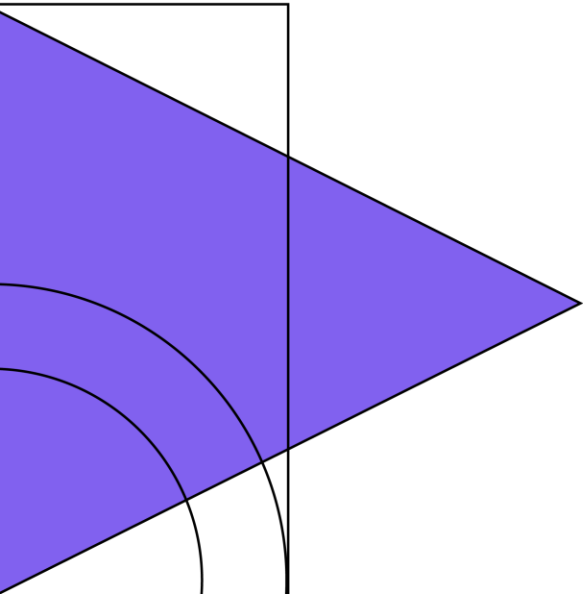
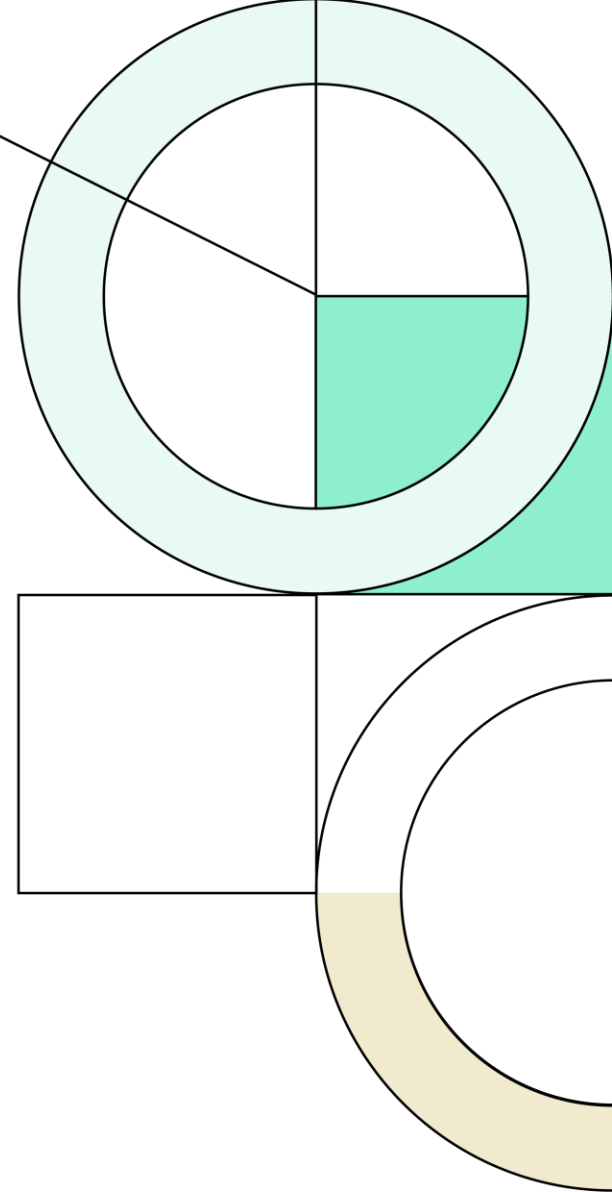




**Jarrell
Independent
School
District**

4Q23

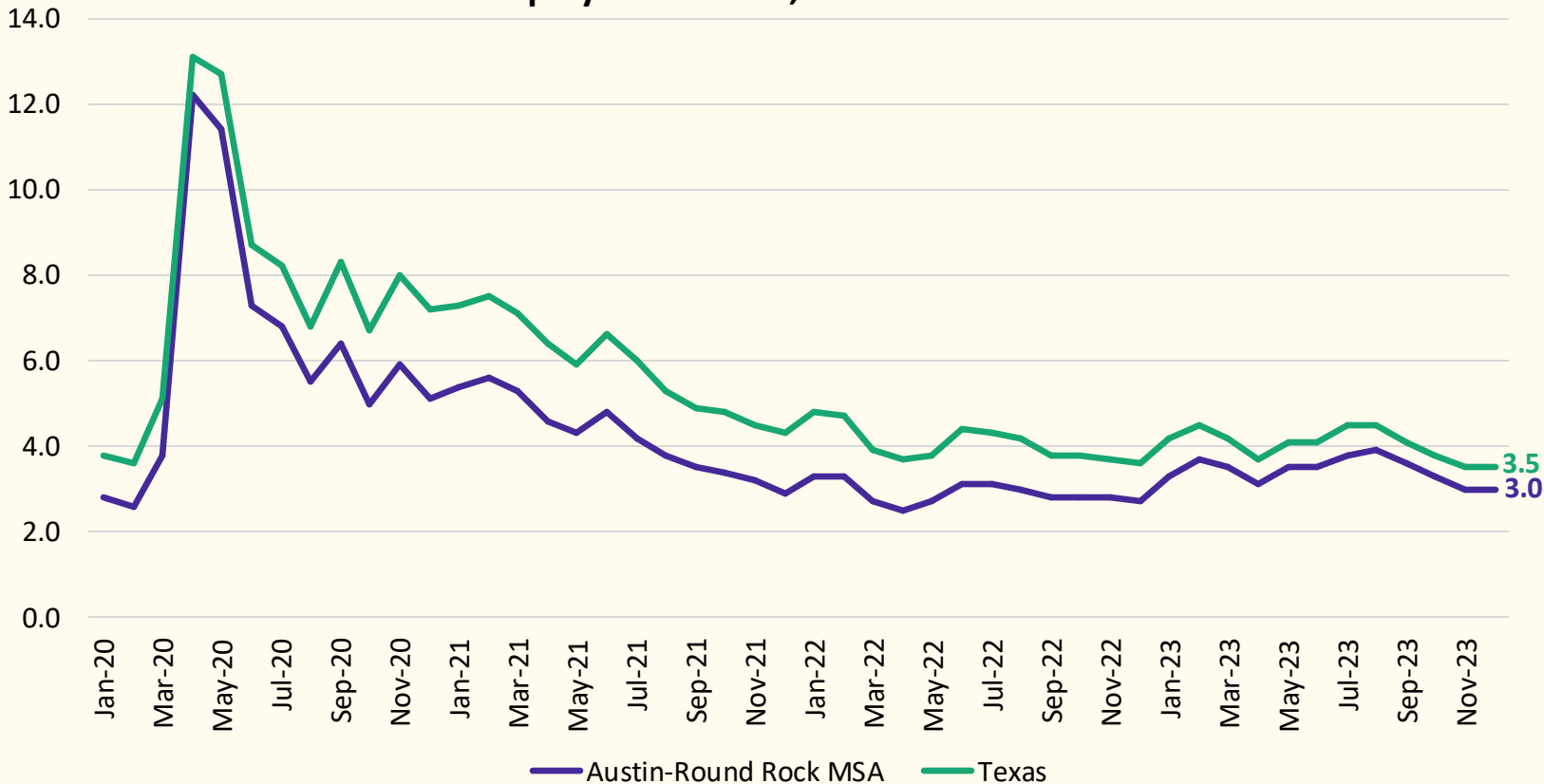
Demographic Report



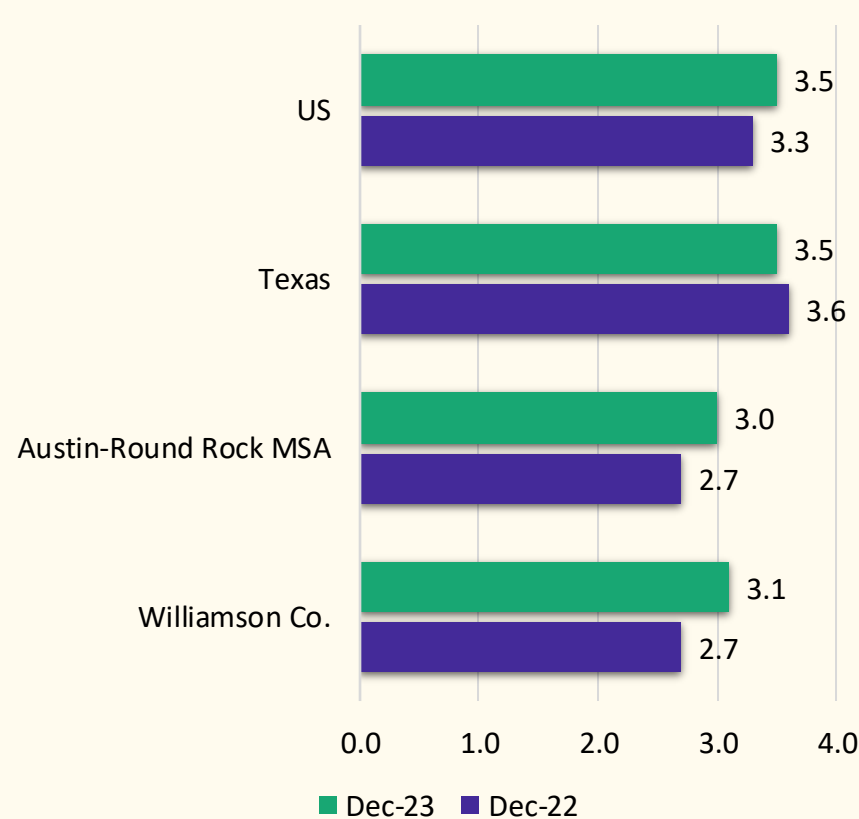


Local Economic Conditions

Unemployment Rates, Jan 2020 - Dec 2023



Unemployment Rate, Year-Over-Year





Austin New Home Ranking Report

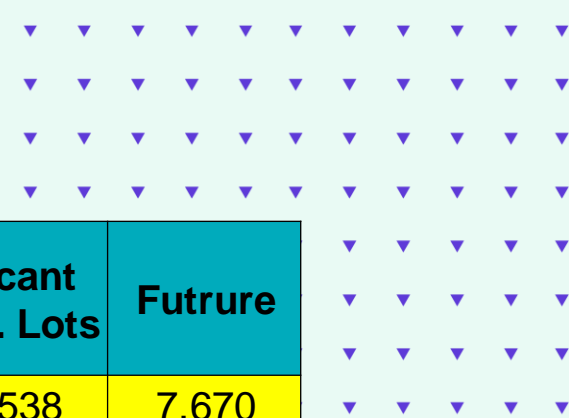
ISD Ranked by Annual Closings – 4Q23

Rank	District Name	Annual Starts	Annual Closings	Inventory	VDL	Future
1	HAYS CISD	2,799	2,525	2,341	5,186	39,103
2	GEORGETOWN ISD	1,658	2,262	1,274	3,091	16,758
3	LEANDER ISD	1,415	1,873	1,003	2,223	5,164
4	LIBERTY HILL ISD	1,328	1,826	1,104	3,582	9,112
5	HUTTO ISD	1,244	1,390	873	1,189	10,207
6	MANOR ISD	788	1,183	612	1,375	14,597
7	JARRELL ISD	824	1,034	472	2,740	8,266*
8	AUSTIN ISD	963	940	2,642	1,239	9,941
9	DEL VALLE ISD	600	846	544	2,070	24,689
10	SAN MARCOS CISD	470	750	433	1,069	7,989
11	PFLUGERVILLE ISD	492	696	338	702	5,825
12	DRIPPING SPRINGS ISD	522	656	383	970	7,277
13	BASTROP ISD	451	641	449	2,464	16,721
14	ROUND ROCK ISD	454	619	434	1,209	1,779
15	ELGIN ISD	499	567	329	599	10,476
16	LAKE TRAVIS ISD	293	478	351	1,044	3,992
17	LOCKHART ISD	574	282	366	887	19,637
18	LAGO VISTA ISD	57	181	74	394	3,026
19	TAYLOR ISD	56	92	77	190	1,462
20	EANES ISD	9	37	42	50	71


* Based on additional Zonda Education housing research




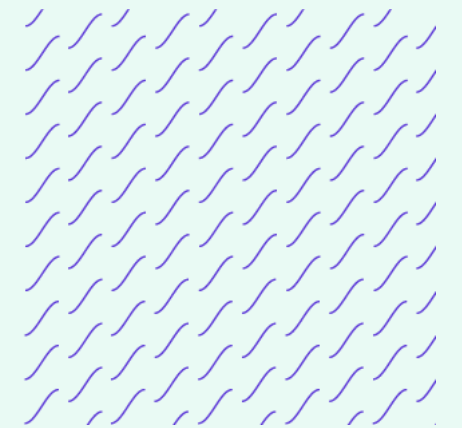
District Housing Overview by Elementary Zone



Elementary	Annual Starts	Quarterly Starts	Annual Closings	Quarterly Closings	Under Construction	Inventory	Vacant Dev. Lots	Futrure
DOUBLE CREEK	389	89	436	91	81	226	1,538	7,670
IGO	389	80	561	117	83	236	1,018	430
JARRELL	46	0	37	27	3	10	184	166
Grand Totals	824	169	1,034	235	167	472	2,740	8,266

 Highest activity in the category

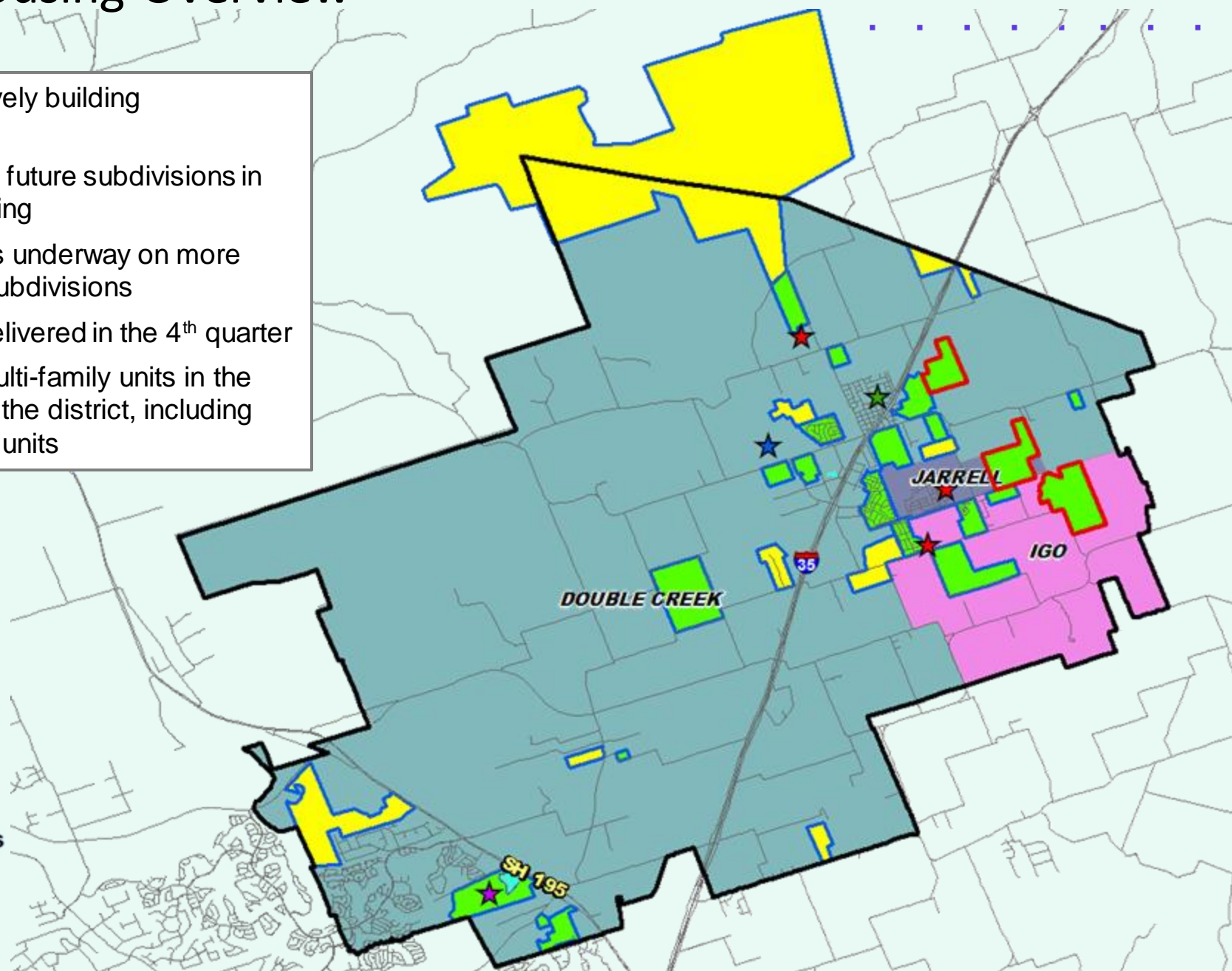
 Second highest activity in the category





District Housing Overview

- The district has 20 actively building subdivisions
- Within JISD there are 9 future subdivisions in various stages of planning
- Of these, groundwork is underway on more than 700 lots within 3 subdivisions
- Nearly 600 lots were delivered in the 4th quarter
- There are 304 future multi-family units in the planning stages across the district, including 224 single family rental units



Subdivisions

- ACTIVE
- FUTURE
- Groundwork Underway

Multi-Family Developments

- FUTURE



Ten Year Forecast by Campus

Campus	Capacity	2022/23	Fall	ENROLLMENT PROJECTIONS									
			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	975	553	615	666	744	801	873	944	1,021	1,105	1,197	1,298
Jarrell Elementary	608	784	658	690	727	762	780	810	821	847	857	871	885
Double Creek Elementary	900		702	763	828	894	988	1,077	1,170	1,276	1,392	1,523	1,665
ELEMENTARY SCHOOL TOTAL	2,308	1,759	1,913	2,068	2,221	2,400	2,569	2,760	2,935	3,144	3,354	3,591	3,848
Elementary Absolute Change		243	154	155	153	179	169	191	175	209	210	237	257
Elementary Percent Change		16.03%	8.75%	8.10%	7.40%	8.06%	7.04%	7.43%	6.34%	7.12%	6.68%	7.07%	7.16%
Jarrell Middle School	764/1,004	741	837	961	1,156	1,244	1,336	1,394	1,495	1,599	1,711	1,804	1,889
MIDDLE SCHOOL TOTAL		741	837	961	1,156	1,244	1,336	1,394	1,495	1,599	1,711	1,804	1,889
Middle School Absolute Change		131	96	124	195	88	92	58	101	104	112	93	85
Middle School Percent Change		21.48%	12.96%	14.81%	20.29%	7.61%	7.40%	4.34%	7.25%	6.96%	7.00%	5.44%	4.71%
Jarrell High School	995/1,258	864	949	1,079	1,207	1,447	1,680	1,904	2,091	2,253	2,377	2,500	2,695
HIGH SCHOOL TOTAL		864	949	1,079	1,207	1,447	1,680	1,904	2,091	2,253	2,377	2,500	2,695
High School Absolute Change		105	85	130	128	240	233	224	187	162	124	123	195
High School Percent Change		13.83%	9.84%	13.70%	11.86%	19.88%	16.10%	13.33%	9.82%	7.75%	5.50%	5.17%	7.80%
DISTRICT TOTALS		3,364	3,703	4,112	4,588	5,095	5,589	6,062	6,525	7,000	7,446	7,899	8,436
District Absolute Change		479	339	409	476	507	494	473	463	475	446	453	537
District Percent Change		16.60%	10.08%	11.05%	11.58%	11.05%	9.70%	8.46%	7.64%	7.28%	6.37%	6.08%	6.80%

*Yellow exceeds Capacity



Five Year Forecast by Campus – New Campuses

Concept to illustrate impact of Elementary #4 and Middle School #2
 ESTIMATES USED TO ILLUSTRATE CHANGES TO ENROLLMENT

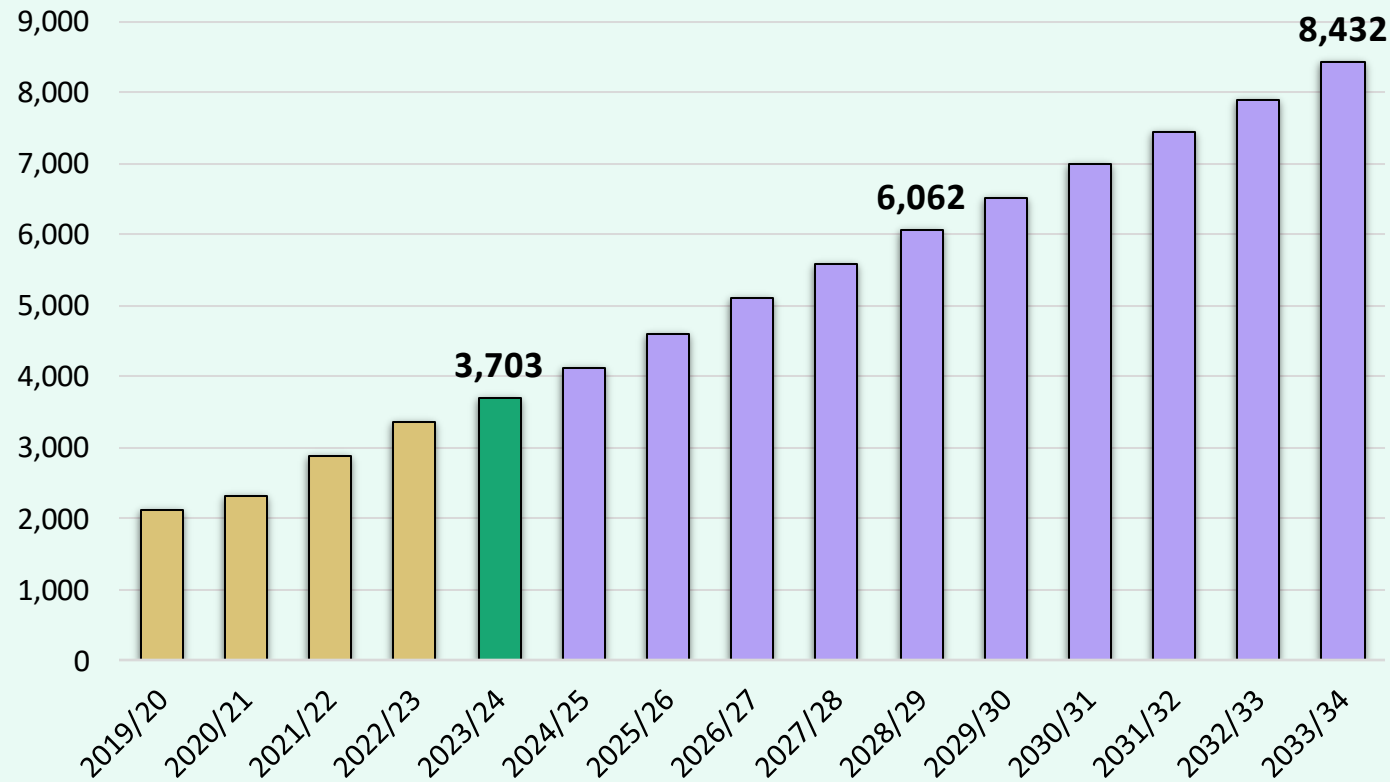
Campus	Capacity	Fall					
		2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Igo Elementary	800	553	615	566	634	650	715
Jarrell Elementary	608	658	690	600	600	600	600
Double Creek Elementary	900	702	763	555	591	669	720
Elementary #4 Opens Fall 2025	900			500	575	650	725
Elementary #5	900						
ELEMENTARY SCHOOL TOTAL	4,108	1,913	2,068	2,221	2,400	2,569	2,760
Elementary Absolute Change		154	155	153	179	169	191
Elementary Percent Change		8.75%	8.10%	7.40%	8.06%	7.04%	7.43%
Jarrell Middle School	764/1,004	837	961	656	719	786	819
Middle School #2 Opens Fall 2025	700			500	525	550	575
MIDDLE SCHOOL TOTAL		837	961	1,156	1,244	1,336	1,394
Middle School Absolute Change		96	124	195	63	67	33
Middle School Percent Change		12.96%	14.81%	20.29%	5.45%	5.39%	2.47%
Jarrell High School	995/1,258	949	1,079	1,207	1,447	1,680	1,904
HIGH SCHOOL TOTAL		949	1,079	1,207	1,447	1,680	1,904
High School Absolute Change		85	130	128	240	233	224
High School Percent Change		9.84%	13.70%	11.86%	19.88%	16.10%	13.33%
DISTRICT TOTALS		3,703	4,112	4,588	5,095	5,589	6,062
District Absolute Change		339	409	476	507	494	473
District Percent Change		10.08%	11.05%	11.58%	11.05%	9.70%	8.46%

*Yellow exceeds Capacity



Key Takeaways

Enrollment Forecast



- Annual starts within the district slowed in 2023 in response to higher interest rates and inflation costs
- JISD has over 2,700 lots currently available to build on, with nearly 500 homes currently in inventory
- Groundwork is underway on more than 700 lots within 3 subdivisions
- Jarrell ISD is forecasted to enroll nearly 6,000 students by 2028/29 and more than 8,400 by 2033/34
- Elementary #4 and Middle School #2 opening fall 2025