

*Pflugerville
Independent
School
District*



Quarterly
Report
4Q17

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



TEMPLETON
DEMOGRAPHICS



Economic Conditions – Austin Area (December 2017)

3.2%

34,950 new jobs
National rate 1.2%



Job Growth

Unemployment Rate



U.S. 3.9%
Texas 3.7%
Austin MSA 2.7%
Pflugerville 3.0%

-0.3%

16,037

636 more starts than 4Q16



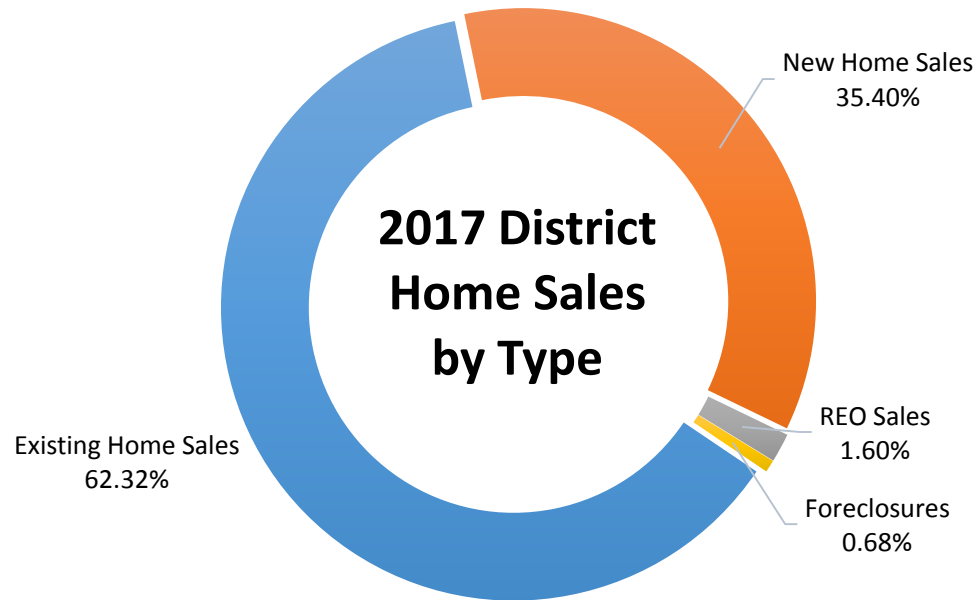
Annual Home Starts





Pflugerville ISD Housing Activity

2017 Home Sales by Transaction Type



- Pflugerville ISD had more than 3,550 home sales in 2017, and roughly 35% were new homes
- Within PISD, the average new home sale price in 2017 was \$294,190
- Within PISD, the average existing home sale price in 2017 was \$265,849





Austin New Home Ranking Report

ISD Ranked by Annual Closings – 4Q17

Rank	District Name	Annual Starts	Annual Closings	VDL	Future
1	Leander ISD	2,425	2,397	3,808	12,088
2	Hays CISD	1,484	1,506	2,273	19,186
3	Austin ISD	1,756	1,473	1,472	11,291
4	Pflugerville ISD*	1,620	1,397	1,638	12,579
5	Round Rock ISD	1,530	1,280	1,826	6,029
6	Georgetown ISD	1,357	1,173	2,478	18,105
7	Hutto ISD	954	949	1,085	5,012
8	Manor ISD	1,104	888	1,435	15,716
9	Lake Travis ISD	723	877	1,899	5,487
10	Del Valle ISD	818	695	1,031	26,670
11	Liberty Hill ISD	752	655	1,657	11,391
12	Dripping Springs ISD	589	499	1,237	6,671
13	Jarrell ISD	331	345	350	6,993
14	San Marcos CISD	276	195	313	8,490
15	Bastrop ISD	125	115	1,436	19,041
16	Taylor ISD	59	62	89	655
17	Lockhart ISD	7	46	14	1,654
18	Lago Vista ISD	44	38	129	154
19	Eanes ISD	55	34	129	154
20	Elgin ISD	20	14	235	5,893

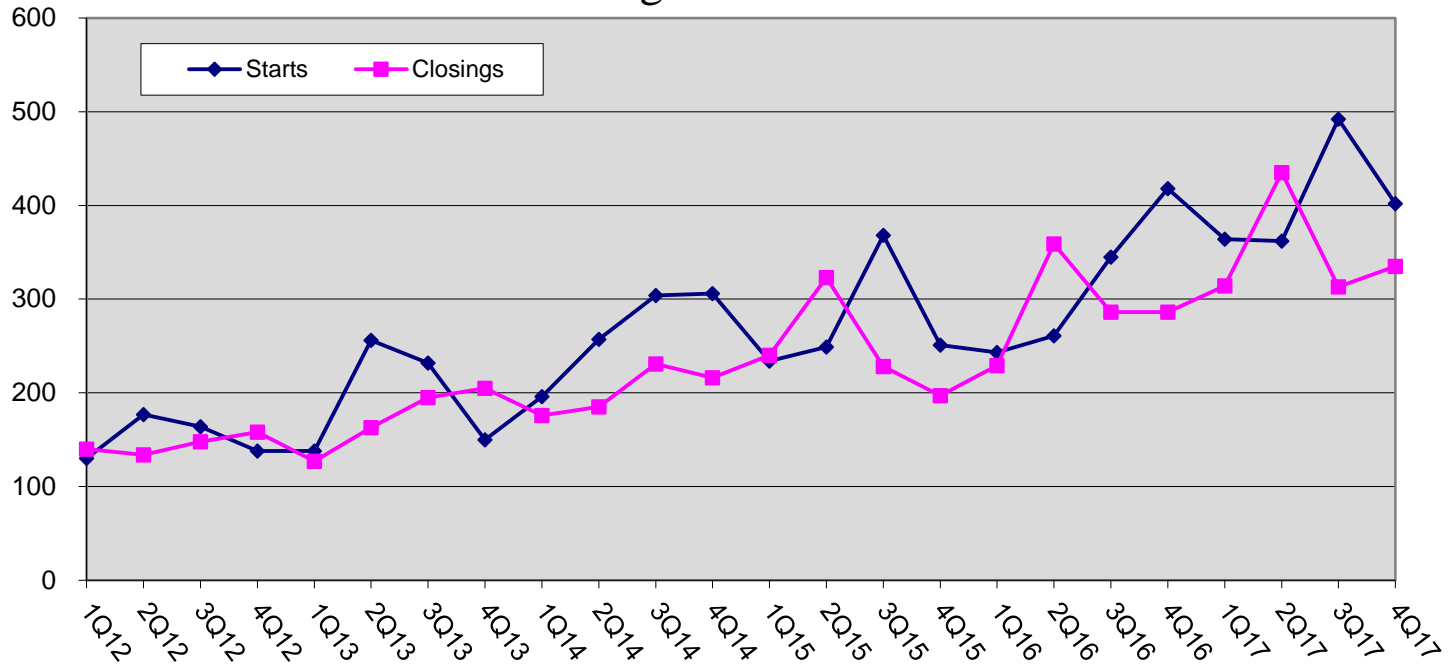
*Totals adjusted based on additional TD research





New Housing Activity

Pflugerville ISD



Starts	2012	2013	2014	2015	2016	2017
1Q	130	138	196	234	243	364
2Q	177	256	257	249	278	362
3Q	164	232	304	368	345	492
4Q	138	150	306	251	418	402
Total	609	776	1,063	1,102	1,284	1,620

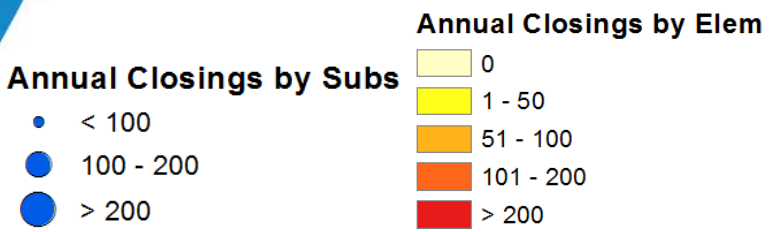
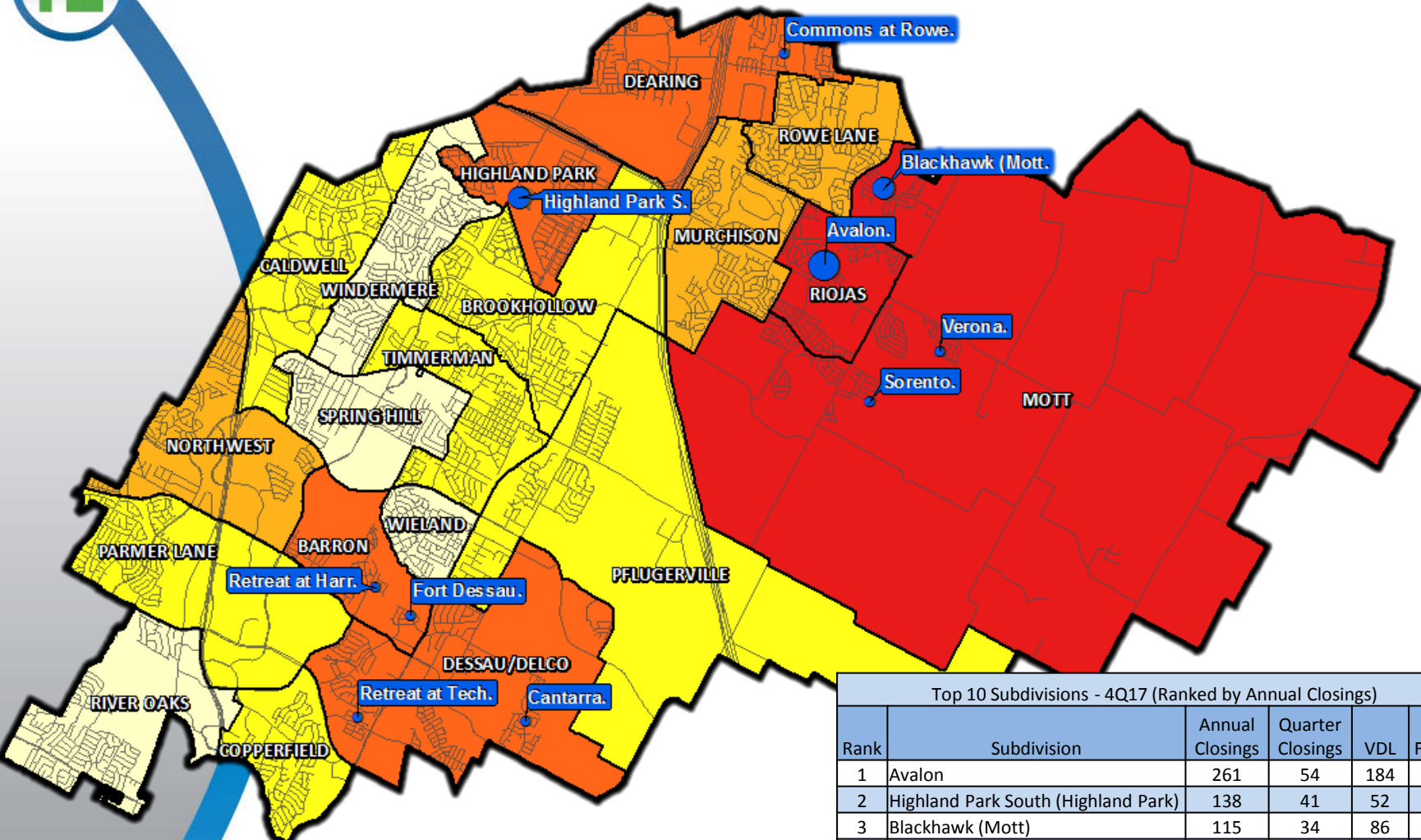
Closings	2012	2013	2014	2015	2016	2017
1Q	140	127	176	240	229	314
2Q	134	163	185	323	375	435
3Q	148	195	231	228	286	313
4Q	158	205	216	197	286	335
Total	580	690	808	988	1,176	1,397

- Pflugerville ISD started 1,620 new homes in 2017, the most annual new home starts in more than 10 years, and a rise of 26% over 2016
- The district had nearly 1,400 new home closings in 2017, the most annual closings since 2006
- District new home inventory is slightly high due to a large number of homes under construction





Annual Closing Distribution

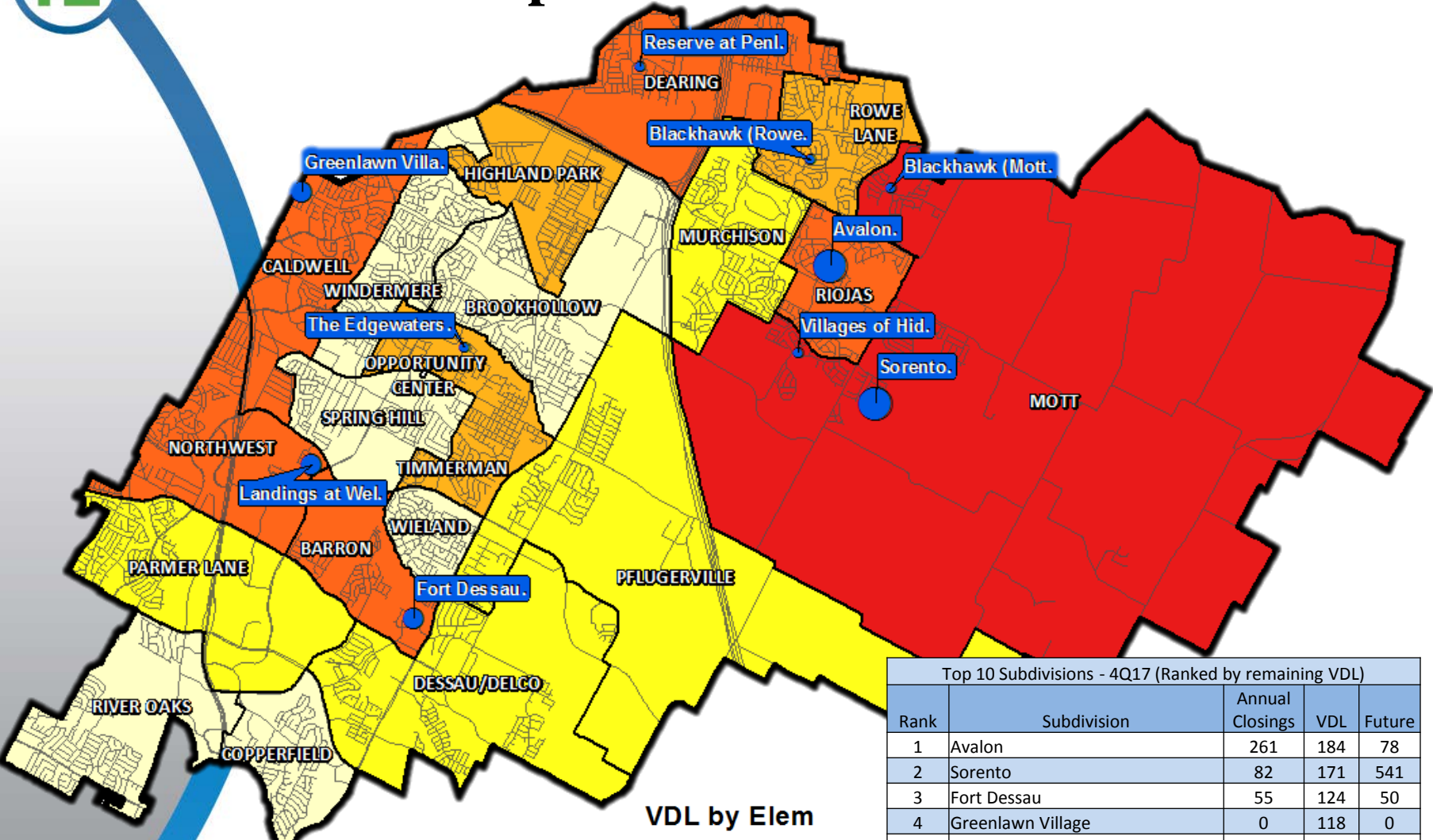


Top 10 Subdivisions - 4Q17 (Ranked by Annual Closings)					
Rank	Subdivision	Annual Closings	Quarter Closings	VDL	Future
1	Avalon	261	54	184	78
2	Highland Park South (Highland Park)	138	41	52	0
3	Blackhawk (Mott)	115	34	86	881
4	Cantarra	99	22	38	477
5	Commons at Rowe Lane (Dearing)	85	23	44	53
6	Sorento	82	13	171	541
7	Retreat at Harris Ridge	73	22	0	0
8	Retreat at Tech Ridge	69	19	3	0
9	Verona	69	13	62	117
10	Fort Dessau	55	8	124	50
TOTALS		1,046	249	764	2,197





Vacant Developed Lots



VDL by Sub

- < 100
- 100 - 150
- > 150

VDL by Elem

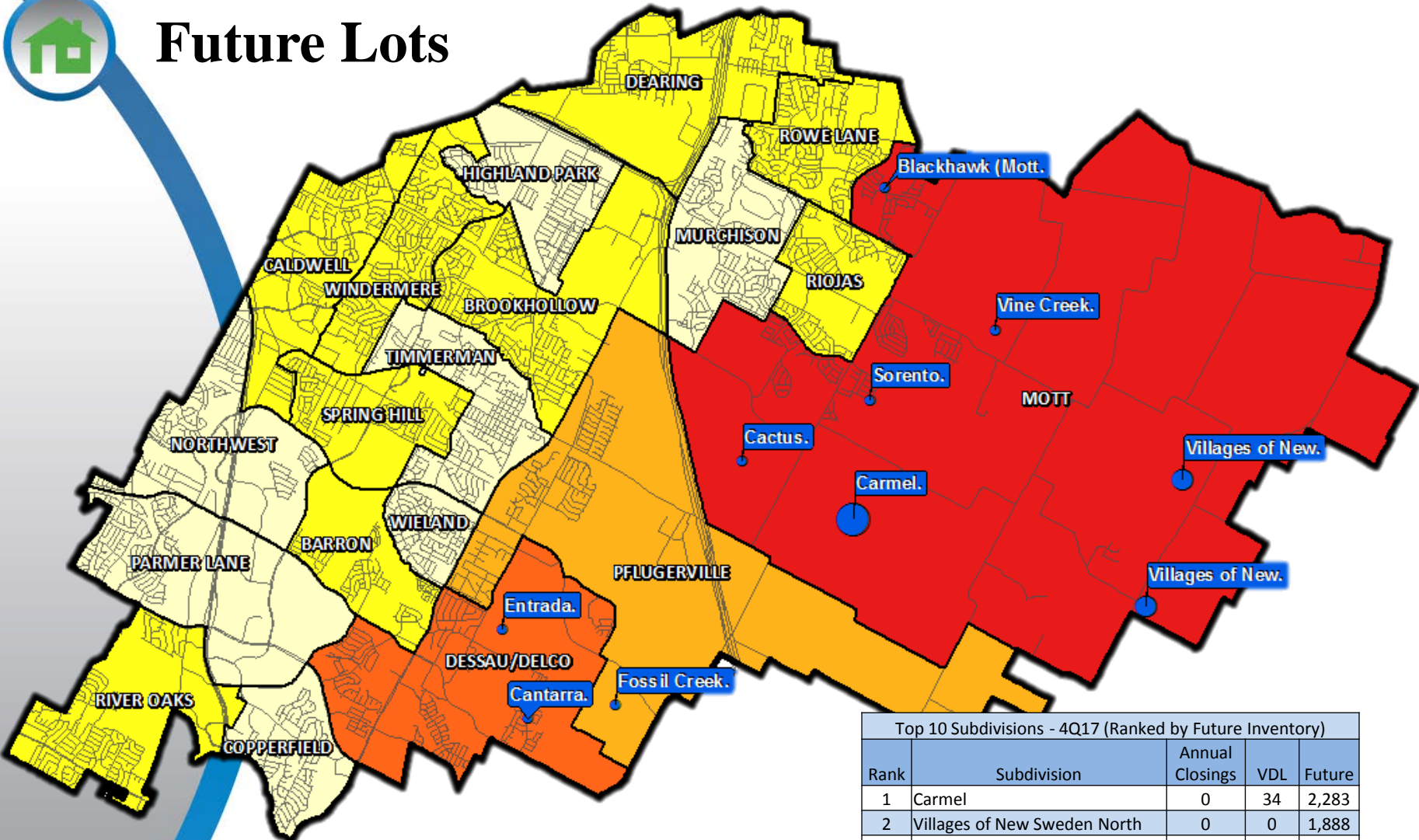
- 0
- 1 - 50
- 51 - 100
- 101 - 200
- > 200

Top 10 Subdivisions - 4Q17 (Ranked by remaining VDL)				
Rank	Subdivision	Annual Closings	VDL	Future
1	Avalon	261	184	78
2	Sorento	82	171	541
3	Fort Dessau	55	124	50
4	Greenlawn Village	0	118	0
5	Landings at Wells Branch	52	106	0
6	Villages of Hidden Lake (Mott)	16	95	0
7	Reserve at Penley Park	16	90	0
8	Blackhawk (Mott)	115	86	881
9	Blackhawk (Rowe Lane)	53	86	99
10	The Edgewaters	32	86	0
TOTALS		682	1,146	1,649





Future Lots



Futures by Sub

- < 1,000
- 1,000 - 2,000
- > 2,000

Futures by Elem

- 0
- 1 - 500
- 501 - 1,000
- 1,001 - 2,000
- > 2,000

Top 10 Subdivisions - 4Q17 (Ranked by Future Inventory)

Rank	Subdivision	Annual Closings	VDL	Future
1	Carmel	0	34	2,283
2	Villages of New Sweden North	0	0	1,888
3	Villages of New Sweden	0	0	1,445
4	Fossil Creek	0	0	922
5	Blackhawk (Mott)	115	86	881
6	Entrada	0	0	822
7	Sorento	82	171	541
8	Vine Creek	0	0	519
9	Cantarra	99	38	477
10	Cactus	0	0	445
TOTALS		296	329	10,223







Overall Housing Data

By Elementary Attendance Zone

ELEMENTARY	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	INV	VDL	Future
BARRON	122	23	128	30	59	124	194
BROOKHOLLOW	45	9	46	17	39	0	99
CALDWELL	36	29	1	0	35	196	106
COPPERFIELD	57	8	35	8	36	0	0
DEARING	140	29	101	28	86	134	181
DESSAU/DELCO	203	60	168	41	125	41	1,660
HIGHLAND PARK	137	28	138	41	83	52	0
MOTT	285	74	285	63	205	460	8,494
MURCHISON	52	10	51	5	28	50	0
NORTHWEST	123	48	53	18	85	179	0
PARMER LANE	20	1	26	9	3	20	0
PFLUGERVILLE	0	0	1	0	1	26	988
RIOJAS	263	61	261	54	140	184	78
RIVER OAKS	0	0	0	0	0	0	150
ROWE LANE	65	14	53	12	48	86	99
SPRING HILL	0	0	0	0	0	0	425
TIMMERMAN	72	8	50	9	63	86	0
WIELAND	0	0	0	0	0	0	0
WINDERMERE	0	0	0	0	0	0	105
GRAND TOTAL	1,620	402	1,397	335	1,036	1,638	12,579

 Highest activity in the category

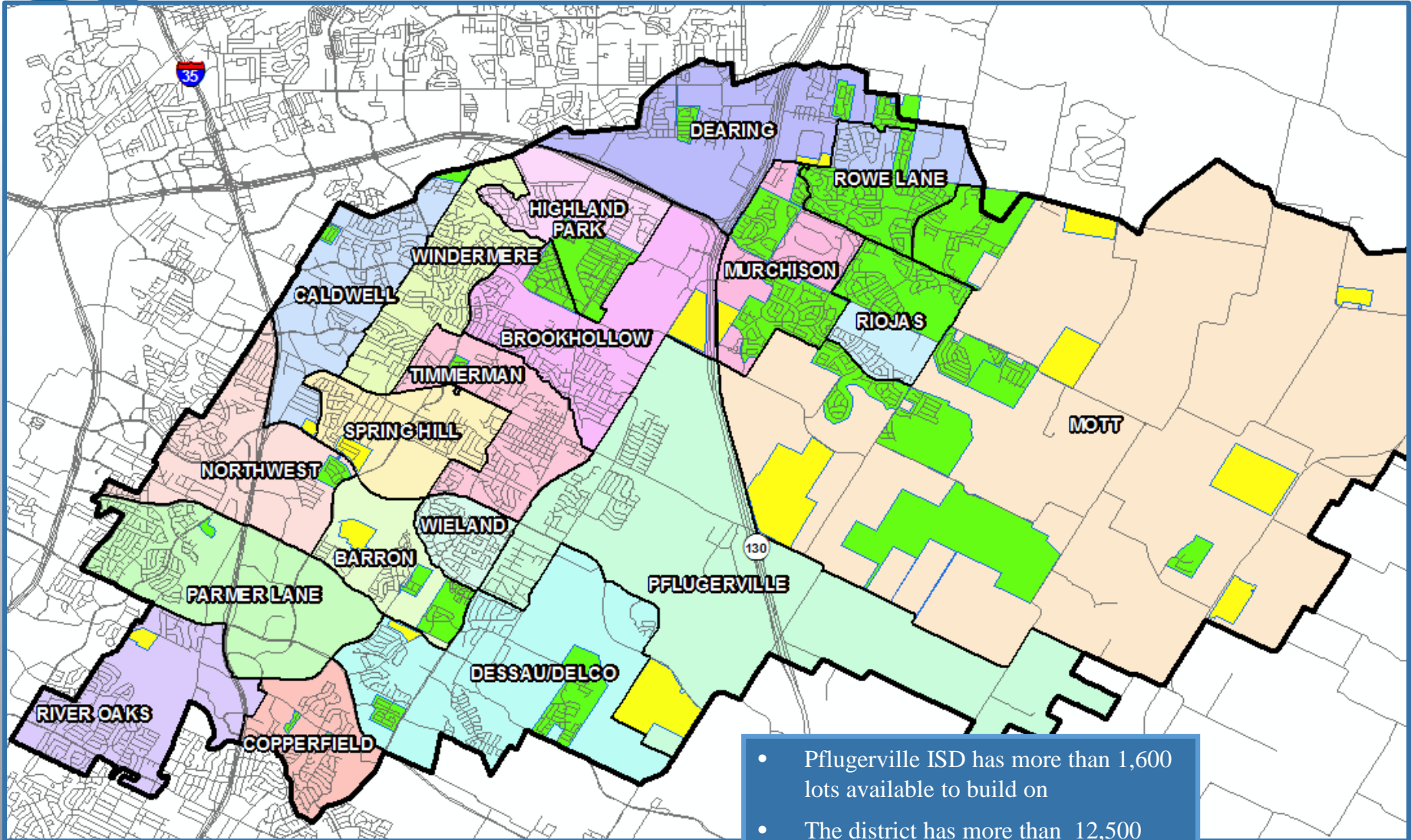
 Second highest activity in the category

 Third highest activity in the category





District Housing Overview

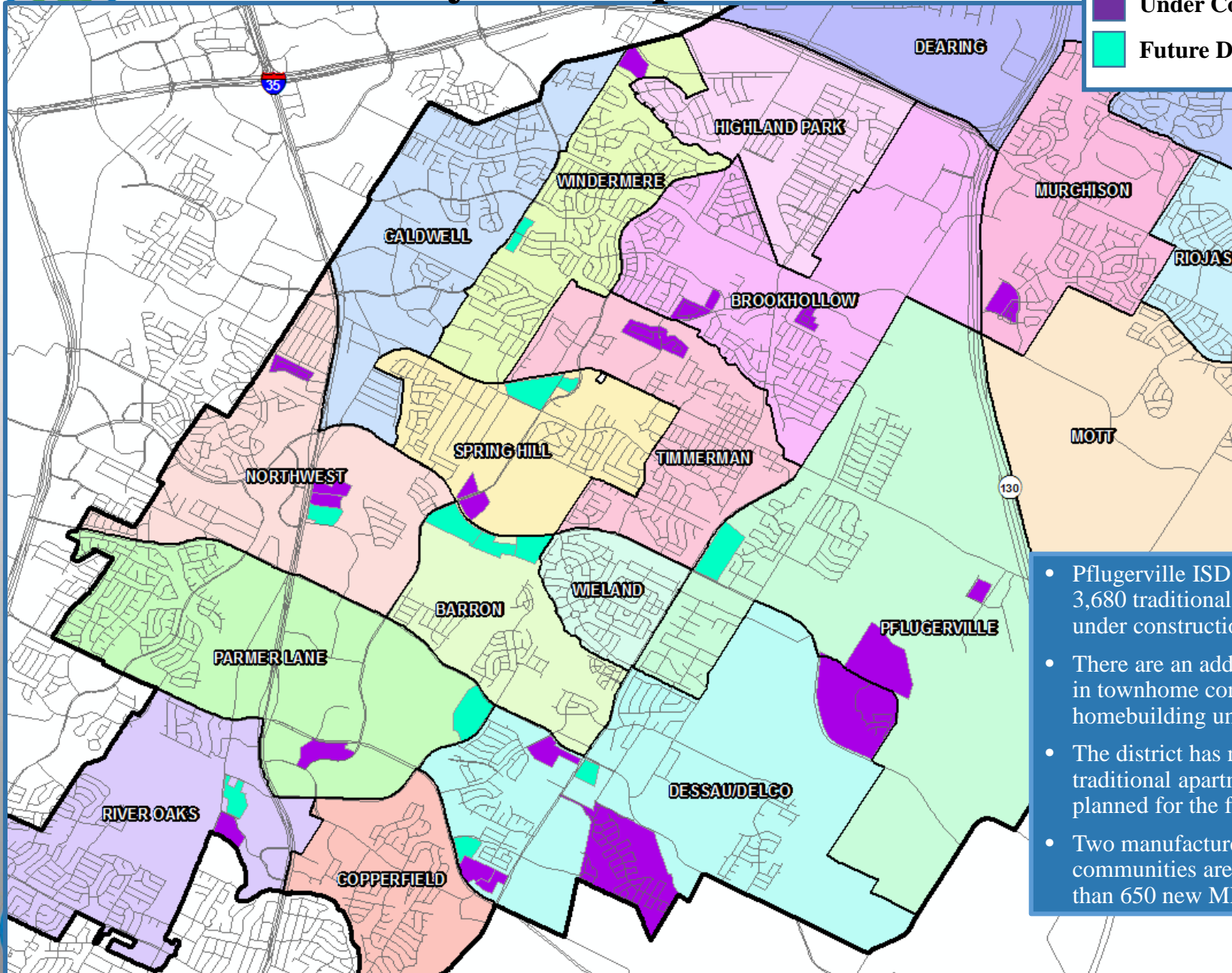


- Active Development
- Future Development

- Pflugerville ISD has more than 1,600 lots available to build on
- The district has more than 12,500 future lots planned
- Of those, groundwork is underway on roughly 960 lots within the district



Multi-Family Development Overview



Under Construction
Future Development

- Pflugerville ISD currently has 3,680 traditional apartment units under construction
- There are an additional 508 lots in townhome communities with homebuilding underway
- The district has more than 3,400 traditional apartment units planned for the future
- Two manufactured home communities are adding more than 650 new MH lots in phases



Residential Activity

Carmel
2,317 total lots
Phase 1 with 82 lots delivered
and pre-sales underway
Homes starting by end of
March 2018
4 new home builders
\$200K - \$300K





Residential Activity



Enclave at Harris Ridge
Final plat under review for 62 future single family lots

Spring at Harris Ridge Apts
324 tax credit apartment units under construction
First units leasing late 2018

Newington Apartments
308 future multi-family units under review with the City of Austin

Retreat at Tech Ridge
232 total lots
200 homes occupied
20 under construction
Built out by mid 2018

Heights on Palmer
252 existing tax credit apartment units
80 additional tax credit units in Ph 2 under construction
Construction complete late 2018

Alta Tech Ridge
230 multi-family units under construction
First units leasing late 2018





Residential Activity

Highland Park South
 922 total lots
 787 occupied
 Built 138 homes in 2017
 Built out by mid 2019

Highland Park South (Brookhollow)
 435 total lots
 396 occupied
 Built 45 homes in 2017
 Built out by the end of 2018

Paradise Cove
 Groundwork underway on 17 future townhome lots

Village on Legacy
 83 future rental homes
 All lots delivered and first homes under construction
 First homes leasing in summer 2018

Walden Square
 82 future townhome lots
 Groundwork underway
 Homes starting by late 2018





Residential Activity

Pecan District
 Future mixed-use development with 735 to 1,200 future residential units
 Phase 1 with 260 multi-family units approved
 First units leasing by 2020

Crossings at Wells Branch
 138 future single family lots
 Groundwork underway on Phase 1 with 94 lots
 Homes starting early 2019
 Site plan approved for 264 multi-family units



Highland Apts
 292 units complete
 early 2018

Landings at Wells Branch
 200 total lots
 52 occupied
 30 under construction
 Building 80 homes in 2018

Santa Clara Apts
 Site plan under review
 for 308 MF units





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
2013/14	801	1,671	1,758	1,780	1,769	1,809	1,775	1,760	1,886	1,704	1,757	1,691	1,687	1,695	23,543		
2014/15	807	1,728	1,744	1,808	1,781	1,797	1,834	1,824	1,794	1,869	1,753	1,808	1,694	1,707	23,948	405	1.72%
2015/16	881	1,730	1,736	1,718	1,834	1,829	1,795	1,813	1,834	1,809	1,973	1,720	1,752	1,676	24,100	152	0.63%
2016/17	1,041	1,722	1,788	1,778	1,775	1,899	1,893	1,824	1,871	1,841	2,035	1,942	1,586	1,696	24,691	591	2.45%
2017/18	1,175	1,688	1,795	1,868	1,872	1,875	1,976	1,936	1,895	1,918	1,951	1,979	1,889	1,608	25,425	734	2.97%
2018/19	1,198	1,757	1,841	1,892	1,968	1,961	1,971	2,049	2,001	1,924	2,007	1,887	1,928	1,839	26,223	798	3.14%
2019/20	1,198	1,784	1,901	1,938	1,983	2,083	2,044	2,020	2,119	2,014	2,077	1,940	1,843	1,903	26,847	624	2.38%
2020/21	1,198	1,877	1,933	1,987	2,030	2,101	2,168	2,124	2,070	2,156	2,185	2,013	1,894	1,820	27,556	709	2.64%
2021/22	1,198	1,945	2,001	2,013	2,069	2,132	2,185	2,231	2,161	2,121	2,340	2,095	1,933	1,863	28,287	731	2.65%
2022/23	1,198	1,996	2,065	2,075	2,098	2,174	2,213	2,212	2,267	2,197	2,310	2,273	2,035	1,907	29,020	733	2.59%
2023/24	1,198	2,033	2,110	2,125	2,154	2,206	2,254	2,262	2,269	2,310	2,380	2,221	2,209	2,000	29,731	711	2.45%
2024/25	1,198	2,070	2,130	2,161	2,209	2,261	2,285	2,293	2,317	2,311	2,527	2,271	2,151	2,155	30,339	608	2.04%
2025/26	1,198	2,135	2,175	2,198	2,232	2,311	2,343	2,333	2,349	2,359	2,514	2,443	2,206	2,111	30,907	568	1.87%
2026/27	1,198	2,185	2,244	2,232	2,276	2,340	2,402	2,378	2,387	2,397	2,573	2,382	2,368	2,163	31,525	618	2.00%
2027/28	1,198	2,235	2,297	2,303	2,313	2,389	2,431	2,435	2,435	2,436	2,636	2,439	2,309	2,322	32,178	653	2.07%

*Yellow box = largest grade per year

*Green box = second largest grade per year

- Pflugerville ISD may enroll more than 26,200 students by 2018
- 5 year growth = 3,595 students
- 2022/23 enrollment = 29,020 students
- 10 year growth = 6,753 students
- 2027/28 enrollment = 32,178 students





Ten Year Forecast

By Elementary Campus

CAMPUS	Capacity	Architectural Capacity	History 2016/17	Current 2017/18	ENROLLMENT PROJECTIONS									
					2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
BARRON ELEMENTARY	763	850	734	693	689	699	707	725	719	721	721	729	731	735
BROOKHOLLOW ELEMENTARY	707	750	424	475	496	534	546	527	536	538	553	564	574	578
CALDWELL ELEMENTARY	707	800	691	661	658	648	657	639	632	647	653	655	659	663
COPPERFIELD ELEMENTARY	763	750	441	413	430	430	434	437	437	443	444	447	450	452
DELCO PRIMARY	628	750	655	702	762	774	813	872	912	948	976	1,005	1,038	1,072
DESSAU ELEMENTARY	502	600	567	608	643	696	743	812	863	917	968	1,000	1,028	1,053
HIGHLAND PARK ELEMENTARY	745	750	839	646	665	650	659	670	655	657	658	667	686	700
MOTT ELEMENTARY	800	800	0	717	765	863	939	1,037	1,156	1,264	1,367	1,473	1,588	1,725
MURCHISON ELEMENTARY	786	880	794	826	859	874	912	924	945	941	925	932	937	939
NORTHWEST ELEMENTARY	586	600	531	537	568	585	602	597	600	615	615	616	617	621
PARMER LANE ELEMENTARY	651	650	496	507	522	551	581	602	595	593	593	596	594	596
PFLUGERVILLE ELEMENTARY	625	600	473	460	450	448	431	421	426	433	438	448	462	475
RIOJAS ELEMENTARY	777	832	954	668	706	771	828	836	834	821	821	829	837	844
RIVER OAKS ELEMENTARY	688	750	558	561	592	604	609	609	590	590	590	593	597	599
ROWE LANE ELEMENTARY	767	800	902	800	791	778	778	741	733	741	724	711	697	686
SPRING HILL ELEMENTARY	670	600	590	605	618	632	654	683	721	729	745	756	769	783
TIMMERMAN ELEMENTARY	754	804	419	546	562	562	570	581	587	585	585	589	592	598
WIELAND ELEMENTARY	667	700	412	435	423	431	436	444	457	454	454	456	458	461
WINDEREMERE ELEMENTARY	530	750	434	402	413	419	414	370	360	351	367	377	388	392
WINDERMERE PRIMARY	641	750	404	407	384	379	374	380	389	398	408	415	419	421
DEARING ELEMENTARY	800	850	578	580	592	603	607	636	672	694	709	734	756	773
ELEMENTARY SCHOOL TOTALS	14,557	15,616	11,896	12,249	12,588	12,931	13,294	13,543	13,819	14,080	14,314	14,592	14,877	15,166
Elementary Absolute Growth			373	353	339	343	363	249	276	261	234	278	285	289
Elementary Percent Growth			3.24%	2.97%	2.77%	2.72%	2.81%	1.87%	2.04%	1.89%	1.66%	1.94%	1.95%	1.94%

*Yellow Box = enrollment exceeds stated campus capacity





Ten Year Forecast

By Secondary Campus

CAMPUS	Capacity	Architectural Capacity	History	Current	ENROLLMENT PROJECTIONS									
			2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
CELE MIDDLE SCHOOL	1,170	1,250	885	1,044	1,178	1,271	1,369	1,444	1,523	1,589	1,613	1,696	1,768	1,854
DESSAU MIDDLE SCHOOL	1,058	1,200	798	860	932	976	1,046	1,042	1,126	1,176	1,254	1,288	1,329	1,369
KELLY LANE MIDDLE SCHOOL	1,142	1,200	1,214	1,079	1,080	1,095	1,102	1,113	1,061	1,093	1,141	1,181	1,179	1,160
PARK CREST MIDDLE SCHOOL	1,042	1,300	904	949	941	932	935	968	967	966	934	929	929	940
PFLUGERVILLE MIDDLE SCHOOL	1,170	1,400	939	1,018	1,041	1,052	1,058	1,049	1,038	1,029	1,010	1,016	1,029	1,052
WESTVIEW MIDDLE SCHOOL	946	1,100	796	799	802	827	840	897	961	988	969	931	928	931
MIDDLE SCHOOL TOTALS	6,528	7,450	5,536	5,749	5,974	6,153	6,350	6,513	6,676	6,841	6,921	7,041	7,162	7,306
Middle School Absolute Growth			80	213	225	179	197	163	163	165	80	120	121	144
Middle School Percent Growth			1.47%	3.85%	3.91%	3.00%	3.20%	2.57%	2.50%	2.47%	1.17%	1.73%	1.72%	2.01%
CONNALLY HIGH SCHOOL	2,475	2,280	1,891	1,862	1,867	1,862	1,902	1,999	2,063	2,127	2,218	2,297	2,352	2,396
HENDRICKSON HIGH SCHOOL	2,525	2,525	3,275	2,619	2,460	2,145	2,115	2,145	2,178	2,168	2,161	2,178	2,184	2,248
PFLUGERVILLE HIGH SCHOOL	2,350	2,280	2,090	2,058	2,001	1,950	1,973	1,976	2,005	2,026	2,033	2,031	2,024	2,013
WEISS HIGH SCHOOL	2,497	2,664	0	884	1,329	1,802	1,918	2,107	2,275	2,485	2,688	2,764	2,922	3,045
HIGH SCHOOL TOTALS	9,847	9,749	7,256	7,423	7,657	7,759	7,908	8,227	8,521	8,806	9,100	9,270	9,482	9,702
High School Absolute Growth			135	167	234	102	149	319	294	285	294	170	212	220
High School Percent Growth			1.90%	2.30%	3.15%	1.33%	1.92%	4.03%	3.57%	3.34%	3.34%	1.87%	2.29%	2.32%
TRAVIS COUNTY JJAEP			3	4	4	4	4	4	4	4	4	4	4	4
DISTRICT TOTALS	30,932	32,815	24,691	25,425	26,223	26,847	27,556	28,287	29,020	29,731	30,339	30,907	31,525	32,178
District Absolute Growth			591	734	798	624	709	731	733	711	608	568	618	653
District Percent Growth			2.5%	3.0%	3.1%	2.4%	2.6%	2.7%	2.6%	2.5%	2.0%	1.9%	2.0%	2.1%

*Yellow Box = enrollment exceeds stated campus capacity





Summary

- Pflugerville's unemployment rate is currently 3%.
- Roughly one out of every three homes sold within Pflugerville ISD is a new home.
- Pflugerville ISD had the most annual new home starts in more than 10 years.
- An IDEA Charter School is opening in Pflugerville next fall.
- PISD can expect an increase of approximately 3,600 students during the next 5 years.
- 2022/23 enrollment projection: 29,020 students.
- Pflugerville ISD is projected to enroll 32,178 students for the 2027/28 school year.