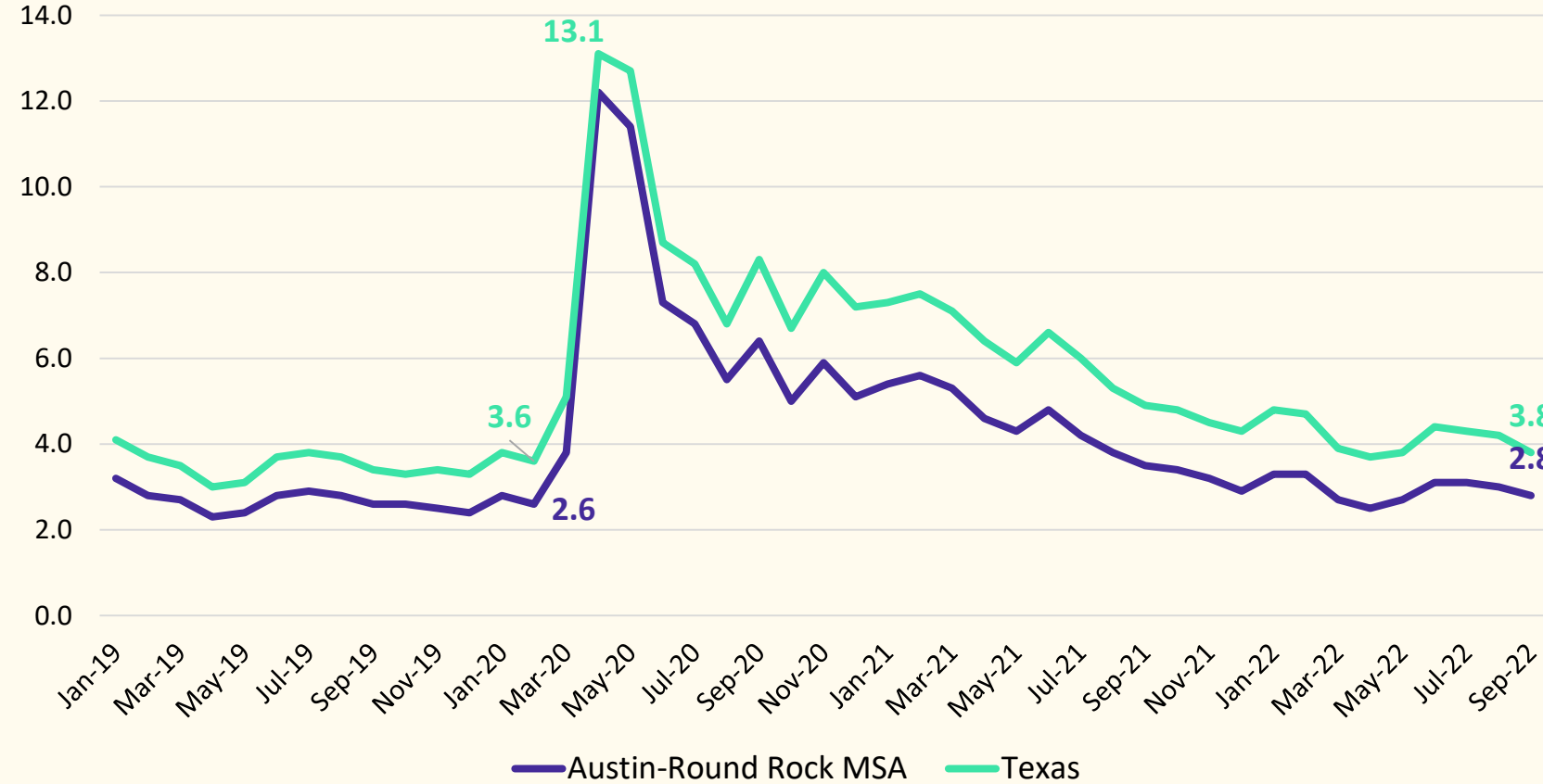
*Yellow Box = largest grade per year
Green Box = second largest grade per year

Year	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Elem	MS	HS
3 year avg	1.767	1.217	1.150	1.224	1.148	1.103	1.162	1.152	1.146	1.158	1.105	1.241	1.049	1.102	0.991	1.157	1.137	1.096
2019/20	0.385	1.270	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	0.770	1.046	1.138	1.104	1.000	1.056	1.095	1.050	1.069	1.041	1.280	1.029	1.096	0.983	1.073	1.054	1.097
2021/22	1.500	1.736	1.231	1.324	1.232	1.227	1.281	1.229	1.130	1.251	1.135	1.256	1.049	1.158	1.029	1.254	1.172	1.123
2022/23	3.000	1.146	1.174	1.210	1.108	1.082	1.149	1.132	1.258	1.154	1.139	1.187	1.068	1.052	0.961	1.142	1.184	1.067

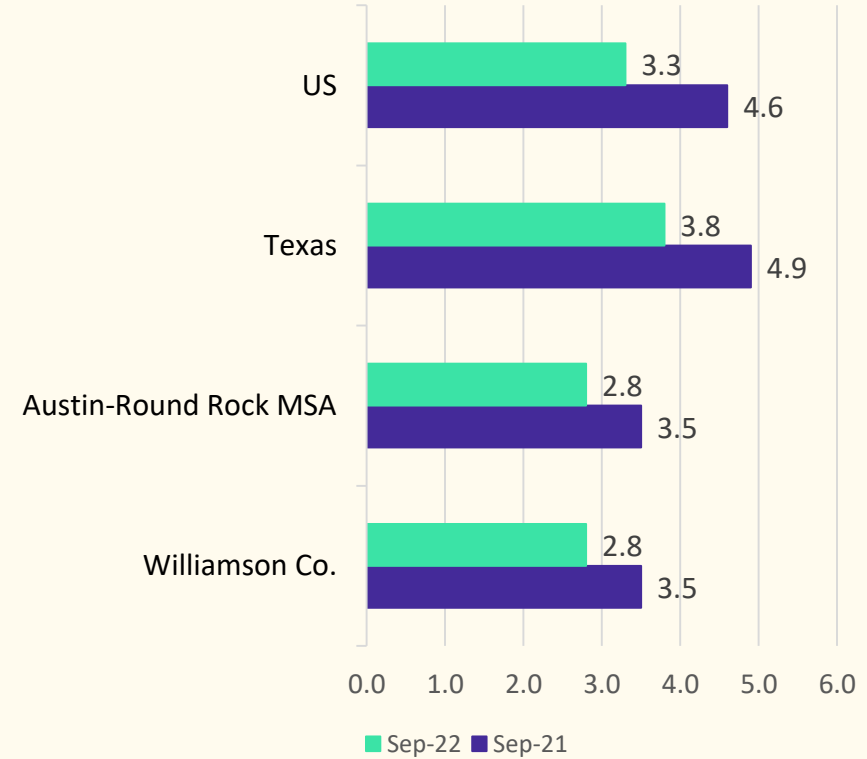


Local Economic Conditions

Unemployment Rates, Jan. 2019 - Sep. 2022



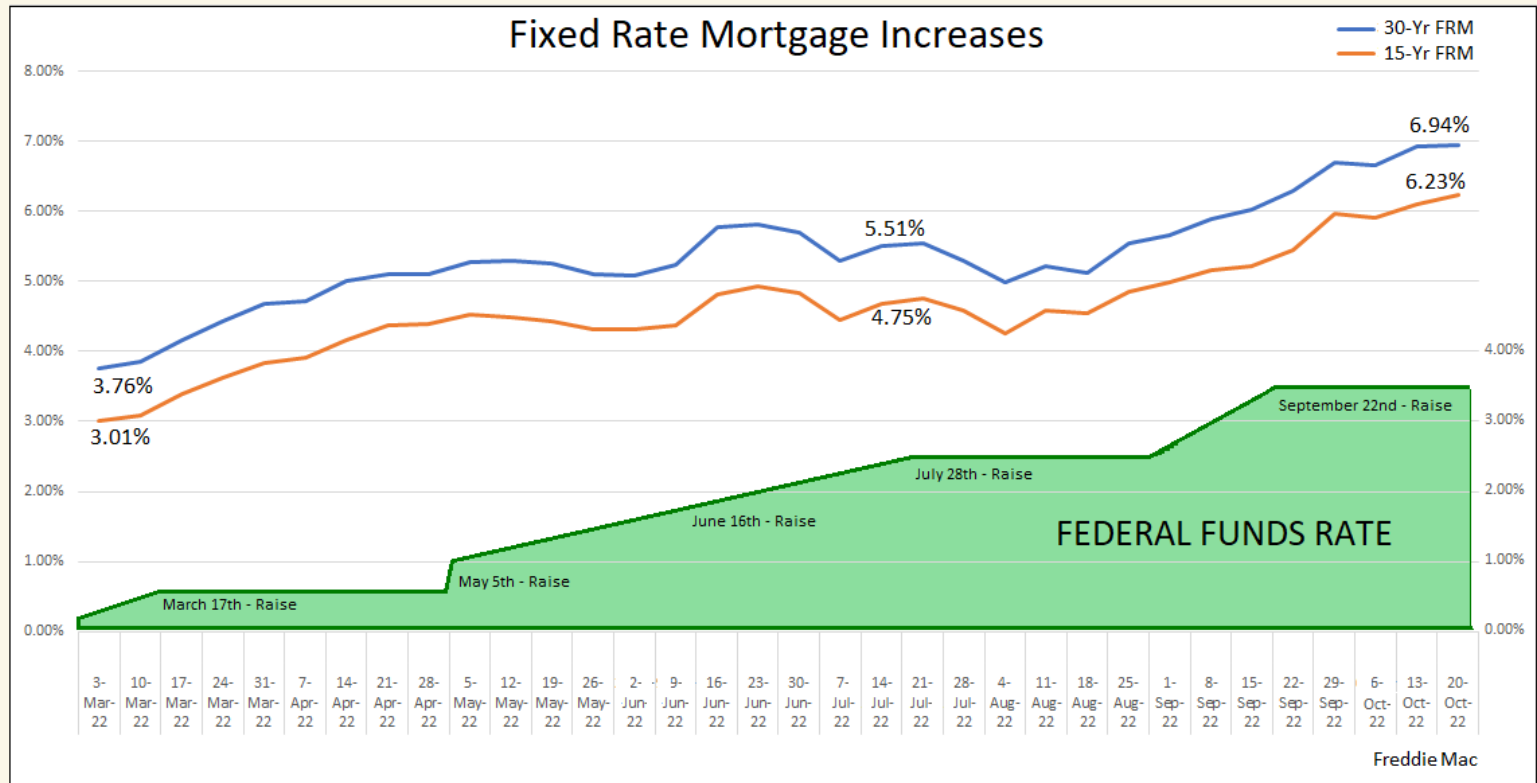
Unemployment Rate, Year-Over-Year





Economic Conditions

Combination of Price Escalation & Interest Rate Increases Impact on Monthly Payments



SPRING 2022
 3.5% Interest Rate
 HOME PRICE
 \$343,221
 Average Monthly House Payment
 \$1,905

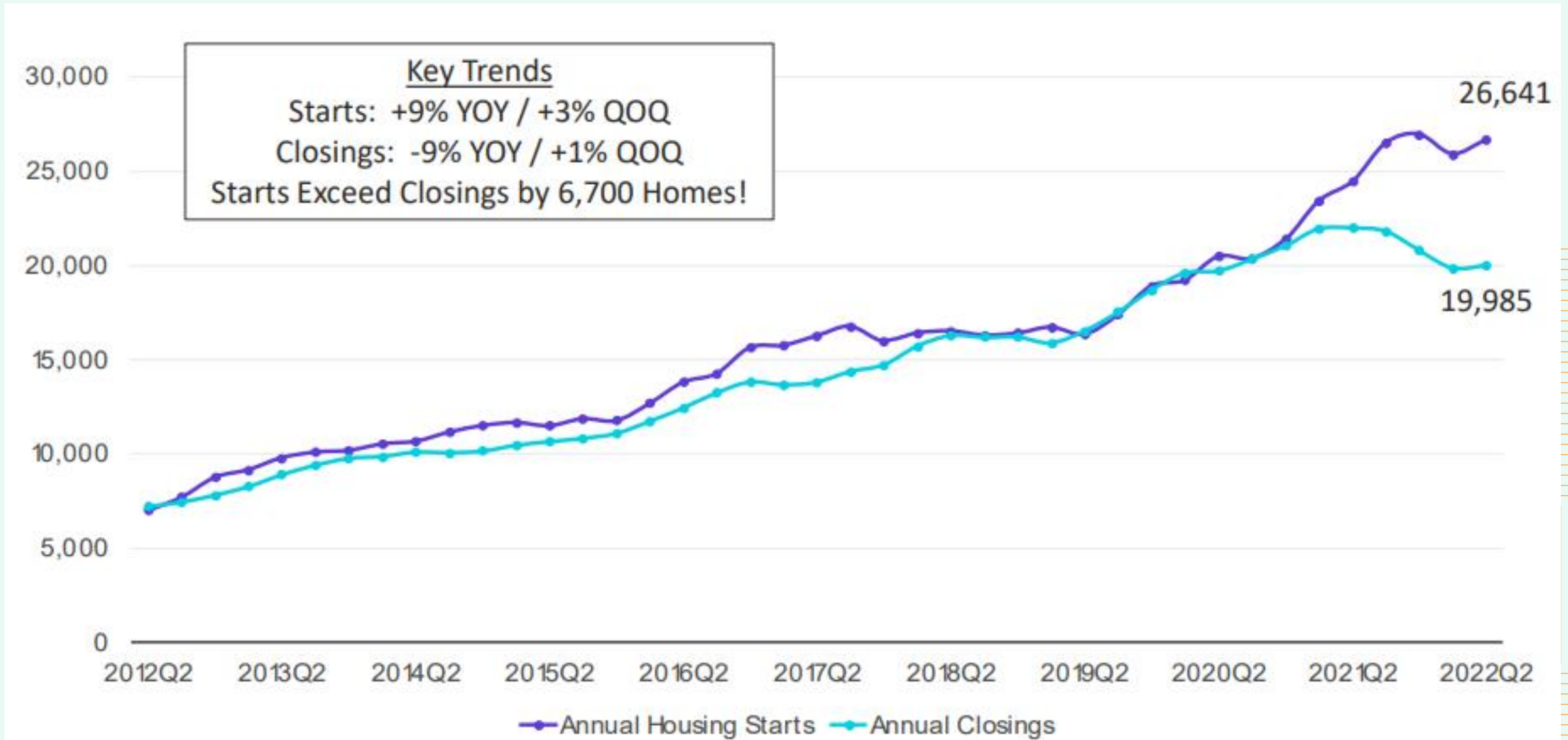
FALL 2022
 7.0% Interest Rate
 HOME PRICE
 \$365,700
 Average Monthly House Payment
 \$2,765

\$860 More Per Month **Increased By 45.15%**

* Since January 2022 – Base Prices have been up by 8% and Mortgage Rates up by approximately 79%



Austin New Home Starts & Closings are Flattening Out





Austin New Home Ranking Report

ISD Ranked by Annual Closings – 3Q22

Rank	District Name	Annual Starts	Annual Closings	Inventory	VDL	Future
1	HAYS CISD	3,512	2,718	2,706	3,824	41,946
2	LEANDER ISD	2,489	2,404	1,854	2,301	6,441
3	GEORGETOWN ISD	2,897	2,338	2,245	3,535	16,467
4	LIBERTY HILL ISD	2,325	1,700	1,940	2,372	9,669
5	HUTTO ISD	1,781	1,675	1,130	1,435	11,235
6	PFLUGERVILLE ISD	789	1,441	601	1,082	9,161
7	AUSTIN ISD	2,852	1,196	3,153	1,296	9,588
8	JARRELL ISD*	1,476	1,086	828	1,990	11,952
9	MANOR ISD	1,642	1,037	1,136	1,777	15,346
10	DEL VALLE ISD	1,058	878	899	1,214	23,170
11	DRIPPING SPRINGS ISD	857	851	719	1,113	7,955
12	BASTROP ISD	860	810	627	2,495	16,372
13	SAN MARCOS CISD	988	650	870	682	6,975
14	LAKE TRAVIS ISD	490	608	648	889	4,453
15	ROUND ROCK ISD	725	542	773	593	5,623
16	ELGIN ISD	682	421	419	257	9,069
17	TAYLOR ISD	197	246	115	283	1,067
18	LAGO VISTA ISD	266	198	236	346	3,729
19	LOCKHART ISD	79	69	52	229	20,982
20	SMITHVILLE ISD	45	39	10	52	471

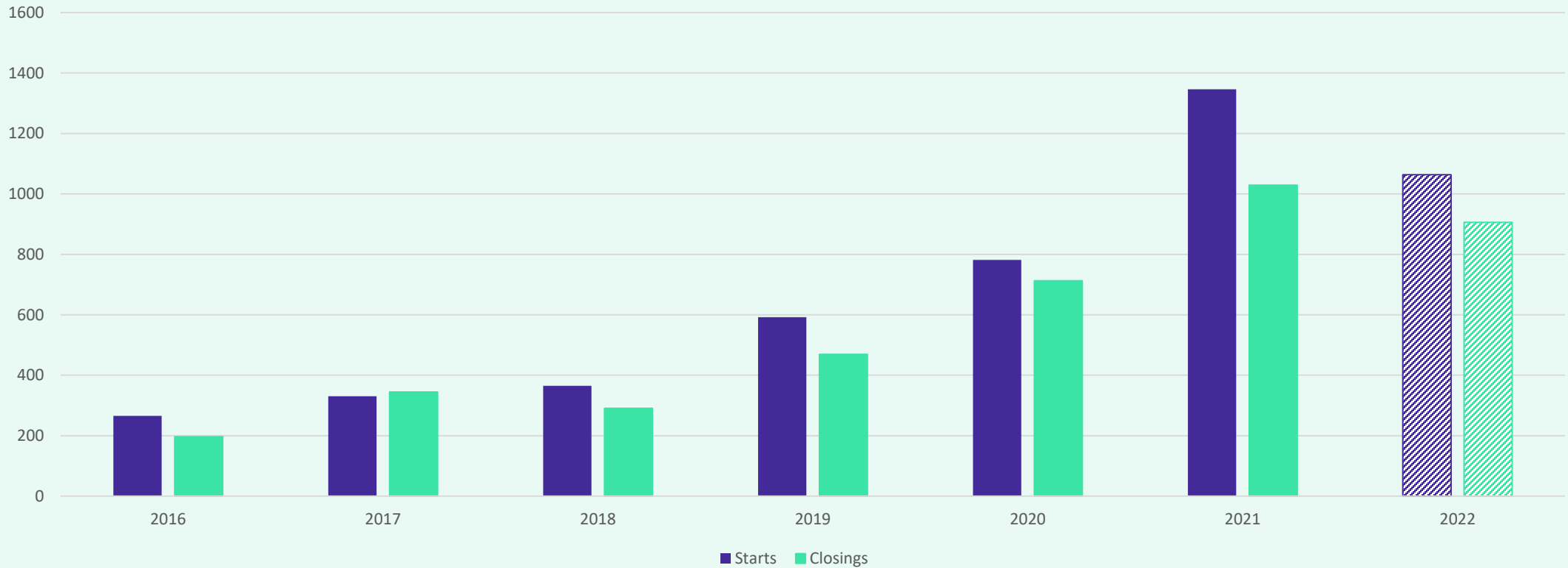
* Based on additional Templeton Demographics housing research



District New Home Starts and Closings by Quarter

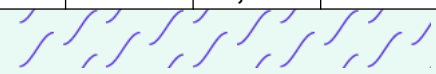


New Home Starts and Closings



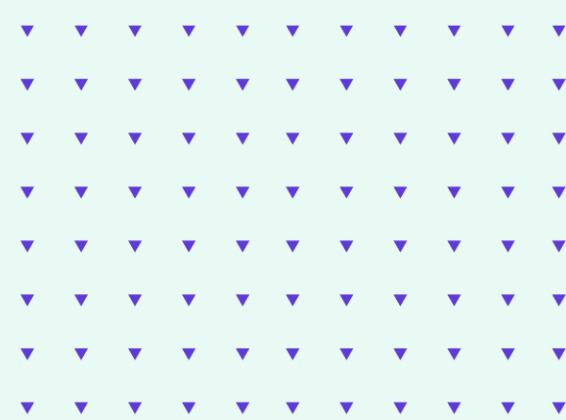
Starts	2016	2017	2018	2019	2020	2021	2022
1Q	36	44	51	55	155	313	327
2Q	62	111	121	129	135	339	413
3Q	82	103	112	248	241	288	324
4Q	86	73	81	160	251	406	
Total	266	331	365	592	782	1,346	1,064

Closings	2016	2017	2018	2019	2020	2021	2022
1Q	45	85	72	85	129	244	230
2Q	45	53	32	97	195	263	409
3Q	62	109	99	107	166	342	267
4Q	45	98	88	180	223	180	
Total	197	345	291	469	713	1,029	906




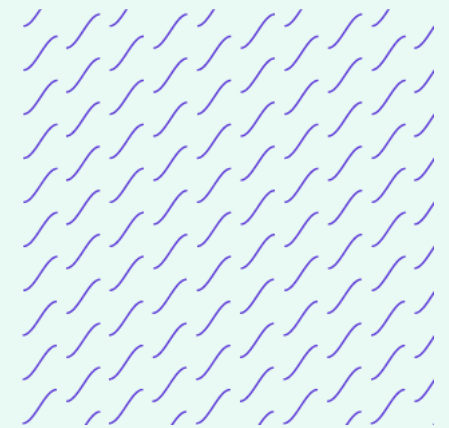


District Housing Overview by Elementary Zone



Elementary	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Under Const.	Inventory	Vacant Dev. Lots	Future
IGO	1,135	296	639	226	607	709	1,566	8,850
JARRELL	341	28	447	41	43	119	424	3102
Grand Total	1,476	324	1,086	267	650	828	1,990	11,952

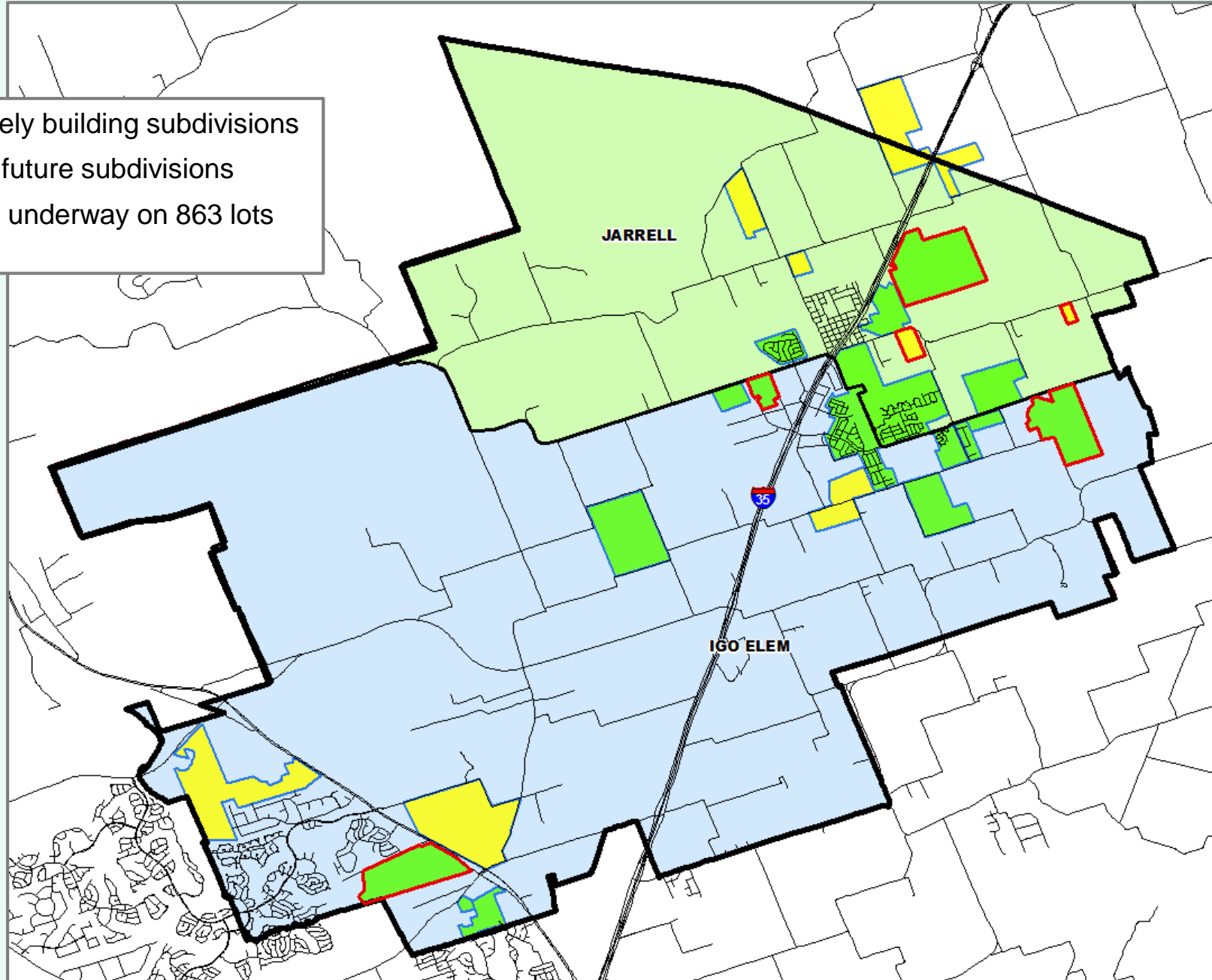
 Highest activity in the category





District Housing Overview

- The district has 14 actively building subdivisions
- Within JISD there are 8 future subdivisions
- Of these, groundwork is underway on 863 lots within 6 subdivisions



Subdivisions



- ACTIVE
- FUTURE
- Groundwork Underway

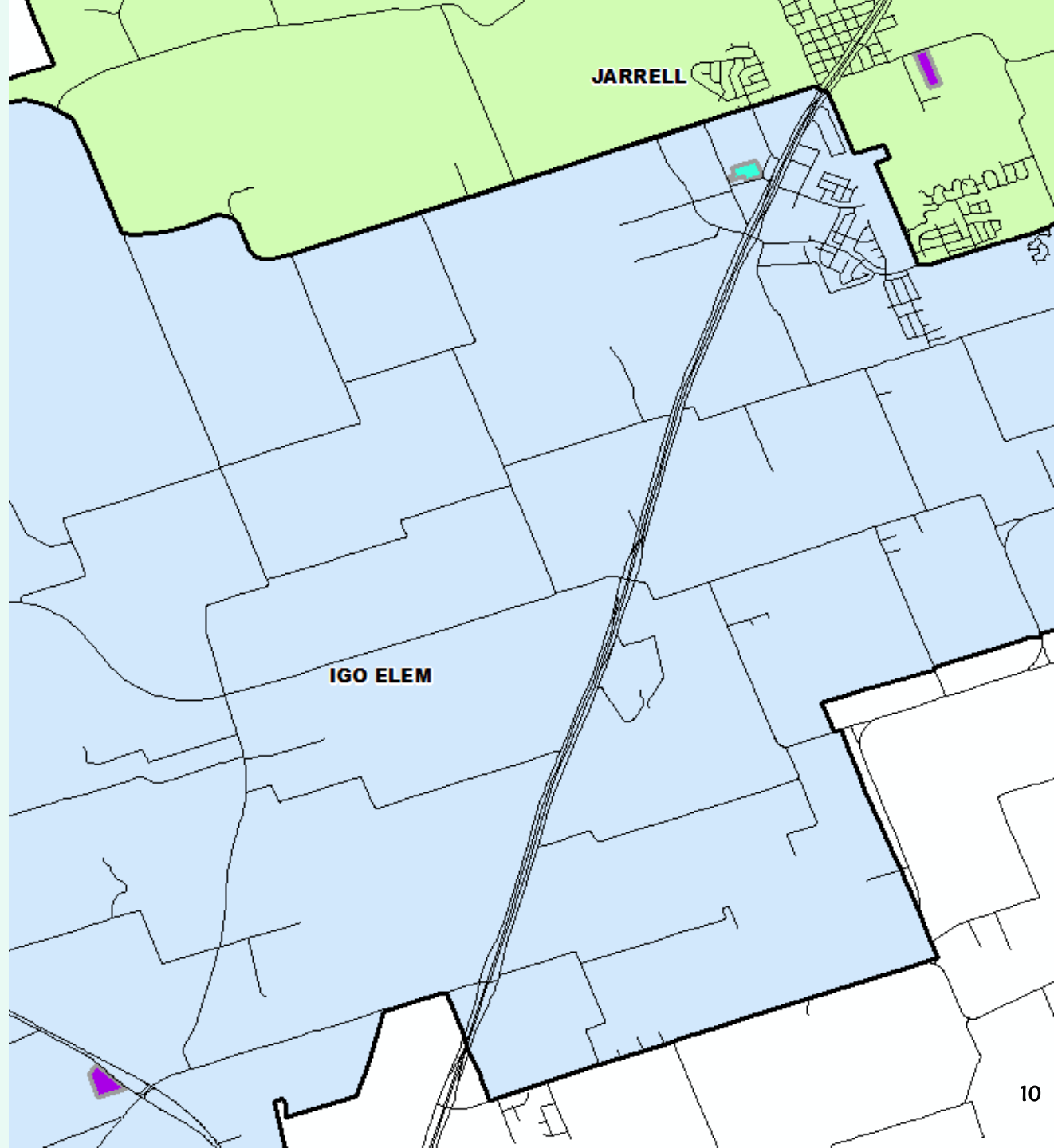


Multi-Family Housing Overview

- There are currently 368 units under construction in the district
- Within Jarrell ISD there are roughly 80 future **age-restricted** multi-family units in the planning stages

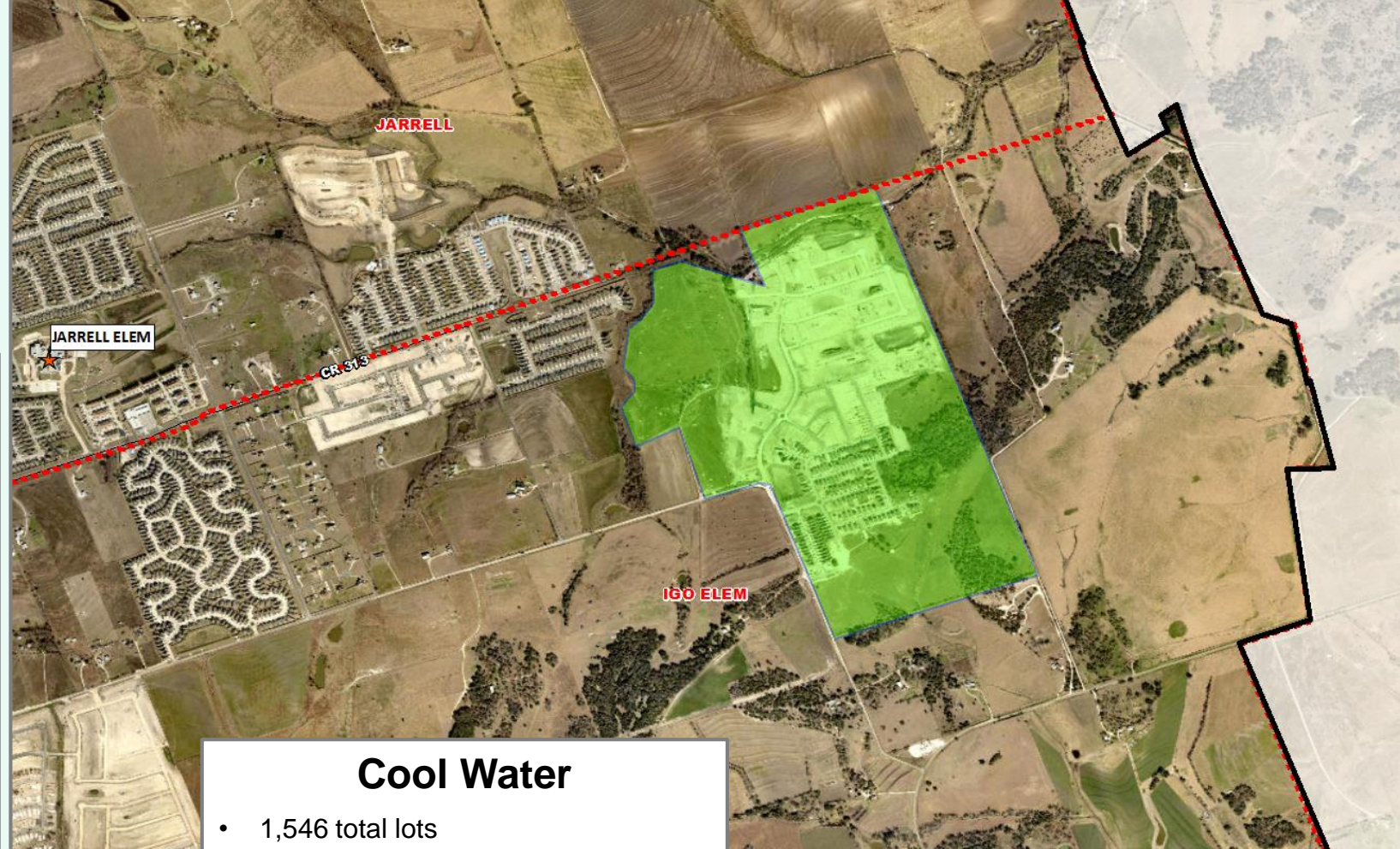
Multi-Family Developments

-  Future Development
-  Under Construction





Residential Activity

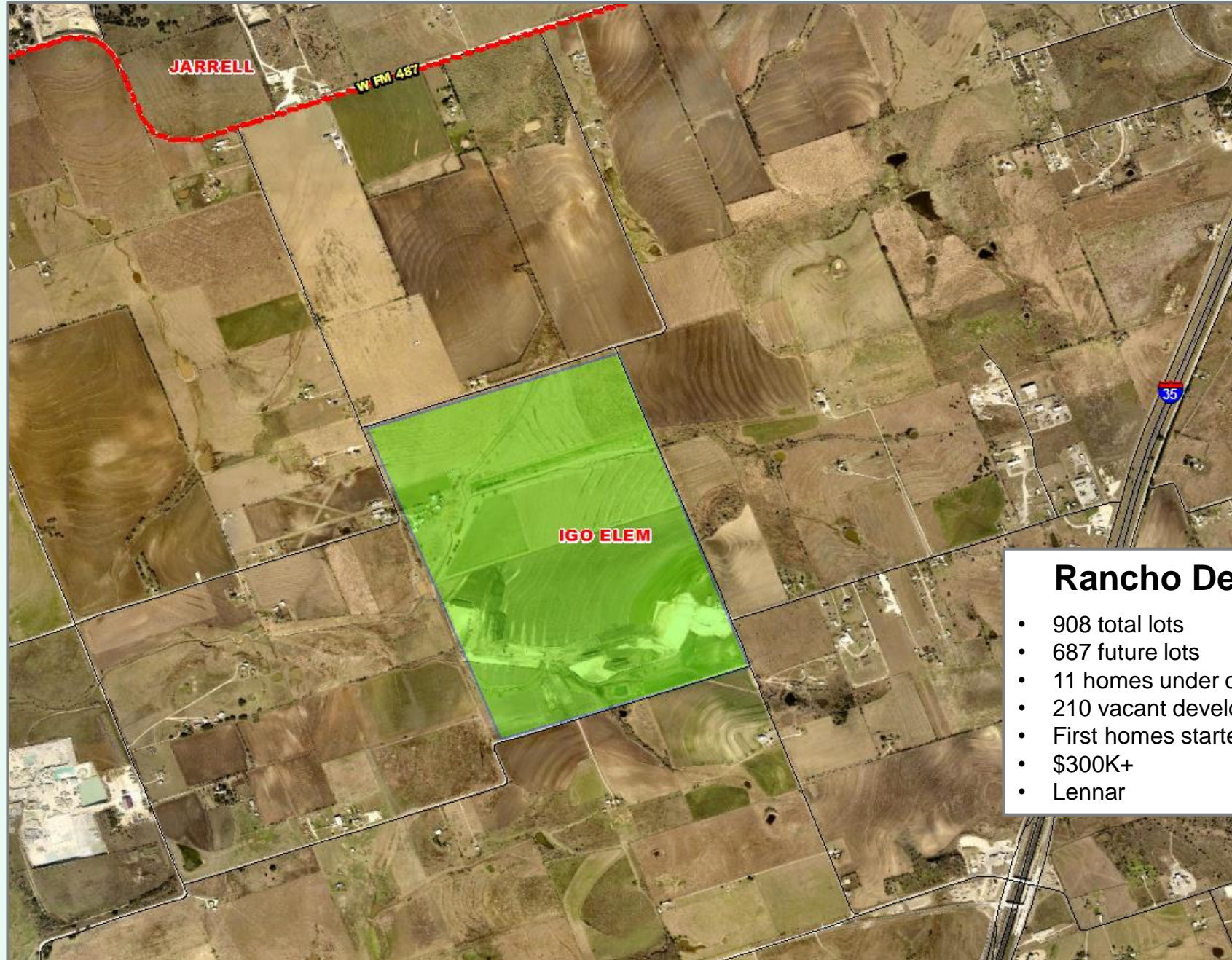


Cool Water

- 1,546 total lots
- 791 future lots
- 186 occupied homes
- 66 homes under construction
- 76 vacant developed lots
- Closed 186 homes in last 12 months
- Groundwork underway on 238 lots in Phase 4-2
- 409 lots in Phase 3 & 4 delivered for homebuilding 3Q22
- \$275K+



Residential Activity

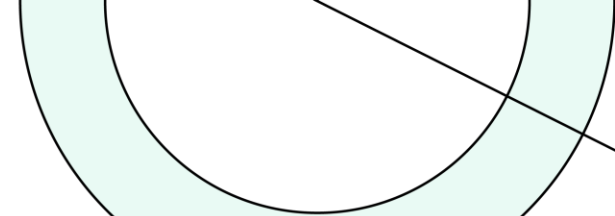


Rancho Del Cielo

- 908 total lots
- 687 future lots
- 11 homes under construction
- 210 vacant developed lots
- First homes started 3Q22
- \$300K+
- Lennar



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	21	200	302	317	304	300	300	290	287	302	270	281	240	247	198	3,859	495	14.7%
2024/25	21	235	336	350	356	340	340	341	328	330	340	319	288	238	242	4,404	545	14.1%
2025/26	21	250	397	410	410	418	398	400	409	394	396	401	327	285	233	5,149	745	16.9%
2026/27	21	290	453	473	459	459	467	451	460	470	453	467	411	324	279	5,937	788	15.3%
2027/28	21	330	509	536	532	514	519	514	519	529	541	535	458	407	318	6,782	845	14.2%
2028/29	21	370	560	596	586	573	558	571	591	597	608	622	530	453	399	7,635	853	12.6%
2029/30	21	400	602	655	640	636	630	614	628	662	687	699	621	525	444	8,464	829	10.9%
2030/31	21	400	647	688	703	695	700	693	706	703	761	790	692	615	515	9,329	865	10.2%
2031/32	21	400	695	729	739	764	765	770	762	791	787	898	784	685	603	10,193	864	9.3%
2032/33	21	402	731	784	784	803	840	841	847	838	870	929	892	776	671	11,029	836	8.2%

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



Ten Year Forecast by Campus

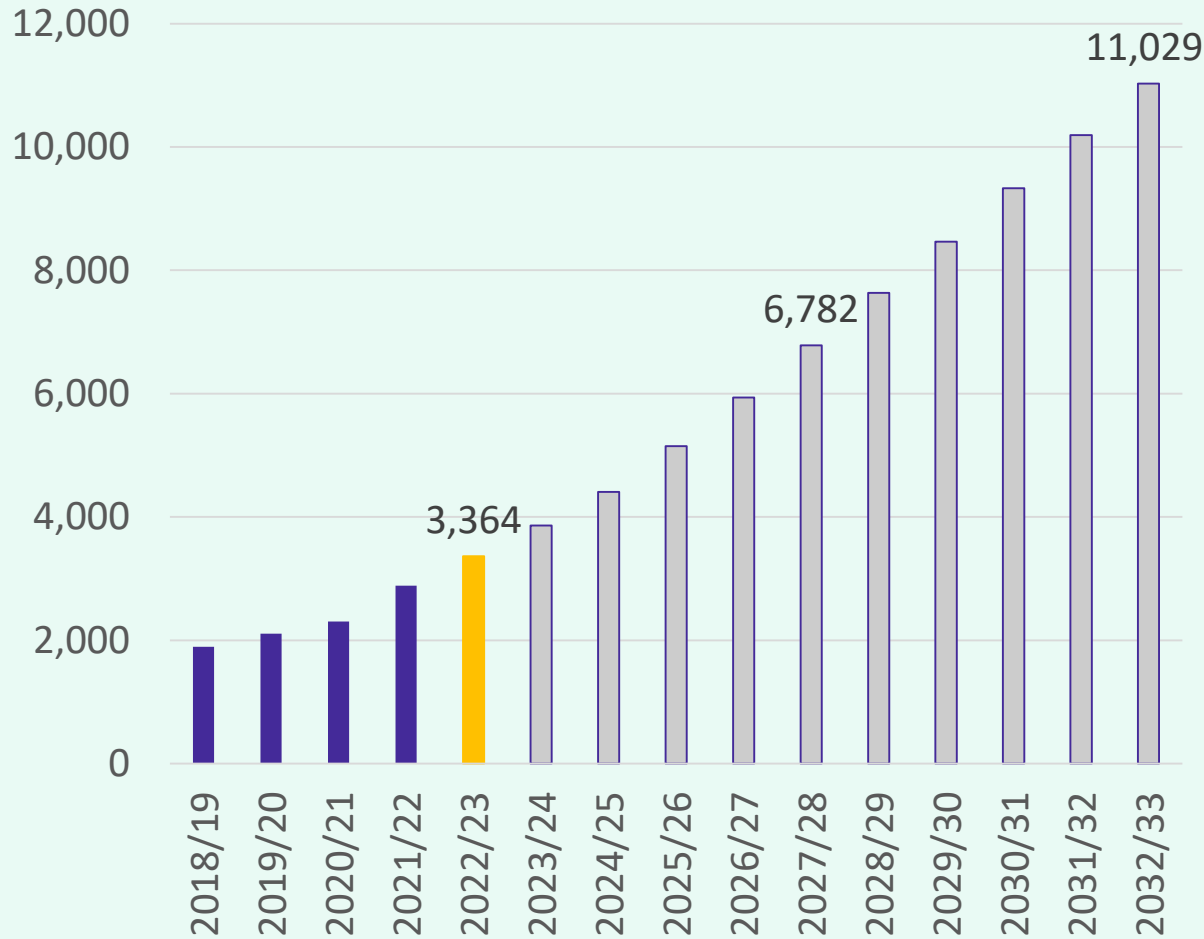
Campus	Capacity	2021/22	Fall	ENROLLMENT PROJECTIONS									
			2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33
Igo Elementary	800	845	975	1,178	1,392	1,670	1,911	2,206	2,460	2,712	2,938	3,173	3,402
Jarrell Elementary	608	671	784	856	927	1,034	1,162	1,269	1,375	1,486	1,609	1,710	1,804
Double Creek Elementary	900			OPENING FALL 2023 - adding 900 student capacity									
ELEMENTARY SCHOOL TOTAL	2,308	1,516	1,759	2,034	2,319	2,704	3,073	3,475	3,835	4,198	4,547	4,883	5,206
Elementary Absolute Change		339	243	275	285	385	369	402	360	363	349	336	323
Elementary Percent Change		28.80%	16.03%	15.63%	14.01%	16.60%	13.65%	13.08%	10.36%	9.47%	8.31%	7.39%	6.61%
Jarrell Middle School	764/1,004	610	741	859	998	1,199	1,383	1,589	1,796	1,977	2,170	2,340	2,555
MIDDLE SCHOOL TOTAL		610	741	859	998	1,199	1,383	1,589	1,796	1,977	2,170	2,340	2,555
Middle School Absolute Change		97	131	118	139	201	184	206	207	181	193	170	215
Middle School Percent Change		18.91%	21.48%	15.92%	16.18%	20.14%	15.35%	14.90%	13.03%	10.08%	9.76%	7.83%	9.19%
Jarrell High School	995/1,258	759	864	966	1,087	1,246	1,481	1,718	2,004	2,289	2,612	2,970	3,268
HIGH SCHOOL TOTAL		759	864	966	1,087	1,246	1,481	1,718	2,004	2,289	2,612	2,970	3,268
High School Absolute Change		144	105	102	121	159	235	237	286	285	323	358	298
High School Percent Change		23.41%	13.83%	11.81%	12.53%	14.63%	18.86%	16.00%	16.65%	14.22%	14.11%	13.71%	10.03%
DISTRICT TOTALS		2,885	3,364	3,859	4,404	5,149	5,937	6,782	7,635	8,464	9,329	10,193	11,029
District Absolute Change		580	479	495	545	745	788	845	853	829	865	864	836
District Percent Change		25.16%	16.60%	14.71%	14.12%	16.92%	15.30%	14.23%	12.58%	10.86%	10.22%	9.26%	8.20%

- All campuses, including Double Creek Elementary and added capacity at MS and HS, are projected to be at or over capacity in the 2025/26 school year



Key Takeaways

Enrollment Forecast



- Jarrell ISD added almost 480 students this fall as the housing market begins to level off due to rising interest rates and inflation
- The district currently has 14 active subdivisions, 8 future subdivisions and almost 12,000 future lots
- The district is forecasted to add 3,000 new homes annually for the next 3 years
- All campuses, including added capacity, are projected to be at or over capacity in the 2025/26 school year
- The district is forecasted to enroll more than 6,750 students in 2027/28, and more than 11,000 students in 2032/33