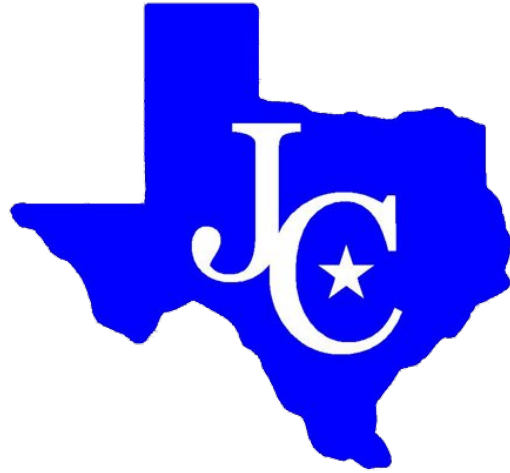
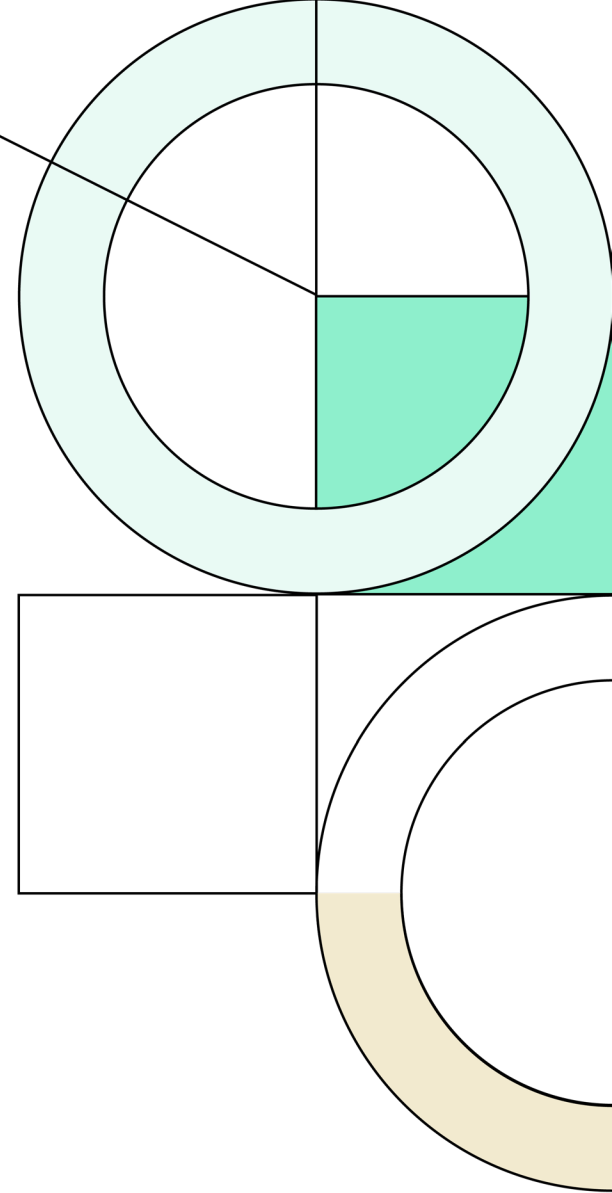




Jarrell Independent School District

3Q23

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
2019/20	5	113	174	164	171	161	168	159	159	169	143	172	125	120	104	2,107		
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	19	200	301	317	302	299	301	293	287	302	273	281	240	247	198	3,860	496	14.7%

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

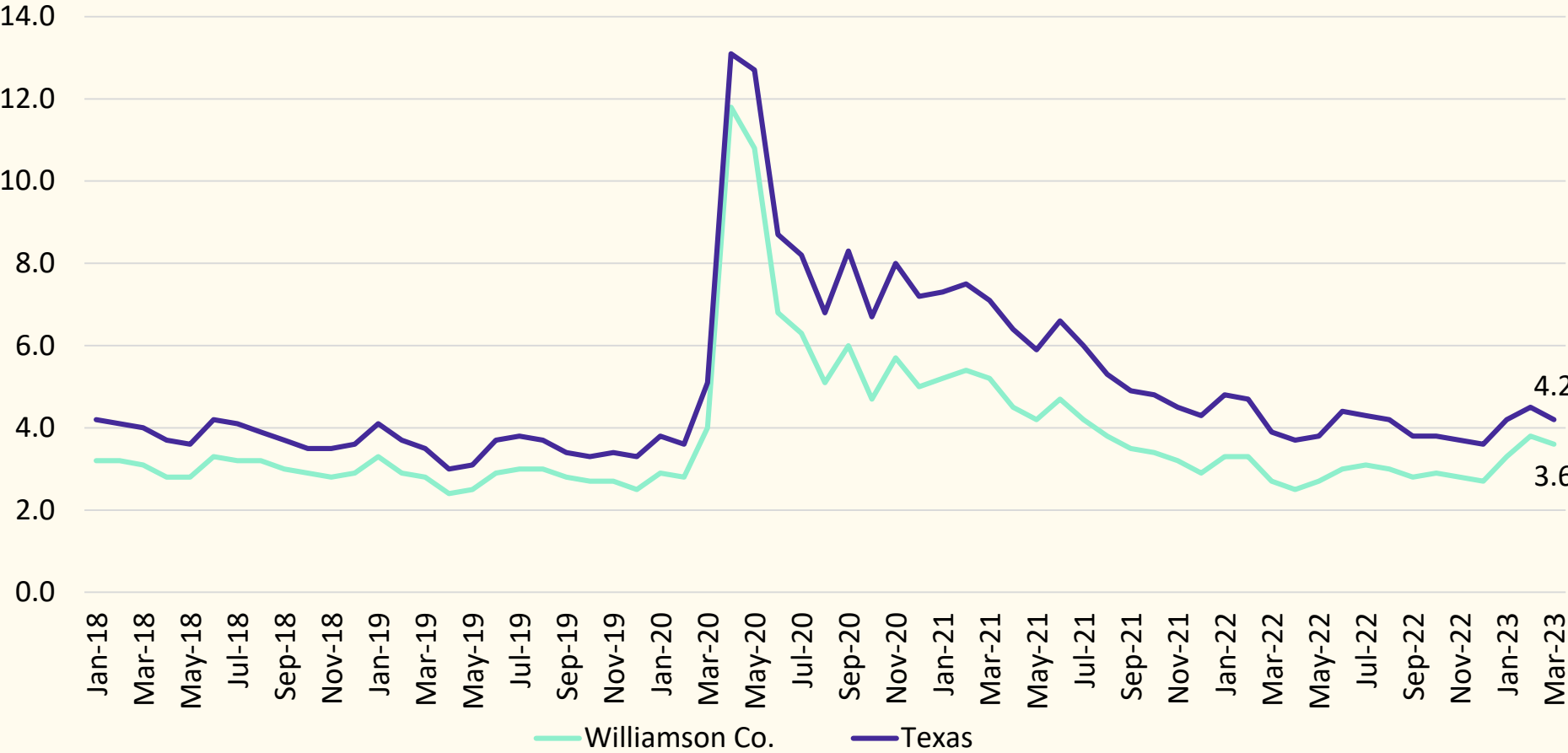
	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total
2023/24	19	200	301	317	302	299	301	293	287	302	273	281	240	247	198	3,860
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Year	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Elem	MS	HS
3 year avg	1.852	1.346	1.183	1.246	1.152	1.143	1.190	1.170	1.182	1.185	1.137	1.208	1.055	1.086	0.990	1.181	1.168	1.085
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
2023/24	1.056	1.156	1.144	1.205	1.114	1.120	1.140	1.149	1.157	1.148	1.138	1.181	1.048	1.047	0.980	1.146	1.148	1.064

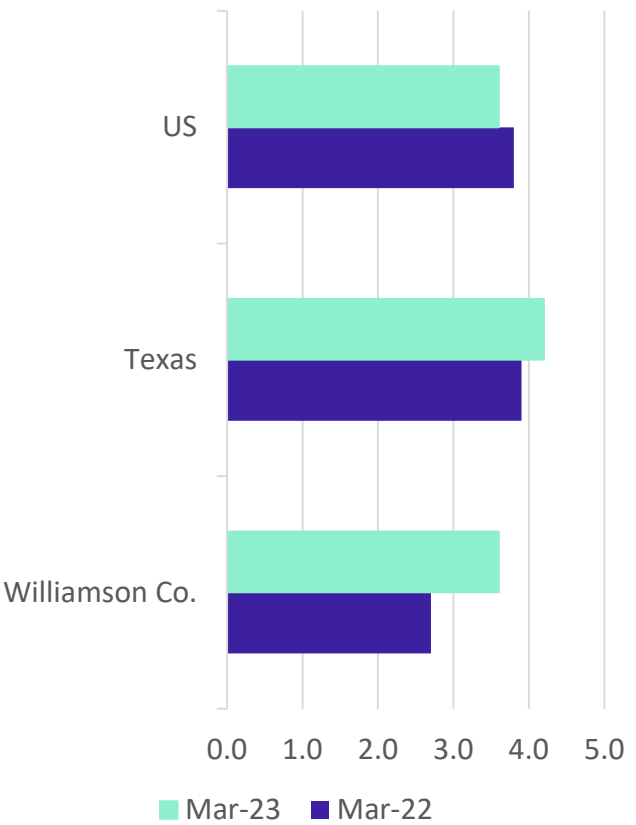


Local Economic Conditions

Unemployment Rates, Jan. 2018 - Mar. 2023



Unemployment Rate, Year-Over-Year

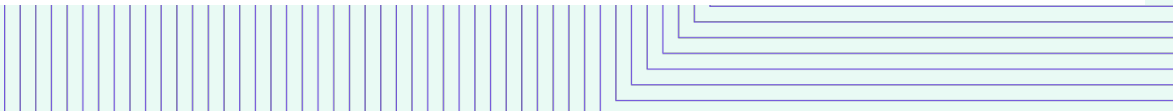
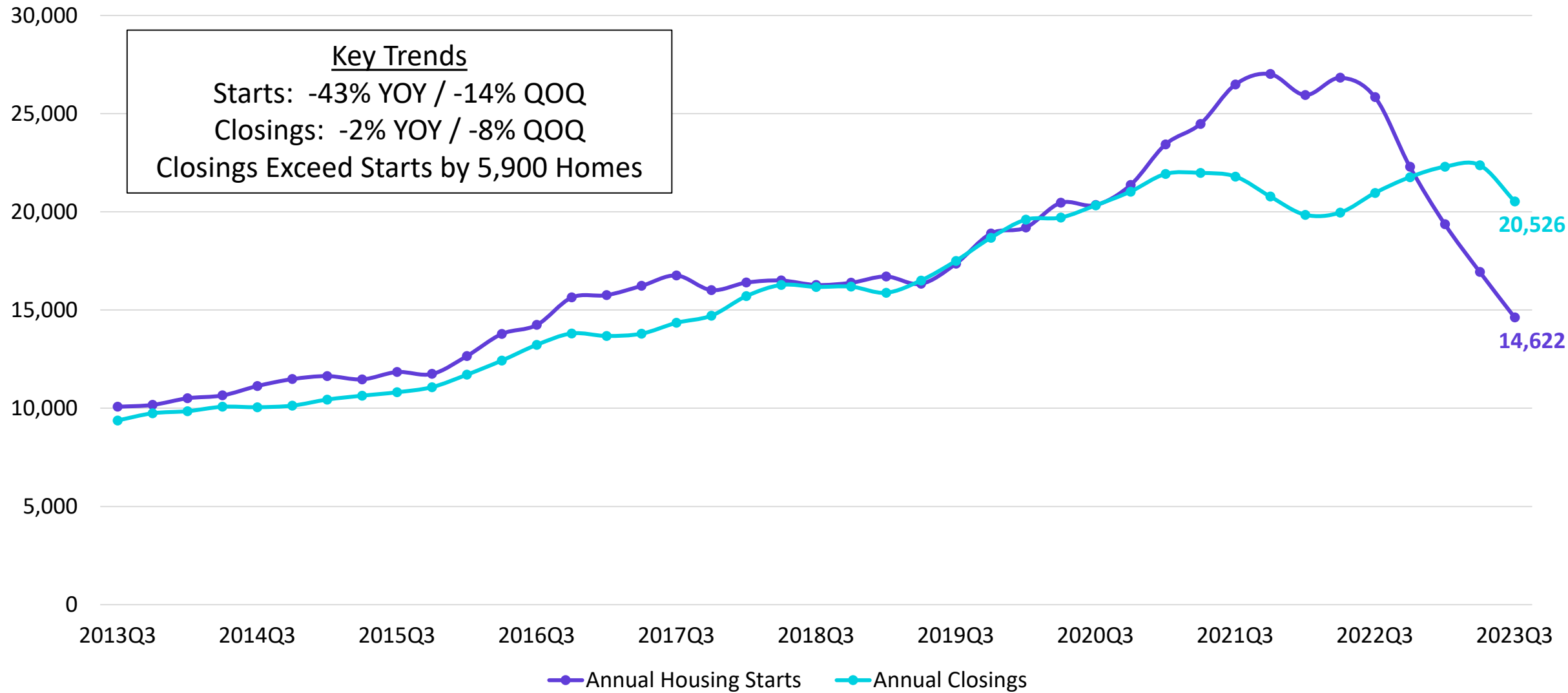




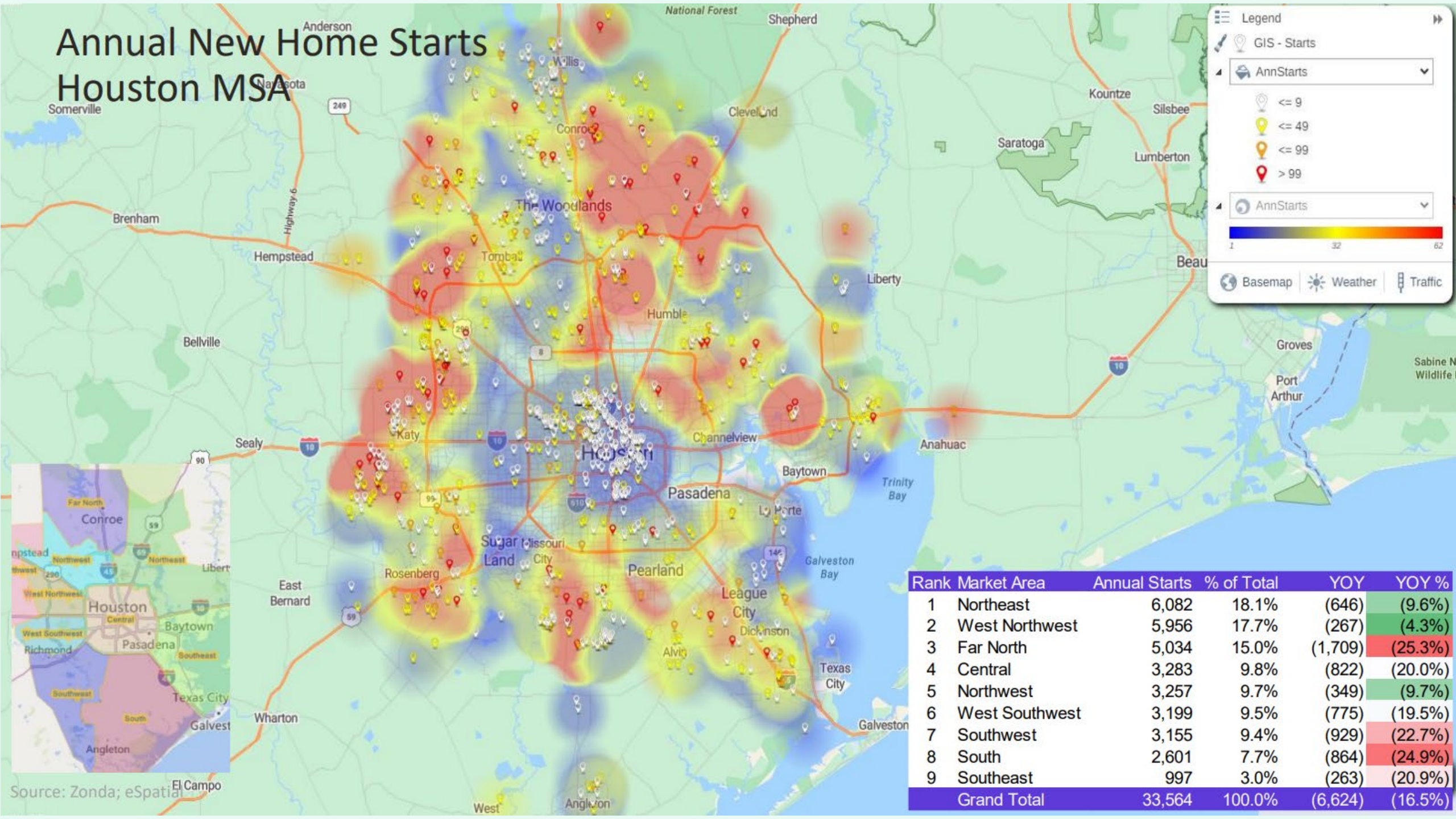
Austin New Home Starts & Closings

Annual Housing Starts vs. Annual Closings

Key Trends
Starts: -43% YOY / -14% QOQ
Closings: -2% YOY / -8% QOQ
Closings Exceed Starts by 5,900 Homes



Annual New Home Starts Houston MSA



Rank	Market Area	Annual Starts	% of Total	YOY	YOY %
1	Northeast	6,082	18.1%	(646)	(9.6%)
2	West Northwest	5,956	17.7%	(267)	(4.3%)
3	Far North	5,034	15.0%	(1,709)	(25.3%)
4	Central	3,283	9.8%	(822)	(20.0%)
5	Northwest	3,257	9.7%	(349)	(9.7%)
6	West Southwest	3,199	9.5%	(775)	(19.5%)
7	Southwest	3,155	9.4%	(929)	(22.7%)
8	South	2,601	7.7%	(864)	(24.9%)
9	Southeast	997	3.0%	(263)	(20.9%)
Grand Total		33,564	100.0%	(6,624)	(16.5%)

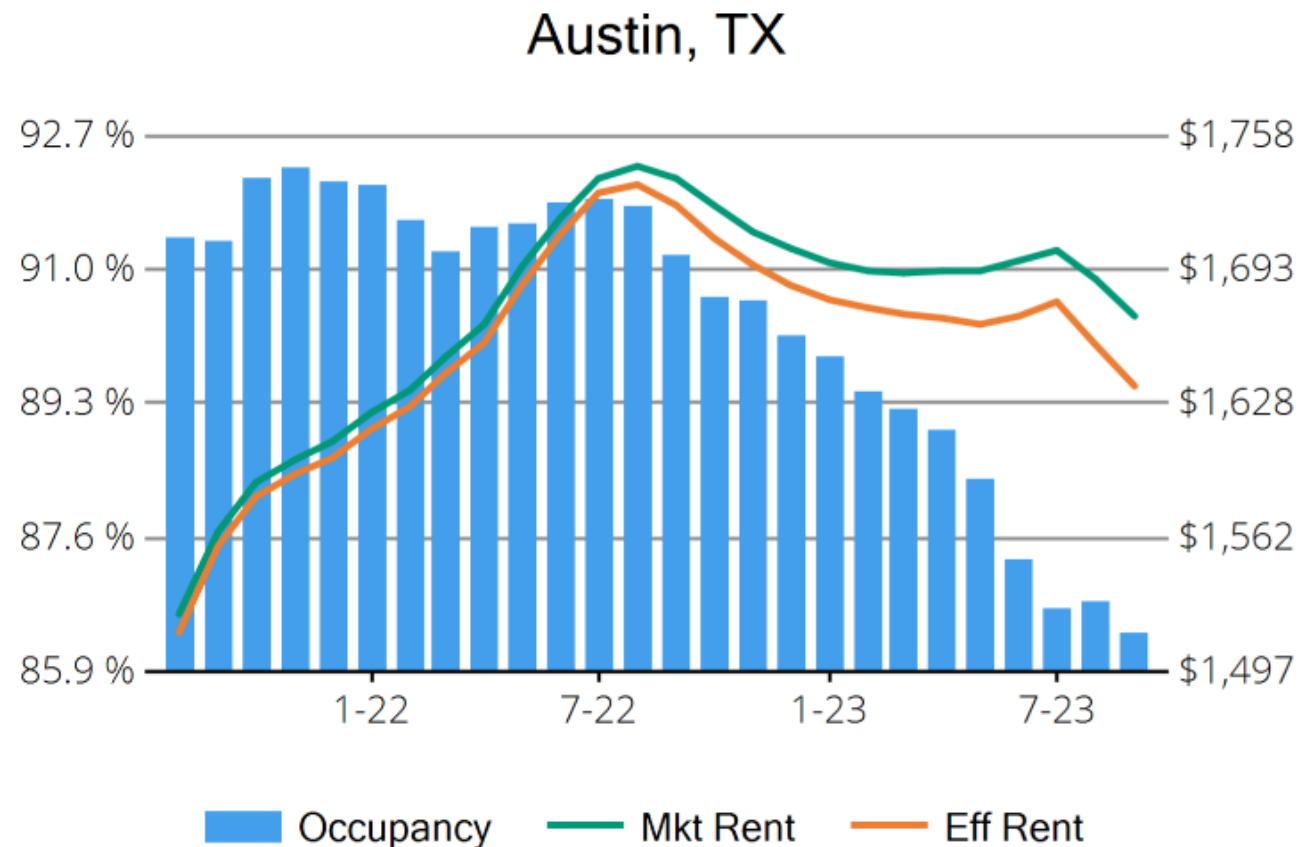


Housing Market Trends: Multi-family Market- Sept 2023



*Stabilized and Lease-up Properties**

Conventional Properties	Sep 2023	Annual Change
Occupancy	86.4	-5.3%
Unit Change	16,493	
Units Absorbed (Annual)	2,571	
Average Size (SF)	869	+0.5%
Asking Rent	\$1,670	-3.9%
Asking Rent per SF	\$1.92	-4.4%
Effective Rent	\$1,636	-5.2%
Effective Rent per SF	\$1.88	-5.6%
% Offering Concessions	30%	+151.5%
Avg. Concession Package	6.3%	+28.0%





Austin New Home Ranking Report

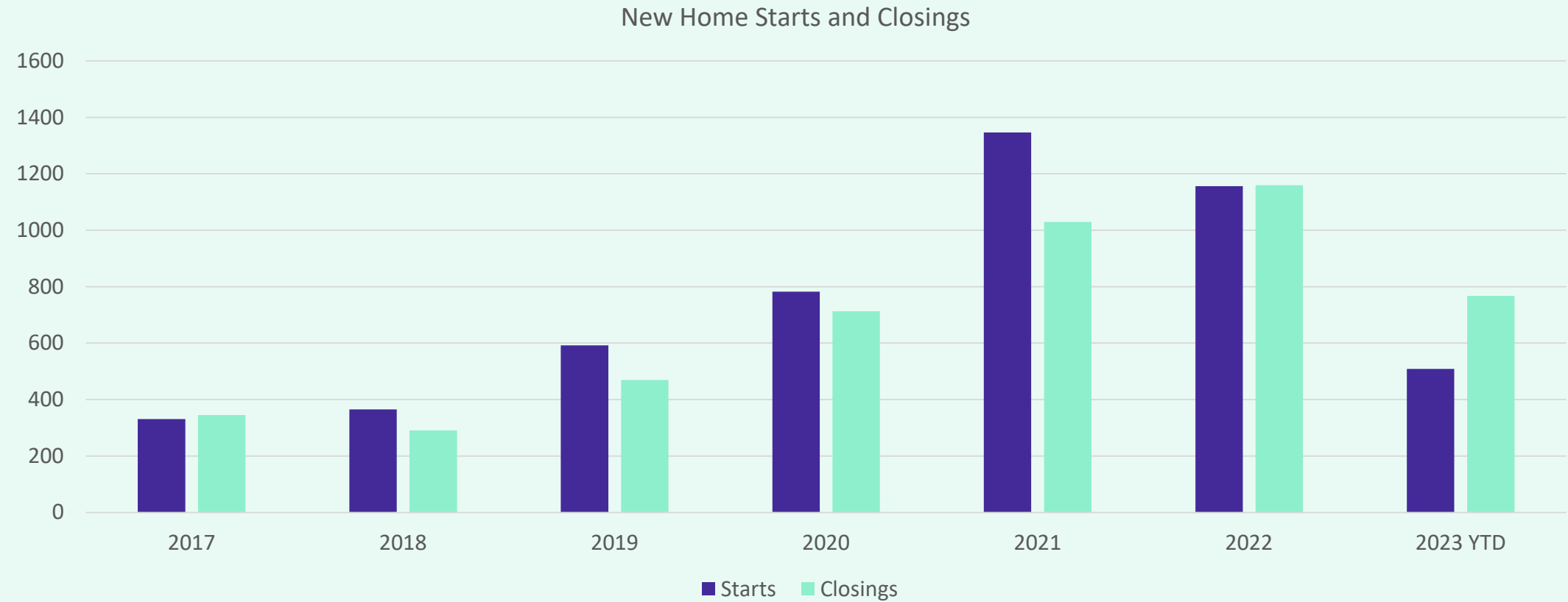
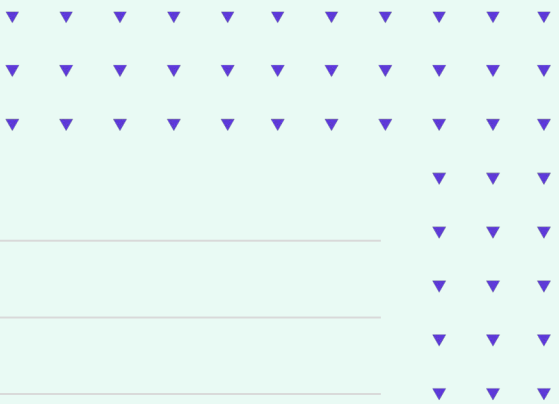
ISD Ranked by Annual Closings – 3Q23

Rank	District Name	Annual Starts	Annual Closings	Inventory	VDL	Future
1	GEORGETOWN ISD	1,646	2,590	1,289	3,557	15,545
2	HAYS CISD	2,076	2,369	2,259	5,653	39,201
3	LIBERTY HILL ISD	1,323	2,086	1,095	3,494	8,706
4	LEANDER ISD	1,300	2,070	1,077	2,524	5,045
5	HUTTO ISD	1,238	1,547	796	1,348	9,698
6	AUSTIN ISD	1,247	1,296	3,093	1,141	9,558
7	MANOR ISD	746	1,226	606	1,528	15,203
8	JARRELL ISD	712	1,053	502	2,353	8,859
9	DEL VALLE ISD	551	911	535	2,197	24,690
10	SAN MARCOS CISD	485	868	449	1,117	7,234
11	PFLUGERVILLE ISD	526	772	355	721	5,922
12	ROUND ROCK ISD	394	770	392	1,310	1,696
13	DRIPPING SPRINGS ISD	494	741	466	1,234	7,237
14	BASTROP ISD	521	652	496	2,535	15,674
15	LAKE TRAVIS ISD	311	546	419	982	3,950
16	ELGIN ISD	447	482	388	601	10,551
17	LAGO VISTA ISD	60	212	85	354	3,083
18	TAYLOR ISD	95	152	57	215	1,359
19	LOCKHART ISD	406	108	350	846	19,853
20	EANES ISD	12	28	50	53	71

* Based on additional housing research by Zonda Education

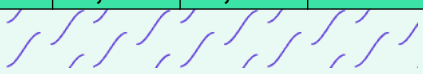


District New Home Starts and Closings by Quarter



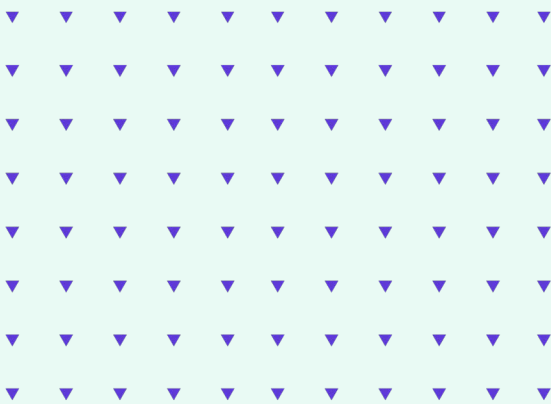
Starts	2017	2018	2019	2020	2021	2022	2023
1Q	44	51	55	155	313	327	93
2Q	111	121	129	135	339	413	180
3Q	103	112	248	241	288	324	308
4Q	73	81	160	251	406	92	
Total	331	365	592	782	1,346	1,156	509

Closings	2017	2018	2019	2020	2021	2022	2023
1Q	85	72	85	129	244	230	308
2Q	53	32	97	195	263	409	240
3Q	109	99	107	166	342	267	219
4Q	98	88	180	223	180	253	
Total	345	291	469	713	1,029	1,159	767





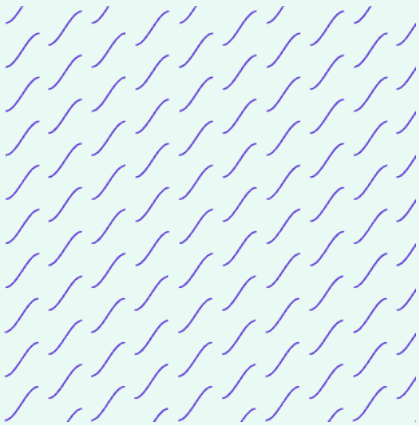
District Housing Overview by Elementary Zone



Elementary	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Under Const.	Inventory	Vacant Dev. Lots	Future
IGO	335	119	394	120	121	192	1,167	8,021
DOUBLE CREEK	331	163	646	90	180	273	1,097	430
JARRELL	46	26	13	9	36	37	89	408
Grand Total	712	308	1,053	219	337	502	2,353	8,859

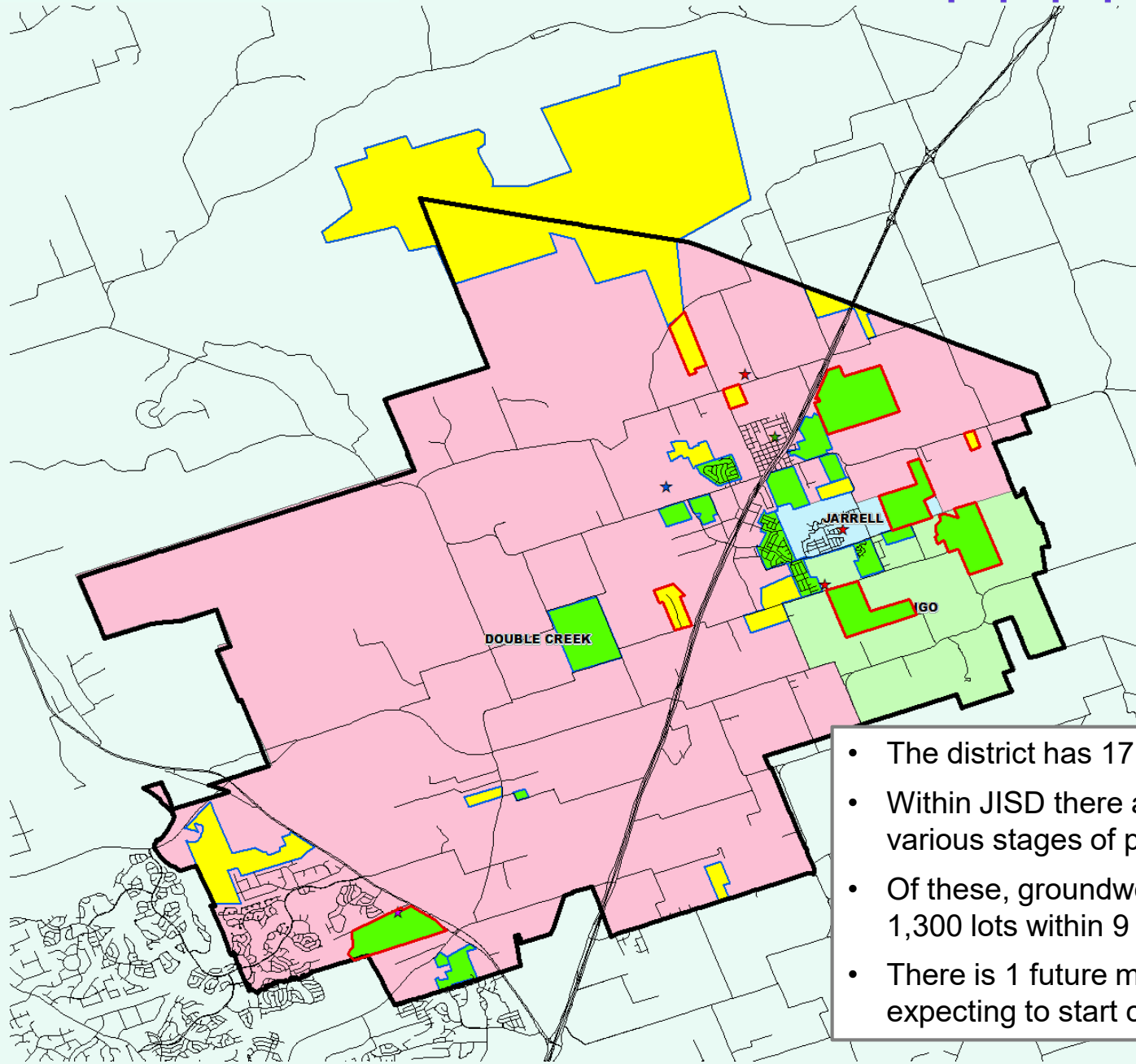
Highest activity in the category

2nd highest activity in the category





District Housing Overview



Multi-Family Developments

 FUTURE

Subdivisions

 ACTIVE

 FUTURE

 Groundwork Underway

- The district has 17 actively building subdivisions
- Within JISD there are 12 future subdivisions in various stages of planning
- Of these, groundwork is underway on more than 1,300 lots within 9 subdivisions
- There is 1 future multi-family development, expecting to start construction in Nov. 2023



Residential Activity

Schwertner Ranch

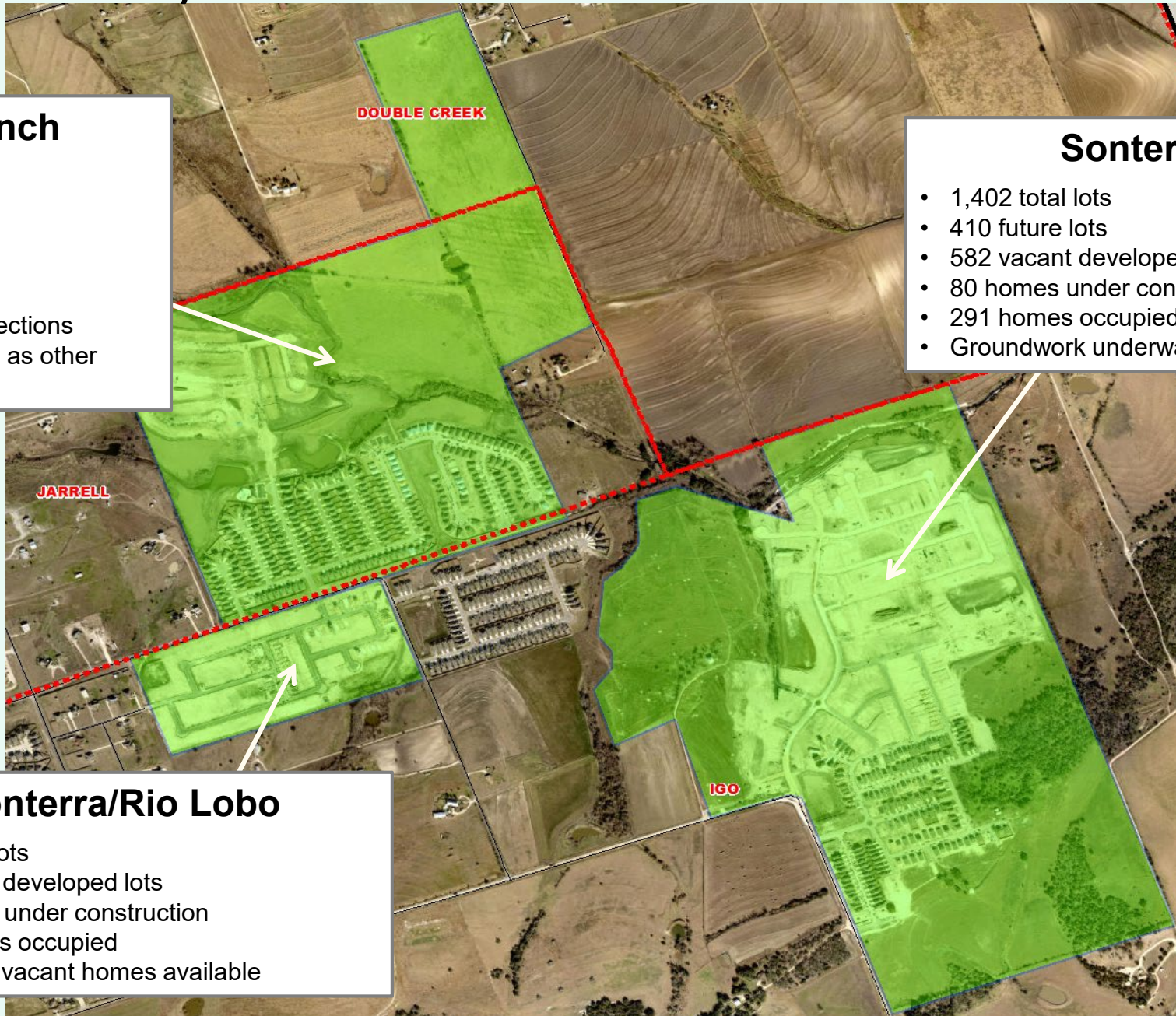
- 822 total lots
- 408 future lots
- 89 vacant developed lots
- 36 homes under construction
- 288 homes occupied
- Groundwork underway in all sections
- Home construction has stalled as other sections finish groundwork

Sonterra/Cool Water

- 1,402 total lots
- 410 future lots
- 582 vacant developed lots
- 80 homes under construction
- 291 homes occupied
- Groundwork underway in next sections (~250 lots)

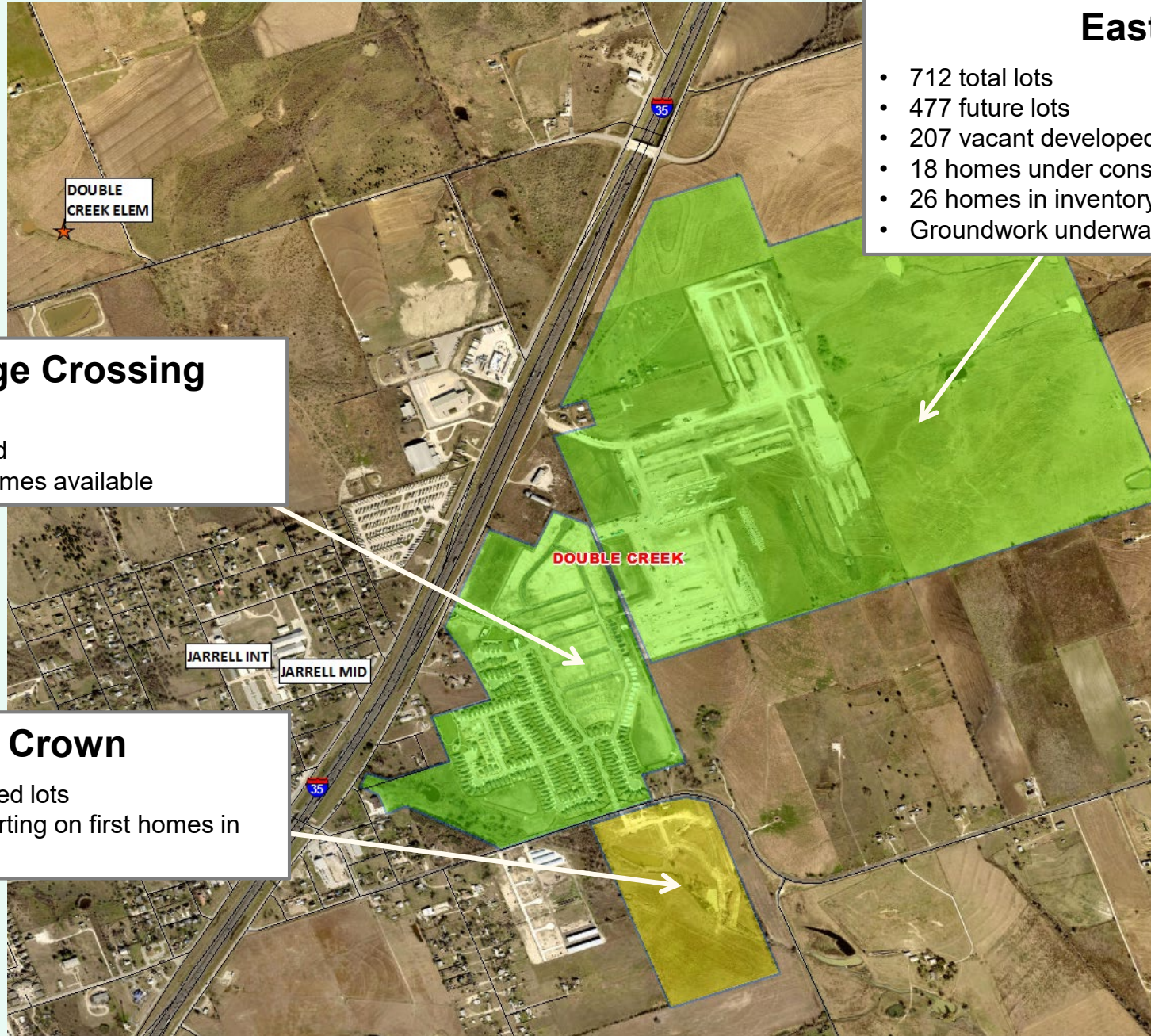
Sonterra/Rio Lobo

- 237 total lots
- 21 vacant developed lots
- 10 homes under construction
- 201 homes occupied
- 4 finished vacant homes available





Residential Activity



Stonebridge Crossing

- 439 total lots
- 431 homes occupied
- 7 finished vacant homes available

Stone Crown

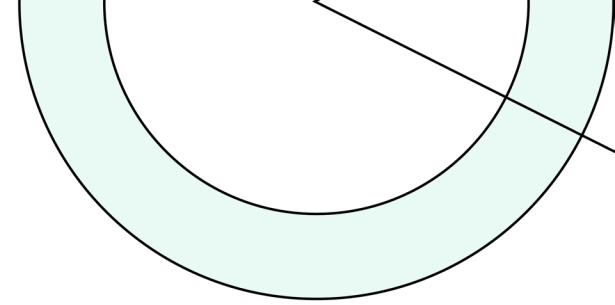
- 125 vacant developed lots
- Builder plans on starting on first homes in Jan 24

Eastern Wells

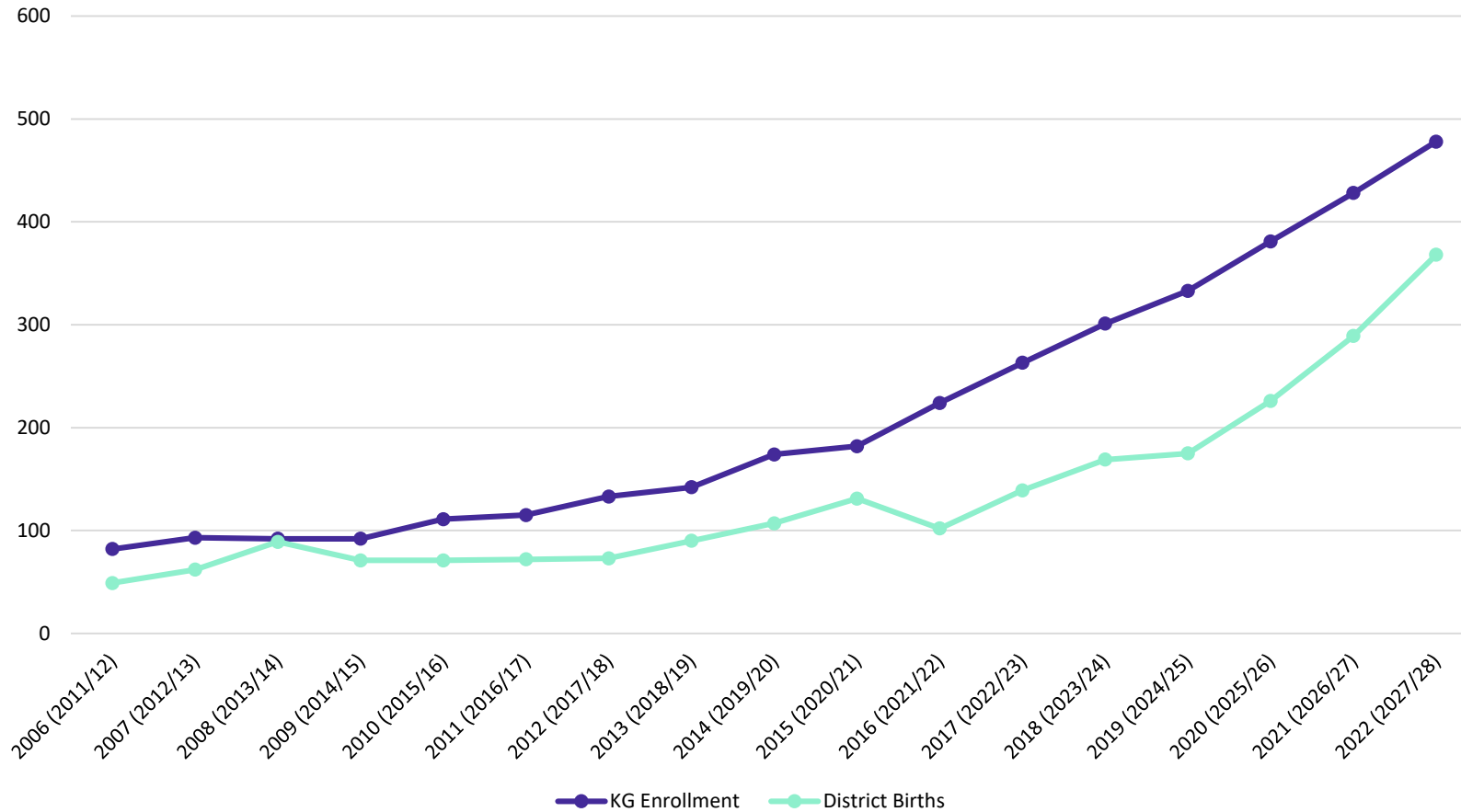
- 712 total lots
- 477 future lots
- 207 vacant developed lots
- 18 homes under construction
- 26 homes in inventory
- Groundwork underway in all sections



Birth Rate Analysis



Jarrell ISD KG Enrollment v. District Births



	KG Enrollment	District Births	Ratio
2006 (2011/12)	82	49	1.67
2007 (2012/13)	93	62	1.50
2008 (2013/14)	92	89	1.03
2009 (2014/15)	92	71	1.30
2010 (2015/16)	111	71	1.56
2011 (2016/17)	115	72	1.60
2012 (2017/18)	133	73	1.82
2013 (2018/19)	142	90	1.58
2014 (2019/20)	174	107	1.63
2015 (2020/21)	182	131	1.39
2016 (2021/22)	224	102	2.20
2017 (2022/23)	263	139	1.89
2018 (2023/24)	301	169	1.78
2019 (2024/25)	333	175	1.90
2020 (2025/26)	381	226	1.69
2021 (2026/27)	428	289	1.48
2022 (2027/28)	478	368	1.30



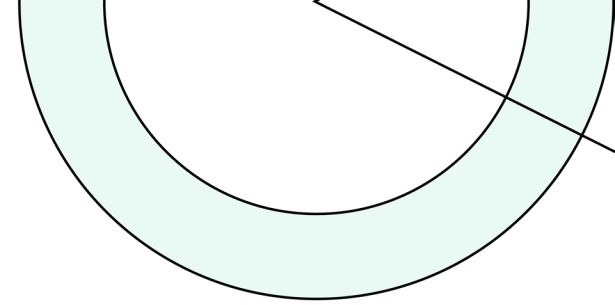
Ten Year Forecast by Grade Level

Year (Oct.)	EE	PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	% Growth
2019/20	5	113	174	164	171	161	168	159	159	169	143	172	125	120	104	2,107		
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	19	200	301	317	302	299	301	293	287	302	273	281	240	247	198	3,860	496	14.7%
2024/25	19	240	333	350	352	335	338	341	332	330	347	322	288	238	242	4,407	547	14.2%
2025/26	19	290	381	410	404	409	387	393	409	398	396	409	330	285	233	5,153	746	16.9%
2026/27	19	320	428	461	461	466	471	443	452	470	458	467	419	327	279	5,941	788	15.3%
2027/28	19	360	478	514	520	520	530	530	509	520	541	540	458	415	320	6,774	833	14.0%
2028/29	19	380	532	560	573	591	590	602	597	585	598	622	535	453	407	7,644	870	12.8%
2029/30	19	400	589	629	622	646	669	668	649	669	673	674	621	530	444	8,502	858	11.2%
2030/31	19	400	645	677	688	687	718	746	753	727	769	758	667	615	519	9,388	886	10.4%
2031/32	19	400	692	729	735	757	759	793	804	843	814	889	752	660	603	10,249	861	9.2%
2032/33	19	400	741	794	788	804	832	834	855	884	927	941	883	744	647	11,093	844	8.2%
2033/34	19	403	794	854	870	863	887	916	917	941	972	1,094	933	874	729	12,066	973	8.8%

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



Ten Year Forecast by Secondary Campus



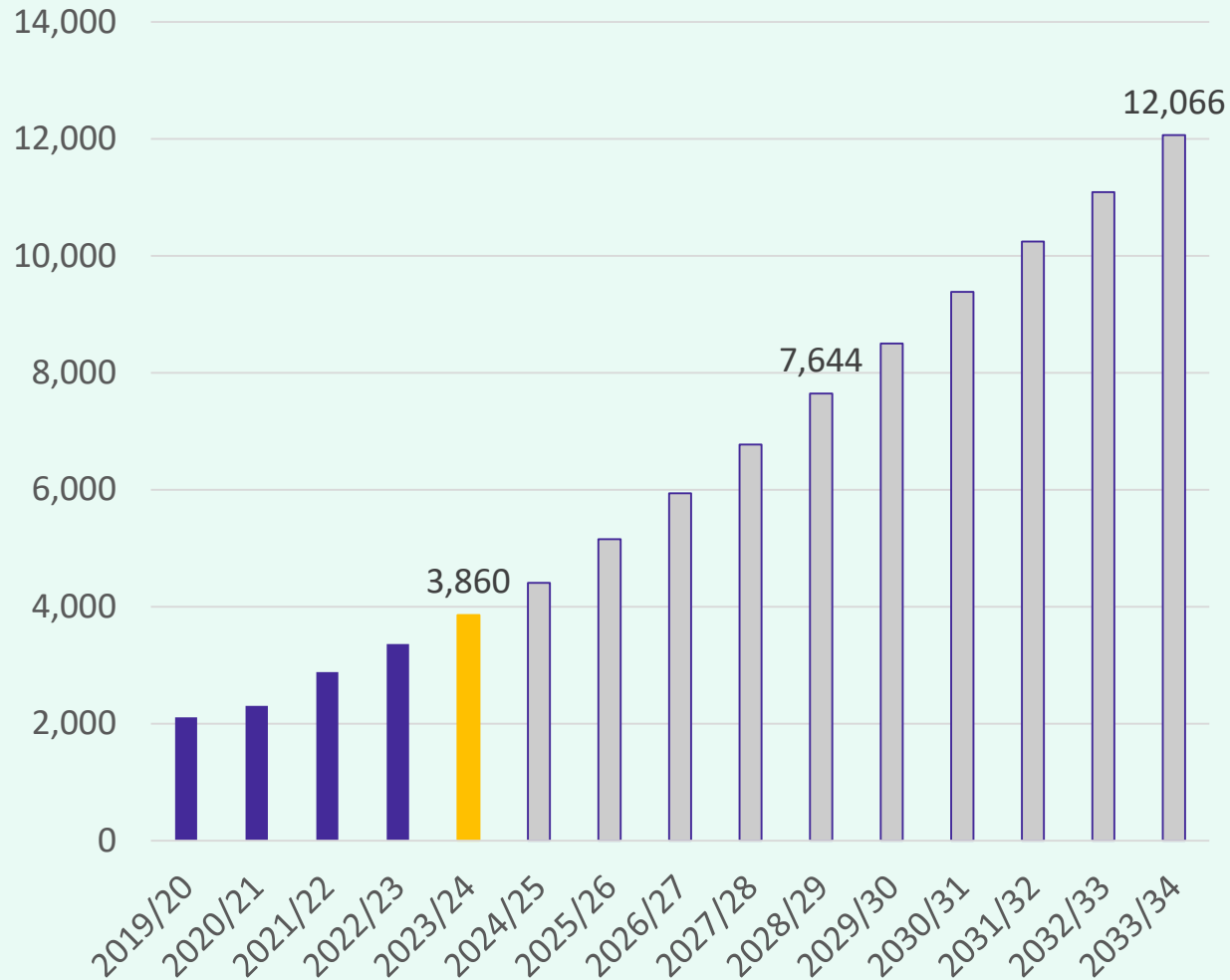
						Fall	ENROLLMENT PROJECTIONS									
Campus	Capacity	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	2030/31	2031/32	2032/33	2033/34
Igo Elementary	800	659	720	845	975	645	779	955	1,091	1,253	1,387	1,509	1,588	1,649	1,709	1,782
Jarrell Elementary	608	456	457	671	784	652	676	740	790	834	857	870	871	871	874	894
Double Creek Elementary	900					735	853	998	1,188	1,384	1,603	1,863	2,121	2,364	2,629	2,930
ELEMENTARY SCHOOL TOTAL	2,308	1,115	1,177	1,516	1,759	2,032	2,308	2,693	3,069	3,471	3,847	4,242	4,580	4,884	5,212	5,606
Elementary Absolute Change			62	339	243	273	276	385	376	402	376	395	338	304	328	394
Elementary Percent Change			5.56%	28.80%	16.03%	15.52%	13.58%	16.68%	13.96%	13.10%	10.83%	10.27%	7.97%	6.64%	6.72%	7.56%
Jarrell Middle School	764/1,004	471	513	610	741	862	1,009	1,203	1,380	1,570	1,780	1,991	2,249	2,461	2,666	2,830
MIDDLE SCHOOL TOTAL		471	513	610	741	862	1,009	1,203	1,380	1,570	1,780	1,991	2,249	2,461	2,666	2,830
Middle School Absolute Change			42	97	131	121	147	194	177	190	210	211	258	212	205	164
Middle School Percent Change			8.92%	18.91%	21.48%	16.33%	17.05%	19.23%	14.71%	13.77%	13.38%	11.85%	12.96%	9.43%	8.33%	6.15%
Jarrell High School	995/1,258	521	615	759	864	966	1,090	1,257	1,492	1,733	2,017	2,269	2,559	2,904	3,215	3,630
HIGH SCHOOL TOTAL		521	615	759	864	966	1,090	1,257	1,492	1,733	2,017	2,269	2,559	2,904	3,215	3,630
High School Absolute Change			94	144	105	102	124	167	235	241	284	252	290	345	311	415
High School Percent Change			18.04%	23.41%	13.83%	11.81%	12.84%	15.32%	18.70%	16.15%	16.39%	12.49%	12.78%	13.48%	10.71%	12.91%
DISTRICT TOTALS		2,107	2,305	2,885	3,364	3,860	4,407	5,153	5,941	6,774	7,644	8,502	9,388	10,249	11,093	12,066
District Absolute Change			198	580	479	496	547	746	788	833	870	858	886	861	844	973
District Percent Change			9.40%	25.16%	16.60%	14.74%	14.17%	16.93%	15.29%	14.02%	12.84%	11.22%	10.42%	9.17%	8.23%	8.77%



Key Takeaways

**Consultants will update key
takeaway bullets**

Enrollment Forecast



- Jarrell ISD added more than 2,450 students this fall as the housing market continued its record pace and students returned after the Covid pandemic
- There was a possible charter impact in lower elementary grades and some elementary campuses
- Groundwork is underway on roughly 2,450 lots across the district
- The district is forecasted to add 3,000 new homes annually for the next 2-3 years
- The district is forecasted to enroll more than 33,470 students in 2026/27, and more than 42,568 students in 2031/32