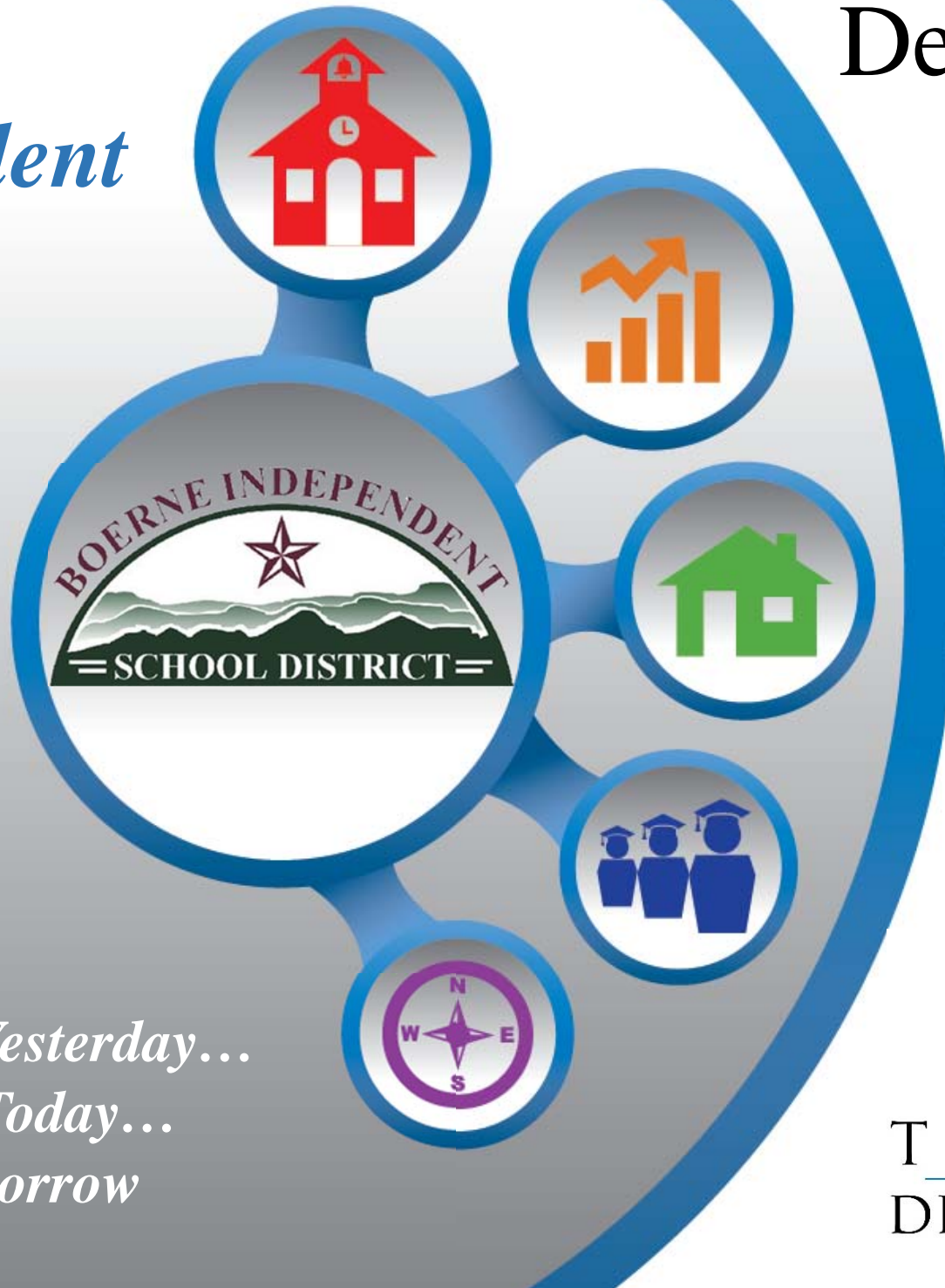


*Boerne
Independent
School
District*



Demographic
Summary

Fall 2015

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



TEMPLETON
DEMOGRAPHICS

Economic Conditions – San Antonio MSA (Sept. 2015)

Unemployment Rate

-0.8%

- U.S. 4.9%
- Texas 4.4%
- Kendall County 3.2%
- San Antonio- New Braunfels 3.7%

3.7%

Job Growth

- 35,000 new jobs created in the last 12 months

2,314

YTD SF Permits
Bexar County

- 63 more than the same period in 2014



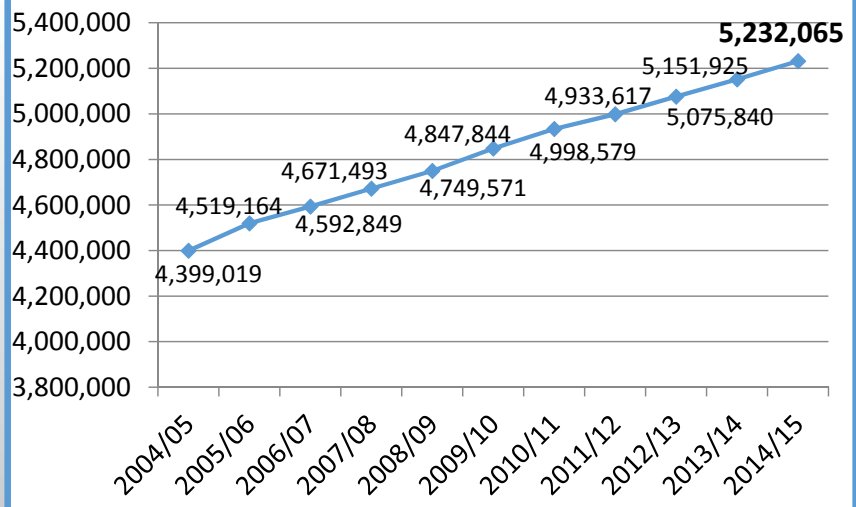


Texas Enrollment Trends

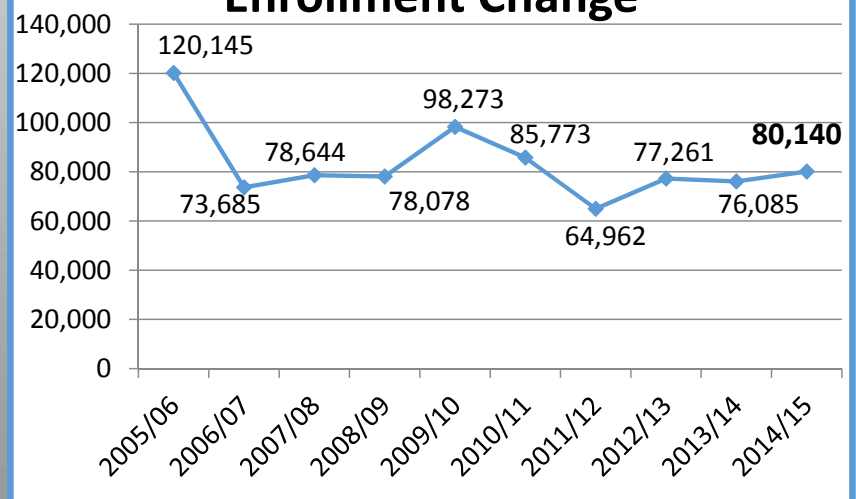
2014/15 State Enrollment

Total Enrollment 5,232,065
Total Growth 80,140

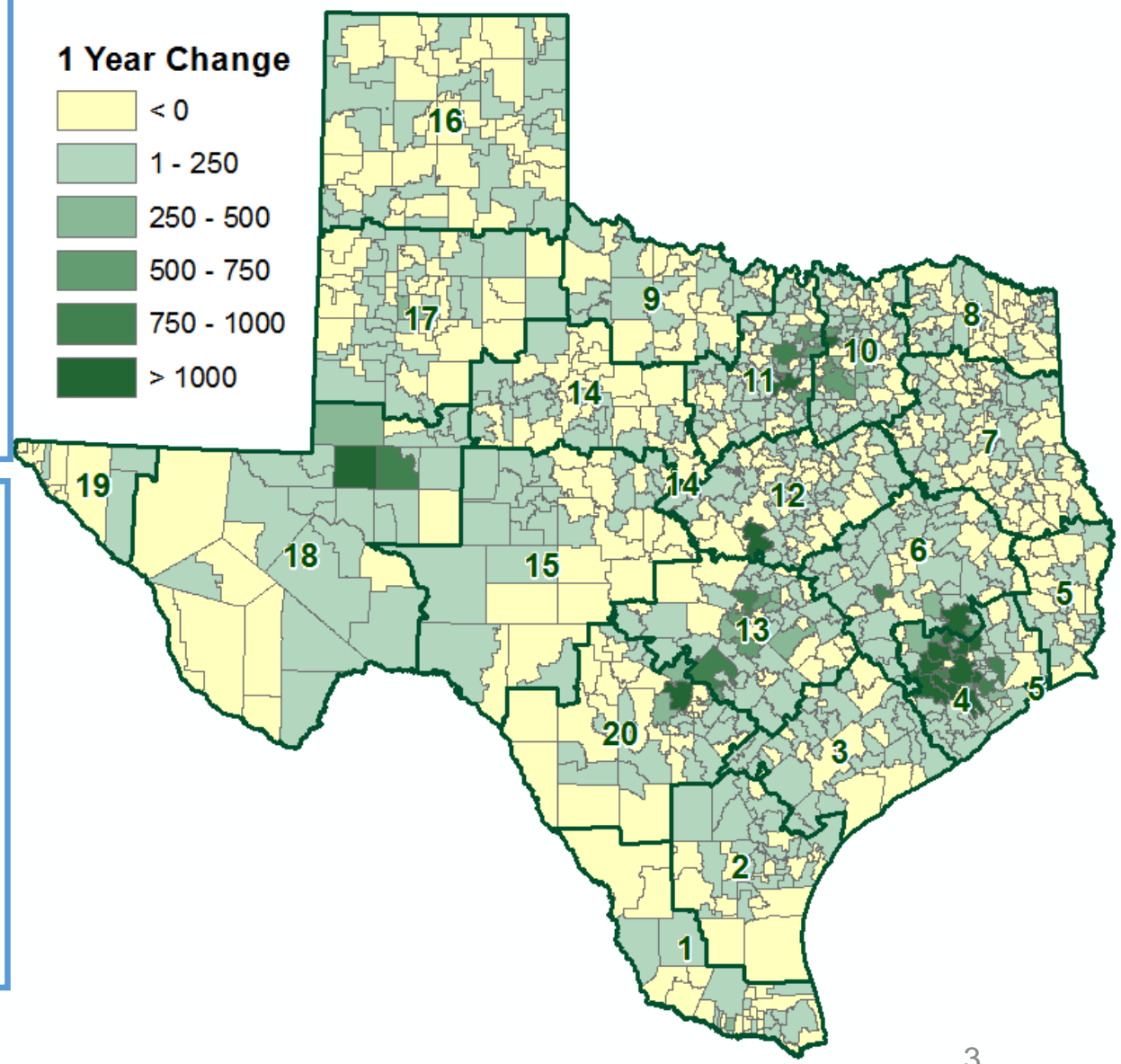
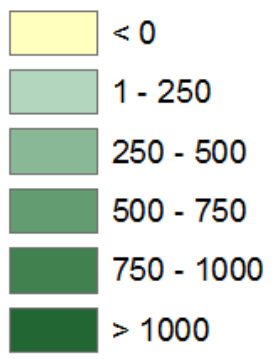
Total State Enrollment



Enrollment Change



1 Year Change





Region 13 & 20 Enrollment Trends

Region 13

| Rank | DISTRICT | 2009/10 Enrollment | 2014/15 Enrollment | 5-YEAR Change (09/10-14/15) | 5-YEAR PCT Growth (09/10-14/15) |
|------|----------------------|--------------------|--------------------|-----------------------------|---------------------------------|
| 1 | Leander ISD | 30,454 | 36,211 | 5,757 | 18.9% |
| 2 | Round Rock ISD | 43,008 | 47,251 | 4,243 | 9.9% |
| 3 | Comal ISD | 16,700 | 20,327 | 3,627 | 21.7% |
| 4 | Hays Cons ISD | 14,649 | 17,947 | 3,298 | 22.5% |
| 5 | Lake Travis ISD | 6,577 | 8,833 | 2,256 | 34.3% |
| 6 | Manor ISD | 6,932 | 8,852 | 1,920 | 27.7% |
| 7 | Pflugerville ISD | 22,060 | 23,948 | 1,888 | 8.6% |
| 8 | Del Valle ISD | 10,158 | 11,727 | 1,569 | 15.4% |
| 9 | Dripping Springs ISD | 4,331 | 5,421 | 1,090 | 25.2% |
| 10 | Hutto ISD | 5,137 | 6,187 | 1,050 | 20.4% |
| 11 | Bastrop ISD | 8,936 | 9,928 | 992 | 11.1% |
| 12 | Lockhart ISD | 4,636 | 5,365 | 729 | 15.7% |
| 13 | Liberty Hill ISD | 2,568 | 3,218 | 650 | 25.3% |
| 14 | New Braunfels ISD | 7,856 | 8,463 | 607 | 7.7% |
| 15 | Eanes ISD | 7,498 | 7,971 | 473 | 6.3% |
| 16 | Jarrell ISD | 917 | 1,265 | 348 | 37.9% |
| 17 | San Marcos Cons ISD | 7,434 | 7,755 | 321 | 4.3% |
| 18 | Elgin ISD | 3,995 | 4,277 | 282 | 7.1% |
| 19 | Gonzales ISD | 2,532 | 2,800 | 268 | 10.6% |
| 20 | Georgetown ISD | 10,443 | 10,651 | 208 | 2.0% |

Region 20

| Rank | DISTRICT | 2009/10 Enrollment | 2014/15 Enrollment | 5-YEAR Change (09/10-14/15) | 5-YEAR PCT Growth (09/10-14/15) |
|----------|-----------------------------------|--------------------|--------------------|-----------------------------|---------------------------------|
| 1 | Northside ISD (Bexar) | 92,335 | 103,606 | 11,271 | 12.2% |
| 2 | Schertz-Cibolo-Universal City ISD | 11,718 | 14,638 | 2,920 | 24.9% |
| 3 | North East ISD | 65,498 | 67,971 | 2,473 | 3.8% |
| 4 | Southwest ISD | 11,531 | 13,524 | 1,993 | 17.3% |
| 5 | Judson ISD | 21,750 | 23,340 | 1,590 | 7.3% |
| 6 | Boerne ISD | 6,392 | 7,493 | 1,101 | 17.2% |
| 7 | Medina Valley ISD | 3,382 | 4,218 | 836 | 24.7% |
| 8 | Harlandale ISD | 14,521 | 15,289 | 768 | 5.3% |
| 9 | Eagle Pass ISD | 14,463 | 15,076 | 613 | 4.2% |
| 10 | East Central ISD | 9,292 | 9,836 | 544 | 5.9% |
| 11 | Jourdanton ISD | 1,276 | 1,638 | 362 | 28.4% |
| 12 | Somerset ISD | 3,726 | 3,964 | 238 | 6.4% |
| 13 | La Vernia ISD | 2,983 | 3,191 | 208 | 7.0% |
| 14 | Cotulla ISD | 1,178 | 1,353 | 175 | 14.9% |
| 15 | Knippa ISD | 239 | 404 | 165 | 69.0% |
| 16 | Floresville ISD | 3,801 | 3,950 | 149 | 3.9% |
| 17 | Kerrville ISD | 4,884 | 5,032 | 148 | 3.0% |
| 18 | Dilley ISD | 917 | 1,048 | 131 | 14.3% |
| 19 | Pleasanton ISD | 3,440 | 3,569 | 129 | 3.8% |
| 20 | Southside ISD | 5,216 | 5,335 | 119 | 2.3% |





San Antonio New Home Ranking Report

ISD Ranked by Annual Closings – 3Q15

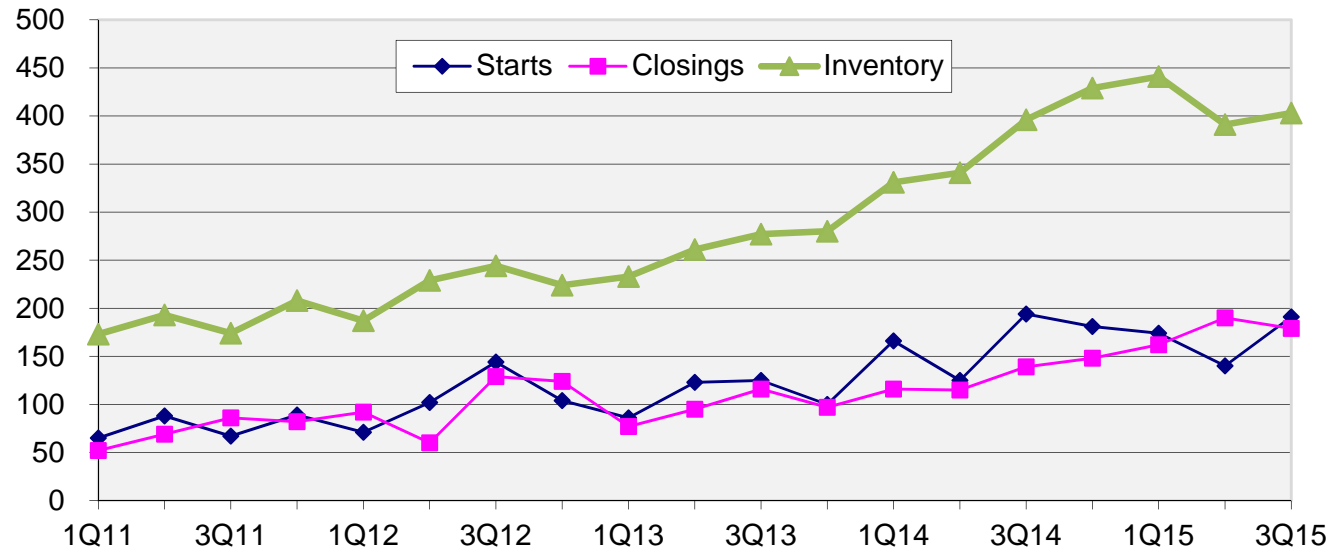
| Rank | District Name | Annual Starts | Annual Closings | VDL | Future |
|----------|---------------------------|---------------|-----------------|--------------|---------------|
| 1 | Northside ISD | 3,188 | 3,148 | 5,887 | 36,322 |
| 2 | Comal ISD | 1,533 | 1,438 | 2,746 | 21,676 |
| 3 | Schertz-Cibolo U City ISD | 792 | 698 | 1,482 | 6,852 |
| 4 | Boerne ISD | 686 | 679 | 1,357 | 11,496 |
| 5 | Judson ISD | 561 | 620 | 1,037 | 6,551 |
| 6 | East Central ISD | 508 | 579 | 445 | 4,406 |
| 7 | New Braunfels ISD | 499 | 539 | 895 | 9,103 |
| 8 | North East ISD | 531 | 524 | 1,180 | 6,455 |
| 9 | Medina Valley ISD | 350 | 309 | 823 | 14,272 |
| 10 | Southwest ISD | 281 | 300 | 620 | 5,348 |
| 11 | Southside ISD | 87 | 85 | 44 | 8,643 |
| 12 | Navarro ISD | 75 | 72 | 77 | 519 |
| 13 | South San Antonio ISD | 59 | 64 | 136 | 335 |
| 14 | San Antonio ISD | 51 | 58 | 253 | 2,357 |
| 15 | Seguin ISD | 83 | 43 | 157 | 938 |
| 16 | Harlandale ISD | 39 | 42 | 119 | 17 |
| 17 | Alamo Heights ISD | 45 | 37 | 69 | 67 |
| 18 | Marion ISD | 29 | 31 | 44 | 50 |
| 19 | Comfort ISD | 0 | 0 | 0 | 0 |
| 20 | Edgewood ISD | 0 | 0 | 0 | 0 |





New Housing Activity

Boerne ISD New Housing Activity



| Starts | 2011 | 2012 | 2013 | 2014 | 2015 |
|--------|------|------|------|------|------|
| 1Q | 65 | 71 | 86 | 166 | 174 |
| 2Q | 88 | 102 | 123 | 125 | 140 |
| 3Q | 67 | 144 | 125 | 194 | 191 |
| 4Q | 89 | 104 | 100 | 181 | |
| Total | 309 | 421 | 434 | 666 | 505 |

| Closings | 2011 | 2012 | 2013 | 2014 | 2015 |
|----------|------|------|------|------|------|
| 1Q | 52 | 92 | 77 | 116 | 162 |
| 2Q | 69 | 60 | 95 | 115 | 190 |
| 3Q | 86 | 129 | 116 | 139 | 179 |
| 4Q | 82 | 124 | 97 | 148 | |
| Total | 289 | 405 | 385 | 518 | 531 |

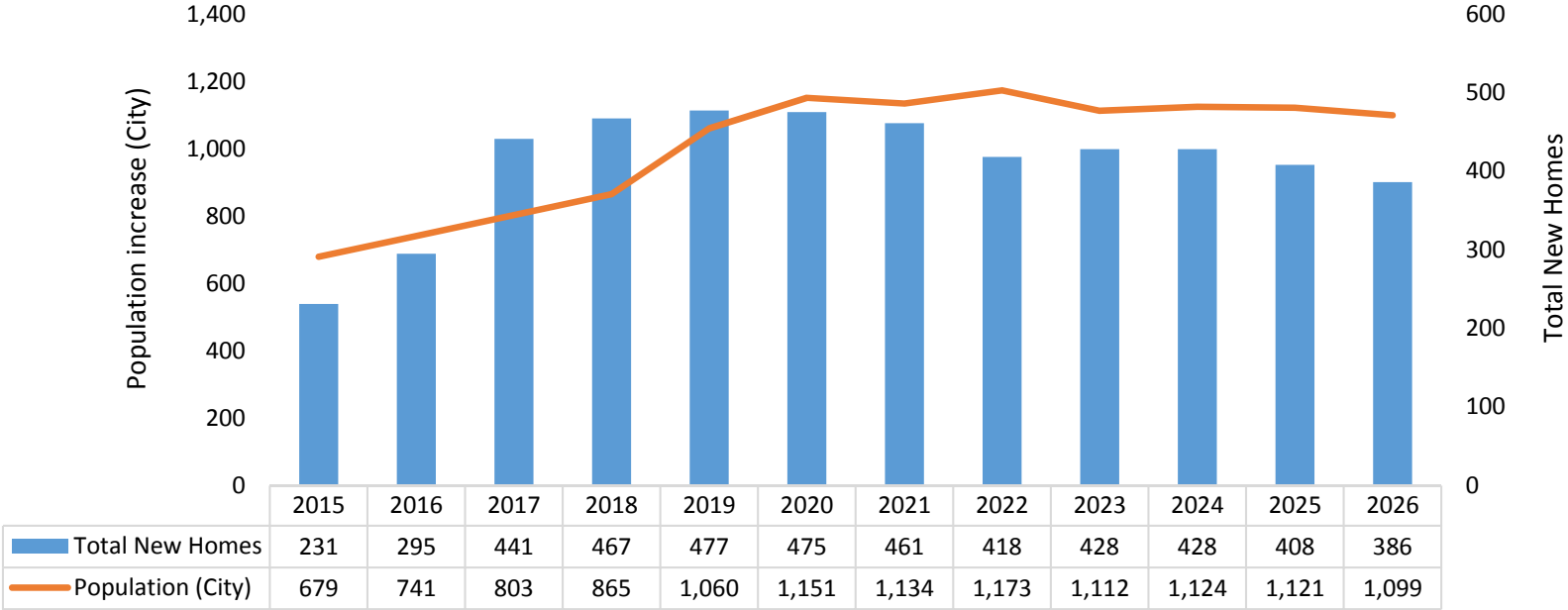
- Boerne ISD is on pace to start more than 650 homes in 2015 for the second straight year
- The district had more than 160 closings in a single quarter for the third straight quarter
- 3Q15 closings are up 28.7% over 3Q14





City of Boerne: Projected Housing and Population

City of Boerne Projected New Home Starts and Population Growth, 2015-2026



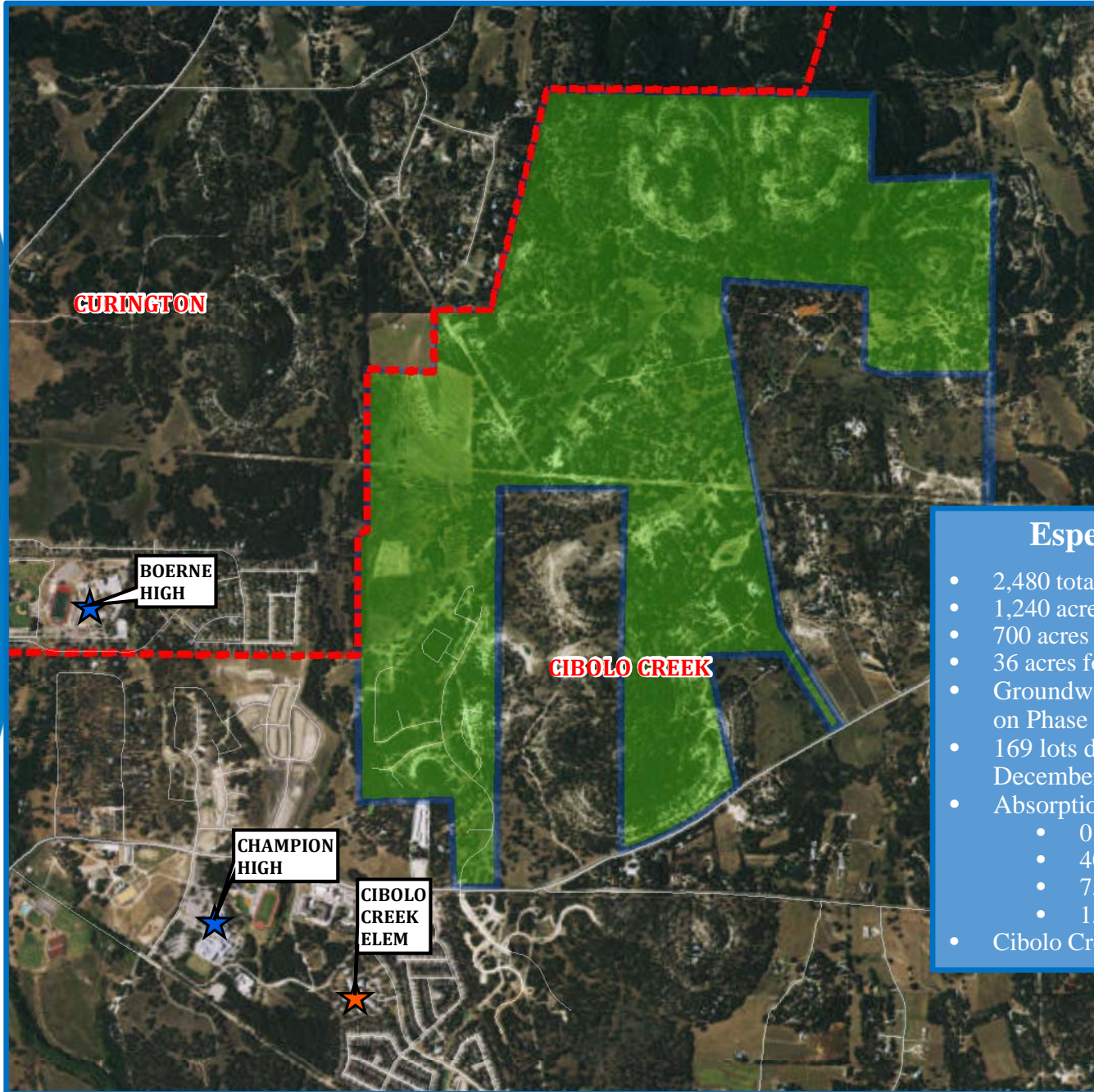
- The city of Boerne is anticipating 230 new homes starts in 2015
- The city anticipates reaching 400 starts a year in 2017 when Esperanza, the Ranches at Creekside and Regent Park are all building
- The city predicts the population to grow by 680 people in 2015 due to new housing
- Boerne anticipates the city’s population to add over 1,000 people each year by 2019





Residential Activity

Esperanza



Esperanza

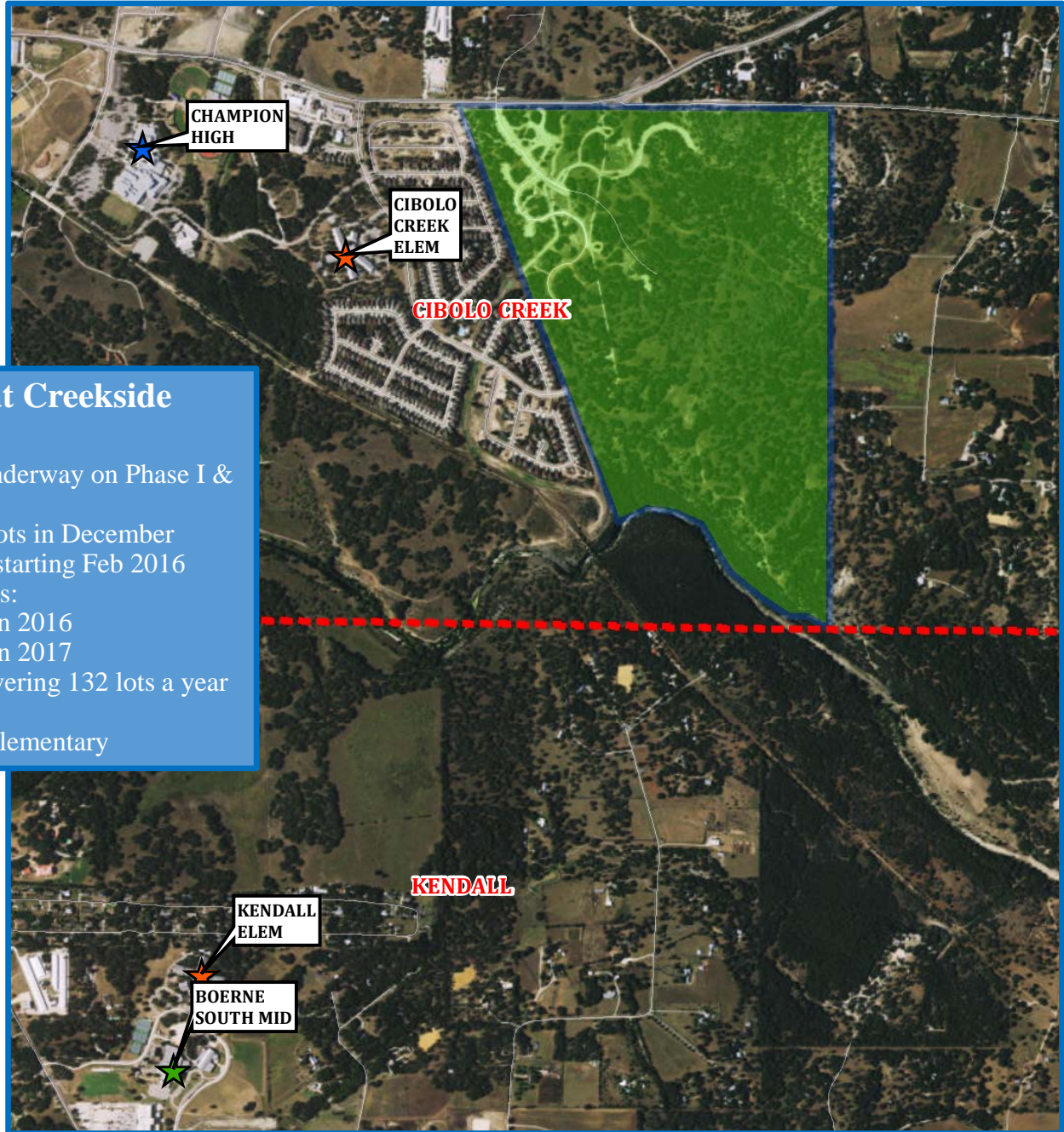
- 2,480 total lots
- 1,240 acres
- 700 acres for residential
- 36 acres for school sites
- Groundwork underway on Phase 1
- 169 lots delivering by December 2015
- Absorption rates:
 - 0 in 2015
 - 40-45 in 2016
 - 75 in 2017
 - 150 by 2018
- Cibolo Creek Elementary





Residential Activity

Ranches at Creekside



Ranches at Creekside

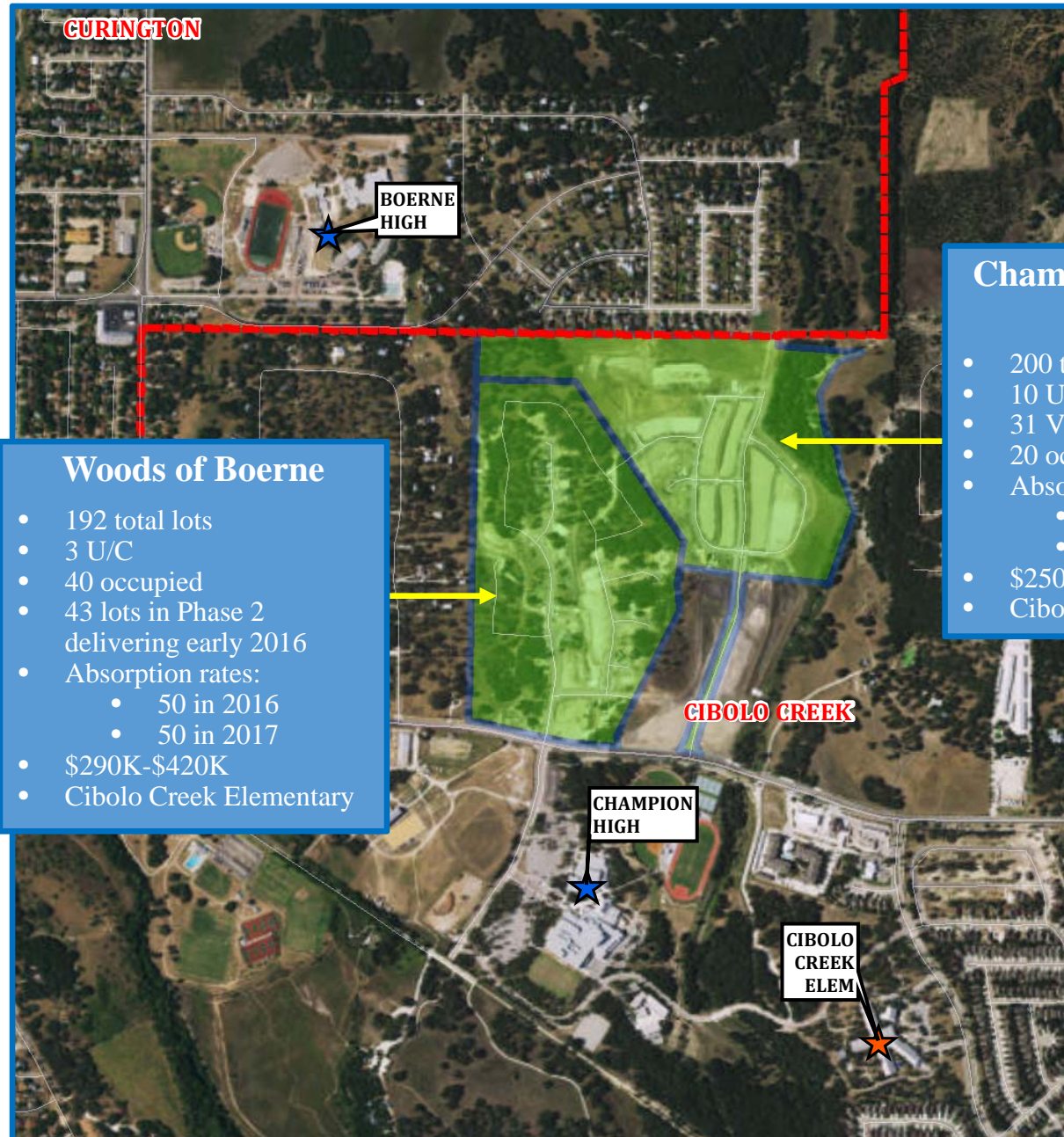
- 868 total lots
- Groundwork underway on Phase I & II with 139 lots
- Delivering 75 lots in December
- Homebuilding starting Feb 2016
- Absorption rates:
 - 40-45 in 2016
 - 70-80 in 2017
- Developer delivering 132 lots a year
- \$290K+
- Cibolo Creek Elementary





Residential Activity

Woods of Boerne and Champion Heights in Boerne



Woods of Boerne

- 192 total lots
- 3 U/C
- 40 occupied
- 43 lots in Phase 2 delivering early 2016
- Absorption rates:
 - 50 in 2016
 - 50 in 2017
- \$290K-\$420K
- Cibolo Creek Elementary

Champion Heights in Boerne

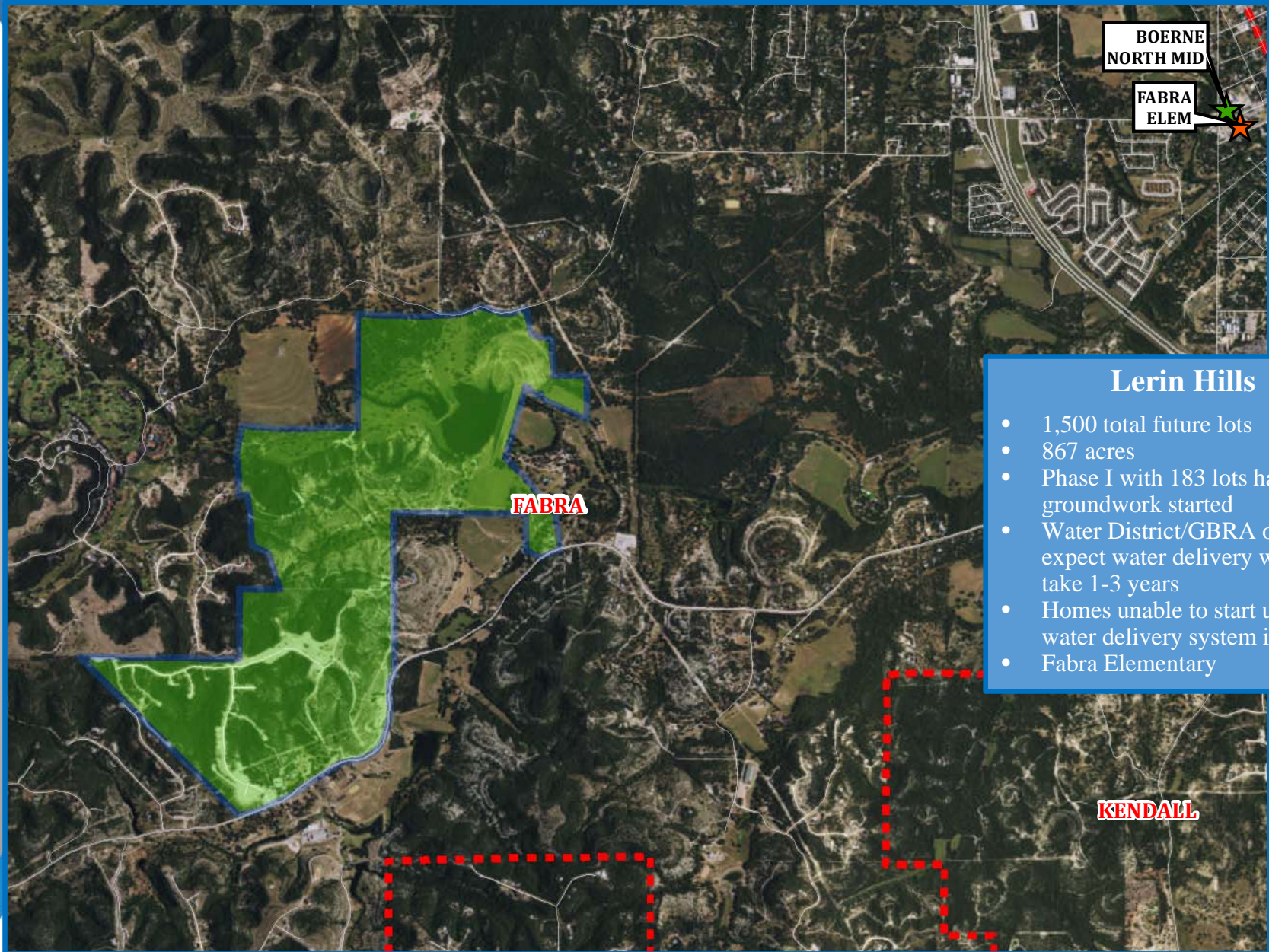
- 200 total lots
- 10 U/C
- 31 VDL
- 20 occupied
- Absorption rates:
 - 25 in 2016
 - 25 in 2017
- \$250K-\$305K
- Cibolo Creek Elementary





Residential Activity

Lerin Hills



Lerin Hills

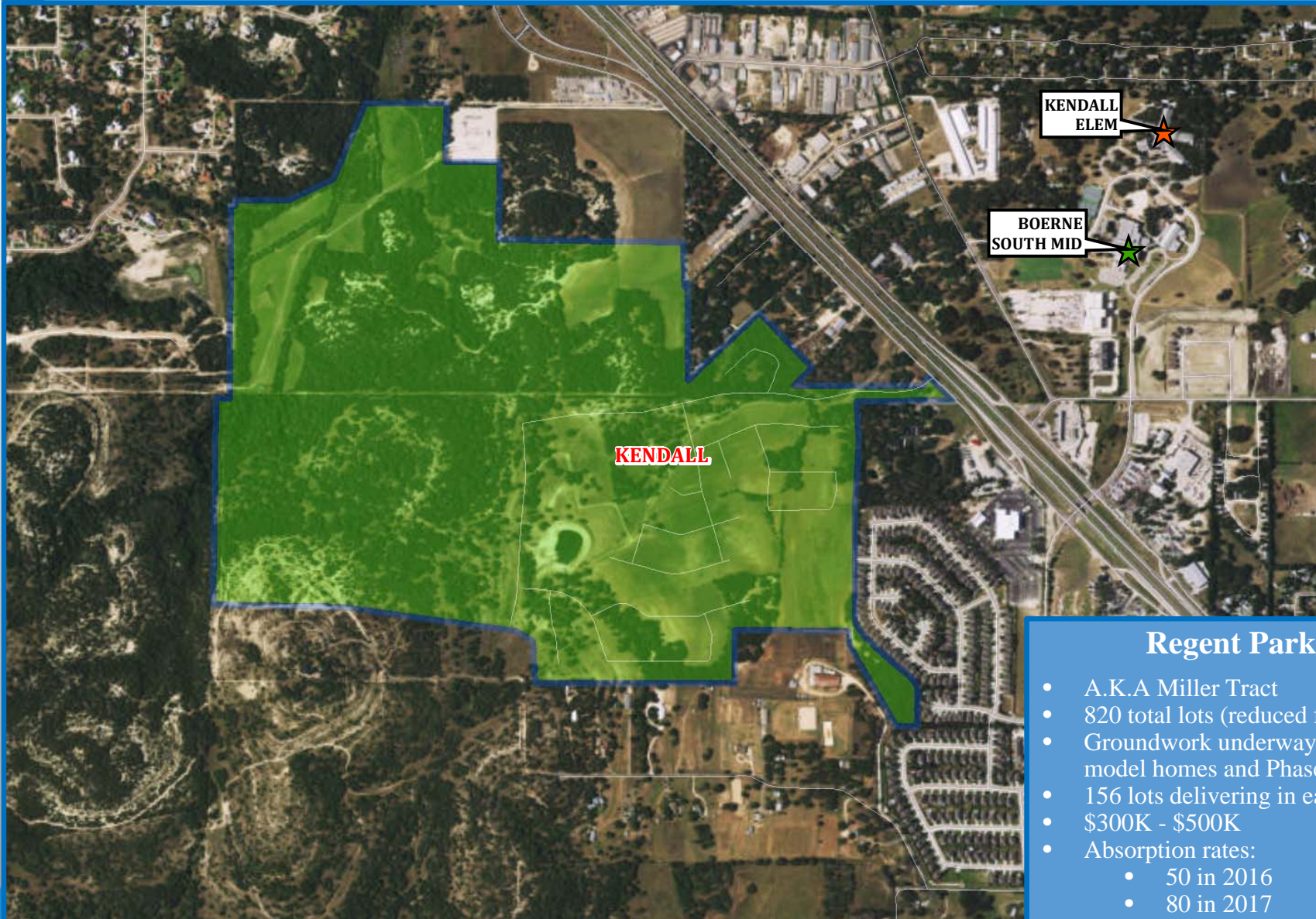
- 1,500 total future lots
- 867 acres
- Phase I with 183 lots has groundwork started
- Water District/GBRA officials expect water delivery would take 1-3 years
- Homes unable to start until water delivery system is in place
- Fabra Elementary





Residential Activity

Regent Park



Regent Park

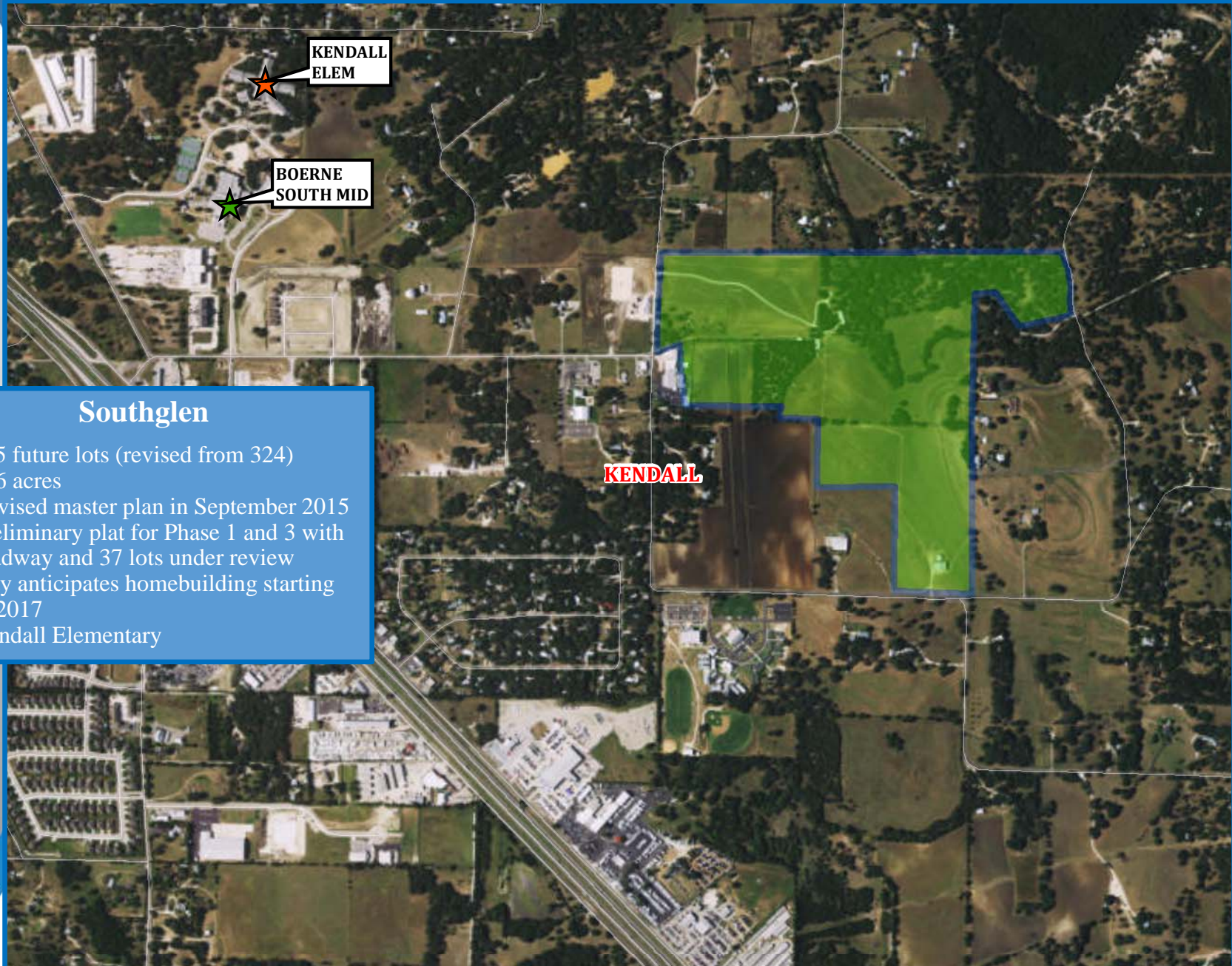
- A.K.A Miller Tract
- 820 total lots (reduced from 950)
- Groundwork underway for model homes and Phase I
- 156 lots delivering in early 2016
- \$300K - \$500K
- Absorption rates:
 - 50 in 2016
 - 80 in 2017
- Kendall Elementary





Residential Activity

Southglen



Southglen

- 375 future lots (revised from 324)
- 106 acres
- Revised master plan in September 2015
- Preliminary plat for Phase 1 and 3 with roadway and 37 lots under review
- City anticipates homebuilding starting in 2017
- Kendall Elementary





Residential Activity

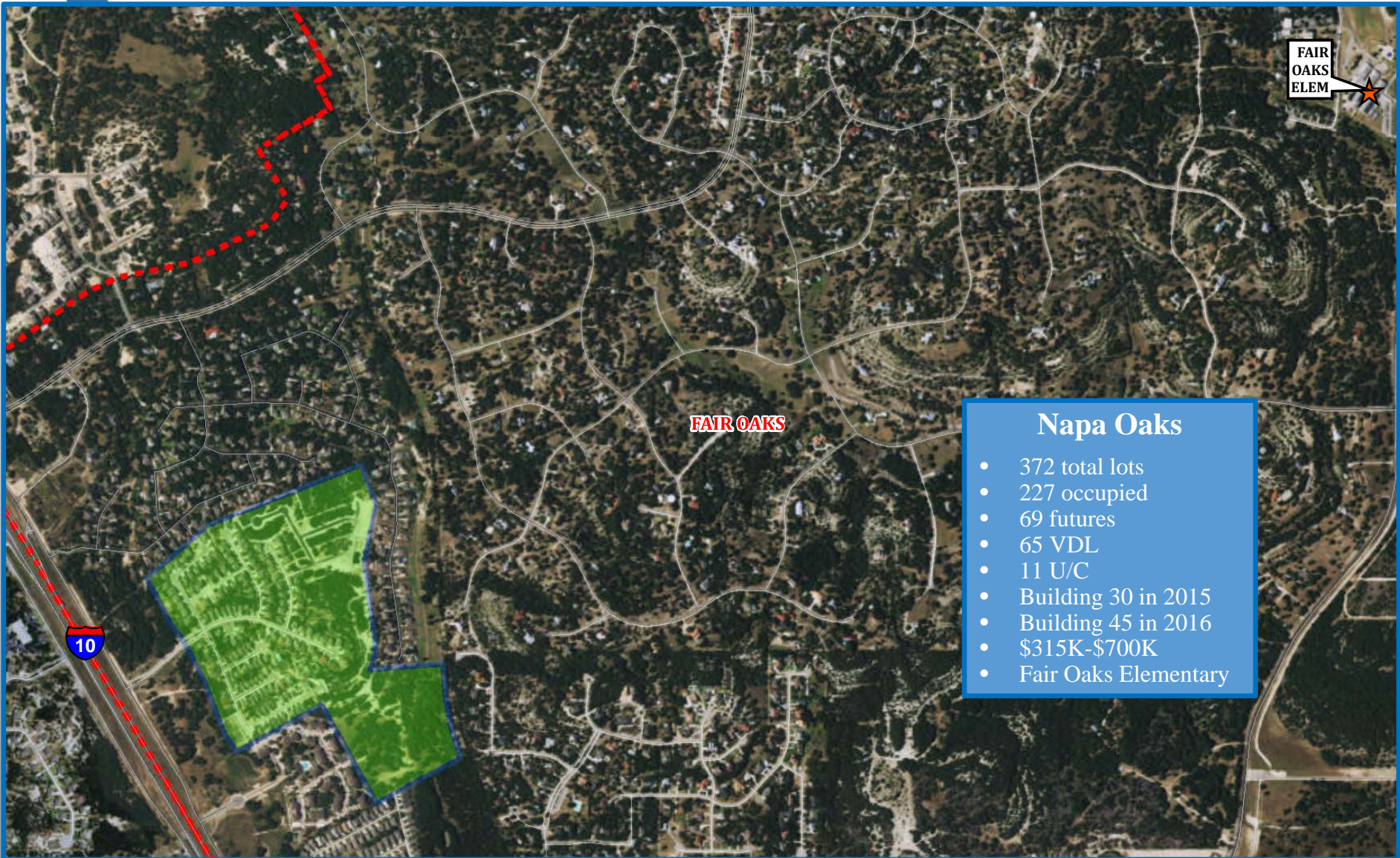
Elkhorn Ridge and Front Gate at Fair Oaks Ranch





Residential Activity

Napa Oaks





Residential Activity

Trailside, River Valley and Cibolo Trails





Residential Activity

Fallbrook

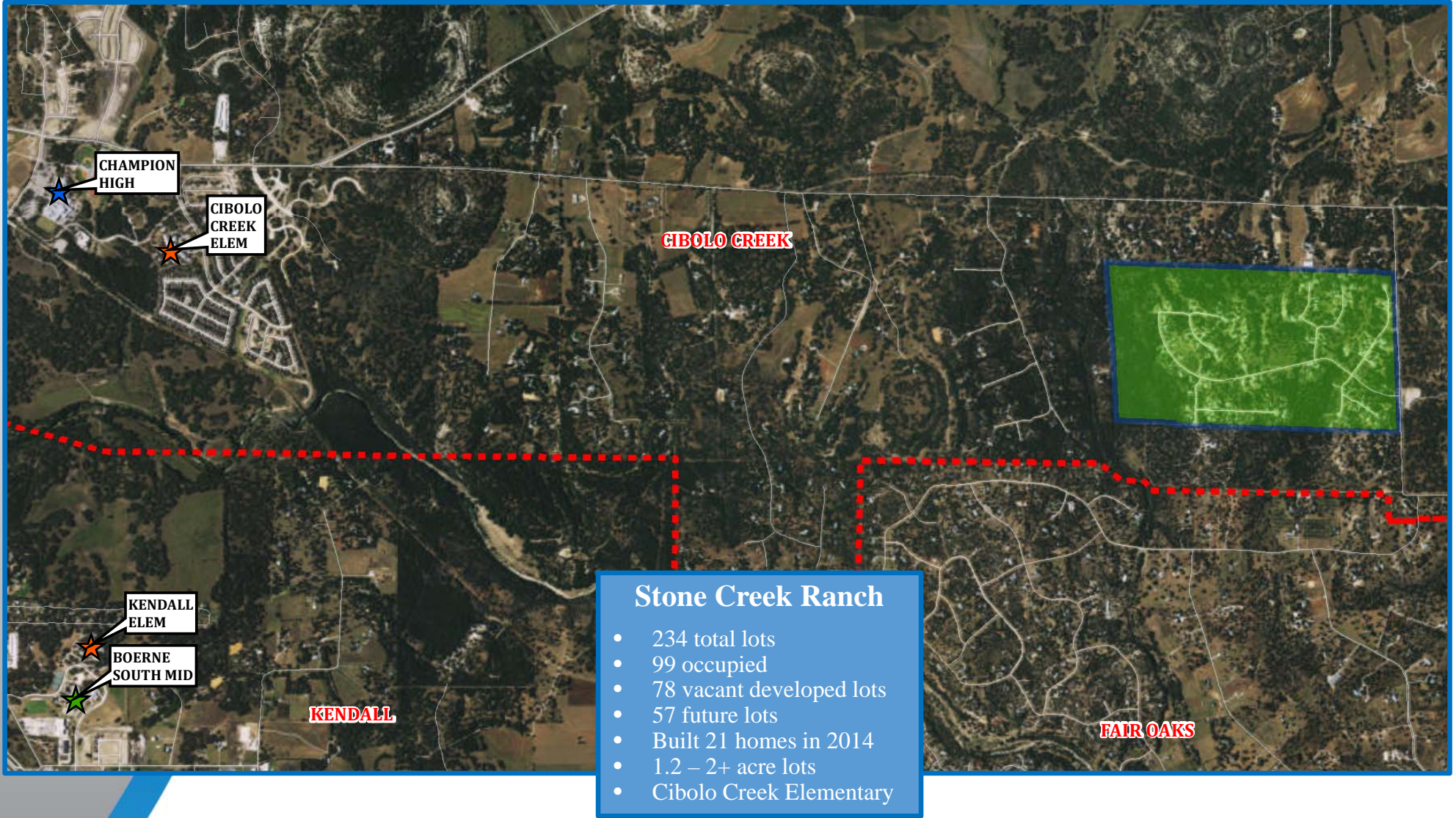
- Fallbrook**
- 350 total lots
 - 75 occupied
 - 32 under construction
 - 72 vacant developed lots
 - Building 65-70 in 2016
 - \$280K-\$405K
 - Fair Oaks Elementary





Residential Activity

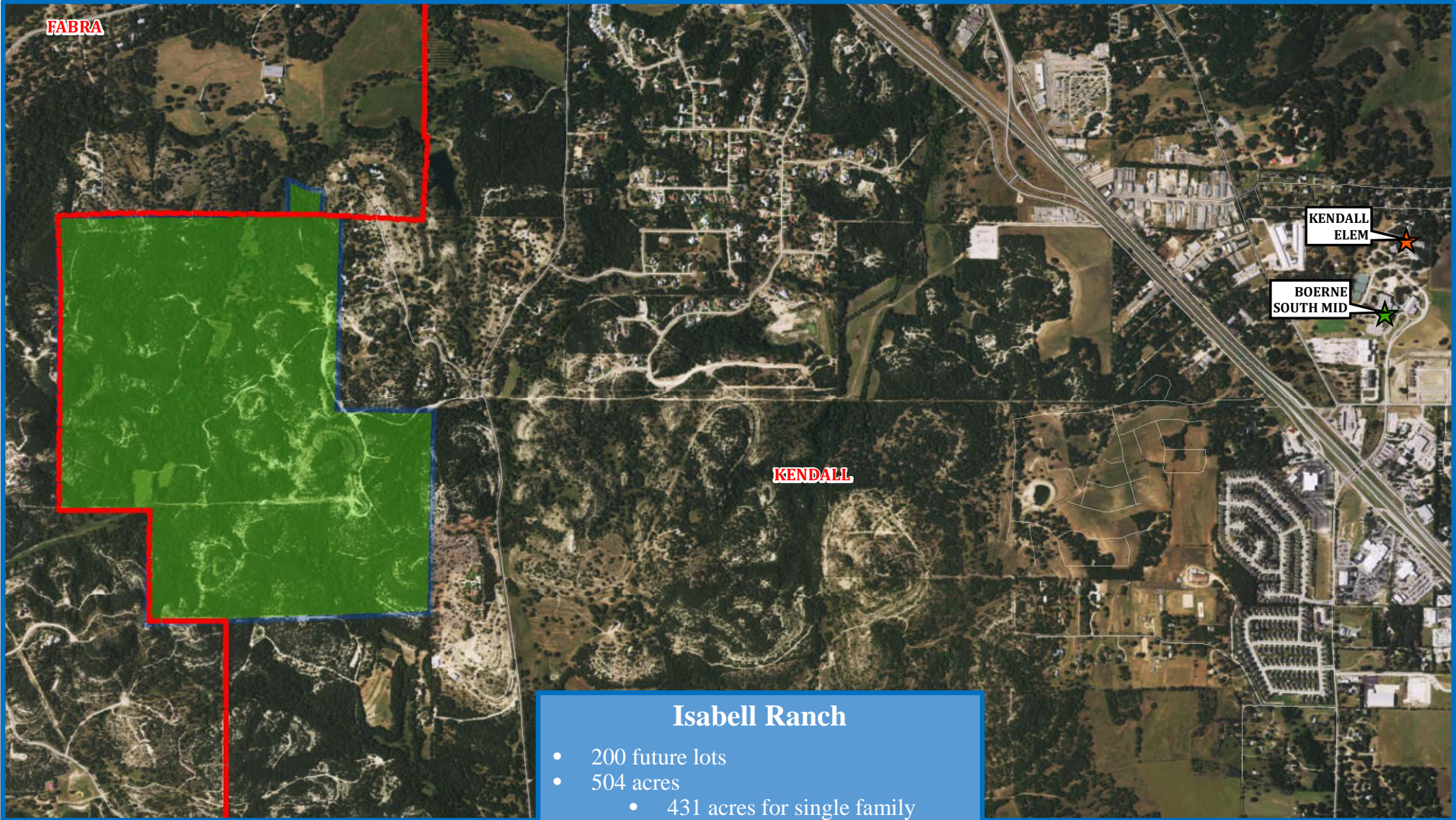
Stone Creek Ranch





Future Development

Isabell Ranch

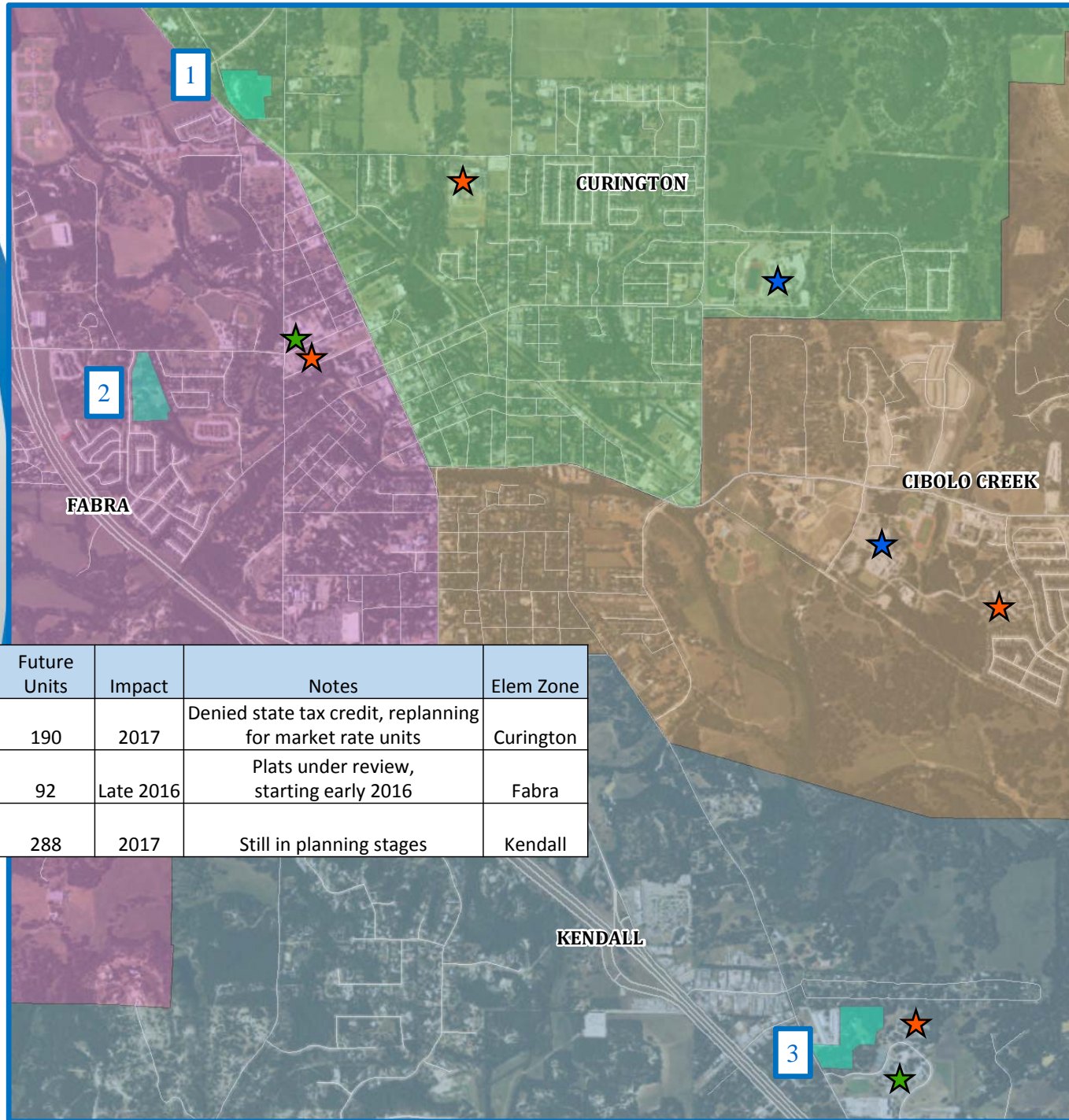


- Isabell Ranch**
- 200 future lots
 - 504 acres
 - 431 acres for single family
 - 12 acres for multi-family
 - City anticipates homes starting by 2019
 - Kendall Elementary





Multi-Family Update



| | Apartment | Future Units | Impact | Notes | Elem Zone |
|---|----------------------------|--------------|-----------|---|-----------|
| 1 | Overlook at Cibolo Creek | 190 | 2017 | Denied state tax credit, replanning for market rate units | Curington |
| 2 | Retreat at Frederick Creek | 92 | Late 2016 | Plats under review, starting early 2016 | Fabra |
| 3 | Future Vantage Development | 288 | 2017 | Still in planning stages | Kendall |





Ten Year Forecast

By Grade Level

| Year (Oct.) | EE/PK | K | 1st | 2nd | 3rd | 4th | 5th | 6th | 7th | 8th | 9th | 10th | 11th | 12th | Total | Growth | % Growth |
|-------------|-------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|-------|------|------|--------|--------|----------|
| 2011/12 | 52 | 408 | 439 | 464 | 457 | 475 | 510 | 575 | 581 | 563 | 573 | 561 | 582 | 513 | 6,753 | | |
| 2012/13 | 70 | 452 | 445 | 480 | 524 | 488 | 544 | 557 | 605 | 603 | 622 | 575 | 572 | 557 | 7,094 | 341 | 5.0% |
| 2013/14 | 85 | 443 | 477 | 455 | 532 | 535 | 525 | 568 | 592 | 634 | 655 | 619 | 556 | 553 | 7,229 | 135 | 1.9% |
| 2014/15 | 49 | 509 | 505 | 515 | 500 | 578 | 594 | 556 | 588 | 623 | 698 | 635 | 608 | 535 | 7,493 | 264 | 3.7% |
| 2015/16 | 50 | 508 | 557 | 543 | 560 | 572 | 614 | 639 | 596 | 620 | 716 | 686 | 640 | 578 | 7,879 | 386 | 5.2% |
| 2016/17 | 50 | 541 | 569 | 597 | 600 | 609 | 613 | 659 | 676 | 628 | 699 | 703 | 676 | 612 | 8,232 | 353 | 4.5% |
| 2017/18 | 50 | 569 | 582 | 608 | 646 | 653 | 663 | 656 | 694 | 712 | 708 | 684 | 700 | 644 | 8,569 | 337 | 4.1% |
| 2018/19 | 50 | 601 | 623 | 626 | 663 | 698 | 713 | 711 | 689 | 731 | 797 | 696 | 683 | 668 | 8,949 | 380 | 4.4% |
| 2019/20 | 50 | 634 | 659 | 661 | 679 | 711 | 757 | 765 | 750 | 726 | 818 | 783 | 692 | 652 | 9,337 | 388 | 4.3% |
| 2020/21 | 50 | 678 | 689 | 703 | 715 | 734 | 771 | 811 | 806 | 790 | 801 | 803 | 780 | 663 | 9,794 | 457 | 4.9% |
| 2021/22 | 50 | 713 | 740 | 734 | 759 | 764 | 792 | 827 | 854 | 850 | 877 | 787 | 800 | 745 | 10,292 | 498 | 5.1% |
| 2022/23 | 50 | 747 | 774 | 786 | 784 | 808 | 819 | 849 | 873 | 901 | 944 | 861 | 783 | 764 | 10,743 | 451 | 4.4% |
| 2023/24 | 50 | 779 | 820 | 830 | 843 | 837 | 861 | 878 | 896 | 922 | 999 | 927 | 858 | 749 | 11,249 | 506 | 4.7% |
| 2024/25 | 50 | 820 | 832 | 867 | 884 | 893 | 899 | 923 | 925 | 946 | 1,023 | 982 | 924 | 820 | 11,788 | 539 | 4.8% |
| 2025/26 | 50 | 859 | 876 | 894 | 913 | 938 | 952 | 964 | 973 | 976 | 1,050 | 1,006 | 978 | 884 | 12,313 | 525 | 4.5% |

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

- Boerne ISD will reach 8,000 students by next fall and 8,500 by the fall of 2017
- 5 year growth = 1,915 students
- 2020/21 enrollment = 9,794 students
- 10 year growth = 4,434 students
- 2025/26 enrollment = 12,313 students



Ten Year Forecast

By Campus

| Campus | HISTORY | | Current | ENROLLMENT PROJECTIONS | | | | | | | | | |
|-------------------------------|--------------|--------------|--------------|------------------------|--------------|--------------|--------------|--------------|---------------|---------------|---------------|---------------|---------------|
| | Capacity | 2014/15 | 2015/16 | 2016/17 | 2017/18 | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 2023/24 | 2024/25 | 2025/26 |
| Cibolo Creek Elementary | 750 | 766 | 706 | 751 | 779 | 813 | 863 | 896 | 956 | 1,038 | 1,110 | 1,174 | 1,244 |
| Curington Elementary | 800 | 778 | 633 | 645 | 665 | 672 | 667 | 670 | 677 | 678 | 686 | 697 | 714 |
| New Fabra Elementary | 800 | 674 | 565 | 572 | 592 | 622 | 654 | 687 | 737 | 791 | 842 | 899 | 963 |
| Fair Oaks Ranch Elementary | 850 | 919 | 843 | 933 | 1,015 | 1,091 | 1,136 | 1,198 | 1,246 | 1,278 | 1,334 | 1,354 | 1,359 |
| Kendall Elementary | 750 | 669 | 657 | 678 | 720 | 776 | 831 | 889 | 936 | 983 | 1,048 | 1,121 | 1,202 |
| ELEMENTARY TOTAL | 3,950 | 3,806 | 3,404 | 3,579 | 3,771 | 3,974 | 4,151 | 4,340 | 4,552 | 4,768 | 5,020 | 5,245 | 5,482 |
| Elementary Absolute Growth | | 186 | -402 | 175 | 192 | 203 | 177 | 189 | 212 | 216 | 252 | 225 | 237 |
| Elementary Percent Growth | | 5.14% | -10.56% | 5.14% | 5.36% | 5.38% | 4.45% | 4.55% | 4.88% | 4.75% | 5.29% | 4.48% | 4.52% |
| Boerne Middle North | 875 | 511 | 730 | 777 | 819 | 850 | 869 | 919 | 936 | 954 | 975 | 1,017 | 1,055 |
| Boerne Middle South | 1,250 | 700 | 1,125 | 1,186 | 1,243 | 1,281 | 1,372 | 1,488 | 1,595 | 1,669 | 1,721 | 1,777 | 1,858 |
| MIDDLE SCHOOL TOTAL | 2,125 | 1,211 | 1,855 | 1,963 | 2,062 | 2,131 | 2,241 | 2,407 | 2,531 | 2,623 | 2,696 | 2,794 | 2,913 |
| Middle School Absolute Growth | | -15 | 644 | 108 | 99 | 69 | 110 | 166 | 124 | 92 | 73 | 98 | 119 |
| Middle School Percent Growth | | -1.22% | 53.18% | 5.82% | 5.04% | 3.35% | 5.16% | 7.41% | 5.15% | 3.63% | 2.78% | 3.64% | 4.26% |
| Samuel V. Champion HS | 1,750 | 1,452 | 1,533 | 1,596 | 1,646 | 1,746 | 1,816 | 1,901 | 2,003 | 2,102 | 2,254 | 2,420 | 2,559 |
| Boerne HS | 1,300 | 1,024 | 1,087 | 1,094 | 1,090 | 1,098 | 1,129 | 1,146 | 1,206 | 1,250 | 1,279 | 1,329 | 1,359 |
| HIGH SCHOOL TOTAL | 3,050 | 2,476 | 2,620 | 2,690 | 2,736 | 2,844 | 2,945 | 3,047 | 3,209 | 3,352 | 3,533 | 3,749 | 3,918 |
| High School Absolute Growth | | 93 | 144 | 70 | 46 | 108 | 101 | 102 | 162 | 143 | 181 | 216 | 169 |
| High School Percent Growth | | 3.90% | 5.82% | 2.67% | 1.71% | 3.95% | 3.55% | 3.46% | 5.32% | 4.46% | 5.40% | 6.11% | 4.51% |
| DISTRICT TOTAL | 9,125 | 7,493 | 7,879 | 8,232 | 8,569 | 8,949 | 9,337 | 9,794 | 10,292 | 10,743 | 11,249 | 11,788 | 12,313 |
| District Absolute Growth | | 264 | 386 | 353 | 337 | 380 | 388 | 457 | 498 | 451 | 506 | 539 | 525 |
| District Percent Growth | | 3.7% | 5.2% | 4.5% | 4.1% | 4.4% | 4.3% | 4.9% | 5.1% | 4.4% | 4.7% | 4.8% | 4.5% |





Summary

- Texas unemployment rate has been below the national average for 8 straight years.
- San Antonio will continue to be a leader in job and population growth due its strong housing market and diverse economy.
- Boerne ISD is on track to close more than 650 homes for the second straight year.
- Esperanza, Ranches at Creekside and Elkhorn Ridge are all anticipating homebuilding to begin in early 2016.
- Vacant Developed Lot supply remains in a good position to sustain the current start rate.
- BISD can expect an increase of approximately 2,000 students during the next 5 years.
- 2020/21 enrollment projection: 9,794 students.
- Boerne ISD is projected to have more than 12,300 students for the 2025/26 school year.