


*Tomball
Independent
School
District*

**Demographic
Update
January 2017**



*Learn from Yesterday...
Understand Today...
Plan for the Future*


TEMPLETON
DEMOGRAPHICS



Houston MSA New Home Ranking Report

ISD Ranking by Annual Closings- 3Q16

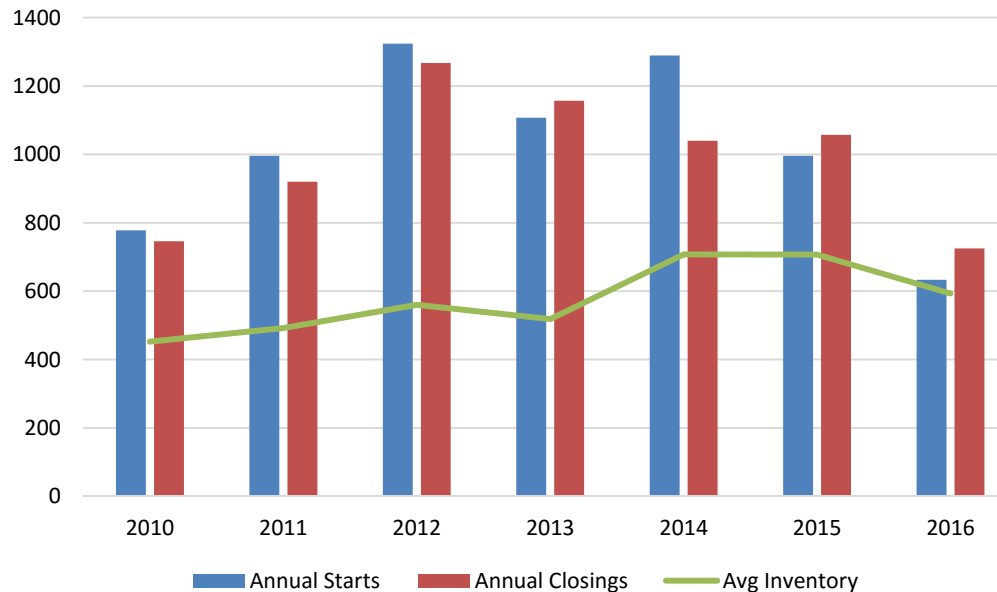
Rank	District Name	Annual Starts	Annual Closings	VDL	Future
1	Fort Bend ISD	3,061	3,220	3,617	15,019
2	Katy ISD	2,345	2,618	3,162	18,561
3	Cypress-Fairbanks ISD	2,650	2,428	3,743	8,193
4	Lamar CISD	2,472	2,415	4,844	16,951
5	Houston ISD	1,612	2,273	3,030	5,265
6	Conroe ISD	1,775	1,944	4,327	26,215
7	Klein ISD	1,193	1,458	2,087	2,293
8	Humble ISD	1,072	1,056	1,711	8,971
9	Alvin ISD	1,114	1,011	2,000	15,558
10	Tomball ISD	847	938	2,274	3,838
11	Clear Creek ISD	828	879	1,392	4,392
12	Spring ISD	606	574	817	6,937
13	Aldine ISD	537	548	823	1,727
14	New Caney ISD	385	546	641	3,912
15	Dickinson ISD	385	440	609	4,913
16	Pearland ISD	361	383	411	427
17	Montgomery ISD	324	379	1,017	4,609
18	Goose Creek CISD	311	375	322	974
19	Spring Branch ISD	493	374	1,431	718
20	Pasadena ISD	349	362	213	232





New Housing Activity

Tomball ISD Housing Activity



Starts	2010	2011	2012	2013	2014	2015	2016
1Q	186	166	273	324	279	282	210
2Q	230	239	416	274	355	252	194
3Q	184	339	337	276	452	248	229
4Q	178	252	298	233	203	214	
Total	778	996	1,324	1,107	1,289	996	633

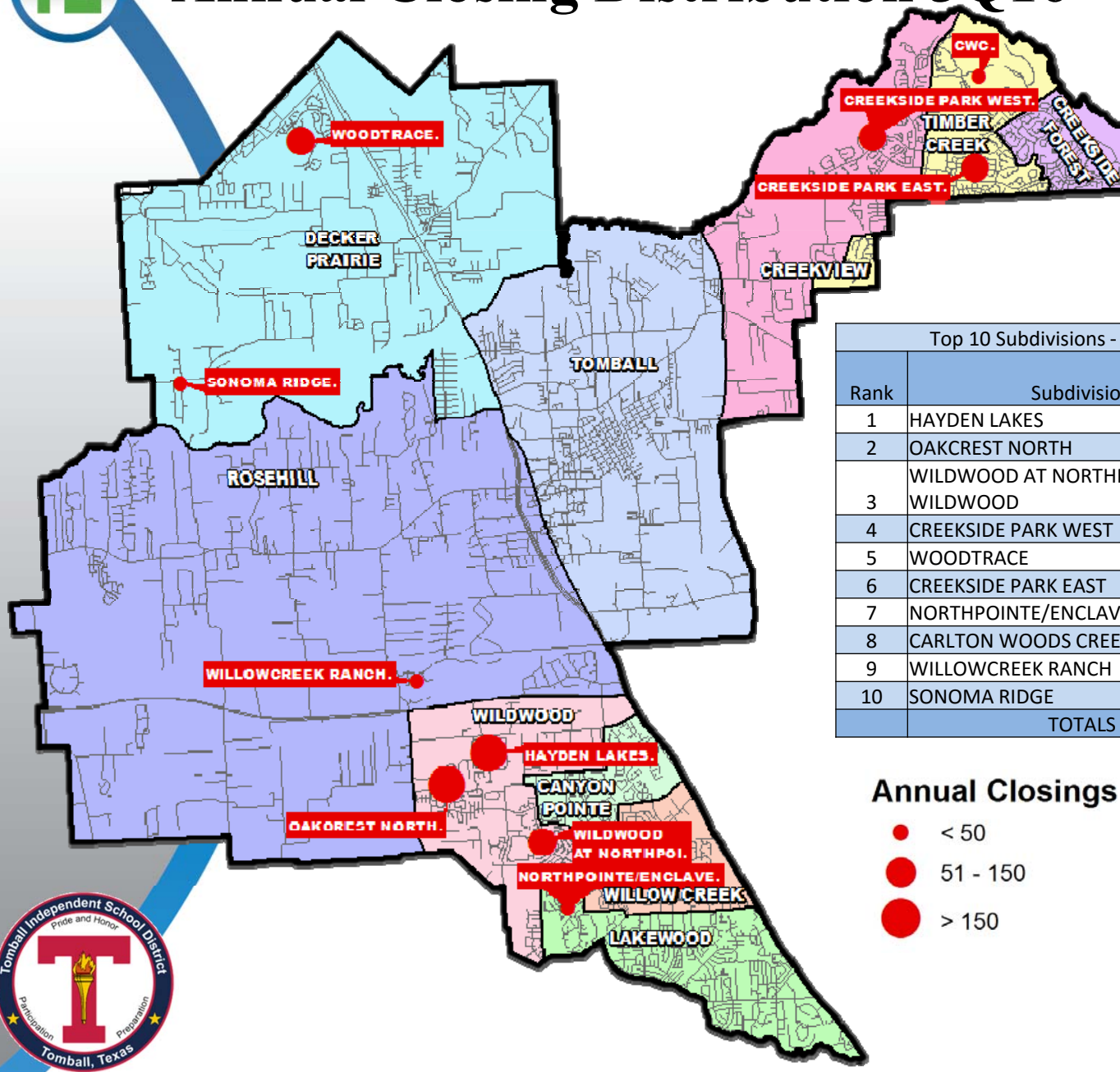
Closings	2010	2011	2012	2013	2014	2015	2016
1Q	128	112	289	311	221	289	244
2Q	178	203	281	331	239	281	240
3Q	205	340	347	277	274	273	241
4Q	235	265	350	238	306	214	
Total	746	920	1,267	1,157	1,040	1,057	725

- Tomball ISD is on track to start more than 800 homes in 2016
- The district has closed 725 homes through 3Q16
- Inventory has cooled slightly to better match the housing activity levels in the region





Annual Closing Distribution 3Q16



Top 10 Subdivisions - 3Q16 (Ranked by Annual Closings)

Rank	Subdivision	Annual Closings	Quarter Closings	VDL
1	HAYDEN LAKES	201	64	185
2	OAKCREST NORTH	174	52	50
3	WILDWOOD AT NORTHPOINTE- WILDWOOD	147	19	165
4	CREEKSIDE PARK WEST	142	39	563
5	WOODTRACE	75	21	275
6	CREEKSIDE PARK EAST	65	13	157
7	NORTHPOINTE/ENCLAVE	43	12	60
8	CARLTON WOODS CREEKSIDE (CWC)	30	7	132
9	WILLOWCREEK RANCH	23	2	67
10	SONOMA RIDGE	9	2	7
	TOTALS	909	231	1,661

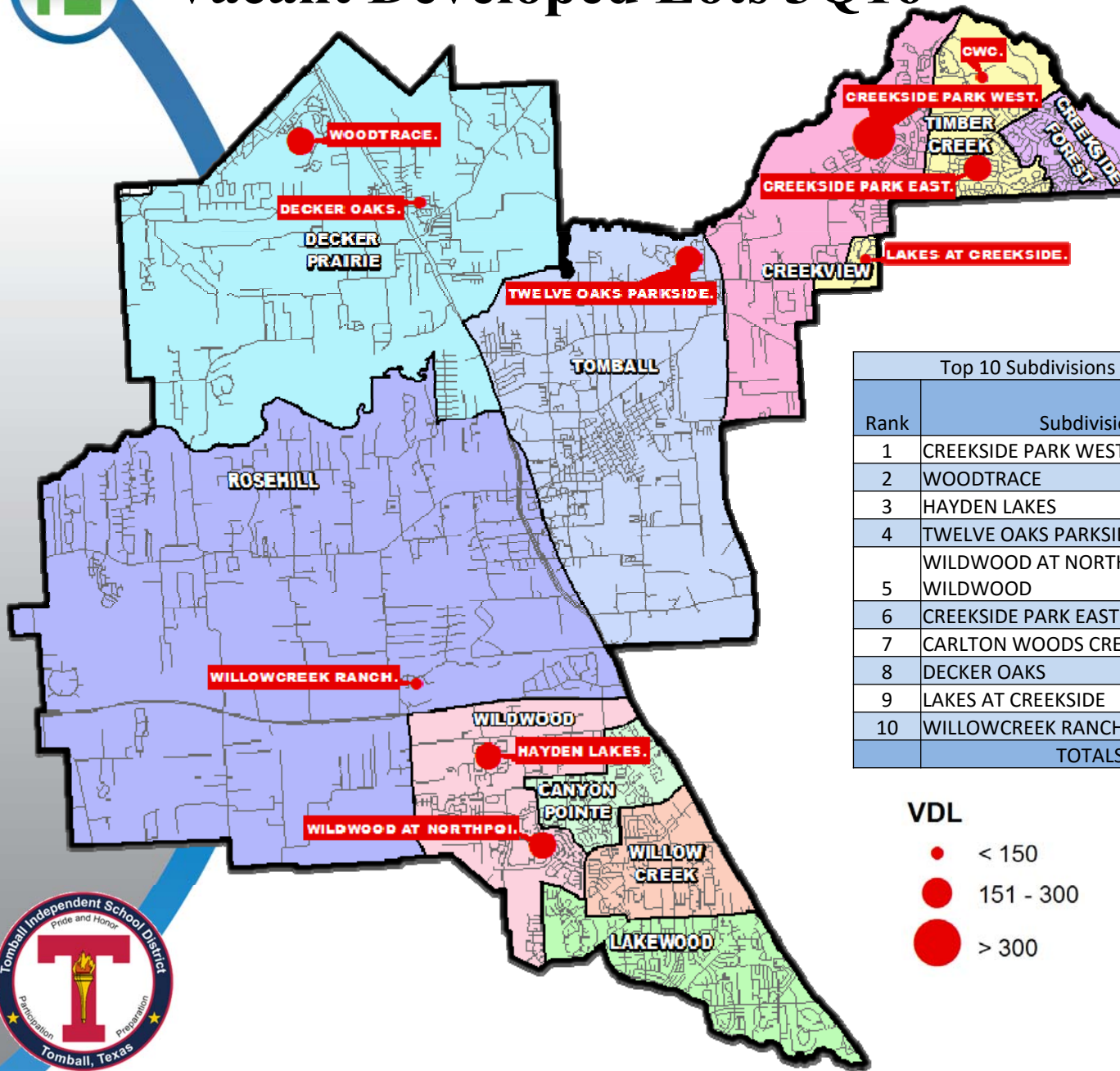
Annual Closings

- < 50
- 51 - 150
- > 150





Vacant Developed Lots 3Q16



Top 10 Subdivisions - 3Q16 (Ranked by remaining VDL)				
Rank	Subdivision	Annual Closings	VDL	Future
1	CREEKSIDE PARK WEST	142	563	259
2	WOODTRACE	75	275	395
3	HAYDEN LAKES	201	185	79
4	TWELVE OAKS PARKSIDE	0	184	0
5	WILDWOOD AT NORTHPOINTE- WILDWOOD	147	165	80
6	CREEKSIDE PARK EAST	65	157	0
7	CARLTON WOODS CREEKSIDE (CWC)	30	132	3
8	DECKER OAKS	0	130	0
9	LAKES AT CREEKSIDE	3	123	357
10	WILLOWCREEK RANCH	23	67	92
TOTALS		686	1,981	1,265

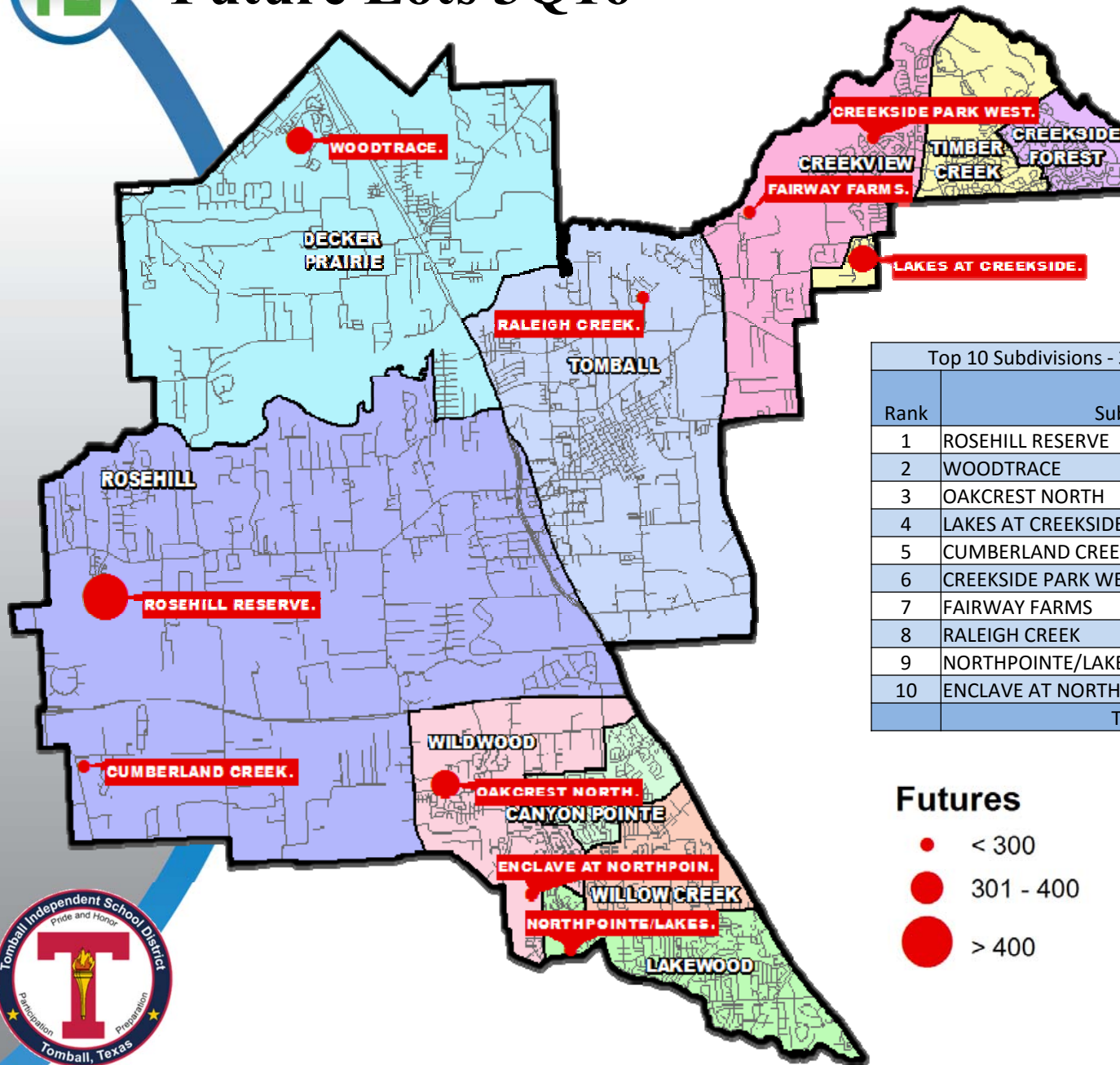
VDL

- < 150
- 151 - 300
- > 300





Future Lots 3Q16



Top 10 Subdivisions - 3Q16 (Ranked by Future Inventory)			
Rank	Subdivision	VDL	Future
1	ROSEHILL RESERVE	0	862
2	WOODTRACE	275	395
3	OAKCREST NORTH	50	377
4	LAKES AT CREEKSIDE	123	357
5	CUMBERLAND CREEK	0	271
6	CREEKSIDE PARK WEST	563	259
7	FAIRWAY FARMS	0	242
8	RALEIGH CREEK	57	226
9	NORTHPOINTE/LAKES	1	226
10	ENCLAVE AT NORTHPOINTE - WILDWOOD	0	100
TOTALS		1,069	3,315

Futures

- < 300
- 301 - 400
- > 400





Residential Activity

Carlton Woods and Creekside Park

Creekside Park East

- 1,403 total lots
- 0 futures
- 16 U/C
- 1,215 occupied
- 157 VDL
- 29 annual starts
- 11 starts in 3Q16
- Student Yield = 0.54

Future Apartments
14.38 acres
260 units

Carlton Woods

- 313 total lots
- 3 future lots
- 16 U/C
- 152 occupied
- 7 annual starts
- Student Yield = 0.21

Creekside Forest
Elementary Zone-
Built Out with 1,392 homes

CREEKVIEW ELEM

TOMBALL ISD

CREEKSIDE PARK JH

TIMBER CREEK ELEM

CREEKSIDE FOREST

CREEKSIDE FOREST ELEM

GOSLING RD

Future Apartments
14.28 acres
290 units





Residential Activity

Creekside Park West



Creekside Park West

- 2,178 total lots
- 259 futures
- 563 VDL
- 1,242 occupied
- 47 U/C
- 142 annual starts
- 30 starts in 3Q16
- Student Yield = 0.47





Residential Activity

Lakes at Creekside



Lakes at Creekside

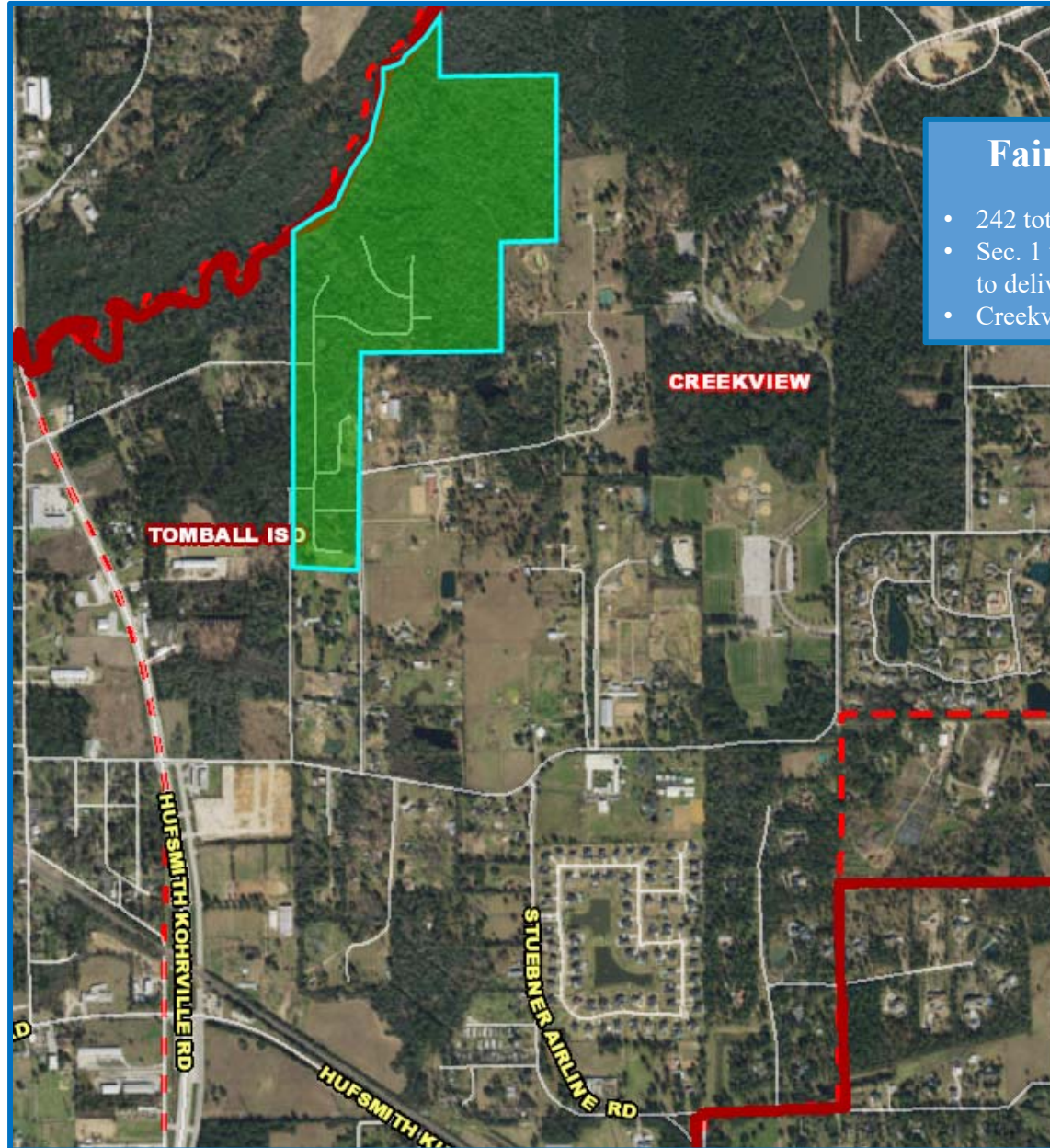
- 500 total lots fall within Tomball ISD
- 354 futures
- 123 VDL
- 4 U/C
- 21 annual starts in 2016
- 4 starts in 3Q16
- \$300K - \$1M





Future Residential Activity

Fairway Farms



Fairway Farms

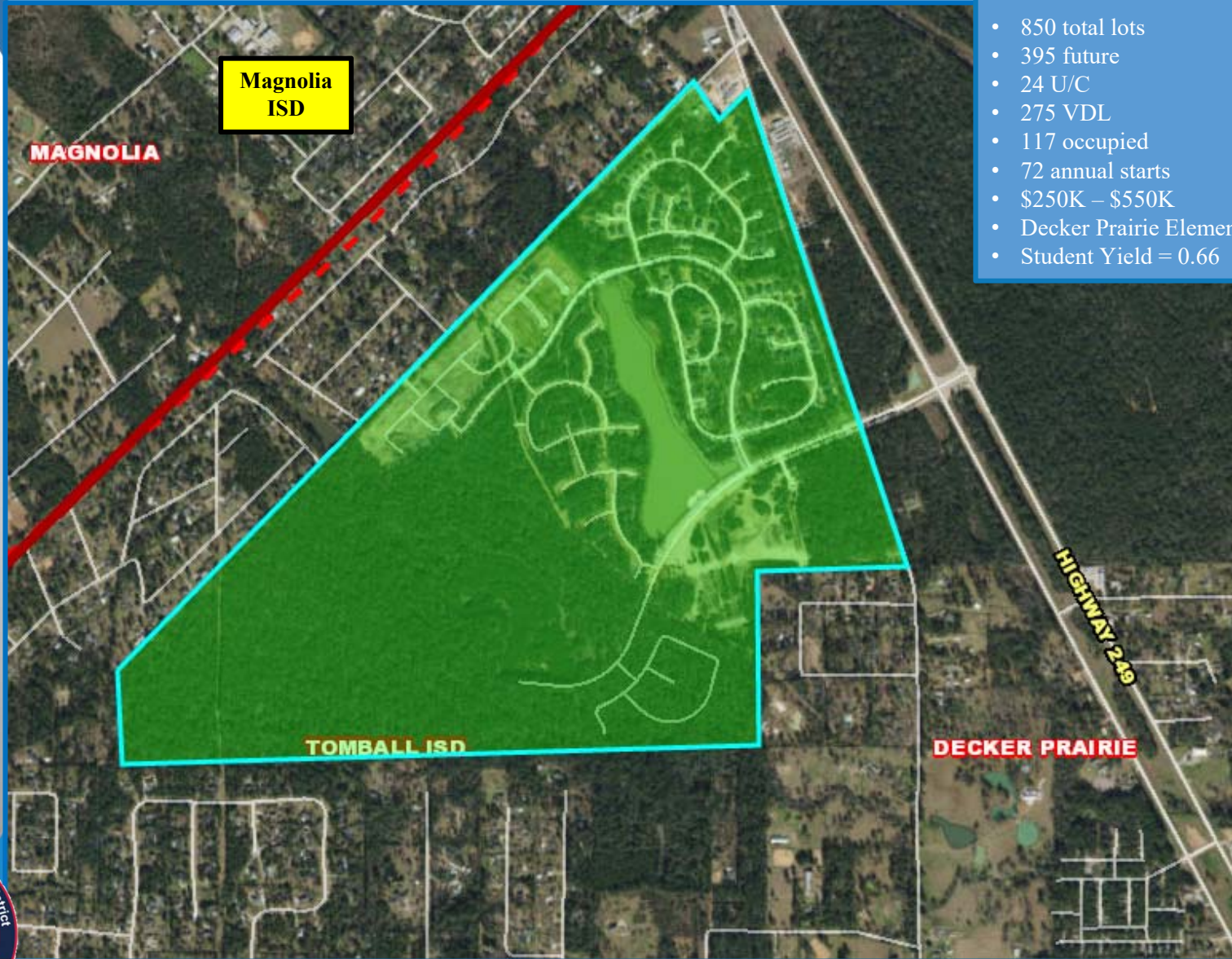
- 242 total lots
- Sec. 1 with 98 lots expected to deliver January 2017
- Creekview Elementary





Residential Activity

Woodtrace



Woodtrace

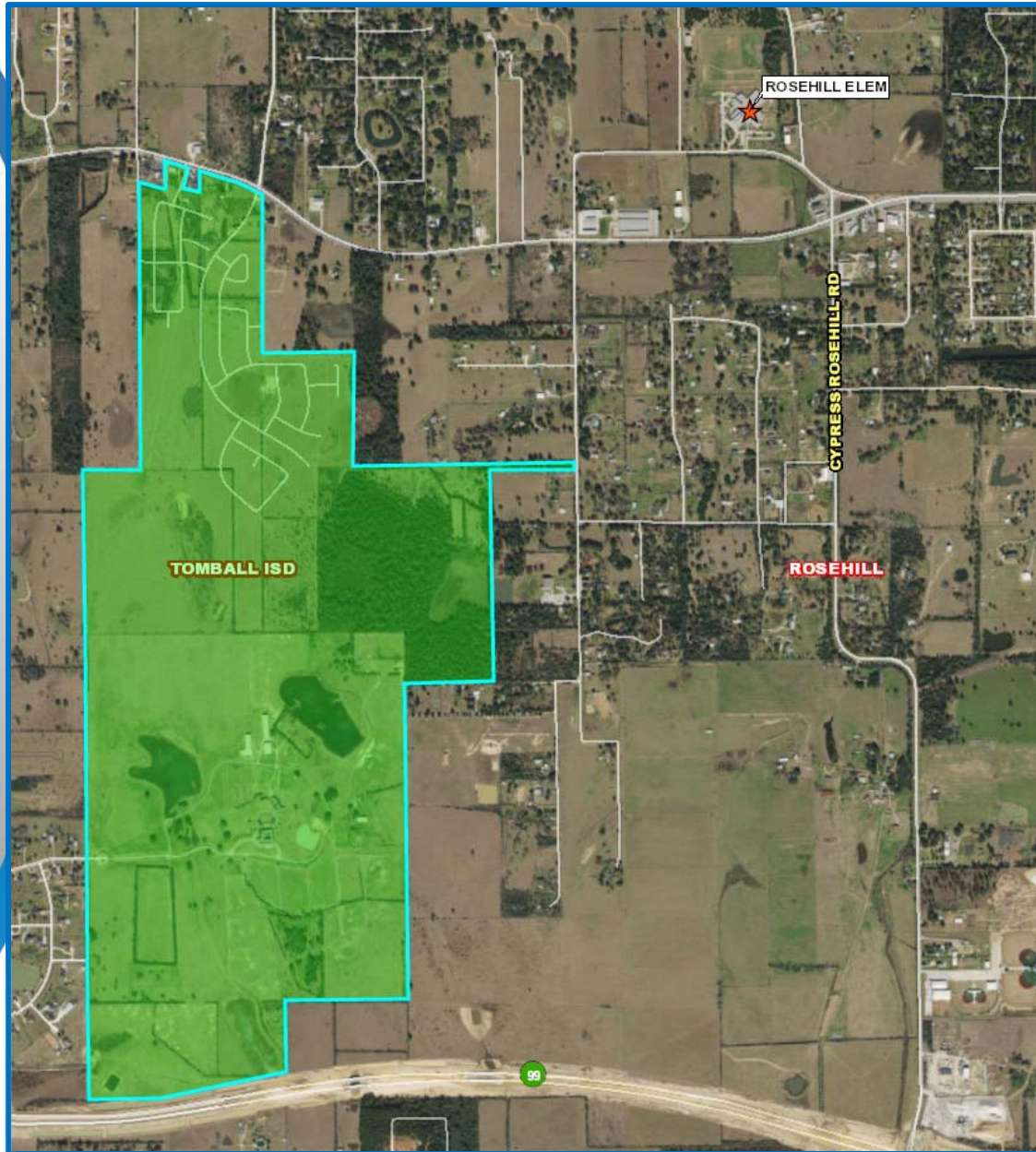
- 850 total lots
- 395 future
- 24 U/C
- 275 VDL
- 117 occupied
- 72 annual starts
- \$250K – \$550K
- Decker Prairie Elementary
- Student Yield = 0.66





Future Residential Activity

Rosehill Reserve



Rosehill Reserve

- 862 future lots
- Financing issues and complications from recent flooding have delayed lot deliveries until further notice
- \$250K – \$600K
- Rosehill Elementary





Residential Activity

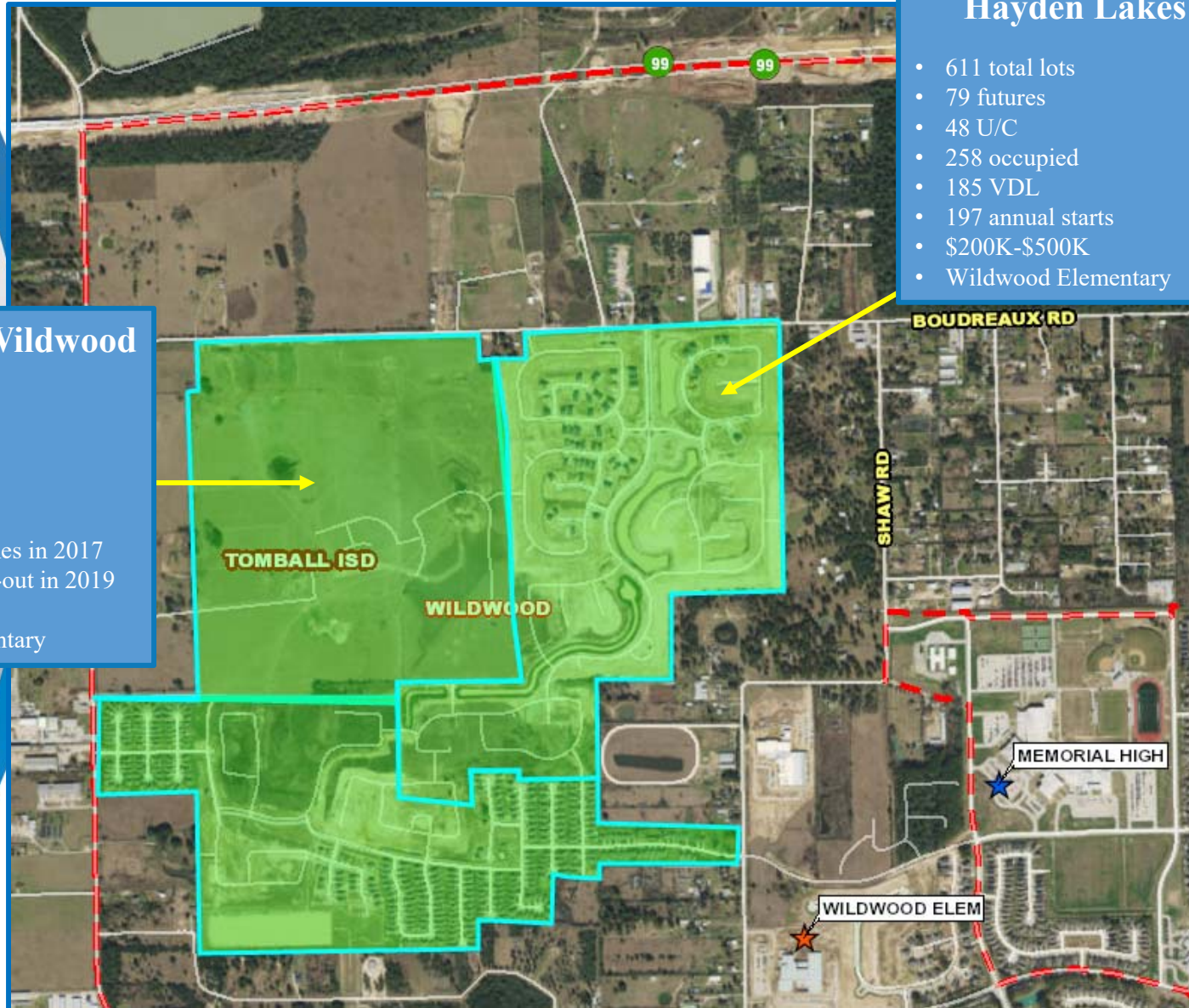
Hayden Lakes and Oakcrest at Wildwood

Oakcrest at Wildwood

- 1,035 total lots
- 377 futures
- 46 U/C
- 531 occupied
- 50 VDL
- Building 200 homes in 2017
- Anticipated build-out in 2019
- \$200K - \$400K
- Wildwood Elementary

Hayden Lakes

- 611 total lots
- 79 futures
- 48 U/C
- 258 occupied
- 185 VDL
- 197 annual starts
- \$200K-\$500K
- Wildwood Elementary





Residential Activity

Treeline North



Treeline North

- 52 future lots
- Final plat under review with Planning and Zoning in October 2015
- Development likely starting mid 2016
- Willow Creek Elementary





Multi-Family Activity

Future Village of Creekside Park



Future Multi-Family

- 3 future MF sites
- Development and unit completion timeframe unknown at this time
- 2 future sites in Timber Creek Elementary
- 1 future site in Creekview Elementary



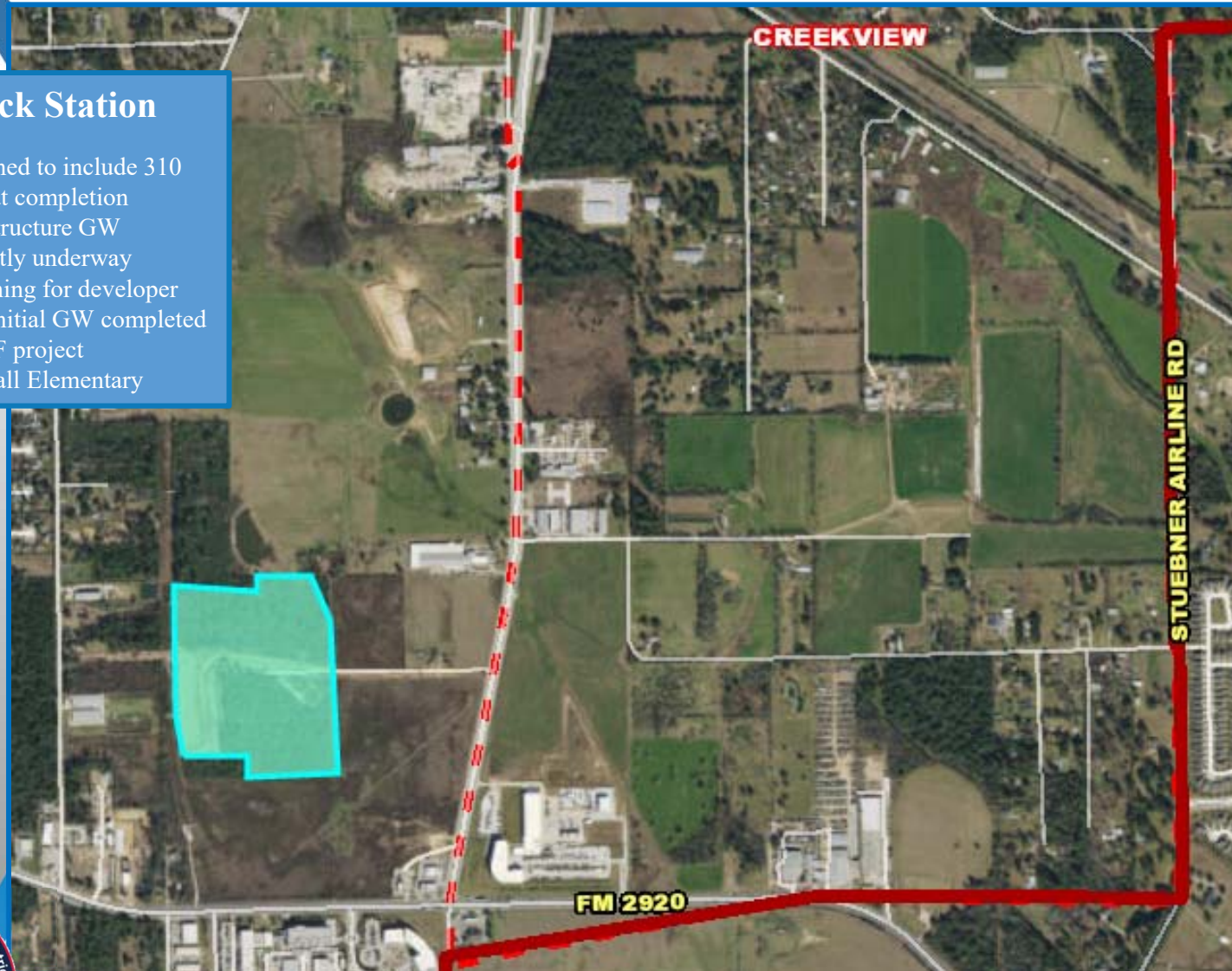


Multi-Family Activity

Peck Station

Peck Station

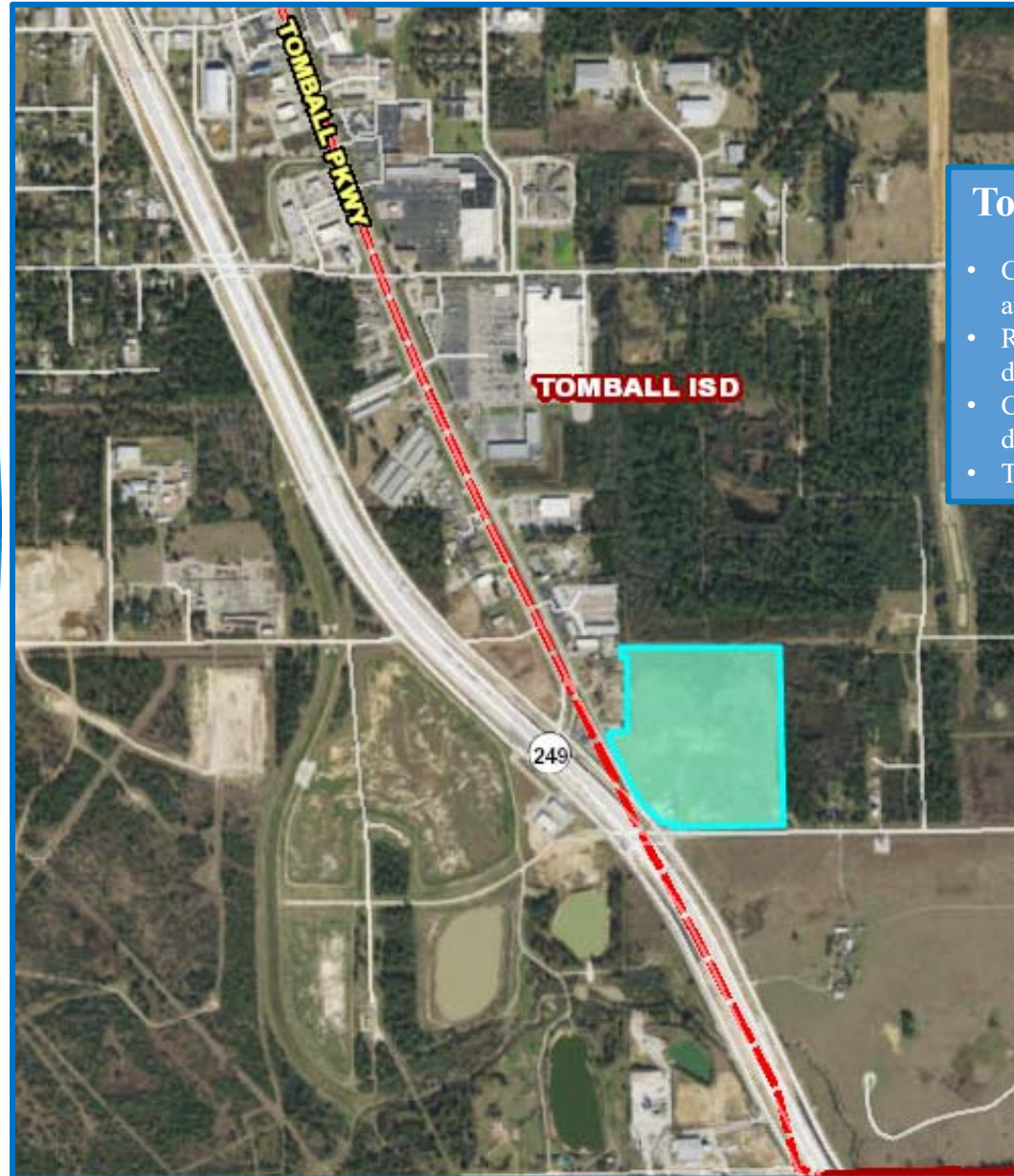
- Designed to include 310 units at completion
- Infrastructure GW currently underway
- Searching for developer after initial GW completed for MF project
- Tomball Elementary





Multi-Family Activity

Tomball Commons



Tomball Commons

- Concept plan has 360 units at completion
- Rezoned for a planned development by the city
- Current timeframe from developer is unknown
- Tomball Elementary



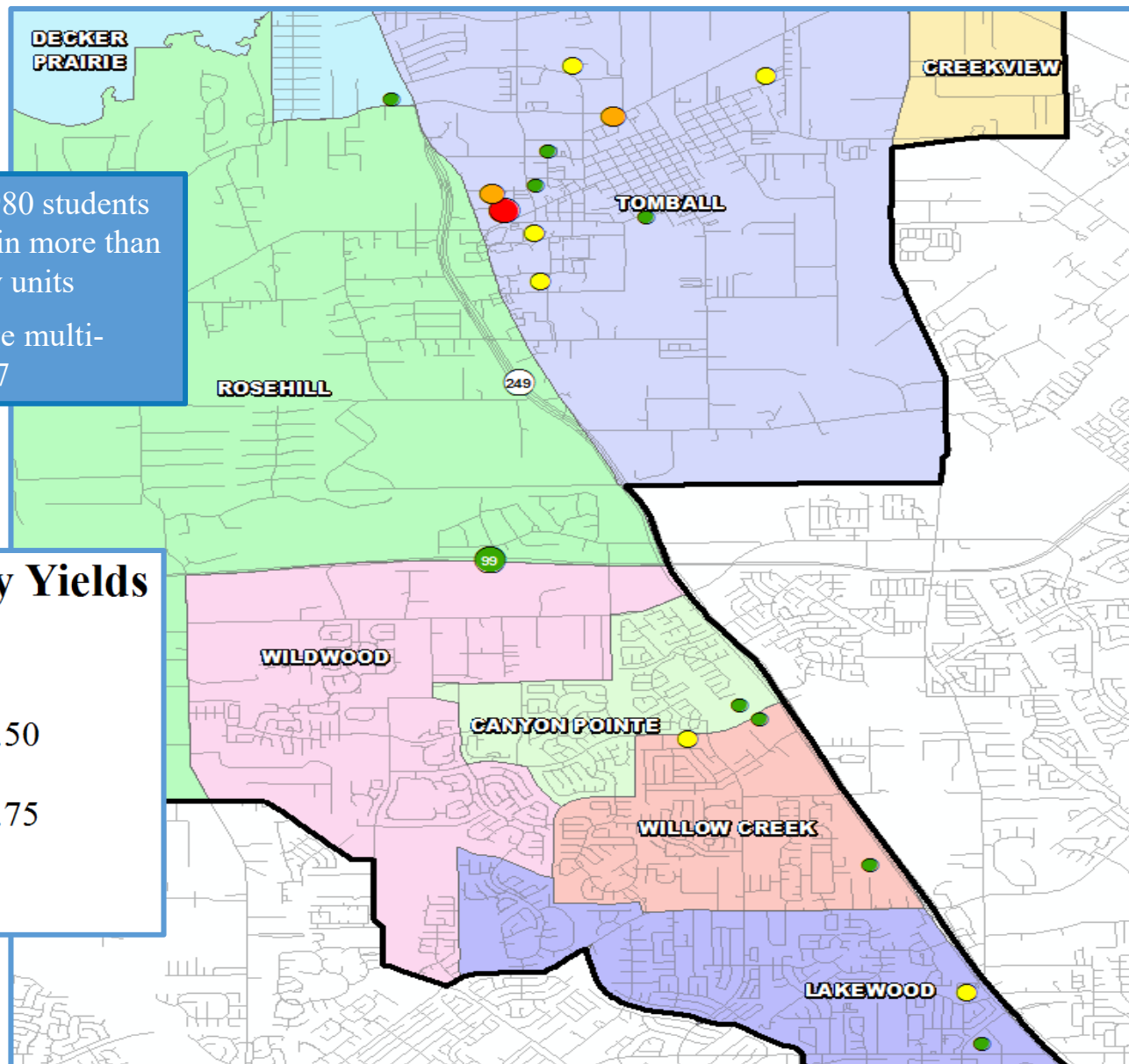


2016/17 Apartment Yield Analysis

- Tomball ISD has 980 students currently residing in more than 3,600 multi-family units
- The district average multi-family yield is 0.27

Multi-Family Yields

- < 0.25
- 0.25 - 0.50
- 0.50 - 0.75
- > 0.75





Ten Year Forecast

By Grade Level

Year (Oct.)	EE/PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Growth	% Growth
2012/13	280	946	965	922	952	935	928	887	914	832	900	810	772	729	11,772		
2013/14	254	956	1,058	1,026	986	1,017	991	999	913	958	910	863	786	782	12,499	727	6.2%
2014/15	303	1,040	1,098	1,091	1,074	1,045	1,059	1,011	1,007	943	1,017	915	821	814	13,238	739	5.9%
2015/16	281	1,087	1,183	1,183	1,164	1,144	1,115	1,126	1,051	1,052	1,046	975	879	834	14,120	882	6.7%
2016/17	315	1,154	1,156	1,188	1,224	1,192	1,204	1,159	1,168	1,118	1,127	1,003	955	922	14,885	765	5.4%
2017/18	315	1,205	1,249	1,215	1,237	1,267	1,242	1,273	1,171	1,210	1,210	1,093	967	970	15,624	739	5.0%
2018/19	315	1,265	1,291	1,311	1,268	1,292	1,318	1,301	1,316	1,215	1,317	1,163	1,057	993	16,422	798	5.1%
2019/20	315	1,297	1,357	1,340	1,360	1,306	1,333	1,397	1,337	1,362	1,313	1,265	1,127	1,091	17,200	778	4.7%
2020/21	315	1,325	1,393	1,406	1,378	1,407	1,361	1,418	1,411	1,387	1,475	1,265	1,223	1,155	17,919	719	4.2%
2021/22	315	1,335	1,408	1,420	1,425	1,409	1,461	1,424	1,466	1,455	1,503	1,420	1,224	1,258	18,523	604	3.4%
2022/23	315	1,379	1,428	1,425	1,440	1,450	1,471	1,533	1,434	1,515	1,572	1,447	1,375	1,259	19,043	520	2.8%
2023/24	315	1,361	1,483	1,473	1,461	1,486	1,515	1,548	1,581	1,497	1,642	1,515	1,402	1,410	19,689	646	3.4%
2024/25	315	1,383	1,455	1,540	1,501	1,497	1,538	1,592	1,591	1,643	1,621	1,580	1,468	1,439	20,163	474	2.4%
2025/26	315	1,377	1,488	1,488	1,576	1,538	1,545	1,617	1,617	1,647	1,779	1,560	1,528	1,504	20,579	416	2.1%
2026/27	315	1,382	1,487	1,539	1,517	1,615	1,590	1,594	1,668	1,665	1,784	1,713	1,510	1,571	20,950	371	1.8%

*Yellow box = largest grade per year

*Green box = second largest grade per year

- Tomball ISD may reach 15,000 students by 2017 and more than 17,000 by 2019
- 5 year growth = 3,638 students
- 2021/22 enrollment = 18,523 students
- 10 year growth = 6,065 students
- 2026/27 enrollment = 20,950 students





Summary

- Houston's unemployment rate is currently near 5%, and has risen 0.4% in the last 12 months.
- The Wildwood Elementary zone has accounted for more than half of all district annual closings due to activity in Hayden Lakes, Oakcrest at Wildwood and Wildwood at Northpointe.
- Tomball ISD has more than 3,800 planned future lots.
- Roughly 6.8% of the current student body resides in multi-family units.
- The district may add more than 3,600 students by 2021.
- Fall 2021 enrollment: 18,523 students.
- The 10 year enrollment forecast adds over 6,000 students to the district by the 2026/27 school year.





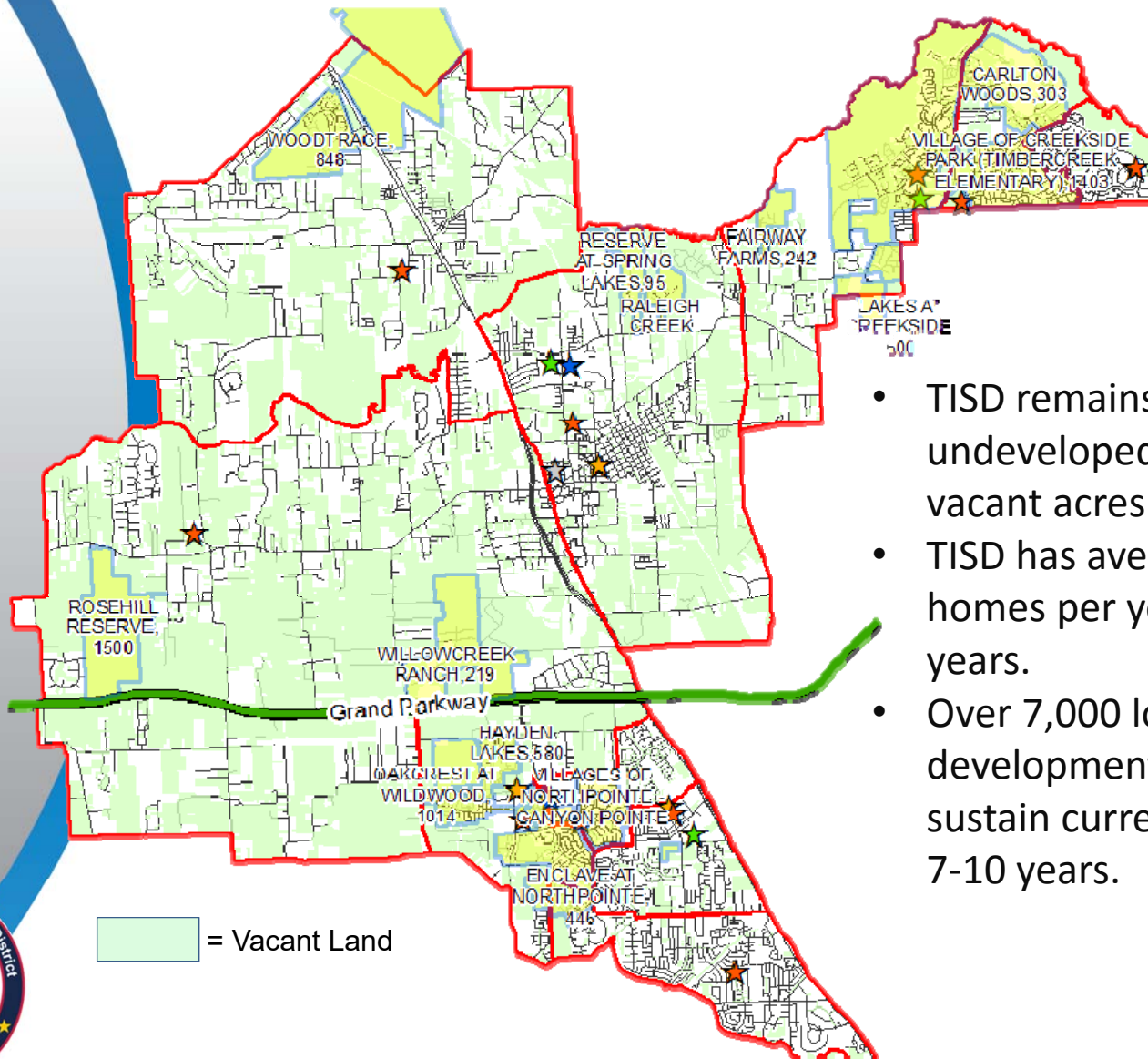
Future Planning





Current Elementary School Boundaries

Vacant Land and Known Future Development



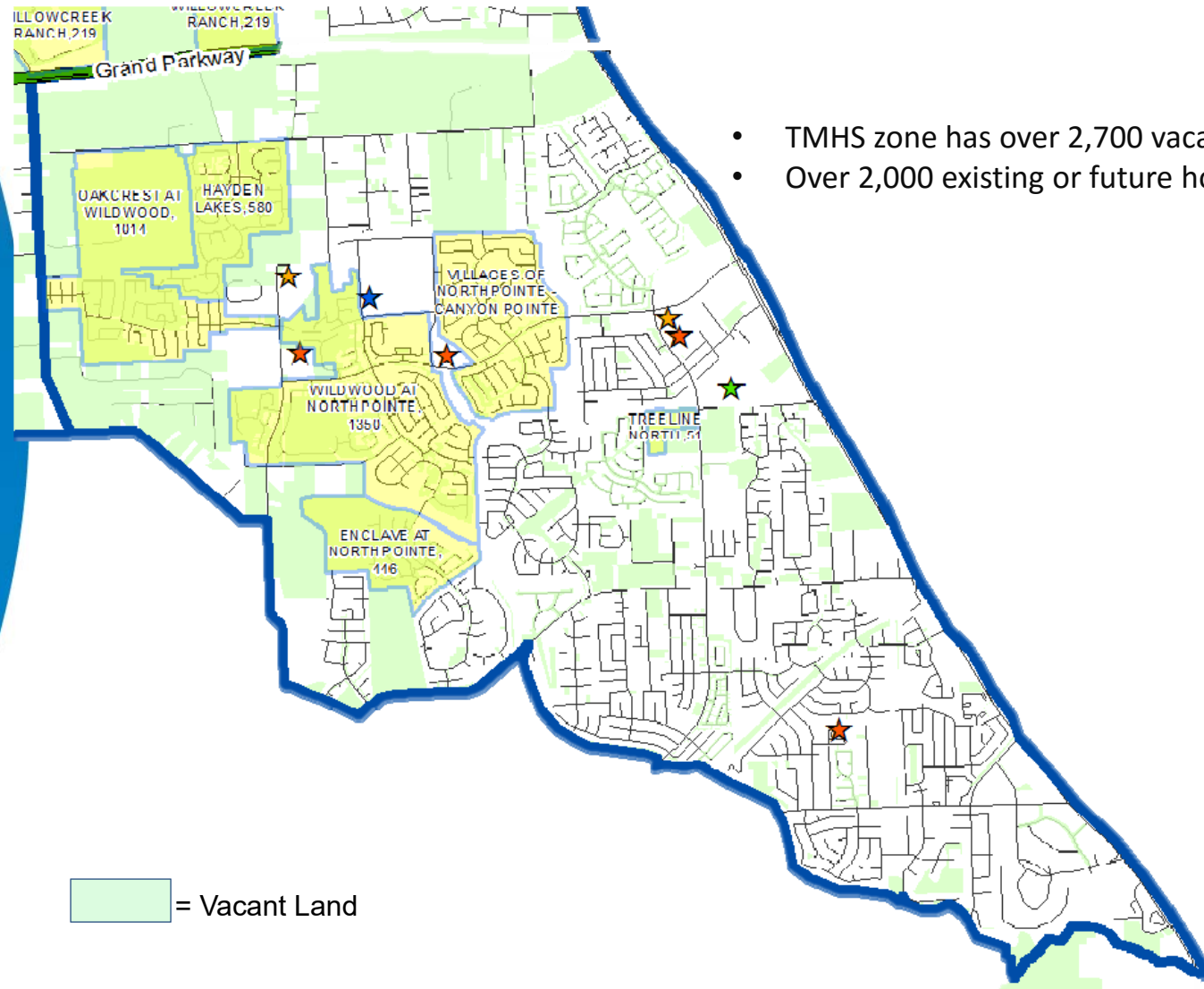
- TISD remains almost 50% undeveloped with over 30,000 vacant acres.
- TISD has averaged over 1,000 new homes per year over the last 5 years.
- Over 7,000 lots exist in planned developments in TISD which could sustain current growth patterns for 7-10 years.





Tomball Memorial High School Zone

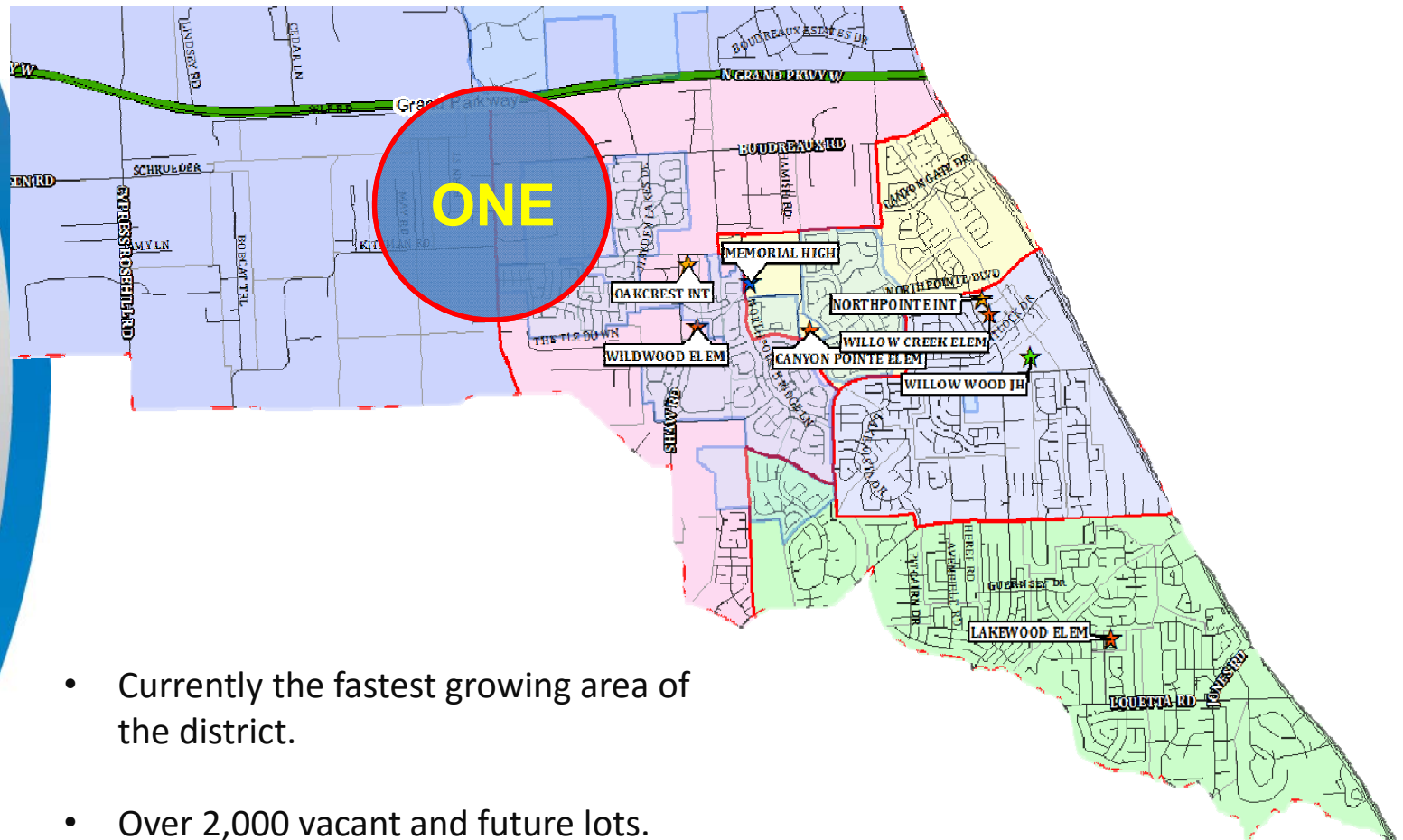
Vacant Land and Known Future Development





Future Elementary School Site Needs

Site “ONE”



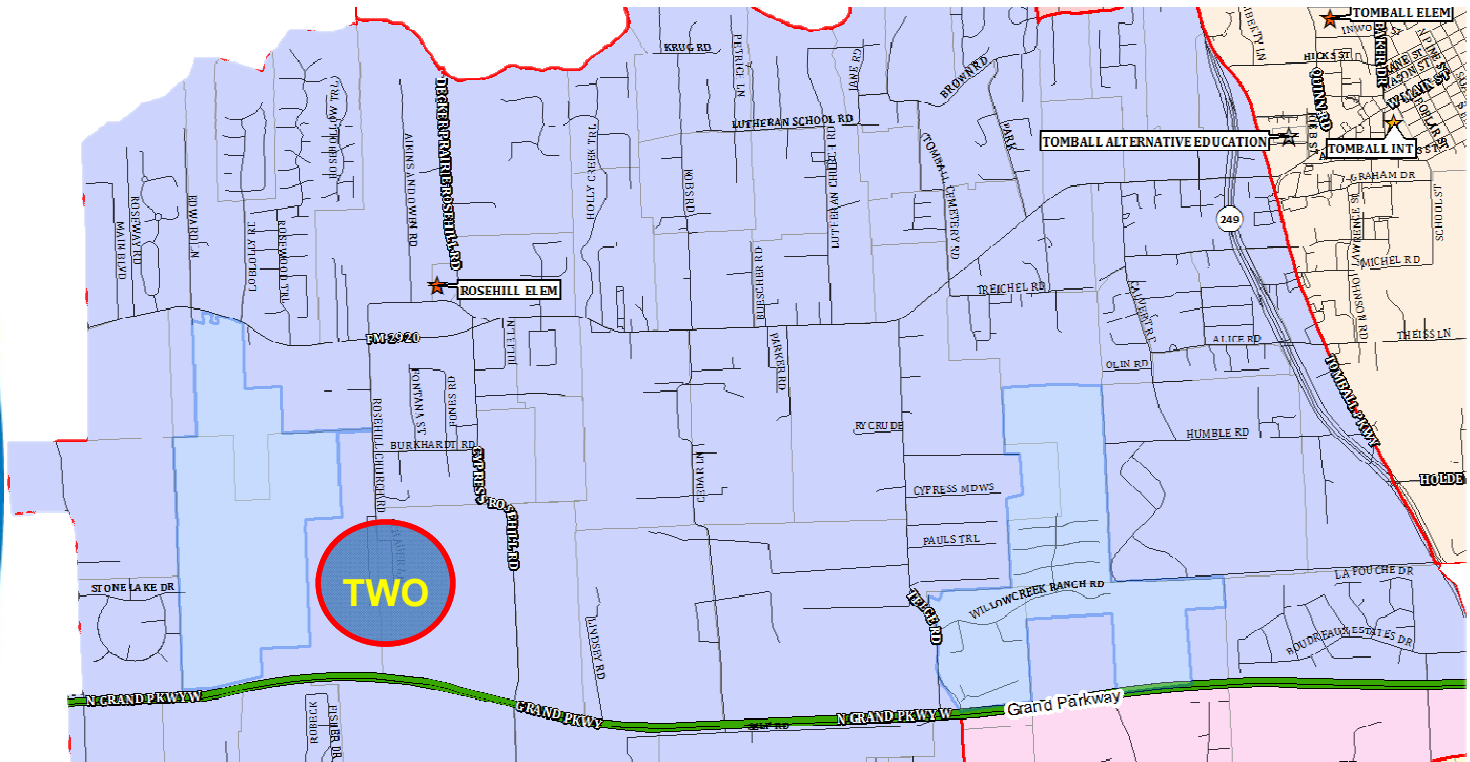
- Currently the fastest growing area of the district.
- Over 2,000 vacant and future lots.
- May relieve sections of Wildwood, Willow Creek, and Lakewood





Future Elementary School Site Needs

Site “TWO”



- Completion of the Grand parkway will significantly change the Rosehill Zone.
- Full impacts will take sometime to quantify, but the north side appears to show the most potential and momentum.
- Rosehill Reserve has approximately 800 lots planned, with first lots being delivered in 2017.

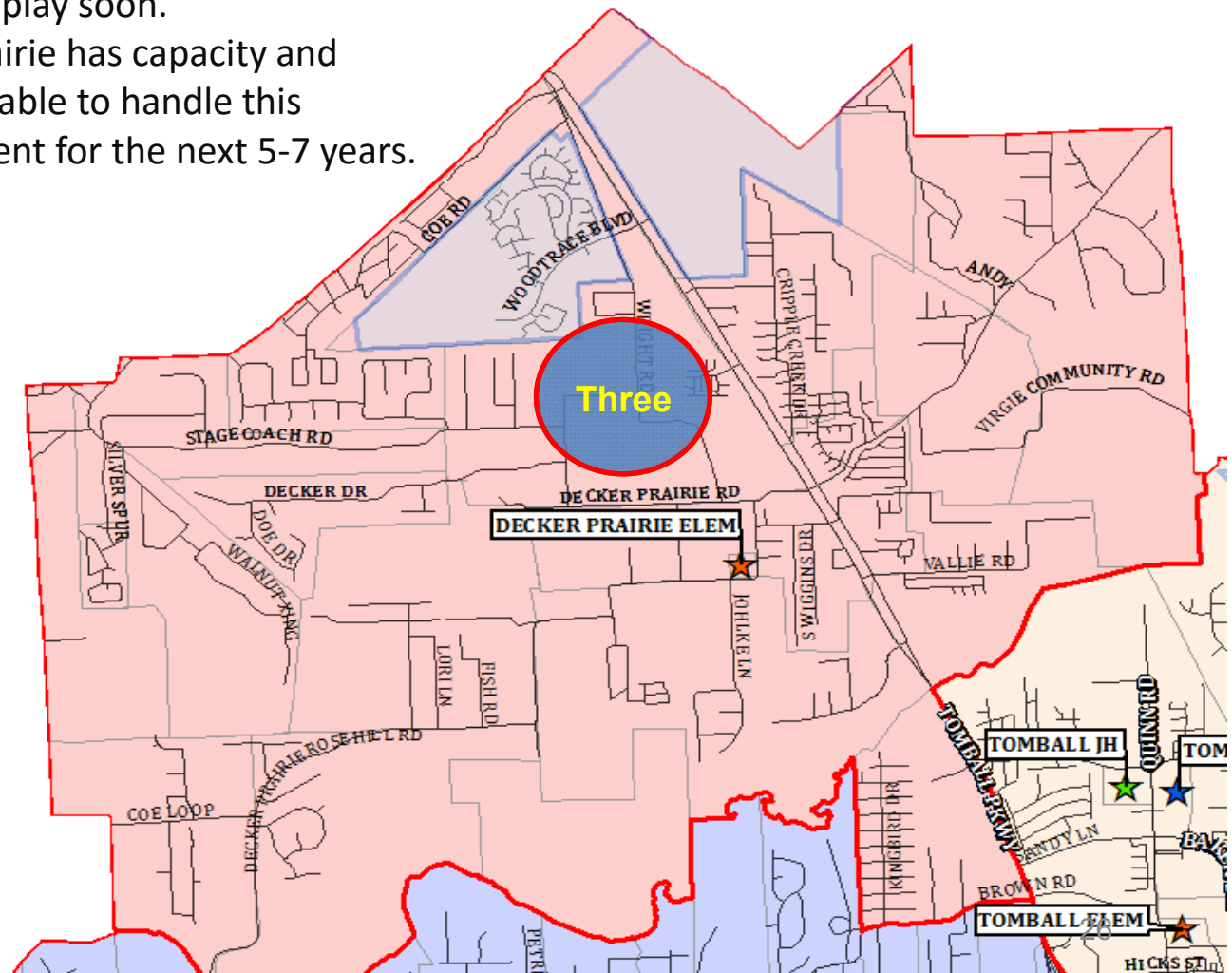




Future Elementary School Site Needs

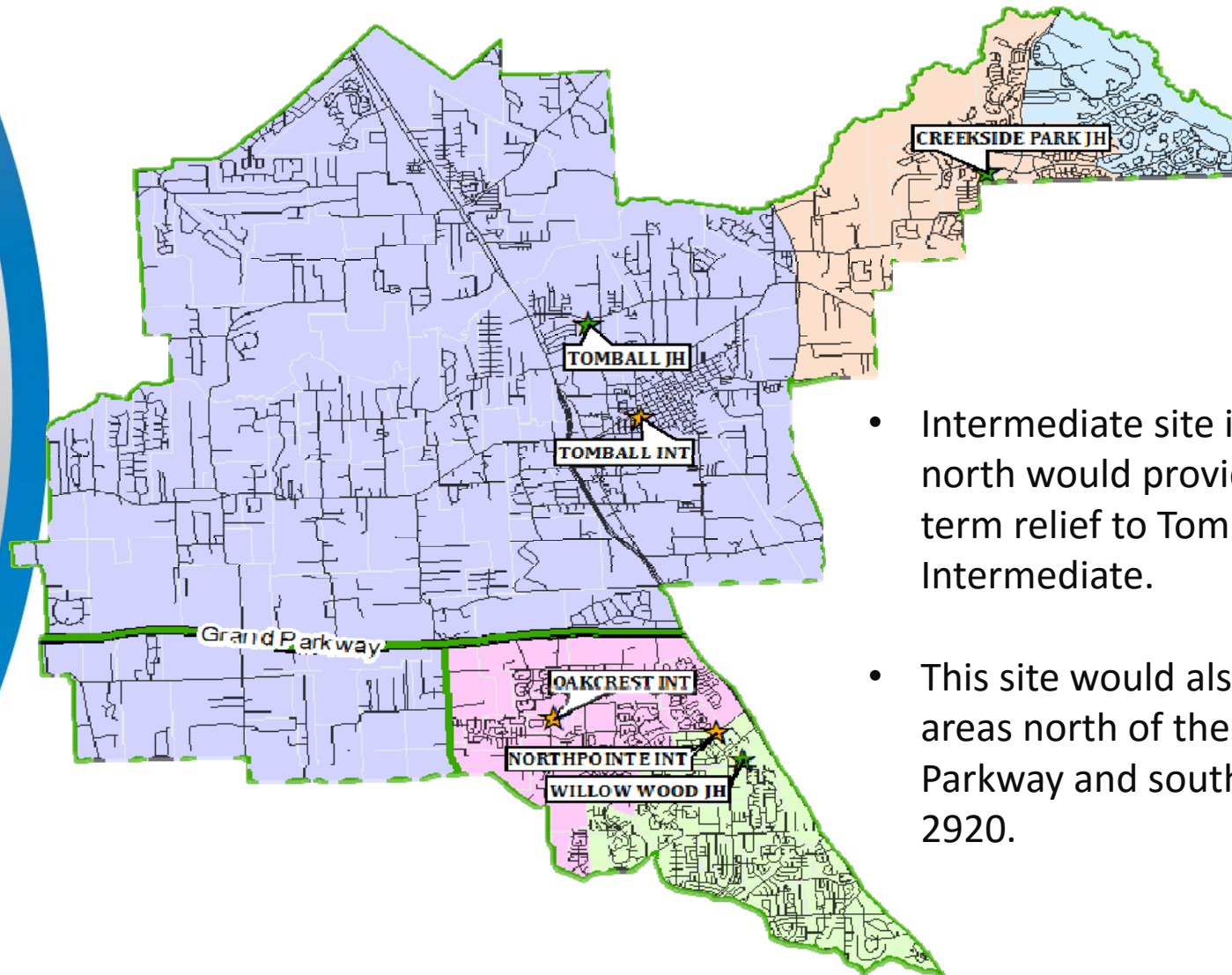
Site “THREE”

- Woodtrace will have almost 900 homes when built-out.
- 2,800 acres east of SH 249 will come into play soon.
- Decker Prairie has capacity and should be able to handle this development for the next 5-7 years.





Intermediate School Site Needs

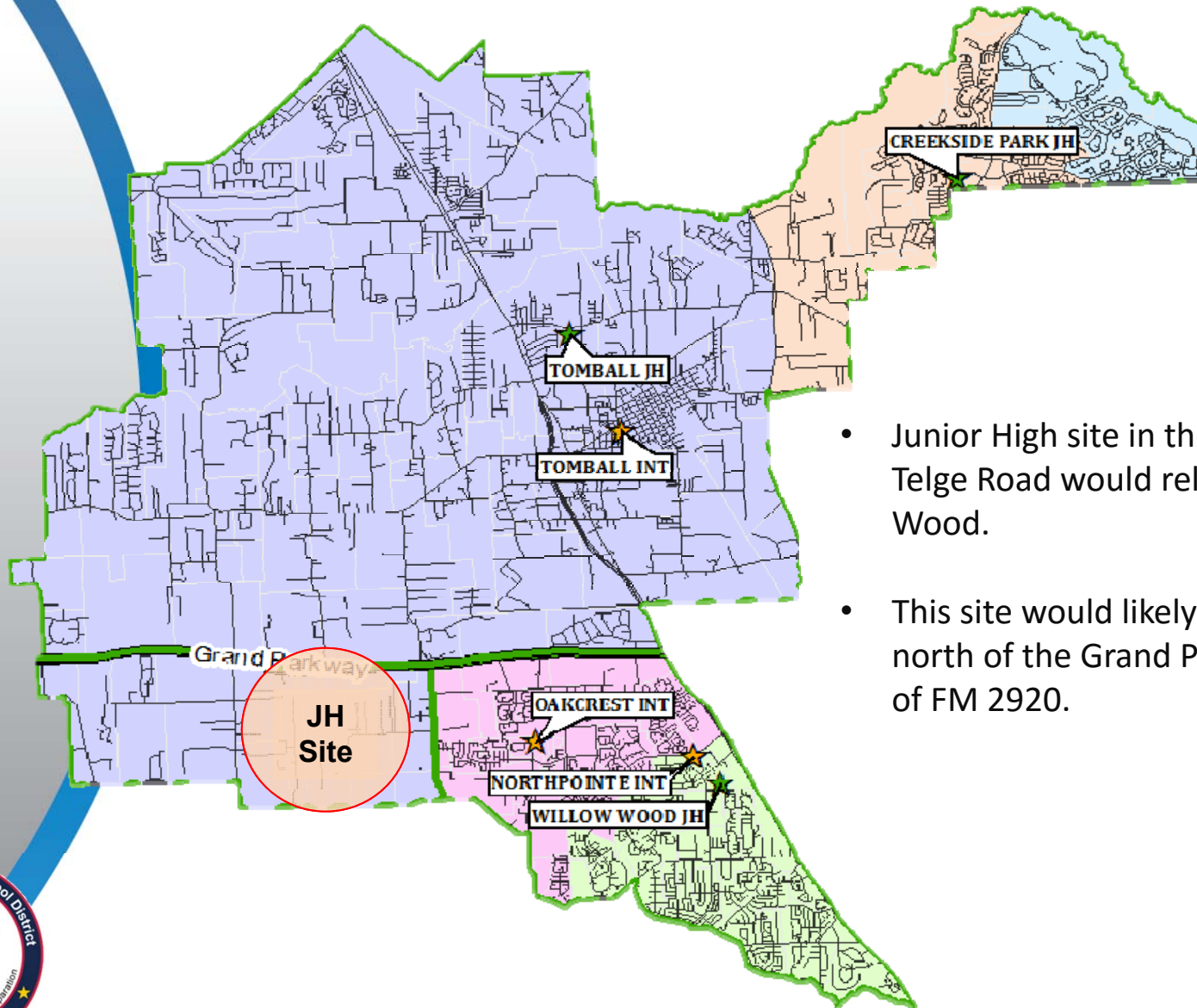


- Intermediate site in the north would provide long term relief to Tomball Intermediate.
- This site would also serve areas north of the Grand Parkway and south of FM 2920.





Junior High School Site Needs

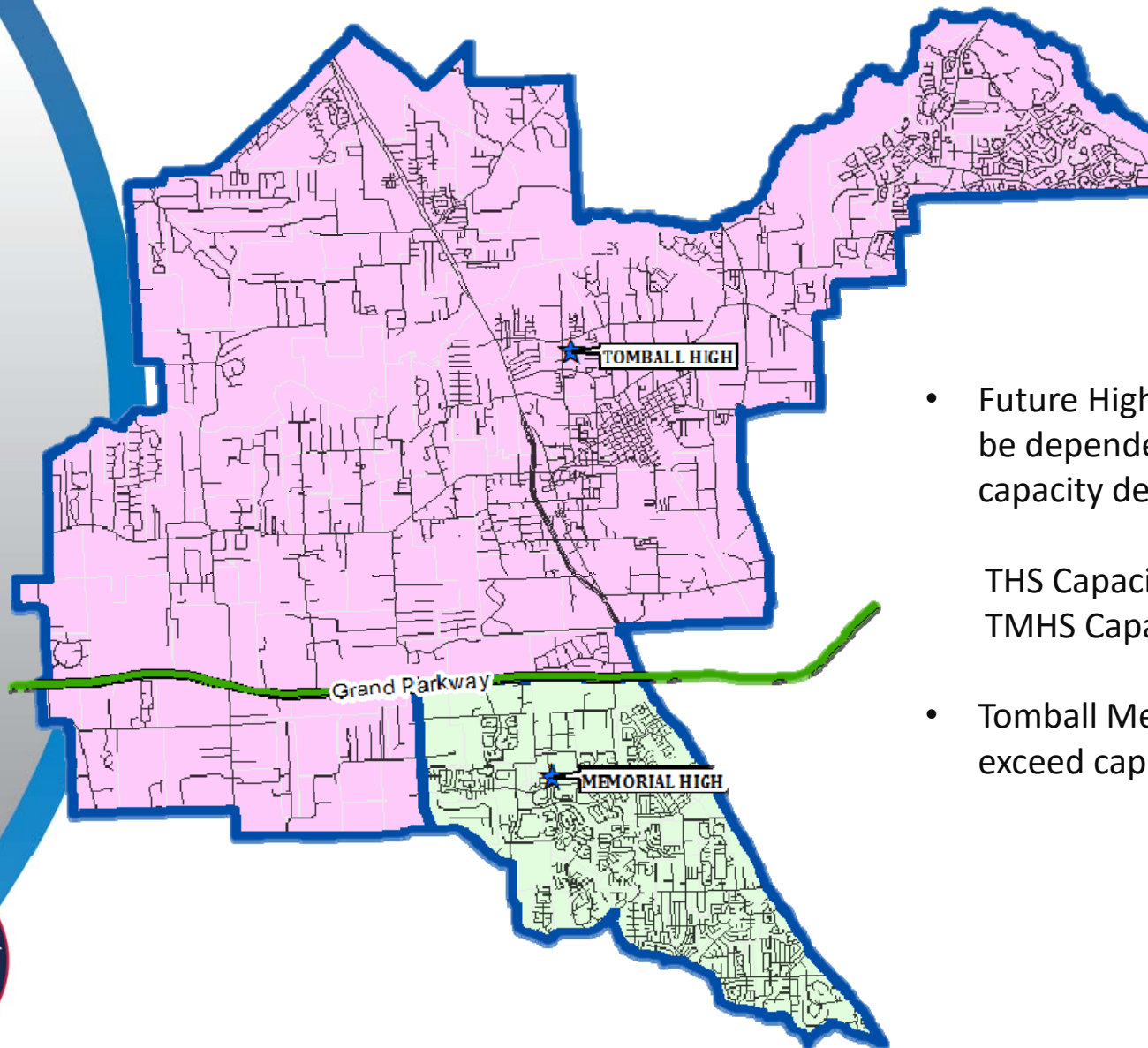


- Junior High site in the proximity of Telge Road would relieve Willow Wood.
- This site would likely also serve areas north of the Grand Parkway and south of FM 2920.





Future High School Site Needs



- Future High School needs will be dependent on district capacity decisions.

THS Capacity: 3,628 / 4,172

TMHS Capacity: 2,349 / 2,701

- Tomball Memorial may exceed capacity in 4 years.





Questions

