

*Judson
Independent
School
District*

Demographic Update

Fall 2016



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



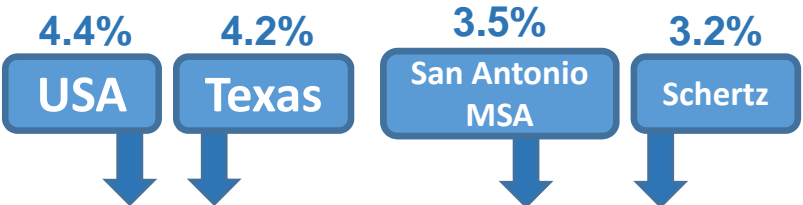
TEMPLETON
DEMOGRAPHICS



Economic Conditions- San Antonio MSA

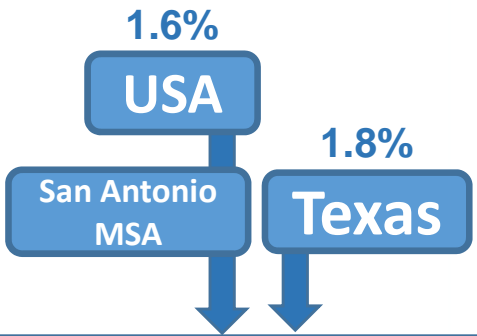
Unemployment Rate

November 2016



Annual Job Growth Rate

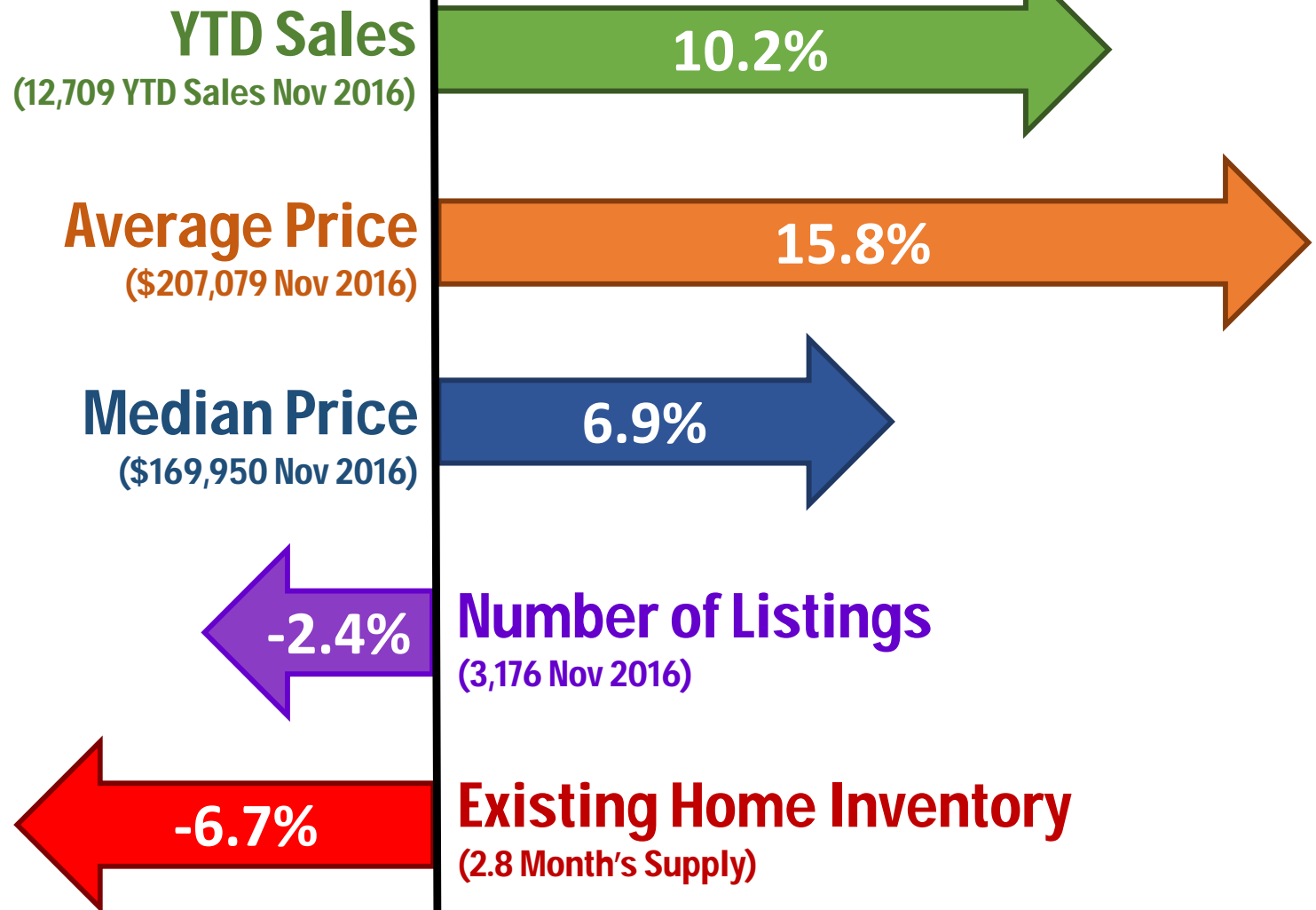
November 2016





San Antonio Housing Market

Year Over Year Comparisons





San Antonio New Home Ranking Report

ISD Ranked by Annual Closings – 3Q16

Rank	District Name	Annual Starts	Annual Closings	VDL	Future
1	Northside ISD	3,449	3,439	5,821	34,494
2	Comal ISD	1,616	1,573	3,007	22,774
3	Schertz-Cibolo U City ISD	837	876	1,587	5,774
4	Boerne ISD	700	667	1,420	10,443
5	Judson ISD	748	628	1,373	5,777*
6	New Braunfels ISD	538	542	1,140	8,680
7	North East ISD	545	494	969	6,123
8	East Central ISD	319	389	757	3,879
9	Medina Valley ISD	447	380	617	14,041
10	Southwest ISD	315	297	355	5,367
11	Seguin ISD	119	123	243	1,206
12	Southside ISD	92	90	93	8,943
13	Navarro ISD	77	75	90	435
14	San Antonio ISD	116	61	309	2,730
15	South San Antonio ISD	29	44	15	114
16	Harlandale ISD	37	33	82	156
17	Alamo Heights ISD	35	31	83	76
18	Marion ISD	26	31	74	28
19	Comfort ISD	0	0	0	0
20	Edgewood ISD	0	0	0	0

*Based on additional research by TD staff

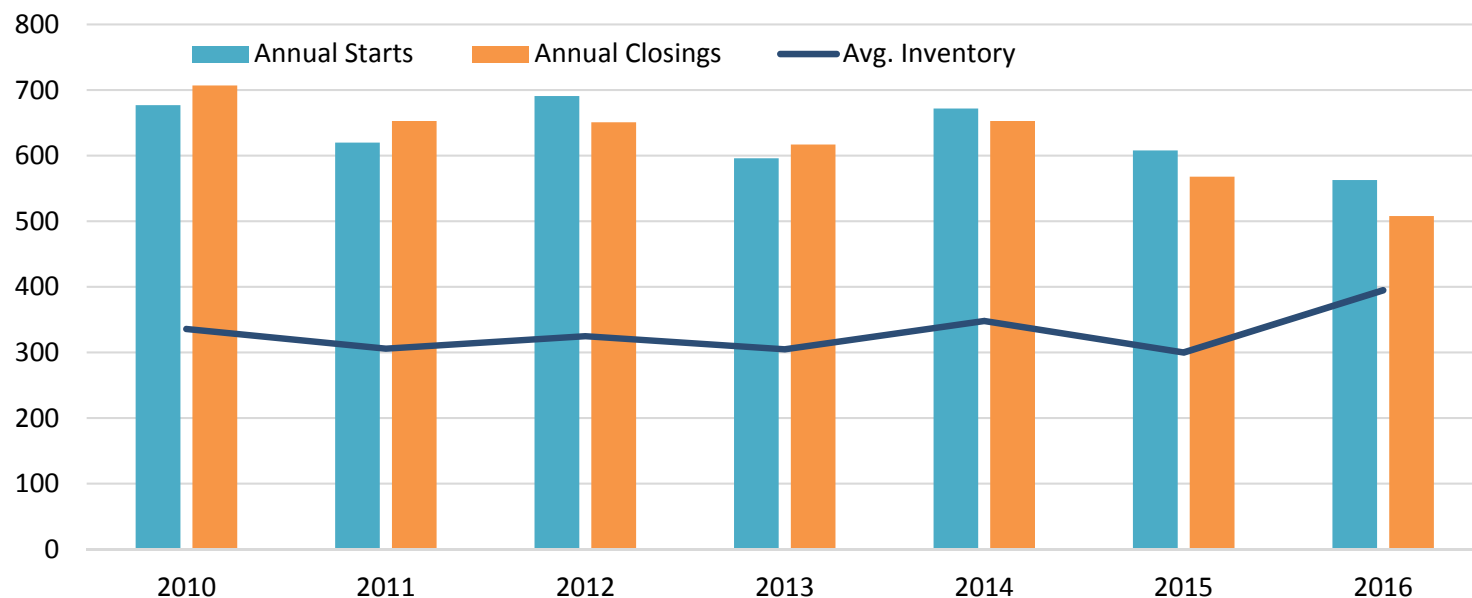




Housing Activity

Historical Starts & Closings

Judson ISD Housing Activity



Starts	2010	2011	2012	2013	2014	2015	2016
1Q	178	129	148	138	169	133	159
2Q	216	208	208	143	170	147	169
3Q	149	143	175	182	195	143	235
4Q	134	140	160	133	138	185	
Total	677	620	691	596	672	608	563

Closings	2010	2011	2012	2013	2014	2015	2016
1Q	171	142	131	146	124	168	132
2Q	198	188	149	168	143	174	182
3Q	209	144	208	152	214	106	194
4Q	129	179	163	151	172	120	
Total	707	653	651	617	653	568	508

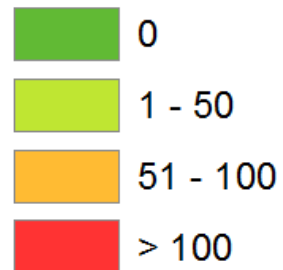
- Judson ISD is on pace to start more than 700 homes in 2016
- The district has closed more than 500 homes so far in 2016, a rise of more than 60 units compared to the same period last year
- Inventory is able to sustain the high number of new home closings



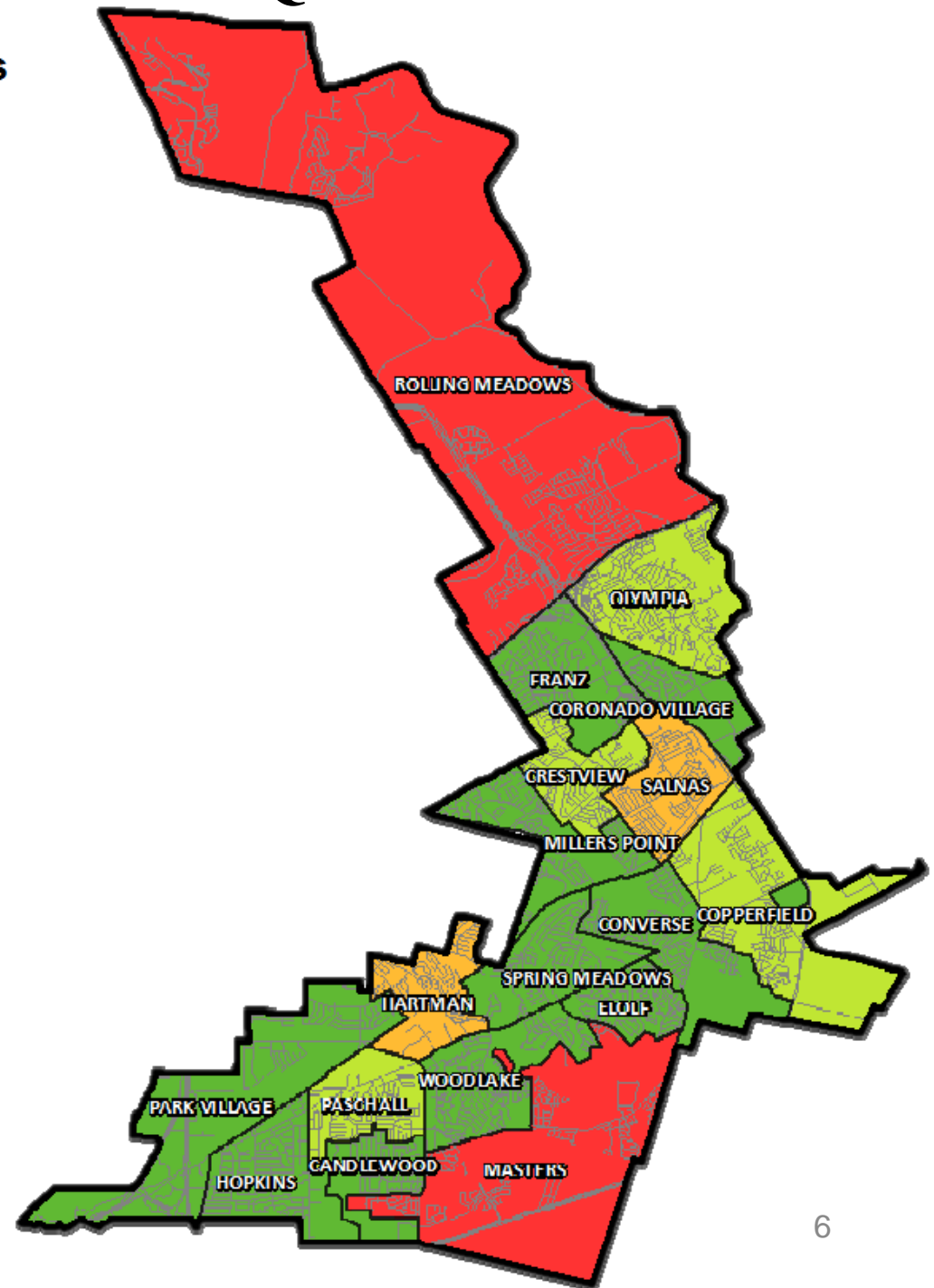


Annual Closing Distribution 3Q16

Annual Closings

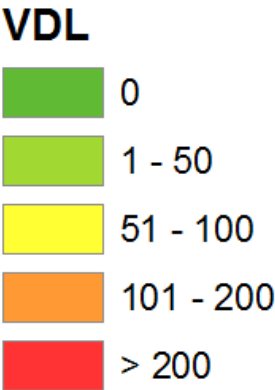


ELEMENTARY	Annual Closings
CANDLEWOOD	0
CONVERSE	0
COPPERFIELD	43
CORONADO VILLAGE	0
CRESTVIEW	1
ELOLF	0
FRANZ	0
HARTMAN	82
HOPKINS	0
MASTERS	128
MILLERS POINT	0
OLYMPIA	10
PARK VILLAGE	0
PASCHALL	39
ROLLING MEADOWS	232
SALNAS	93
SPRING MEADOWS	0
WOODLAKE	0
TOTAL	628

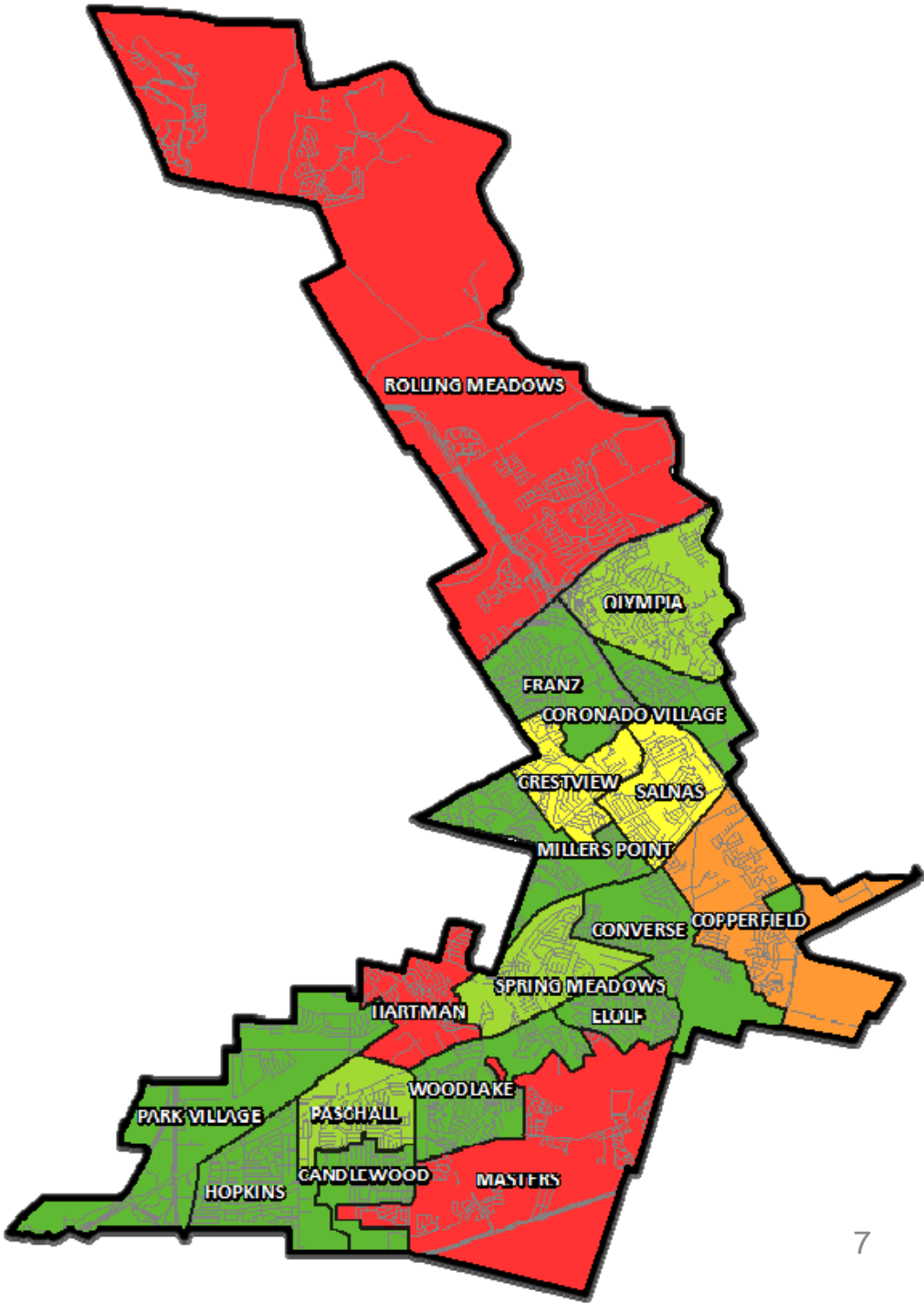




Vacant Developed Lots 3Q16



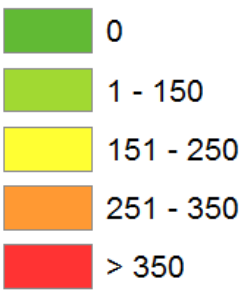
ELEMENTARY	VDL
CANDLEWOOD	0
CONVERSE	0
COPPERFIELD	126
CORONADO VILLAGE	0
CRESTVIEW	63
ELOLF	0
FRANZ	0
HARTMAN	381
HOPKINS	0
MASTERS	309
MILLERS POINT	0
OLYMPIA	14
PARK VILLAGE	0
PASCHALL	19
ROLLING MEADOWS	375
SALNAS	82
SPRING MEADOWS	4
WOODLAKE	0
TOTAL	1,373



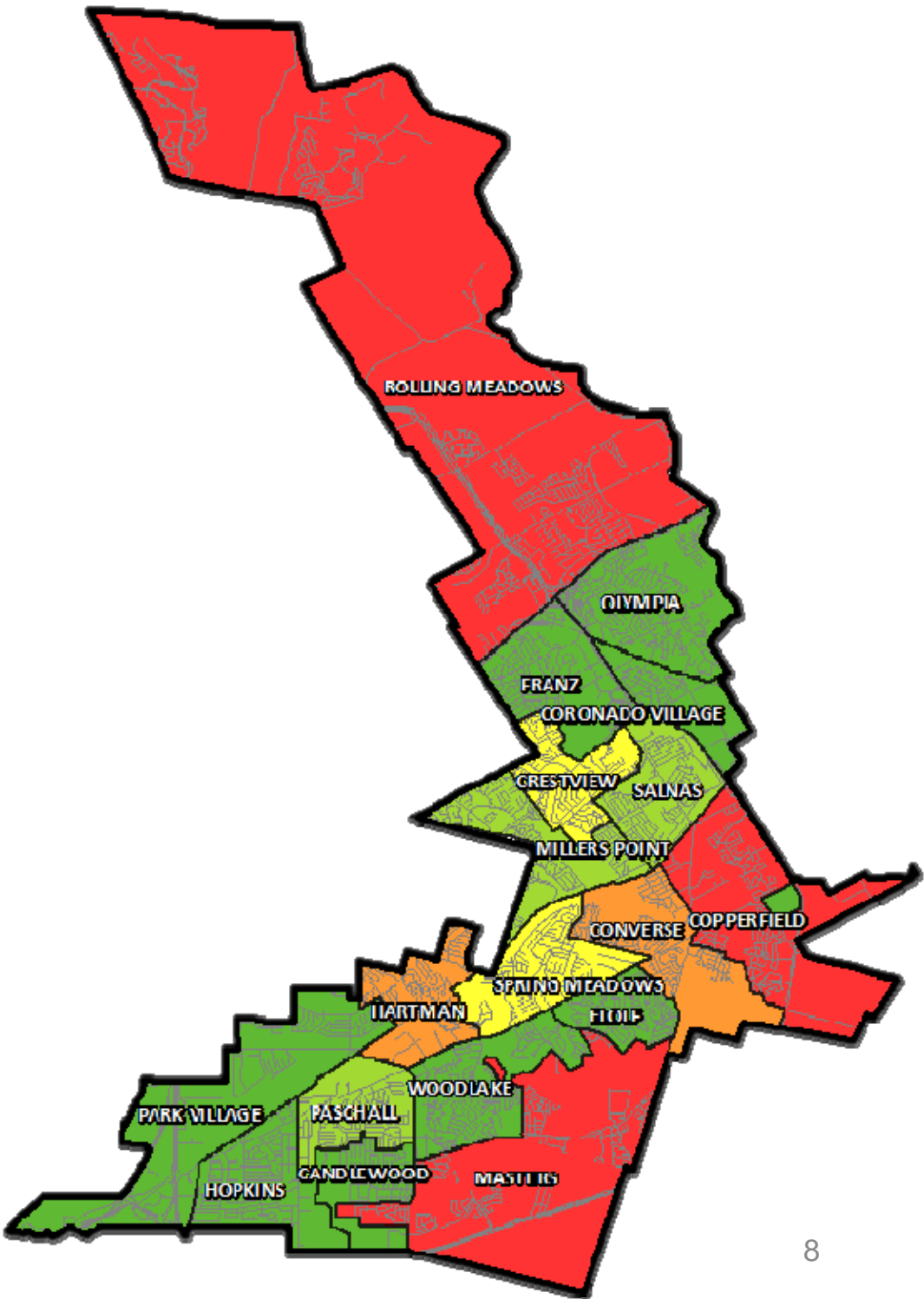


Future Lots 3Q16

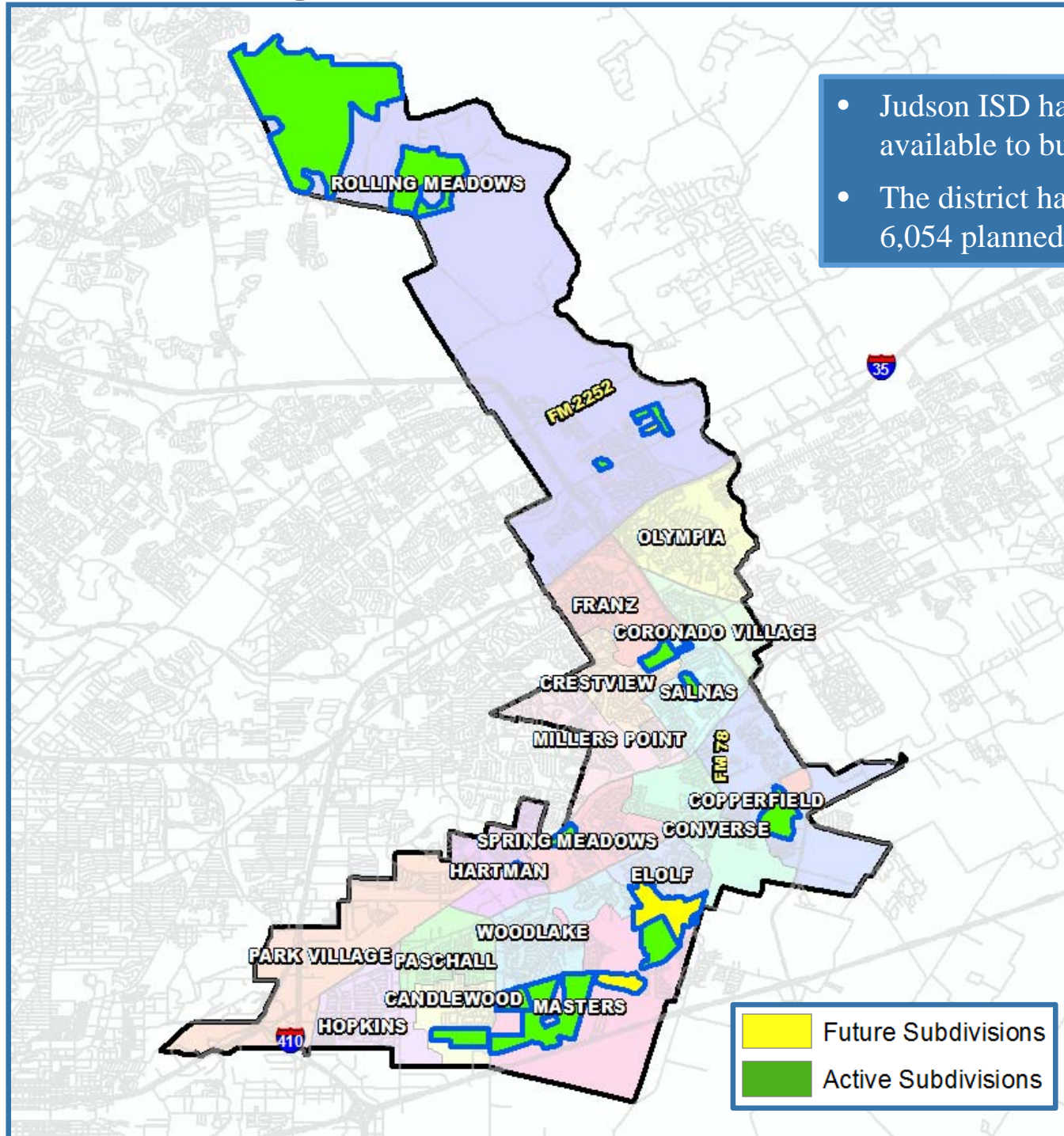
FUTURE



ELEMENTARY	FUTURE
CANDLEWOOD	0
CONVERSE	265
COPPERFIELD	335
CORONADO VILLAGE	0
CRESTVIEW	234
ELOLF	0
FRANZ	0
HARTMAN	267
HOPKINS	0
MASTERS	2,694
MILLERS POINT	85
OLYMPIA	0
PARK VILLAGE	0
PASCHALL	138
ROLLING MEADOWS	1475
SALNAS	44
SPRING MEADOWS	193
WOODLAKE	0
TOTAL	5,777



District Housing Overview

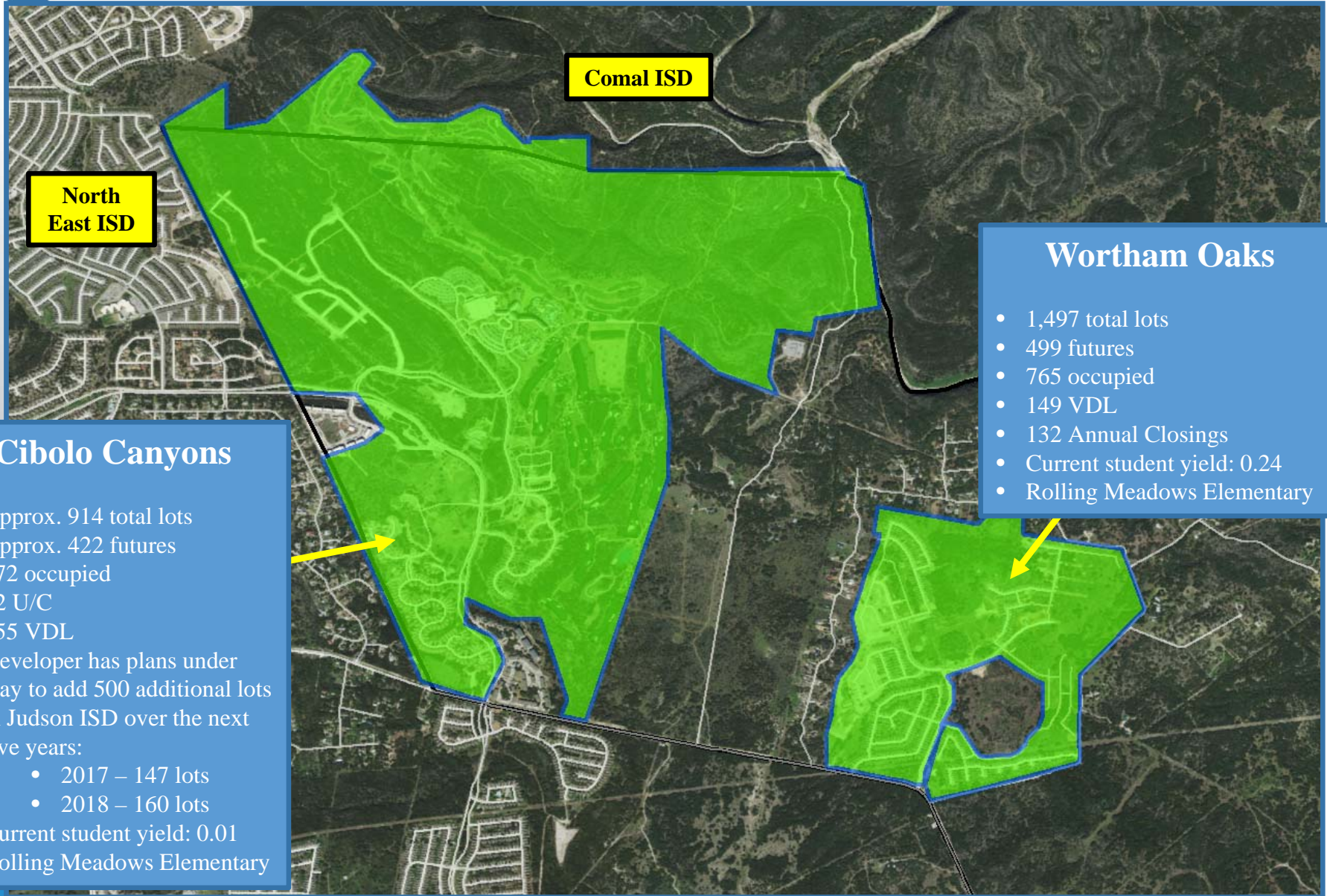


- Judson ISD has 1,373 lots available to build on
- The district has more than 6,054 planned future lots



Residential Activity

Cibolo Canyons and Wortham Oaks





Residential Activity

Chandler Crossing and Summerhill

Chandler Crossing

- 250 total lots
- 185 futures
- 0 occupied
- 0 U/C
- 65 VDL
- Delivered 65 lots to builders Fall 2016
- First residents expected Summer 2017
- \$405K – \$525K
- Copperfield Elementary

Summerhill

- 375 total lots
- Groundwork currently under way on first phase
- Of the platted lots 47 will lie in Judson ISD
- Split between Judson ISD and East Central ISD





Residential Activity

Copano Ridge, Scheel Farms and Rolling Creek





Residential Activity

Northeast Crossing

Northeast Crossing

- 1,344 total lots
- \$150K - \$210K
- Within Judson ISD:
 - 1,040 lots
 - 355 current students
 - Current student yield: .66
 - Building 50-60 per year
- Park Village Elementary:
 - 367 total lots
 - 209 future lots
 - 69 occupied
 - 12 U/C
 - 77 VDL
- Hartman Elementary:
 - 673 total lots
 - 118 future lots
 - 483 occupied
 - 9 U/C
 - 63 VDL
 - Unit 16A has groundwork underway with 63 lots





Residential Activity

Horizon Pointe



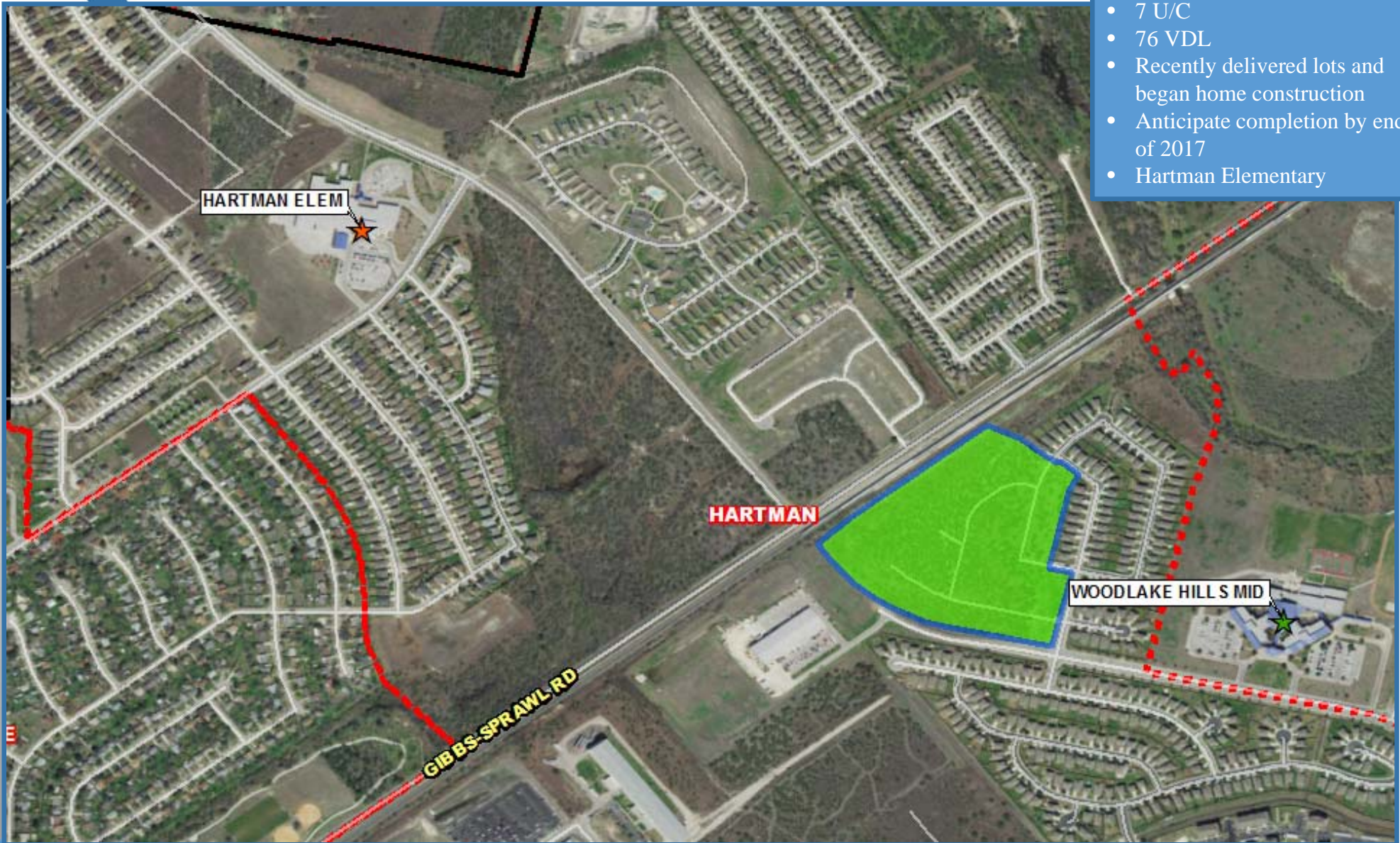


Residential Activity

Woodlake Meadows

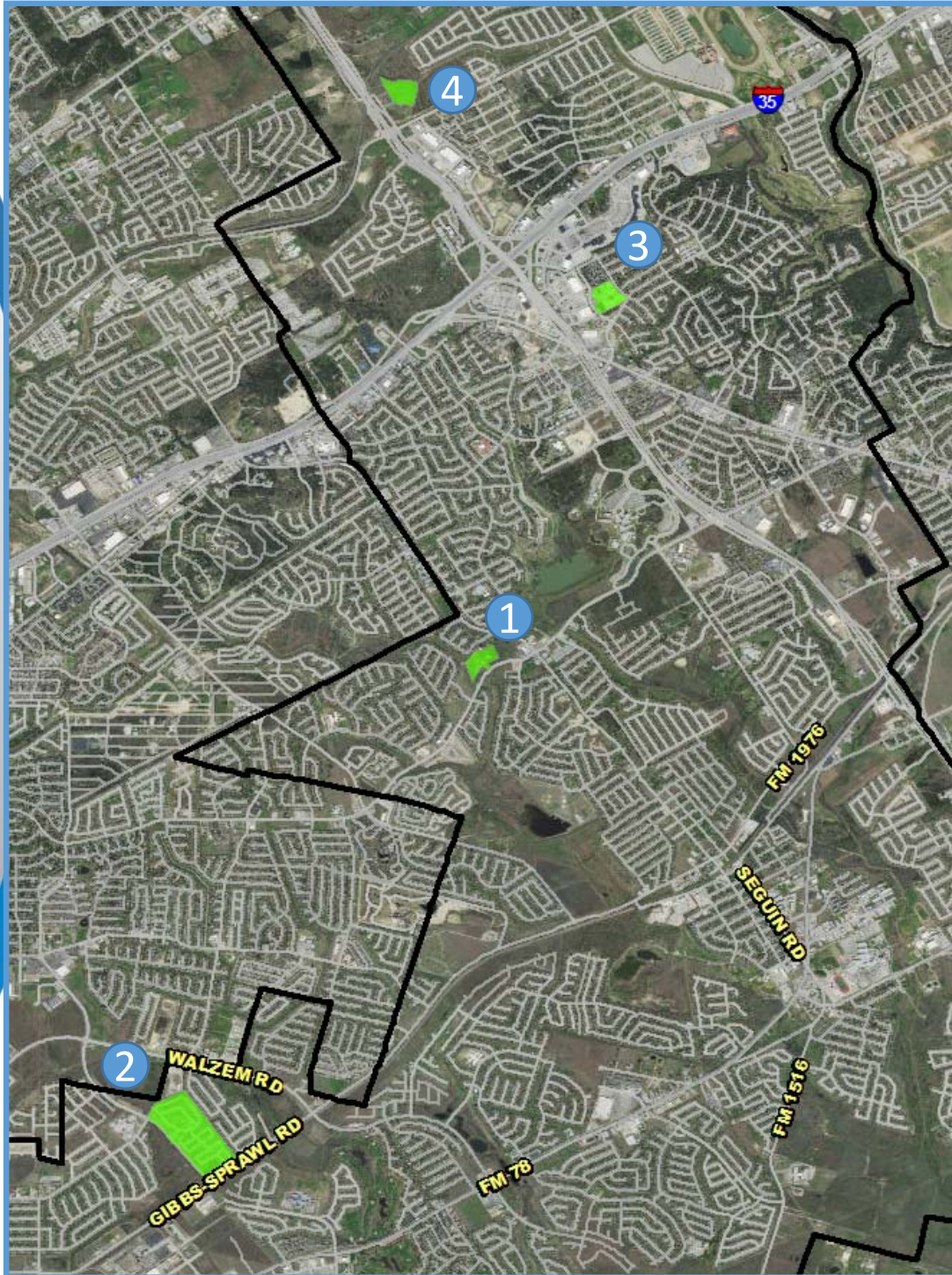
Woodlake Meadows

- 84 total lots
- 7 U/C
- 76 VDL
- Recently delivered lots and began home construction
- Anticipate completion by end of 2017
- Hartman Elementary






Multi-Family Update




No. #	Apartment
1	HEIGHTS AT CONVERSE
2	WOODLAKE ESTATES
3	ARBORS AT CENTERBROOK
4	LOOKOUT SPRINGS



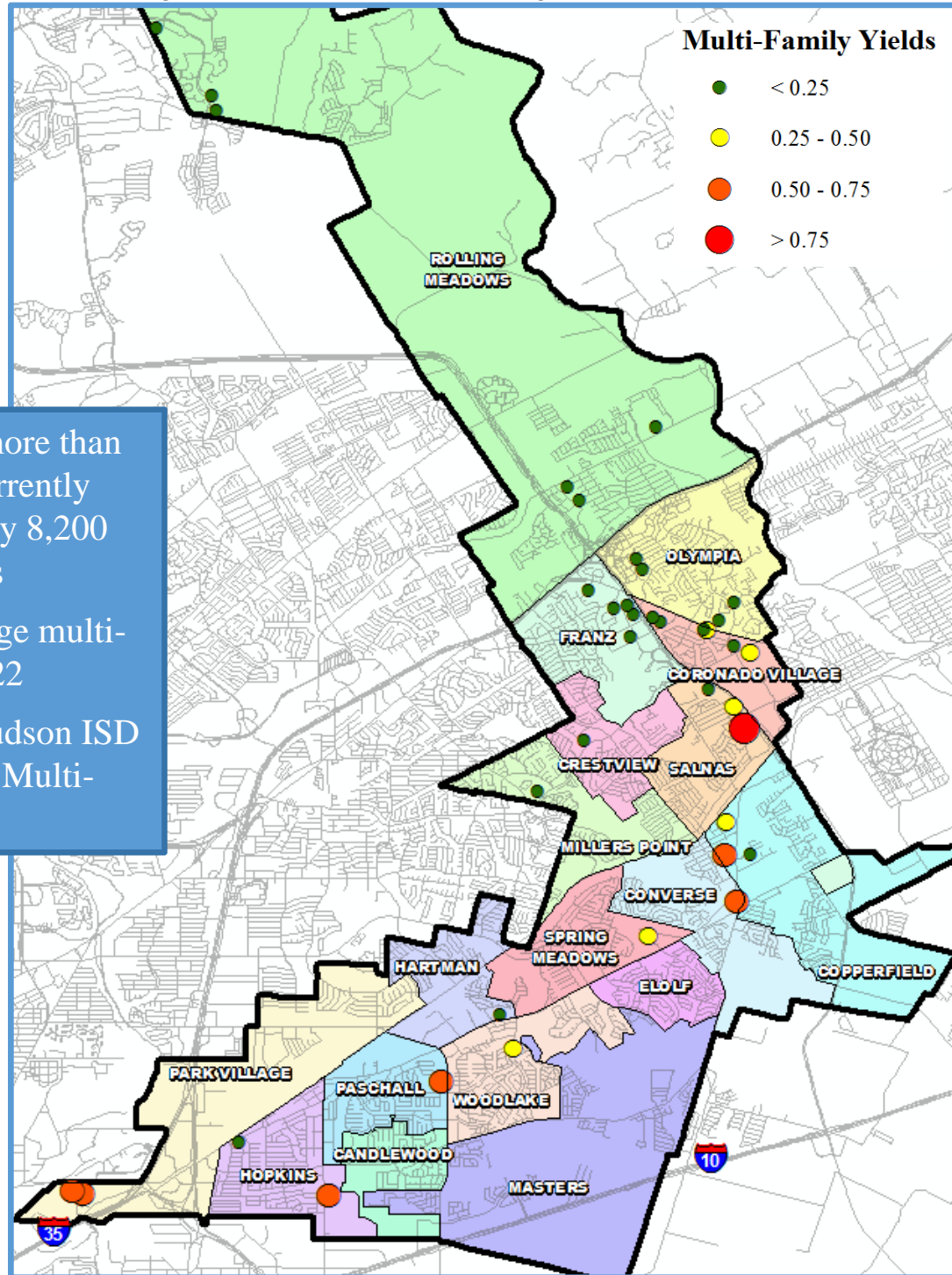
Multi-Family Update



Apartment	Status	Tax Credit	Total Units	Impact	Elementary Zone
HEIGHTS AT CONVERSE	Existing	No	200	Fall 2016	Crestview
WOODLAKE ESTATES	Under Construction	No	138	Fall 2016	Hartman
ARBORS AT CENTERBROOK	Existing	Yes	80	Fall 2016	Olympia
LOOKOUT SPRINGS	Under Construction	Yes	320	Fall 2017	Rolling Meadows



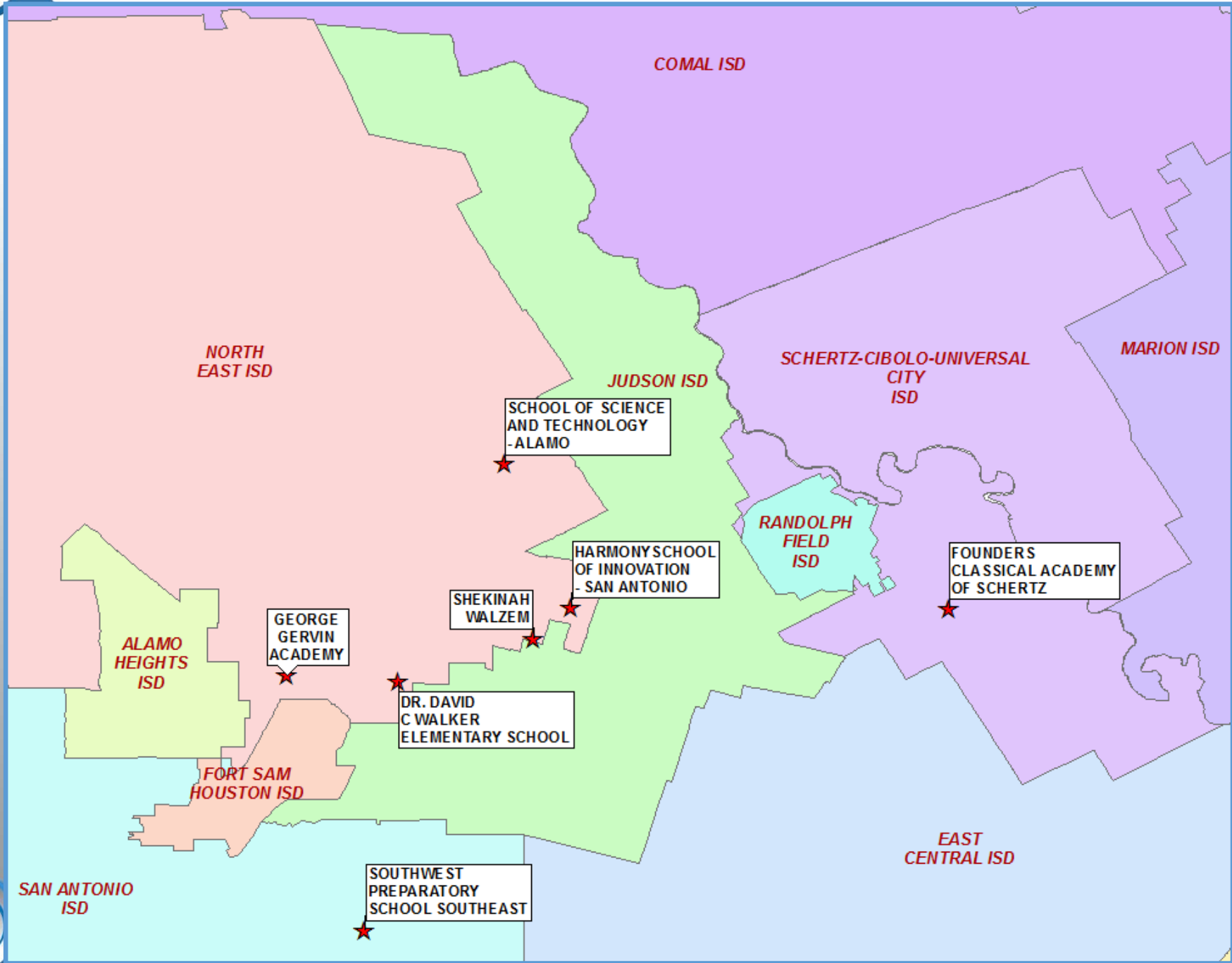
Multi-Family Yield Analysis



- Judson ISD has more than 1,770 students currently residing in roughly 8,200 multi-family units
- The district average multi-family yield is 0.22
- Roughly 8% of Judson ISD students reside in Multi-Family units



Charter School Impact





Charter School Impact

- Founders Classical Academy of Schertz opened August 2016 with 330 students in K-7
- The Founders Academy has future plans to add additional grades until K-12
- Roughly 3,940 students are enrolled in Judson ISD area charter schools in the 2016/2017 school year
- Judson ISD area charter schools enrolled 3,425 students in the 2015/2016 school year
- Judson ISD area charter schools have added roughly 1,000 students over the past five years





Student Mobility

From 2014-15 to 2016-17, newcomers decreased by 144 students, while leavers increased by 357 students. This accounts for an decrease in expected enrollment growth of 501 students.

	2014-15	2015-16	2016-17	Difference
Newcomers	3,712	3,849	3,568	-144
Leavers	4,100	4,513	4,457	357
Student Gain	-388	-664	-889	

* Student geocode data is taken from an enrollment snapshot, totals may vary from official enrollment reports.

Newcomers: Number of student IDs that were in the 2016-17 student geocode, and did not exist in 2015-16 student file (excludes incoming KG, PK, EE).

Leavers: Number of student IDs that were in the 2015-16 student geocode, and did not exist in 2016-17 student file (excludes graduating seniors).





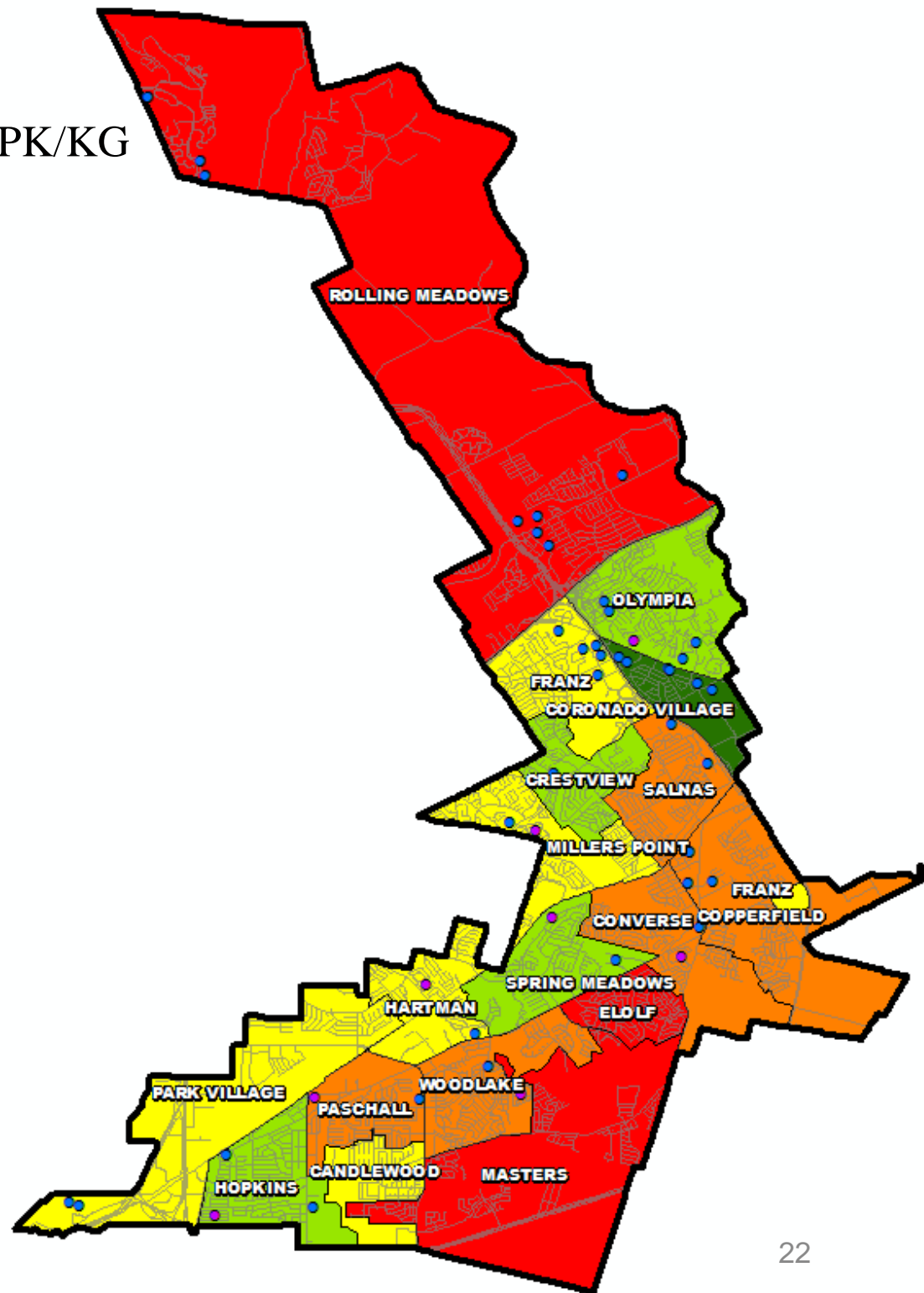
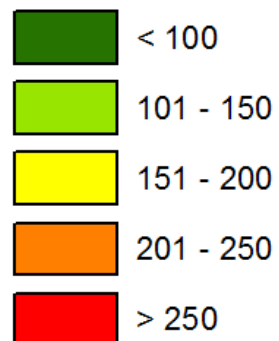
Mobility Patterns

New to District – Excluding EE/PK/KG

Multi-Family

- Apartment
- Manufactured Home

Newcomers





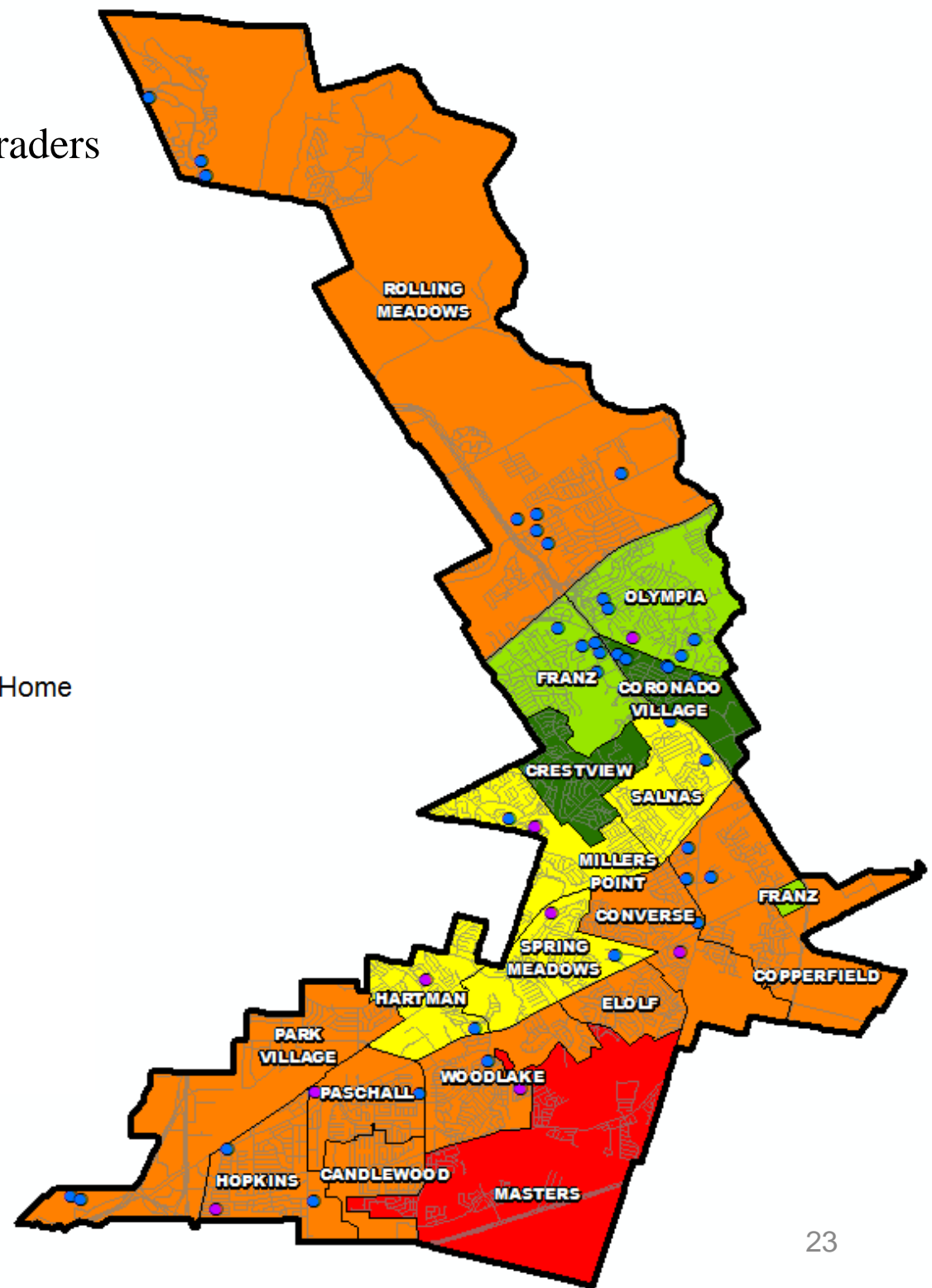
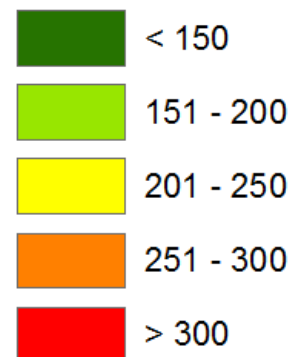
Mobility Patterns

Left District- Excluding 12th graders

Multi-Family

- Apartment
- Manufactured Home

Leavers





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	Total %
2012/13	59	877	1,764	1,745	1,776	1,717	1,680	1,697	1,674	1,733	1,652	2,199	1,626	1,302	1,105	22,606		
2013/14	68	852	1,769	1,902	1,754	1,820	1,720	1,738	1,667	1,687	1,776	1,814	1,683	1,575	1,147	22,972	366	1.6%
2014/15	94	792	1,732	1,830	1,866	1,818	1,776	1,821	1,700	1,680	1,740	1,954	1,652	1,784	1,101	23,340	368	1.6%
2015/16	99	680	1,607	1,809	1,872	1,862	1,803	1,795	1,753	1,716	1,718	1,908	1,770	1,820	1,074	23,286	-54	-0.2%
2016/17	106	692	1,543	1,698	1,789	1,834	1,893	1,818	1,662	1,748	1,732	1,976	1,716	1,901	1,024	23,132	-154	-0.7%
2017/18	106	692	1,681	1,630	1,725	1,803	1,852	1,906	1,741	1,677	1,764	1,966	1,777	1,826	1,264	23,411	279	1.2%
2018/19	106	692	1,698	1,771	1,638	1,748	1,836	1,901	1,879	1,748	1,683	1,997	1,751	1,878	1,292	23,619	208	0.9%
2019/20	106	692	1,834	1,796	1,796	1,647	1,783	1,894	1,795	1,882	1,748	1,920	1,759	1,841	1,350	23,842	224	0.9%
2020/21	106	692	1,868	1,928	1,823	1,810	1,661	1,837	1,813	1,808	1,890	1,980	1,753	1,839	1,350	24,157	315	1.3%
2021/22	106	692	1,884	1,977	1,950	1,840	1,833	1,705	1,753	1,816	1,813	2,134	1,714	1,831	1,387	24,435	278	1.2%
2022/23	106	692	1,880	1,940	1,997	1,959	1,834	1,873	1,650	1,772	1,820	2,047	1,893	1,789	1,367	24,619	184	0.8%
2023/24	106	692	1,878	1,960	1,956	2,015	1,978	1,856	1,775	1,657	1,780	2,054	1,820	1,976	1,338	24,840	221	0.9%
2024/25	106	692	1,895	1,984	2,005	1,966	2,035	2,025	1,781	1,787	1,663	2,018	1,813	1,896	1,456	25,122	282	1.1%
2025/26	106	692	1,901	2,003	2,029	2,015	1,983	2,082	1,935	1,789	1,794	1,891	1,786	1,895	1,406	25,307	185	0.7%
2026/27	106	692	1,892	2,010	2,005	2,040	2,037	2,030	1,990	1,944	1,797	2,029	1,676	1,860	1,392	25,499	192	0.8%

*Yellow box = largest grade per year

*Green box = second largest grade per year

- Judson ISD could enroll more than 23,500 students by 2018
- 5 year growth = 1,303 students
- 2021/22 enrollment = 24,435
- 10 year growth = 2,367 students
- 2026/27 enrollment = 25,499





Ten Year Forecast

By Elementary Campus

		Current	ENROLLMENT PROJECTIONS									
CAMPUS	Capacity	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
CANDLEWOOD ELEMENTARY	851	601	600	586	598	587	595	600	597	598	596	589
CONVERSE ELEMENTARY	750	614	594	562	556	538	552	558	567	585	596	606
COPPERFIELD ELEMENTARY	750	654	663	672	686	699	709	721	736	758	777	791
CORONADO VILLAGE ELEMENTARY	535	389	396	411	418	441	440	442	433	430	421	413
CRESTVIEW ELEMENTARY	594	622	628	616	631	665	678	691	698	712	710	710
FRANZ ELEMENTARY	594	458	463	469	469	482	478	483	488	495	494	488
ELOLF ELEMENTARY	931	631	611	583	576	572	585	612	613	624	618	607
HOPKINS ELEMENTARY	851	793	767	739	746	750	764	778	793	811	819	817
MASTERS ELEMENTARY	750	782	804	818	840	876	948	1,025	1,093	1,180	1,236	1,269
HARTMAN ELEMENTARY	750	743	728	731	741	745	725	743	751	755	753	743
MILLER'S POINT ELEMENTARY	792	571	571	562	584	585	585	600	615	622	624	619
OLYMPIA ELEMENTARY	594	470	448	453	463	465	472	476	479	492	494	492
PARK VILLAGE ELEMENTARY	634	550	559	556	559	571	590	605	608	618	619	620
SALINAS ELEMENTARY	750	672	680	691	695	711	713	723	727	746	750	748
SPRING MEADOWS ELEMENTARY	713	638	654	653	664	657	671	681	678	684	691	700
ROLLING MEADOWS ELEMENTARY	750	865	941	1,012	1,056	1,129	1,184	1,218	1,235	1,252	1,272	1,274
PASCHALL ELEMENTARY	693	691	683	680	676	682	710	722	733	740	732	718
WOODLAKE ELEMENTARY	792	629	605	596	590	570	588	603	597	606	609	608
ELEMENTARY SCHOOL TOTALS	13,074	11,373	11,395	11,390	11,548	11,725	11,987	12,281	12,441	12,708	12,811	12,812
Elementary Absolute Change		-154	22	-5	158	177	262	294	160	267	103	1
Elementary Percent Change		-1.34%	0.19%	-0.04%	1.39%	1.53%	2.23%	2.45%	1.30%	2.15%	0.81%	0.01%





Ten Year Forecast

By Secondary Campus

		Current	ENROLLMENT PROJECTIONS									
CAMPUS	Capacity	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27
METZGER MIDDLE SCHOOL	1,170	938	950	996	1,017	1,071	1,023	999	964	988	1,074	1,150
JUDSON MIDDLE SCHOOL	1,728	852	896	792	777	811	792	791	760	755	785	819
KIRBY MIDDLE SCHOOL	1,197	771	777	770	803	800	782	746	744	758	801	832
KITTY HAWK MIDDLE SCHOOL	1,251	1,335	1,416	1,485	1,516	1,479	1,478	1,442	1,518	1,517	1,588	1,633
WOODLAKE HILLS MIDDLE SCHOOL	1,170	856	858	866	911	949	906	863	825	812	869	896
MIDDLE SCHOOL TOTALS	6,516	4,752	4,897	4,909	5,024	5,110	4,981	4,841	4,811	4,830	5,117	5,330
Middle School Absolute Change		-399	145	12	115	86	-129	-140	-30	19	287	213
Middle School Percent Change		-7.75%	3.05%	0.25%	2.34%	1.71%	-2.52%	-2.81%	-0.62%	0.39%	5.94%	4.16%
JUDSON EARLY COLLEGE ACADEMY		455	454	453	454	454	454	454	454	454	454	454
JUDSON HIGH SCHOOL	3,300	3,268	3,071	2,768	2,517	2,477	2,530	2,498	2,573	2,561	2,462	2,437
VETERANS MEMORIAL HIGH SCHOOL	1,600	607	1,024	1,460	1,767	1,863	1,958	2,037	1,969	2,001	1,971	1,982
WAGNER HIGH SCHOOL	2,430	2,174	2,172	2,125	2,019	2,015	2,012	1,995	2,079	2,055	1,979	1,971
LEARNING ACADEMY		86	86	86	86	86	86	86	86	86	86	86
HIGH SCHOOL TOTALS	7,330	6,590	6,807	6,892	6,843	6,895	7,040	7,070	7,161	7,157	6,952	6,930
High School Absolute Change		62	217	85	-49	52	145	30	91	-4	-205	-22
High School Percent Change		0.95%	3.29%	1.25%	-0.71%	0.76%	2.10%	0.43%	1.29%	-0.06%	-2.86%	-0.32%
ALTERNATIVE SCHOOL		62	62	62	62	62	62	62	62	62	62	62
JUDSON STEM ACADEMY		355	361	365	365	365	365	365	365	365	365	365
ALTERNATIVE SCHOOL TOTALS		417	423	427	427	427	427	427	427	427	427	427
DISTRICT TOTALS	26,920	23,132	23,522	23,619	23,842	24,157	24,435	24,619	24,840	25,122	25,307	25,499
District Absolute Change		-154	390	97	224	315	278	184	221	282	185	192
District Percent Change		-0.66%	1.68%	0.41%	0.95%	1.32%	1.15%	0.75%	0.90%	1.14%	0.74%	0.76%





Summary

- The San Antonio MSA's unemployment rate is below 4%.
- The average home price in San Antonio is more than \$205,000, a rise of more than 15% over the same time last year.
- Judson ISD is on pace to start more than 700 new homes in 2016.
- Rolling Meadows Elementary zone has the highest rates of new home activity, accounting for nearly 40% of the district's annual new home closings.
- Veterans Memorial High School opened next fall with 600 students.
- Judson ISD can expect a five year enrollment growth of more than 1,300 students, for a fall 2021 enrollment of 24,435.
- Judson ISD can expect a to enroll roughly 25,500 students by 2026.