

*Georgetown
Independent
School
District*

Fall 2014
Demographic
Update



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

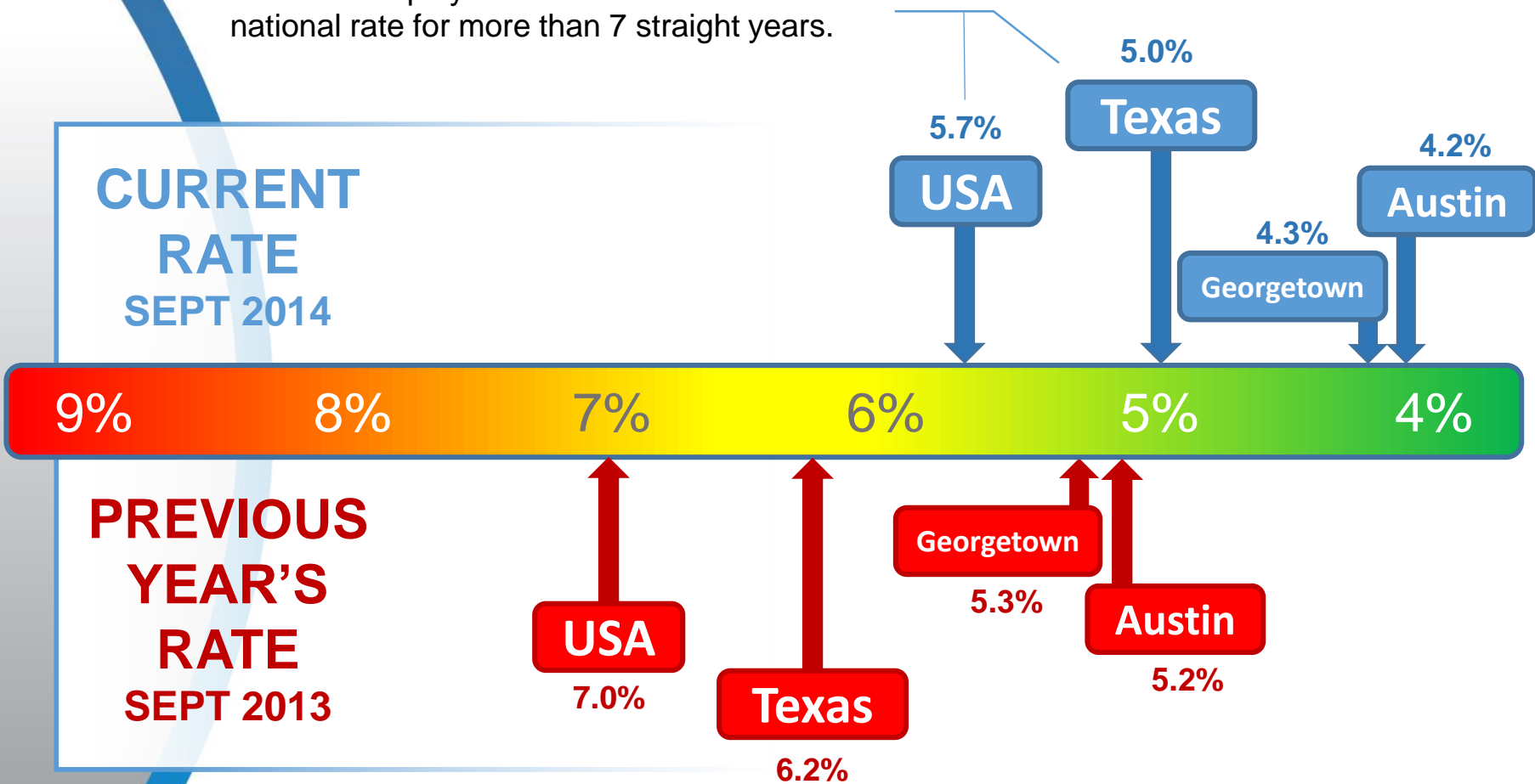


TEMPLETON
DEMOGRAPHICS



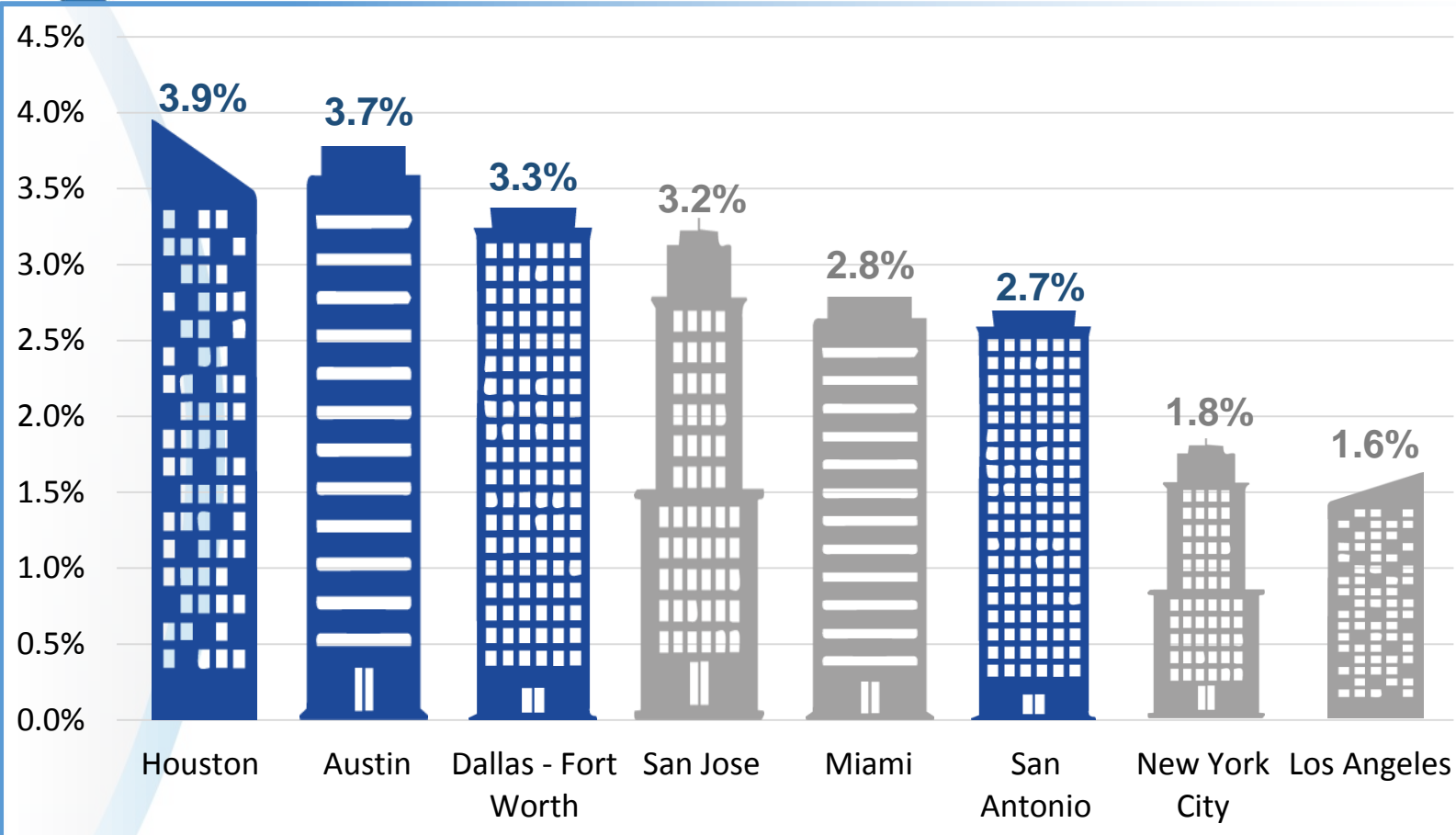
Unemployment Rate Change

Texas' unemployment rate has been below the national rate for more than 7 straight years.





Annual Job Growth – Aug 2013 to Aug 2014



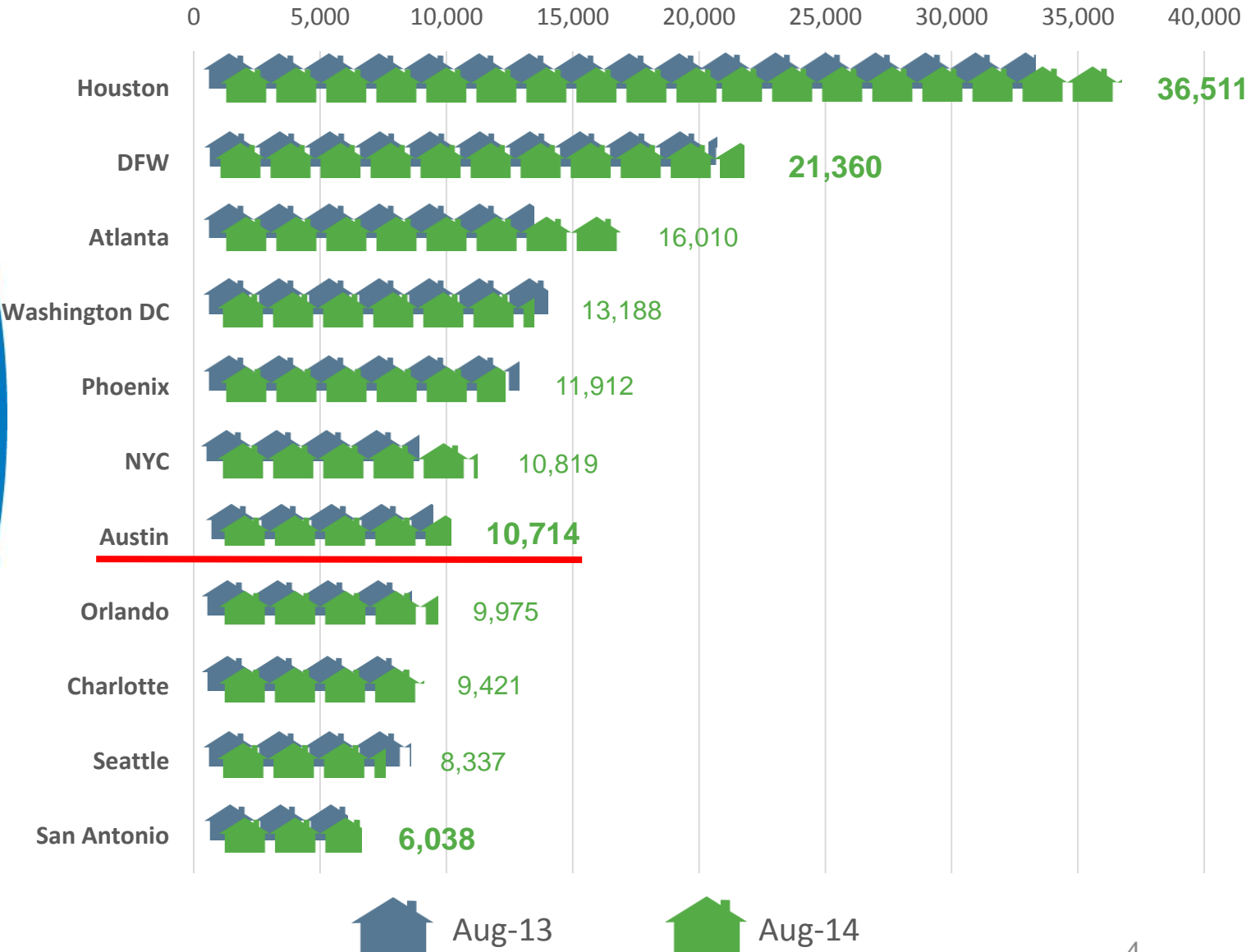
Texas' 4 largest metros are in the top 25 in the nation in total jobs and percent growth over the past 12 months.





Annualized SF Permits by MSA

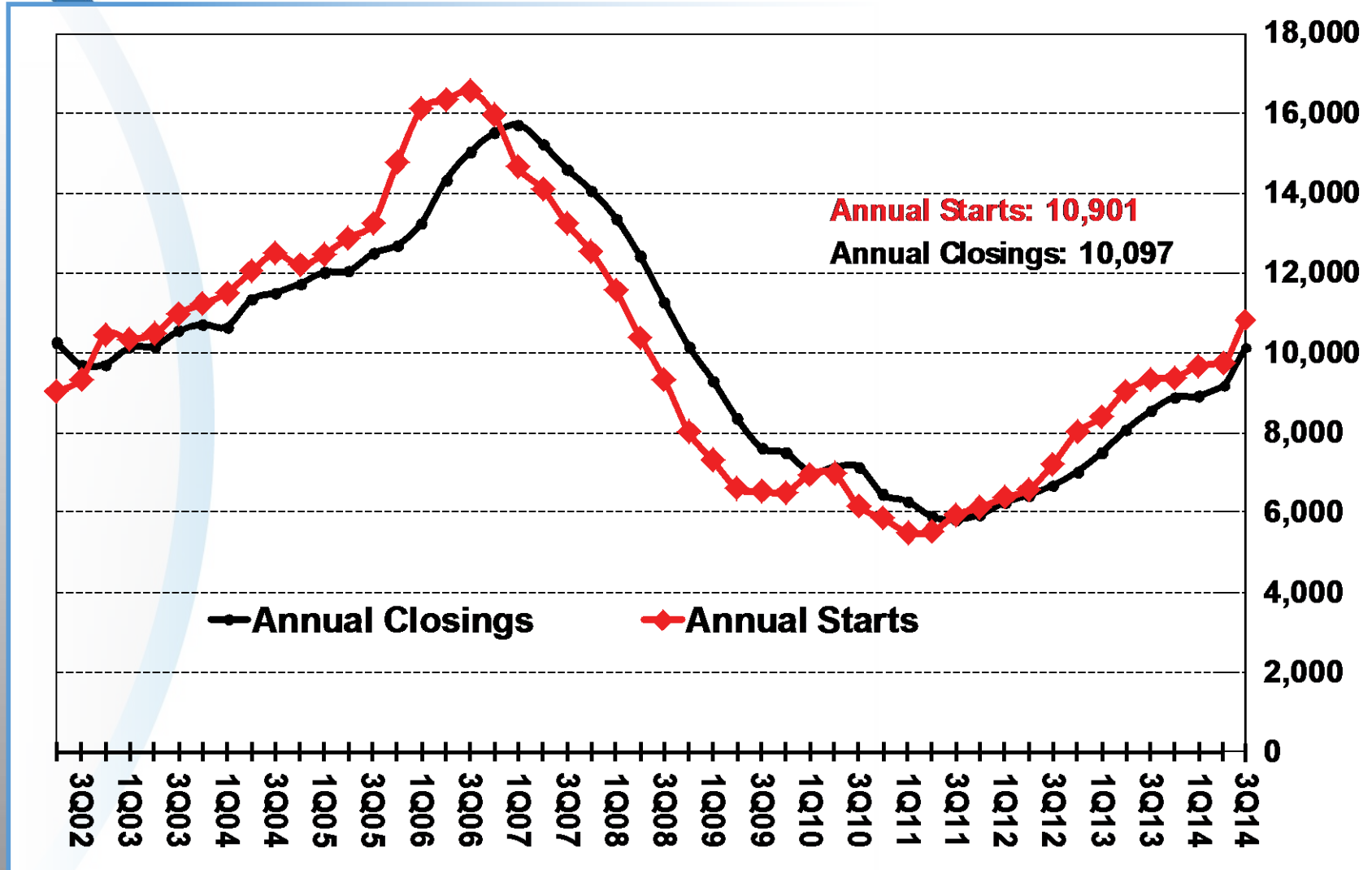
Aug 2013 vs Aug 2014





Austin Housing Market

Single Family Homes: 3Q14 Starts & Closes



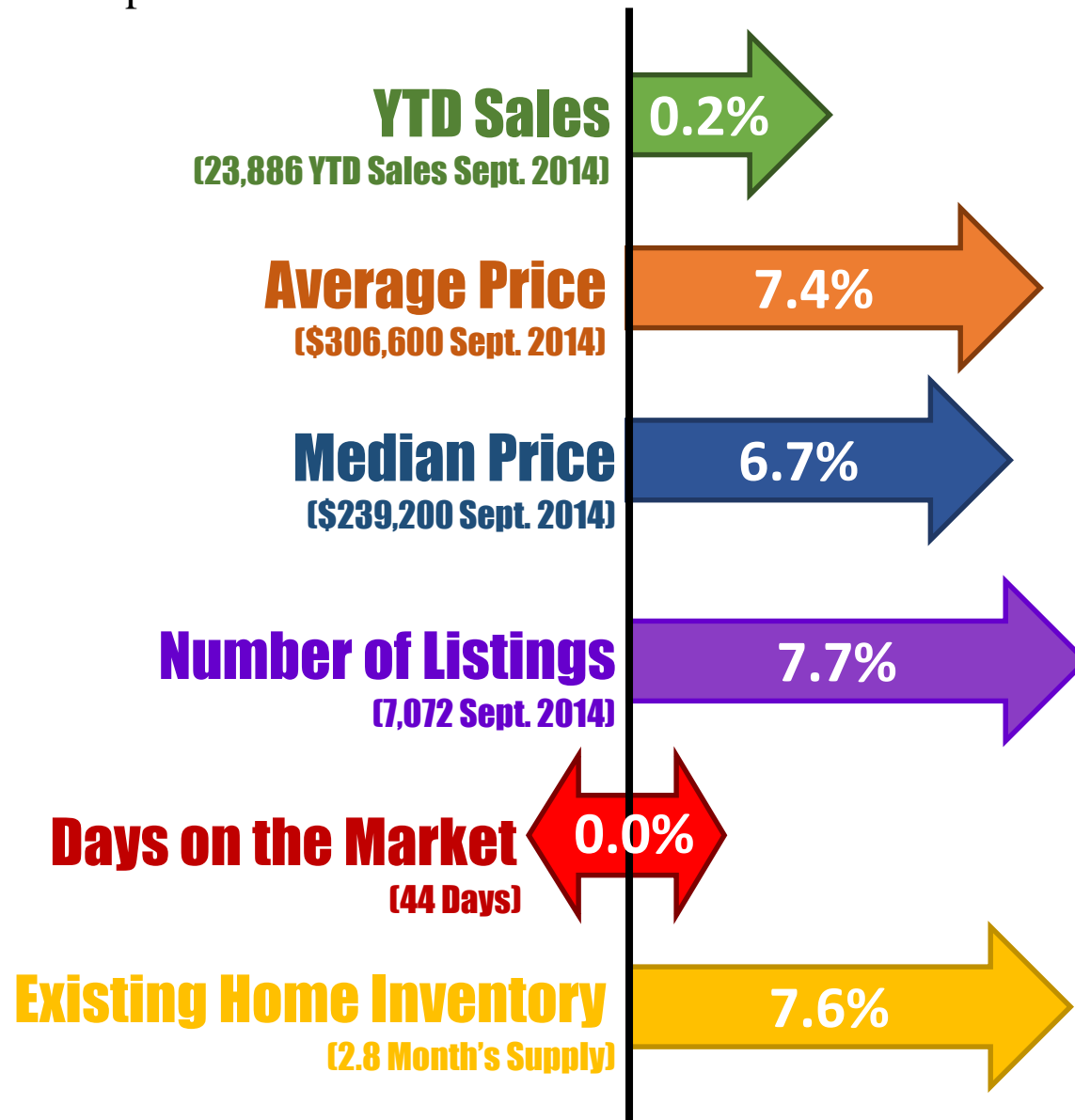
Austin MSA Starts are above 10,000 for the first time since 2Q08





Austin MSA Housing Market

Year Over Year Comparisons





Austin New Home Ranking Report

ISD Ranked by Annual Closings –3Q14

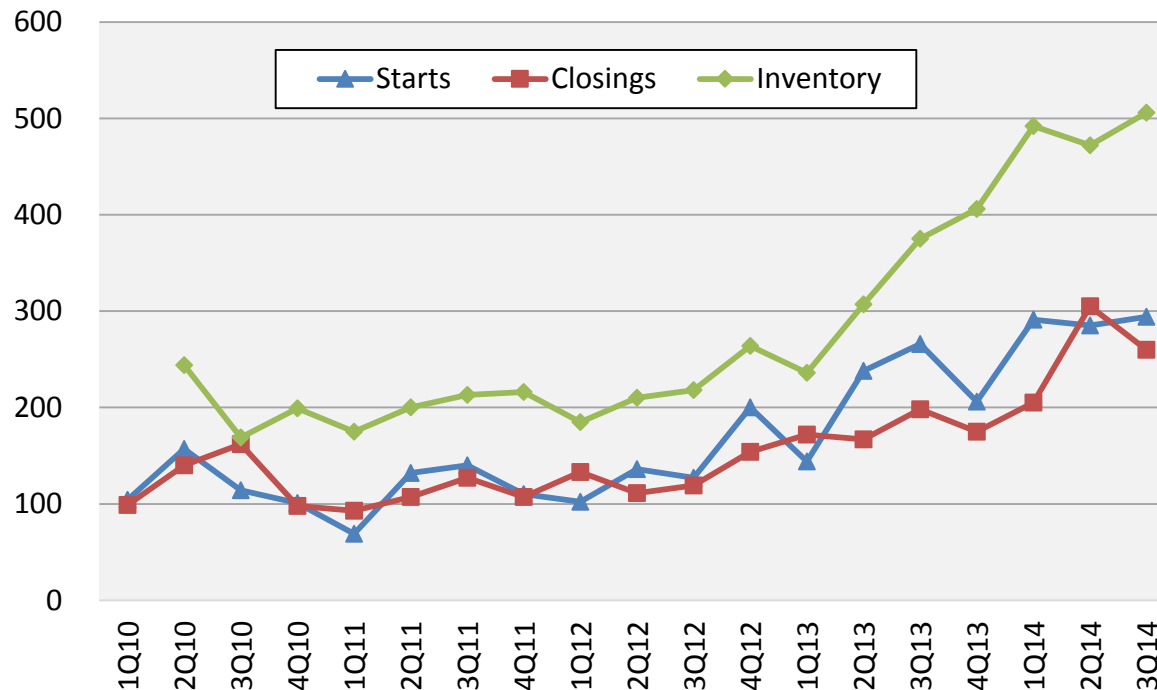
Rank	District Name	Annual Starts	Annual Closings	VDL	Future
1	Leander ISD	1,856	1,655	2,179	10,634
2	Austin ISD	1,301	1,427	1,332	11,476
3	Hays CISD	1,210	1,085	1,087	10,357
4	Round Rock ISD	1,078	1,017	1,254	2,352
5	Georgetown ISD	1,076	945	1,346	18,471
6	Lake Travis ISD	917	904	1,883	4,053
7	Pflugerville ISD	908	797	1,021	6,469
8	Manor ISD	579	493	671	16,527
9	Hutto ISD	577	478	745	5,923
10	Dripping Springs ISD	415	375	906	4,671
11	Del Valle ISD	189	246	126	26,957
12	Jarrell ISD	213	183	207	7,485
13	Liberty Hill ISD	197	158	742	5,826
14	San Marcos ISD	139	142	136	6,660
15	Bastrop ISD	94	92	372	11,960
16	Eanes ISD	28	29	164	323
17	Elgin ISD	33	23	186	4,525
18	Taylor ISD	14	17	102	545
19	Lago Vista ISD	12	11	596	3,069
20	Lockhart ISD	50	9	121	673





New Housing Activity 3Q14

Georgetown ISD



Starts	2010	2011	2012	2013	2014
1Q	104	69	102	144	291
2Q	157	132	136	238	285
3Q	114	140	127	266	294
4Q	101	110	200	206	
Total	476	451	565	854	870

Closings	2010	2011	2012	2013	2014
1Q	99	93	133	172	205
2Q	140	107	111	167	305
3Q	162	127	119	198	260
4Q	98	107	154	175	
Total	499	434	517	712	770

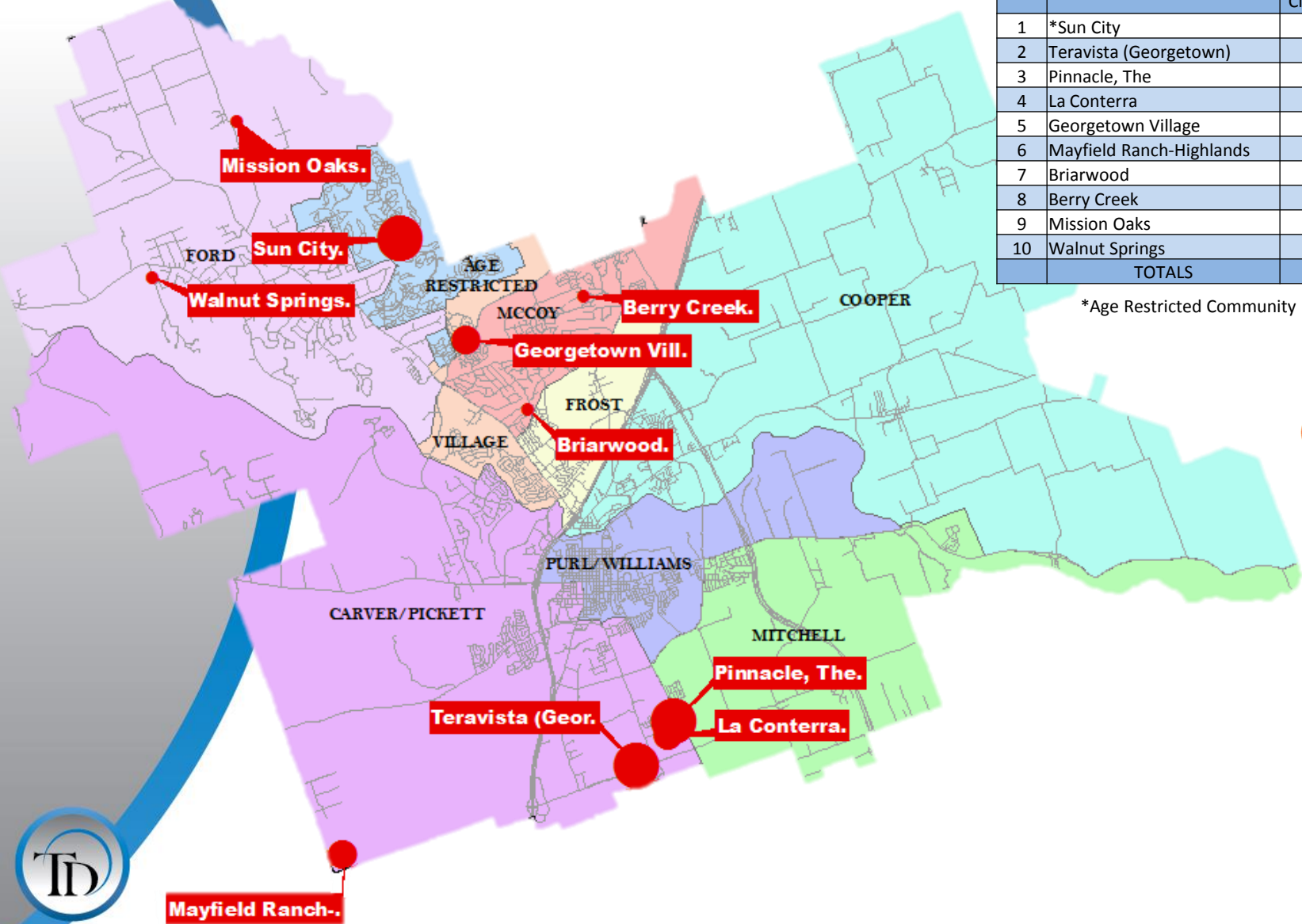
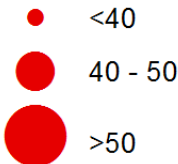
- Georgetown starts remain high, with the highest overall quarter in 5 years
- 3Q closings dropped slightly but remain 62 units above 3Q13
- Inventory is healthy for future growth with 506 units



Annual Closing Distribution 3Q14

Top 10 Subdivisions - 3Q14 (Ranked by Annual Closings)				
Rank	Subdivision	Annual Closings	Quarter Closings	VDL
1	*Sun City	323	78	250
2	Teravista (Georgetown)	127	47	311
3	Pinnacle, The	76	26	34
4	La Conterra	50	16	97
5	Georgetown Village	47	8	48
6	Mayfield Ranch-Highlands	44	24	27
7	Briarwood	39	2	29
8	Berry Creek	28	5	101
9	Mission Oaks	25	7	14
10	Walnut Springs	23	4	26
TOTALS		782	217	937

*Age Restricted Community

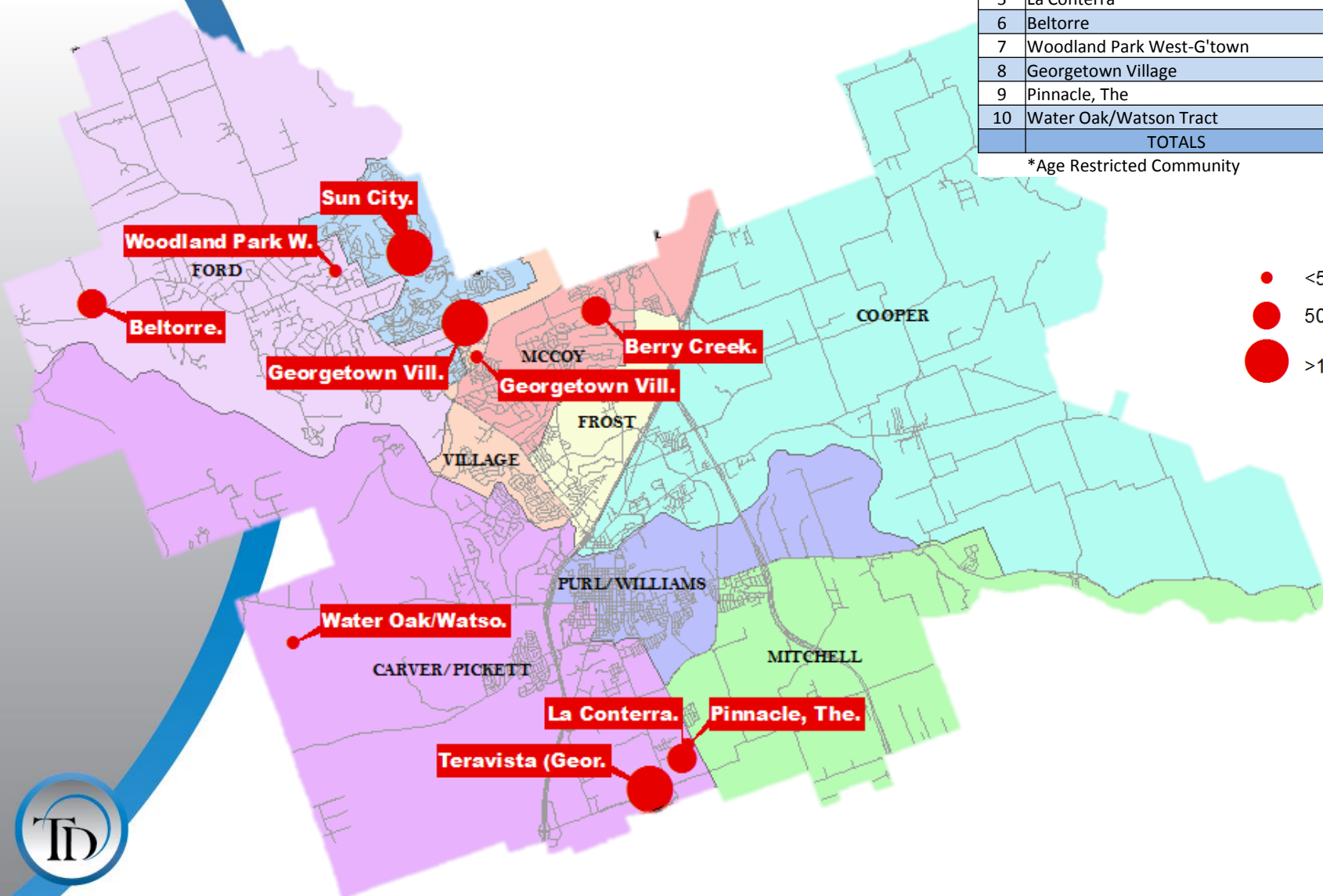




Vacant Developed Lots 3Q14

Top 10 Subdivisions - 3Q14 (Ranked by remaining VDL)			
Rank	Subdivision	VDL	Future
1	Teravista (Georgetown)	311	278
2	*Sun City	250	2,480
3	Georgetown Village/Creekside	130	65
4	Berry Creek	101	0
5	La Conterra	97	0
6	Beltorre	52	0
7	Woodland Park West-G'town	50	0
8	Georgetown Village	48	26
9	Pinnacle, The	34	118
10	Water Oak/Watson Tract	31	43
TOTALS		1,104	3,010

*Age Restricted Community



- <50
- 50 - 105
- >105

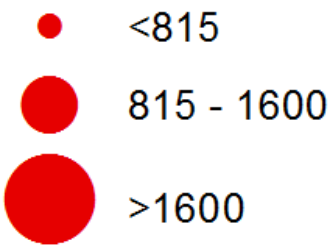
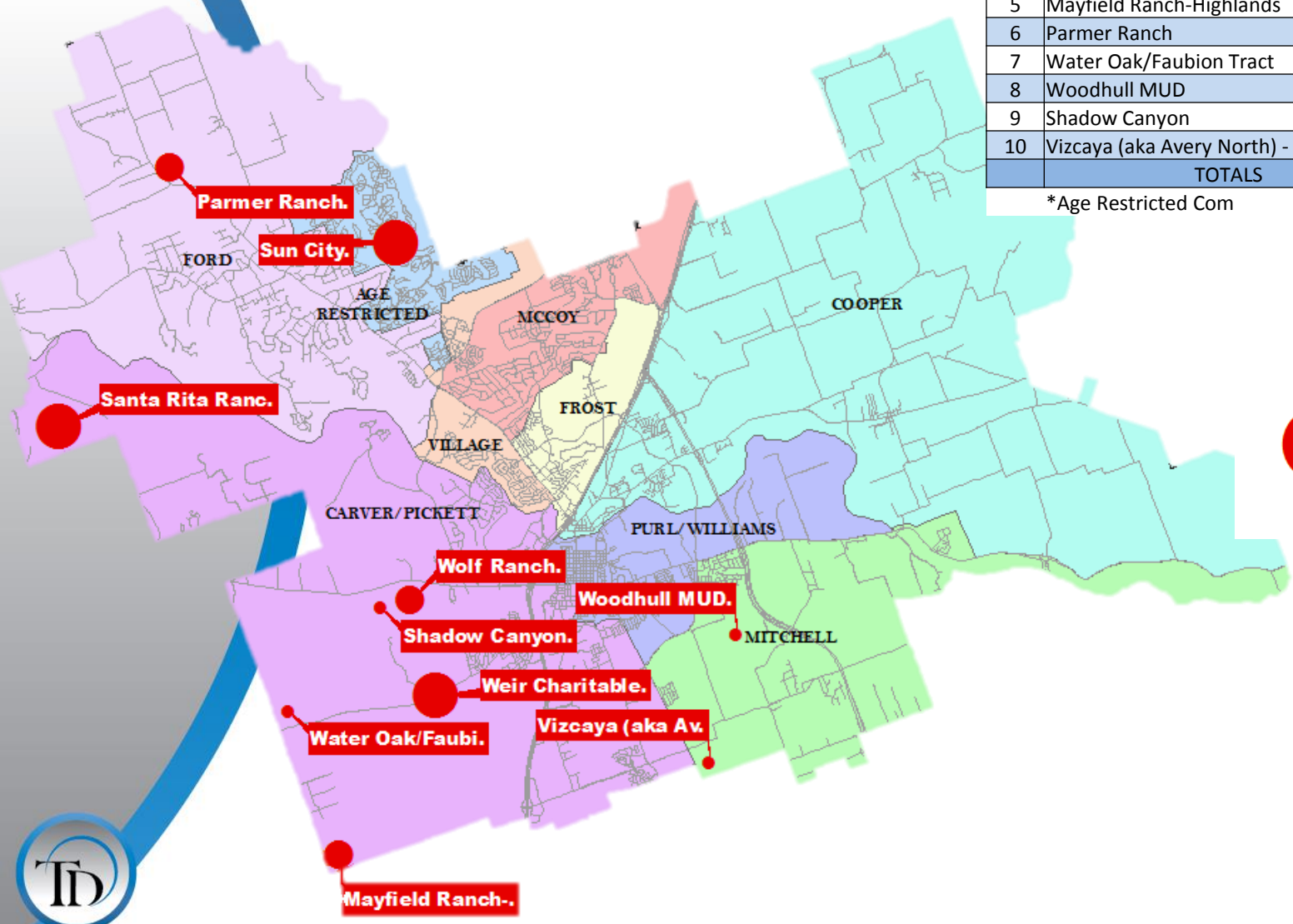




Future Lots 3Q14

Top 10 Subdivisions - 3Q14 (Ranked by Future Inventory)			
Rank	Subdivision	VDL	Future
1	Weir Charitable Trust	0	4,207
2	Santa Rita Ranch	0	2,500
3	*Sun City	250	2,480
4	Wolf Ranch	0	1,600
5	Mayfield Ranch-Highlands	27	914
6	Parmer Ranch	0	875
7	Water Oak/Faubion Tract	0	811
8	Woodhull MUD	0	792
9	Shadow Canyon	0	665
10	Vizcaya (aka Avery North) - Georgtown	0	479
TOTALS		277	15,323

*Age Restricted Com





Overall Housing Data

By Elementary Attendance Zone

Elementary	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Vacant Dev. Lots	Future
CARVER/PICKETT	488	153	325	128	512	12,460
COOPER	19	1	14	3	0	187
FORD	114	27	113	25	223	1,011
FROST	0	0	0	0	0	434
MCCOY	53	3	75	8	134	227
MITCHELL	0	0	0	0	0	792
PURL/WILLIAMS	1	0	11	0	0	225
VILLAGE	75	31	57	9	194	176
Grand Total	750	215	595	173	1,063	15,512

Highest activity in the category

Second highest activity in the category

Third highest activity in the category

*Age Restricted Communities are not reflected in this table.



Active Subdivision

The Brownstones at the Summit

The Brownstones at the Summit

- 114 total lots at build-out
- Under construction
 - 13 under construction
 - 23 built
- Estimated velocity rates:
 - 2015 = 25
 - 2016 = 26
 - 2017 = 25
- \$470K-\$650K
- No homes will be built in the Frost Elementary zone
- Carver/Pickett Elementary

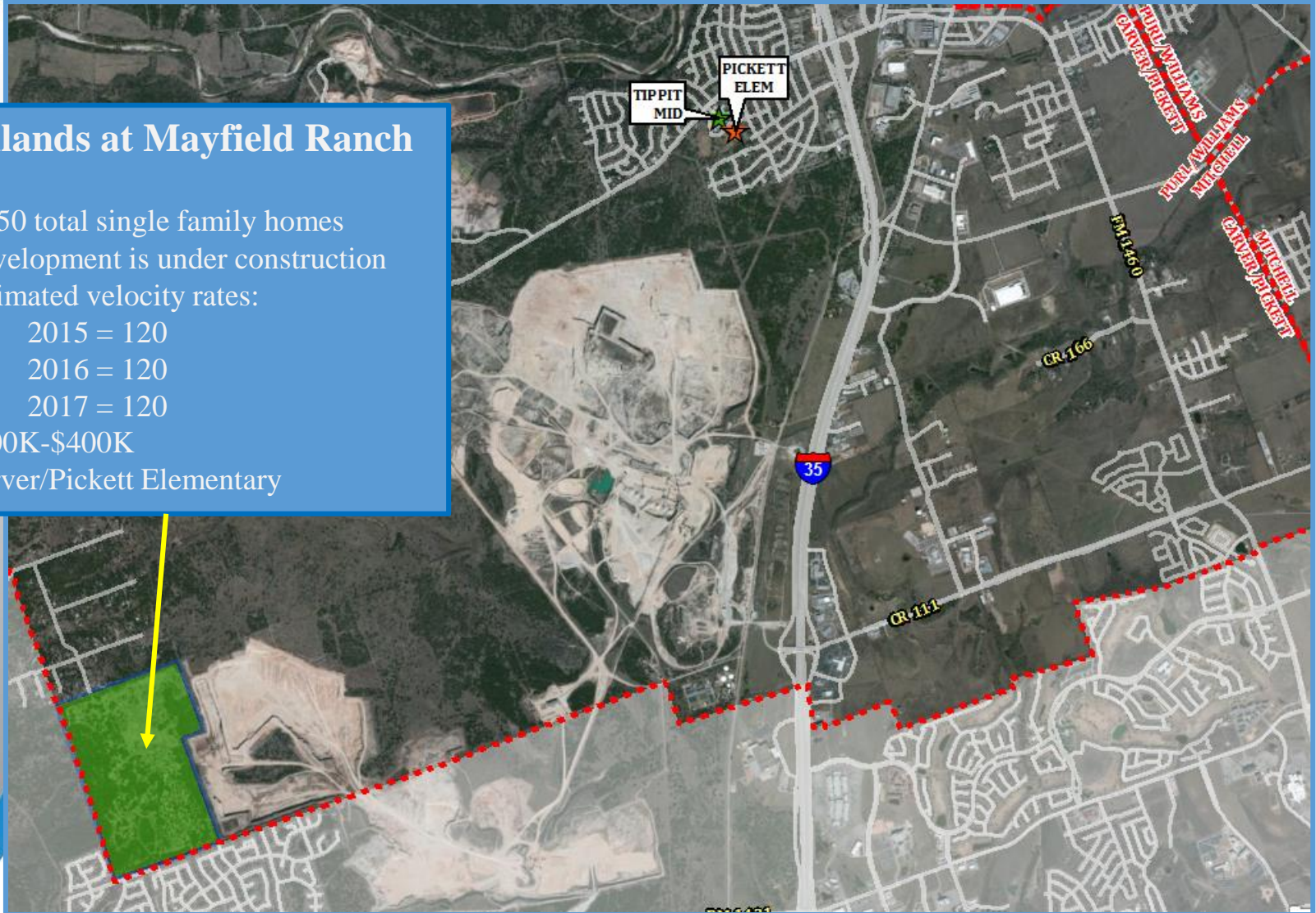


Active Subdivision

Highlands at Mayfield Ranch - City of Georgetown

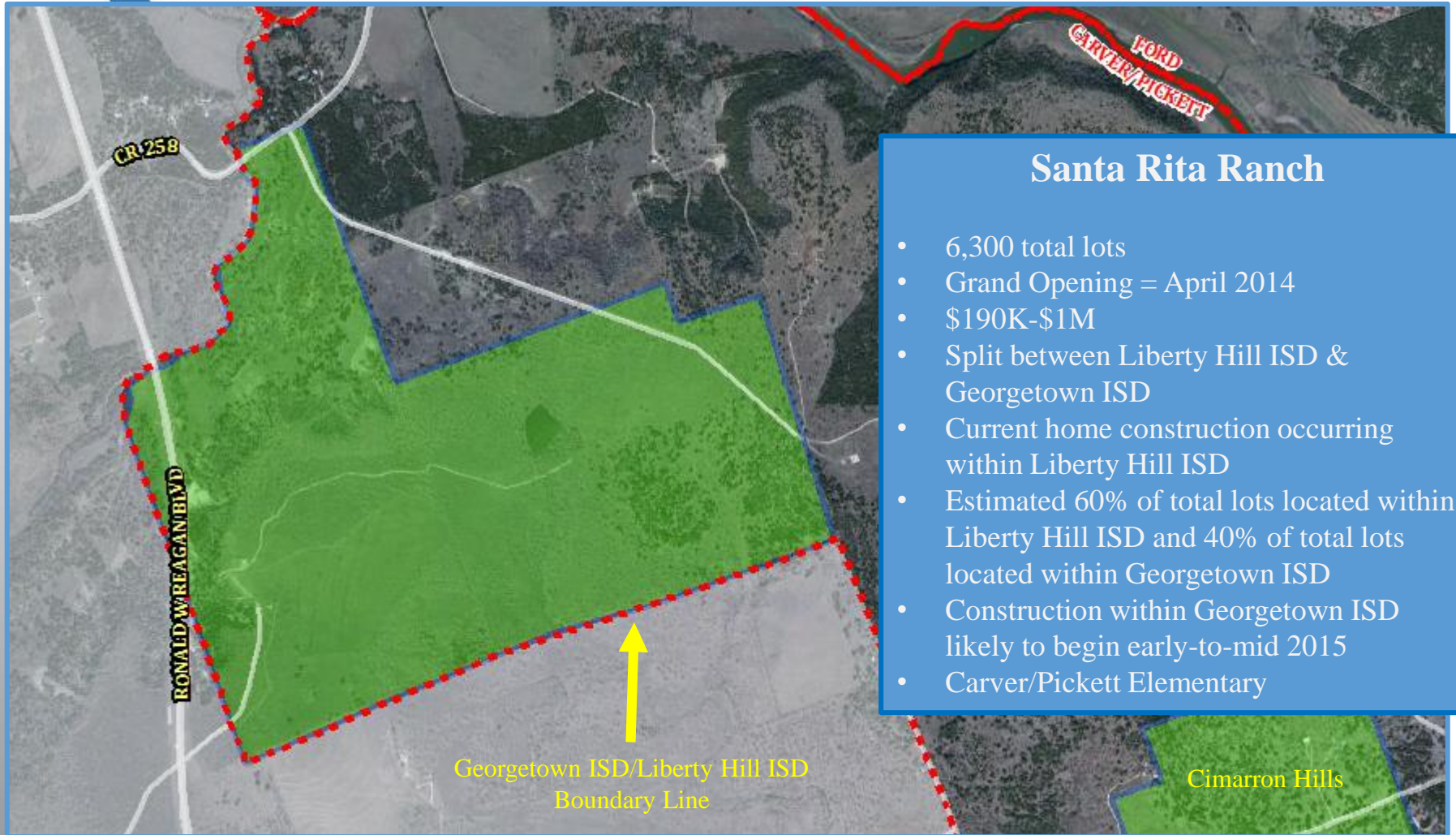
Highlands at Mayfield Ranch

- 1,050 total single family homes
- Development is under construction
- Estimated velocity rates:
 - 2015 = 120
 - 2016 = 120
 - 2017 = 120
- \$200K-\$400K
- Carver/Pickett Elementary



Active Subdivision

Santa Rita Ranch - City of Georgetown



Santa Rita Ranch

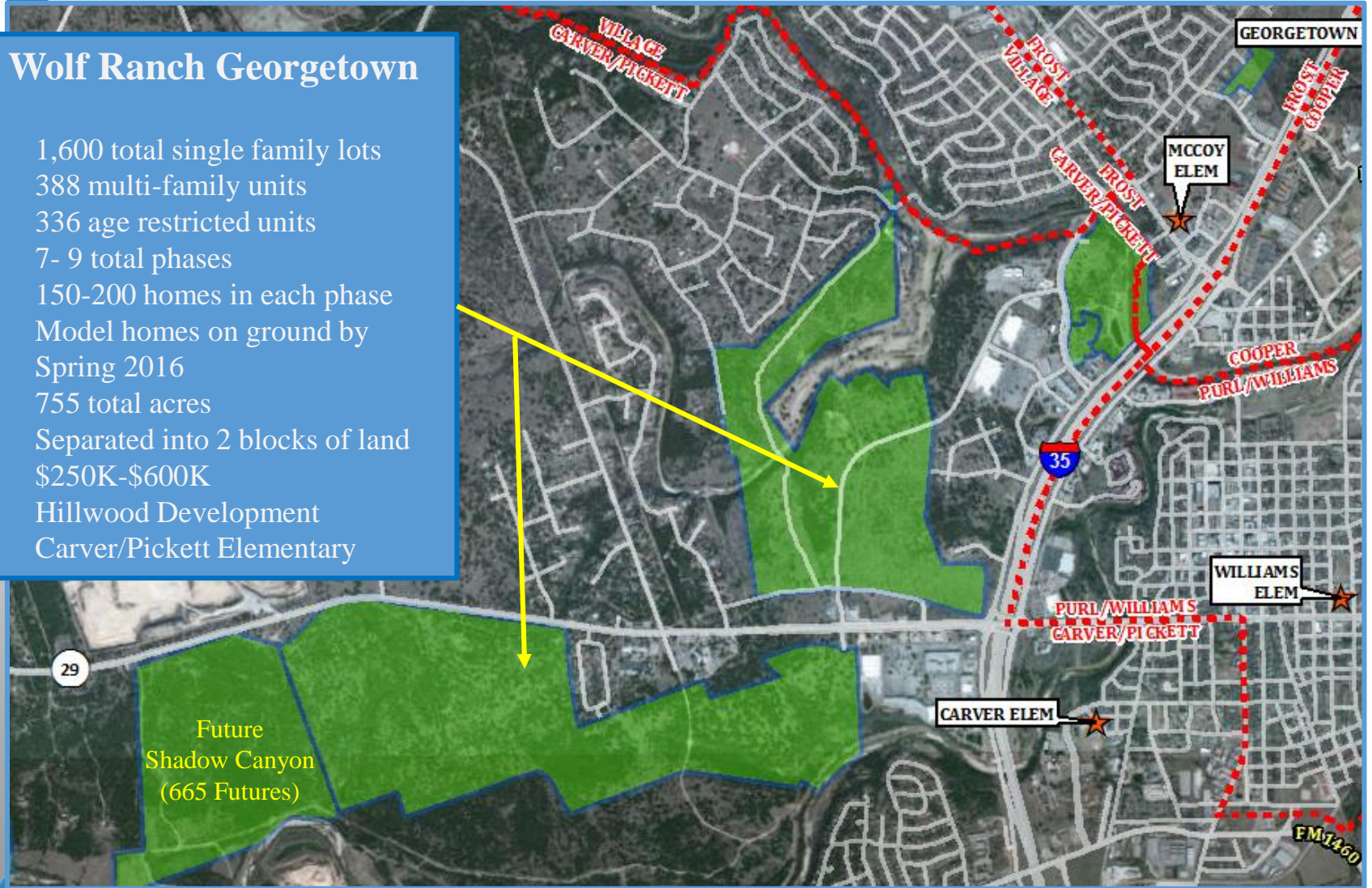
- 6,300 total lots
- Grand Opening = April 2014
- \$190K-\$1M
- Split between Liberty Hill ISD & Georgetown ISD
- Current home construction occurring within Liberty Hill ISD
- Estimated 60% of total lots located within Liberty Hill ISD and 40% of total lots located within Georgetown ISD
- Construction within Georgetown ISD likely to begin early-to-mid 2015
- Carver/Pickett Elementary

Future Subdivision

Wolf Ranch Georgetown

Wolf Ranch Georgetown

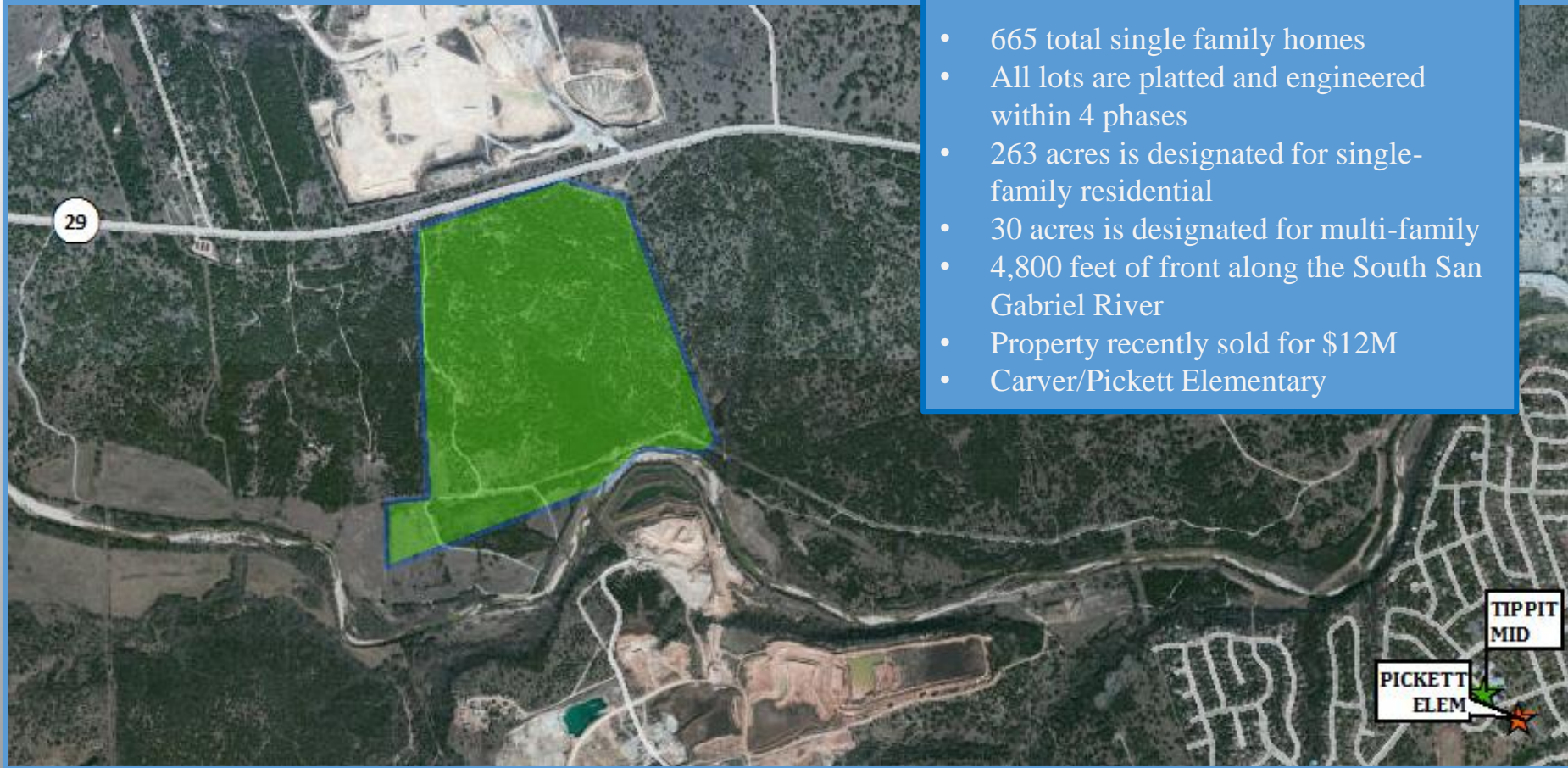
- 1,600 total single family lots
- 388 multi-family units
- 336 age restricted units
- 7- 9 total phases
- 150-200 homes in each phase
- Model homes on ground by Spring 2016
- 755 total acres
- Separated into 2 blocks of land
- \$250K-\$600K
- Hillwood Development
- Carver/Pickett Elementary





Future Subdivision

Shadow Canyon - City of Georgetown



Shadow Canyon

- 665 total single family homes
- All lots are platted and engineered within 4 phases
- 263 acres is designated for single-family residential
- 30 acres is designated for multi-family
- 4,800 feet of front along the South San Gabriel River
- Property recently sold for \$12M
- Carver/Pickett Elementary





Future Subdivision

Woodhull MUD - City of Georgetown

Woodhull MUD

- 1,184 total housing units
 - 792 single family homes
 - 392 multi-family units
 - Multi-family contains townhomes and apartments
- MUD approved by City of Georgetown in September 2014
- \$180K-\$300K's
- First homes on ground in Spring 2016
- Estimated single-family velocity rates
 - 2016 = 80
 - 2017 = 125
 - 2018 = 125
- Estimated multi-family velocity rates
 - Per developer, 330 units could be built at one time or split in two phases of 165 units in each phase
 - Multi-family could happen at any point in the first 4 years of development
- Mitchell Elementary



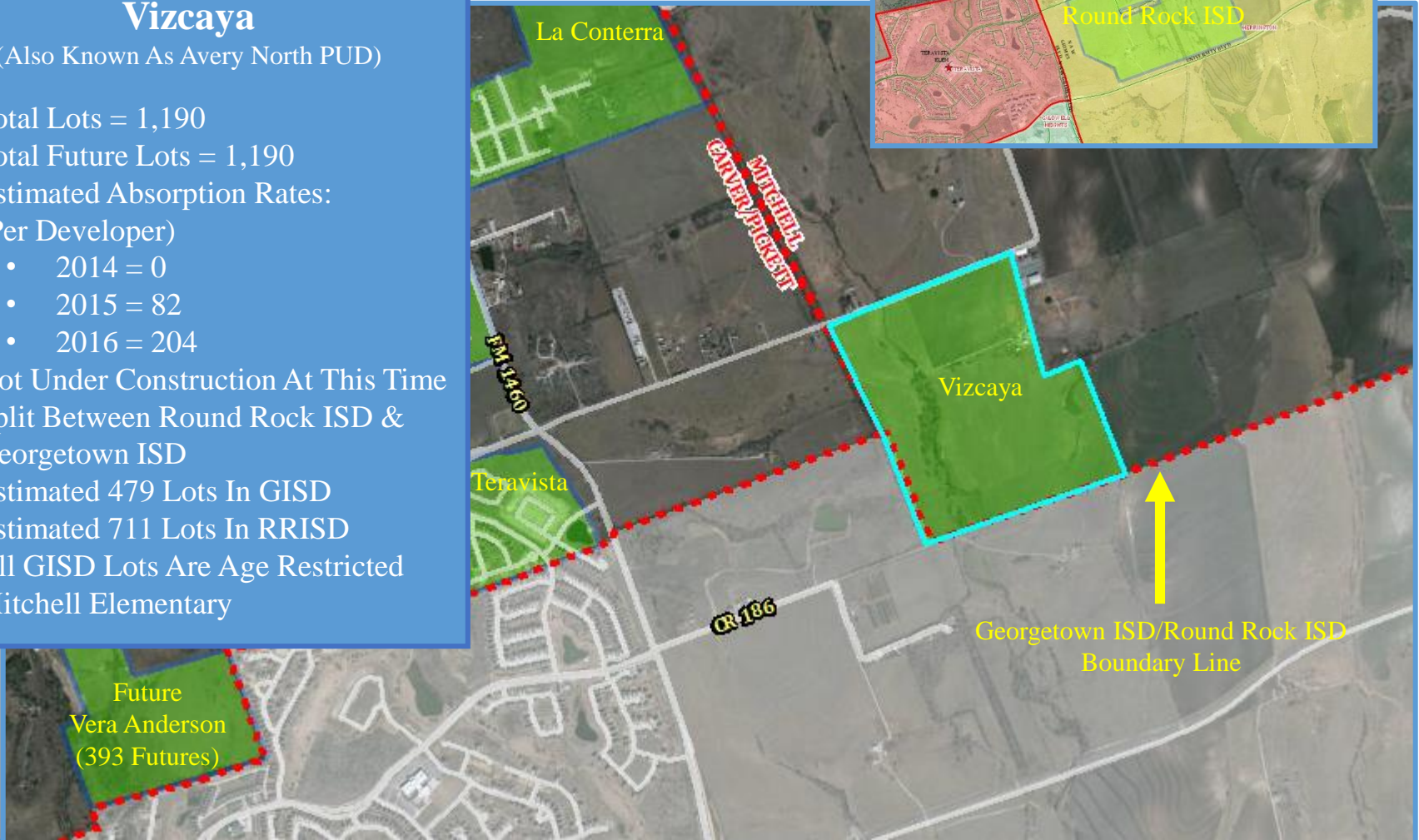
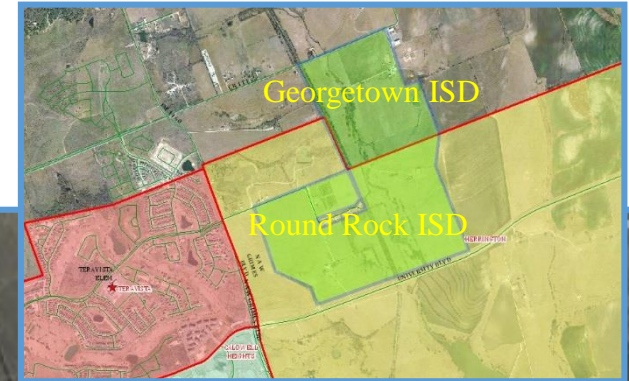
Future Subdivision

Vizcaya (aka Avery North PUD)

Vizcaya

(Also Known As Avery North PUD)

- Total Lots = 1,190
- Total Future Lots = 1,190
- Estimated Absorption Rates:
(Per Developer)
 - 2014 = 0
 - 2015 = 82
 - 2016 = 204
- Not Under Construction At This Time
- Split Between Round Rock ISD & Georgetown ISD
- Estimated 479 Lots In GISD
- Estimated 711 Lots In RRISD
- All GISD Lots Are Age Restricted
- Mitchell Elementary



Future
Vera Anderson
(393 Futures)



Future Multi-Family

City of Georgetown

Apartment	Proposed Units	Type	Status	Impact To District	Attendance Zone
Summit at the Rivery	228	Luxury	Under Construction	Spring 2015	Carver-Pickett
Gateway Northwest	180	Affordable	Under Construction	Late Winter 2015	Frost
Vantage at Georgetown	225	Luxury	Under Construction	Spring 2015	Carver-Pickett
Anatole @ Georgetown (A.K.A. Westinghouse Pointe)	250	Luxury	Under Construction	November 2014	Carver-Pickett
Windmill Hill	324	Luxury	TBD	TBD	Carver-Pickett
Totals	1,207				

- Additionally, an assisted living development is slated to be constructed containing 132 units within the McCoy Elementary zone.
- This development will be called The Wesleyan at Estrella but will have no student impact on GISD.





Enrollment History

Year (OCT)	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2010/11	54	397	719	793	733	850	753	807	784	800	738	844	760	727	711	10,470		
2011/12	53	394	753	695	763	711	809	763	769	815	809	810	821	734	698	10,397	-73	-0.7%
2012/13	58	321	746	755	713	775	712	810	757	784	808	849	795	792	695	10,370	-27	-0.3%
2013/14	43	308	726	763	751	762	778	733	824	776	811	859	853	770	797	10,554	184	1.8%
2014/15	38	300	665	746	778	763	805	807	756	860	797	855	887	837	781	10,675	121	1.1%

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

Cohort Analysis

	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th
3-Year Avg	0.960	1.018	1.013	1.033	1.021	1.023	1.014	1.029	1.018	1.056	1.006	0.971	0.989
2011/12	1.047	0.967	0.962	0.970	0.952	1.013	0.953	1.040	1.011	1.098	0.973	0.966	0.960
2012/13	0.991	1.003	1.026	1.016	1.001	1.001	0.992	1.020	0.991	1.049	0.981	0.965	0.947
2013/14	0.973	1.023	0.995	1.069	1.004	1.029	1.017	1.025	1.034	1.063	1.005	0.969	1.006
2014/15	0.916	1.028	1.020	1.016	1.056	1.037	1.031	1.044	1.027	1.054	1.033	0.981	1.014

Roll-up Analysis

	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Growth
Roll-up	665	665	746	778	763	805	807	756	860	797	855	887	837	10,559	-116
Prev Cohort	609	683	761	790	806	835	832	789	883	840	883	870	849	10,770	95
3-YR Avg.	638	677	756	804	779	823	818	778	875	841	860	862	828	10,678	3



North Austin Private and Charter Schools

Gateway College Prep School

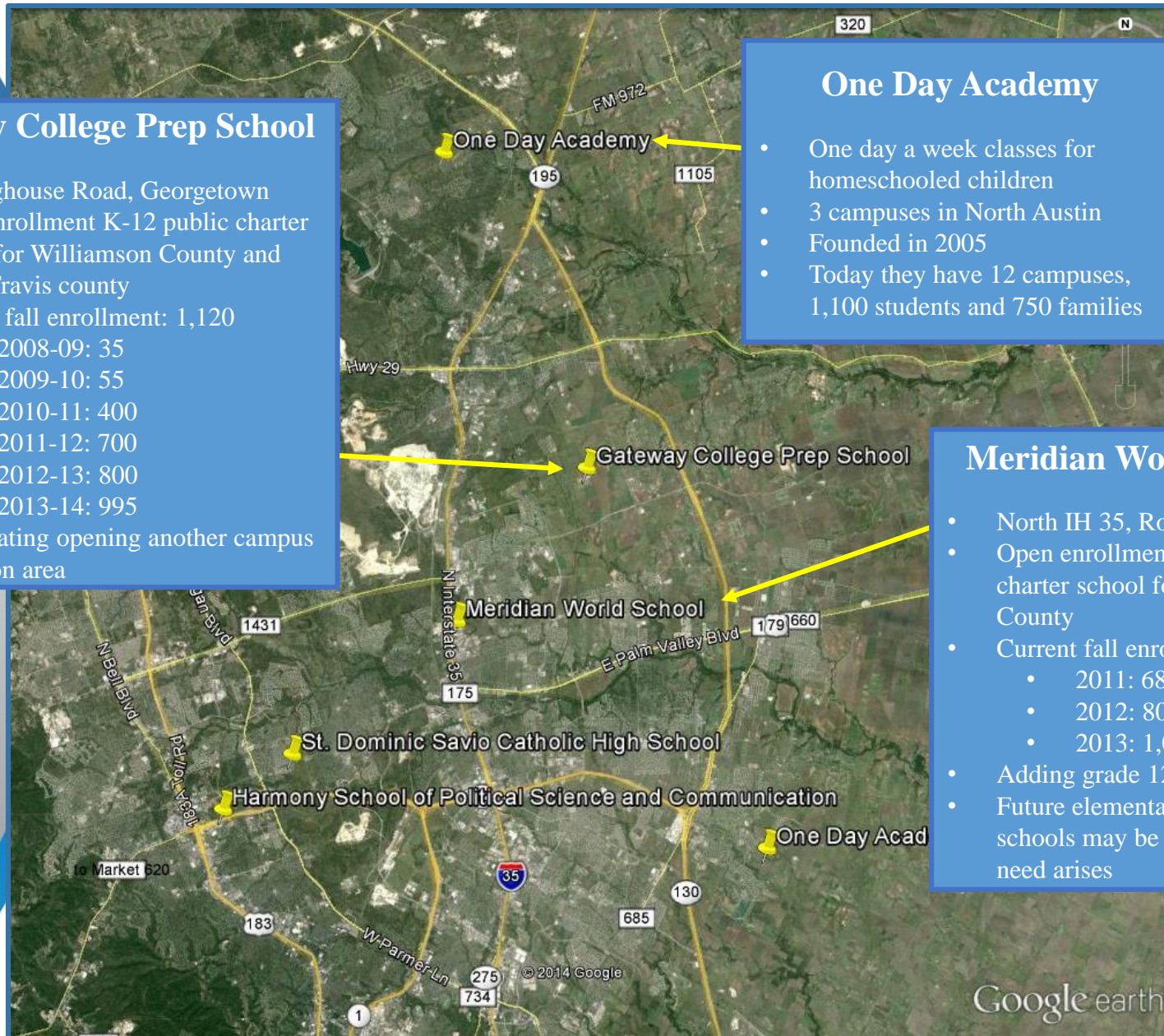
- Westinghouse Road, Georgetown
- Open enrollment K-12 public charter school for Williamson County and North Travis county
- Current fall enrollment: 1,120
 - 2008-09: 35
 - 2009-10: 55
 - 2010-11: 400
 - 2011-12: 700
 - 2012-13: 800
 - 2013-14: 995
- Anticipating opening another campus in Belton area

One Day Academy

- One day a week classes for homeschooled children
- 3 campuses in North Austin
- Founded in 2005
- Today they have 12 campuses, 1,100 students and 750 families

Meridian World School

- North IH 35, Round Rock
- Open enrollment K-11 public charter school for Williamson County
- Current fall enrollment: 1,120
 - 2011: 680
 - 2012: 800
 - 2013: 1,000
- Adding grade 12 next fall
- Future elementary and middle schools may be built as the need arises





Ten Year Forecast

By Grade Level

Year (OCT)	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2010/11	719	793	733	850	753	807	784	800	738	844	760	727	711	10,470		
2011/12	753	695	763	711	809	763	769	815	809	810	821	734	698	10,397	-73	-0.7%
2012/13	746	755	713	775	712	810	757	784	808	849	795	792	695	10,370	-27	-0.3%
2013/14	726	763	751	762	778	733	824	776	811	859	853	770	797	10,554	184	1.8%
2014/15	665	746	778	763	805	807	756	860	797	855	887	837	781	10,675	121	1.1%
2015/16	702	693	767	795	790	842	835	776	881	853	853	869	831	10,825	150	1.4%
2016/17	734	748	723	799	851	841	885	858	799	928	841	835	874	11,054	229	2.1%
2017/18	773	790	790	778	851	902	887	911	883	839	919	848	839	11,348	294	2.7%
2018/19	814	834	830	843	823	904	952	911	935	934	832	908	848	11,706	358	3.2%
2019/20	849	864	871	877	889	868	949	984	937	982	923	826	899	12,056	350	3.0%
2020/21	875	897	893	911	919	932	911	983	1,014	985	972	918	812	12,360	304	2.5%
2021/22	904	929	935	942	959	969	976	942	1,019	1,069	975	963	904	12,824	464	3.8%
2022/23	942	961	966	986	991	1,009	1,015	1,010	974	1,074	1,057	967	951	13,241	417	3.3%
2023/24	983	1,002	1,000	1,017	1,029	1,042	1,057	1,050	1,035	1,029	1,061	1,047	954	13,644	403	3.0%
2024/25	1,026	1,045	1,045	1,054	1,065	1,083	1,089	1,093	1,083	1,093	1,017	1,050	1,033	14,114	470	3.4%

*Yellow box = largest grade per year

*Green box = second largest grade per year

- Georgetown ISD will reach over 11,000 enrollment in the fall of 2016 and over 13,000 in the fall of 2022
- 5 year growth = 1,381 students
- 2019/20 enrollment = 12,056
- 10 year growth = 3,439 students
- 2024/25 enrollment = 14,114





Ten Year Forecast

By Elementary Campus

Campus	Capacity	HISTORY	Current	ENROLLMENT PROJECTIONS									
		2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Annie Purl Elementary	650	566	528	512	500	510	521	532	539	548	558	567	576
Carver Elementary	529	401	428	448	490	530	572	619	669	723	782	845	916
Dell Pickett Elementary	495	345	335	355	374	410	437	490	536	586	641	699	761
Frost Elementary	496	418	432	434	463	494	493	476	473	474	471	472	479
Mitchell Elementary	792	700	739	742	763	802	837	868	904	942	979	1,009	1,047
Ford Elementary	653	527	554	544	540	561	574	597	623	646	670	694	718
Cooper Elementary	693	578	589	598	601	606	617	621	636	642	649	657	663
Mccoy Elementary	792	571	559	573	567	569	579	583	594	606	617	627	638
Village Elementary	633	411	369	345	341	336	343	351	362	370	379	385	393
Williams Elementary	515	347	368	375	394	403	412	418	428	438	446	455	464
ELEMENTARY SCHOOL TOTALS		4,864	4,901	4,926	5,033	5,221	5,385	5,555	5,764	5,975	6,192	6,410	6,655
Elementary Absolute Change		-26	37	25	107	188	164	170	209	211	217	218	245
Elementary Percent Change		-0.53%	0.76%	0.51%	2.17%	3.74%	3.14%	3.16%	3.76%	3.66%	3.63%	3.52%	3.82%

*Yellow box = enrollment exceeds location capacity

- Carver Elementary will have more than 500 students in 2017, this is a 19% rise from current enrollment
- Dell Pickett Elementary will have more than 500 students in 2020
- Williams Elementary will have more than 400 students in 2017
- Total elementary enrollment will reach 5,000 students in 2016
- Elementary absolute growth in GISD will reach triple digits in 2016





Ten Year Forecast

By Middle School & High School Campus

		HISTORY	Current	ENROLLMENT PROJECTIONS									
Campus	Capacity	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
Forbes Middle School	974	715	740	758	739	756	766	776	770	782	782	809	825
Benold Middle School	974	885	826	867	933	1,003	1,059	1,066	1,054	1,029	1,031	1,067	1,088
Tippit Middle School	808	801	840	860	863	915	966	1,021	1,077	1,119	1,179	1,259	1,345
MIDDLE SCHOOL TOTALS		2,401	2,406	2,485	2,535	2,674	2,791	2,863	2,901	2,930	2,992	3,135	3,258
Middle School Absolute Change		58	5	79	50	139	117	72	38	29	62	143	123
Middle School Percent Change		2.48%	0.21%	3.28%	2.01%	5.48%	4.38%	2.58%	1.33%	1.00%	2.12%	4.78%	3.92%
East View High School	2,000	1,399	1,424	1,463	1,497	1,469	1,526	1,546	1,564	1,676	1,742	1,813	1,902
Georgetown High School	2,000	1,781	1,837	1,844	1,882	1,877	1,897	1,985	2,024	2,136	2,208	2,179	2,192
Richarte High School	100	86	83	83	83	83	83	83	83	83	83	83	83
HIGH SCHOOL TOTALS		3,266	3,344	3,390	3,462	3,429	3,506	3,614	3,671	3,895	4,033	4,075	4,177
High School Absolute Change		160	78	46	72	-33	77	108	57	224	138	42	102
High School Percent Change		5.15%	2.39%	1.38%	2.12%	-0.95%	2.25%	3.08%	1.58%	6.10%	3.54%	1.04%	2.50%
Georgetown Alternative Program	80	20	9	9	9	9	9	9	9	9	9	9	9
Williamson County Detention Ctr.		0	5	5	5	5	5	5	5	5	5	5	5
Williamson County JJAEP		3	10	10	10	10	10	10	10	10	10	10	10
ALTERNATIVE CAMPUS TOTALS		23	24	24	24	24	24	24	24	24	24	24	24
DISTRICT TOTALS		10,554	10,675	10,825	11,054	11,348	11,706	12,056	12,360	12,824	13,241	13,644	14,114
District Absolute Change		184	121	150	229	294	358	350	304	464	417	403	470
District Percent Change		1.77%	1.15%	1.41%	2.12%	2.66%	3.15%	2.99%	2.52%	3.75%	3.25%	3.04%	3.44%

*Yellow box = enrollment exceeds location capacity

- Benold Middle School will have more than 900 students in 2016 and 1,000 in 2017
- East View High School will enroll more than 1,500 in 2018
- Georgetown High School will reach 2,000 students in 2020





Summary

- Texas economy continues to be the strongest state economy in the country.
- Austin will continue to be a leader in job and population growth due to the energy boom and its technology centers.
- Georgetown ISD had the highest number of quarter starts in 5 years, with almost 300 units.
- Housing inventory remains healthy to sustain future growth.
- Carver/Pickett and Ford attendance zones have the highest activity of new home starts representing over 85.4% of the total starts for the district.
- GISD can expect an increase of approximately 1,400 students during the next 5 years.
- 2019/20 enrollment projection= 12,056.
- Georgetown ISD is projected to have 14,114 students for the 2024/25 school year.



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