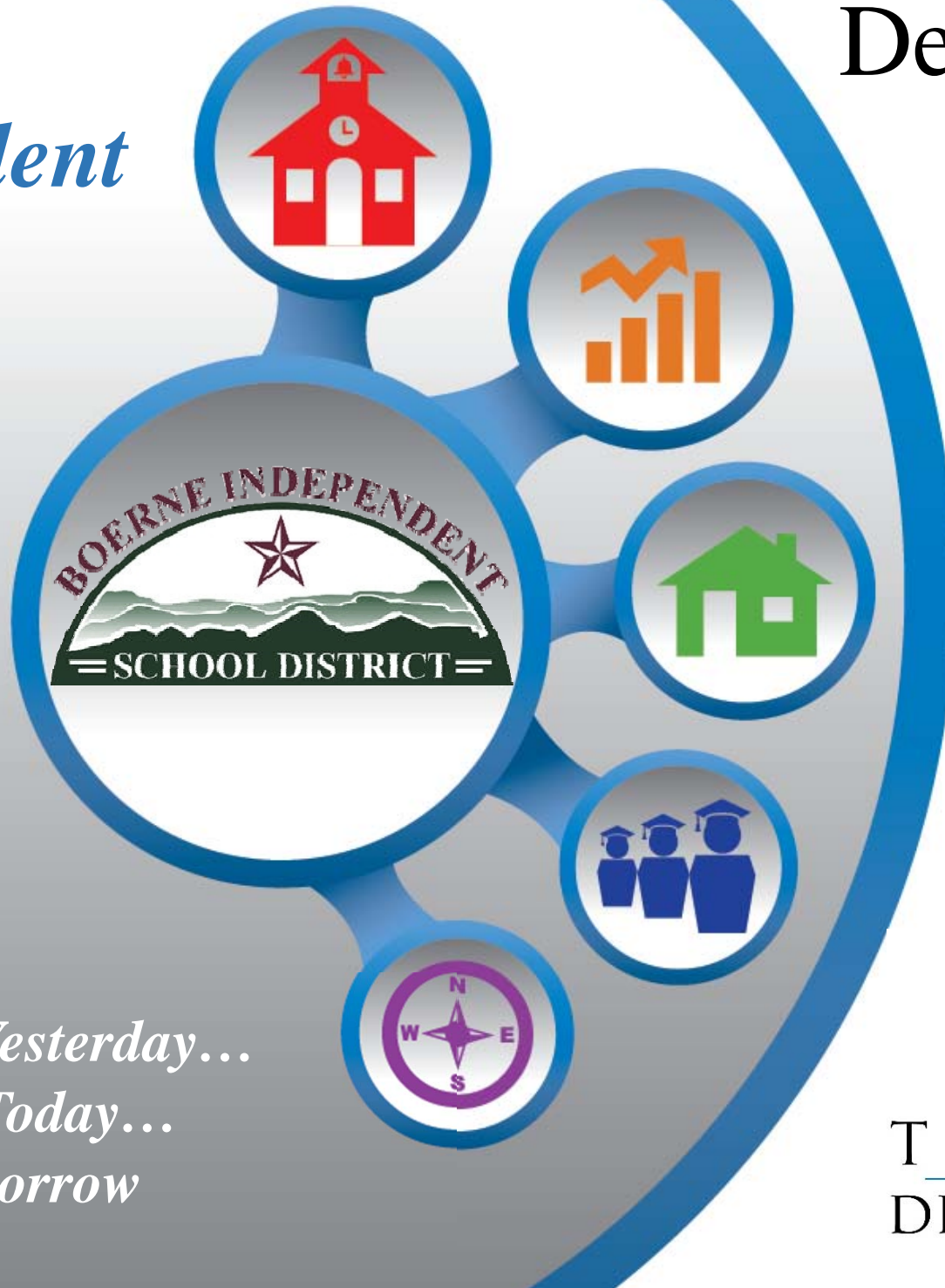


*Boerne
Independent
School
District*



Demographic
Summary
Spring 2016

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



TEMPLETON
DEMOGRAPHICS

Economic Conditions – San Antonio MSA (March 2016)

Unemployment Rate

0.1%

- U.S. 5.1%
- Texas 4.5%
- **Kendall County 3.1%**
- San Antonio- New Braunfels 3.7%

2.9%

Job Growth

- 27,700 new jobs created in the last 12 months

9,640

New Single Family Home Starts 2015

- 351 more than 2014





San Antonio New Home Ranking Report

ISD Ranked by Annual Closings – 3Q15

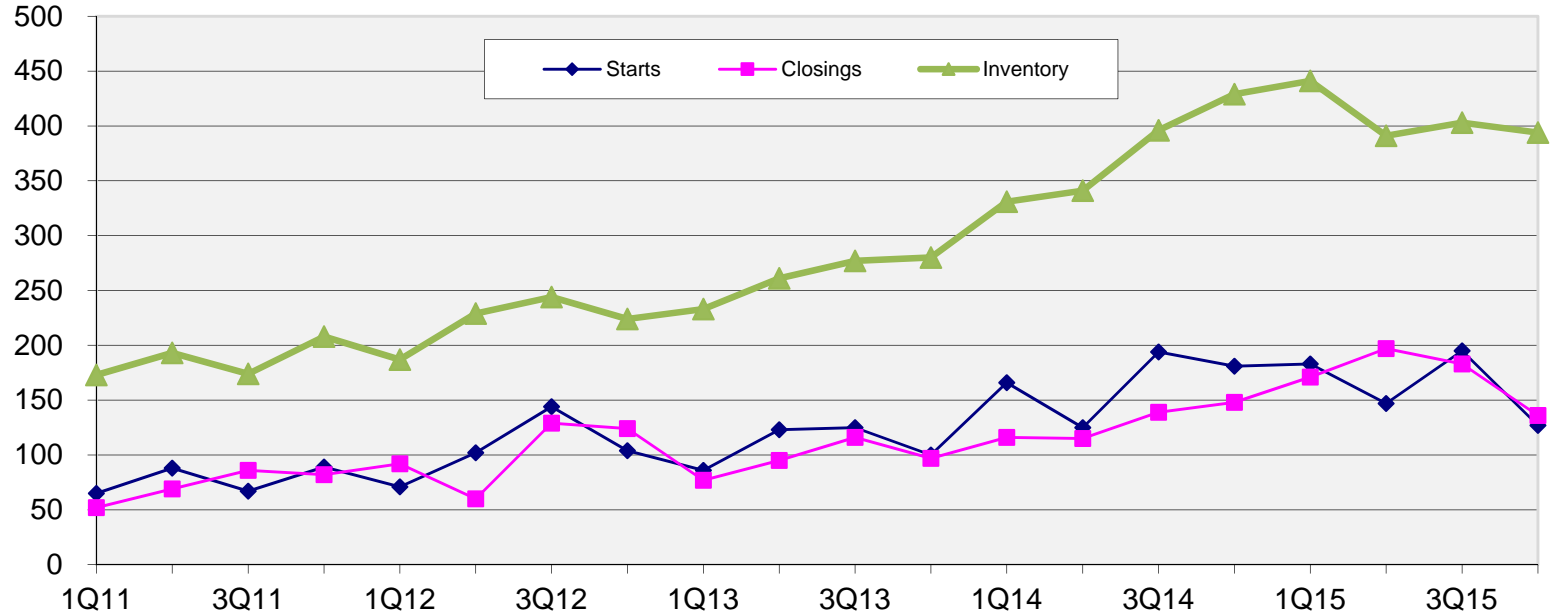
Rank	District Name	Annual Starts	Annual Closings	VDL	Future
1	Northside ISD	3,188	3,148	5,887	36,322
2	Comal ISD	1,533	1,438	2,746	21,676
3	Schertz-Cibolo U City ISD	792	698	1,482	6,852
4	Boerne ISD	652	687	1,780	11,030
5	Judson ISD	561	620	1,037	6,551
6	East Central ISD	508	579	445	4,406
7	New Braunfels 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	183
2Q	88	102	123	125	147
3Q	67	144	125	194	195
4Q	89	104	100	181	127
Total	309	421	434	666	652

Closings	2011	2012	2013	2014	2015
1Q	52	92	77	116	171
2Q	69	60	95	115	197
3Q	86	129	116	139	183
4Q	82	124	97	148	136
Total	289	405	385	518	687

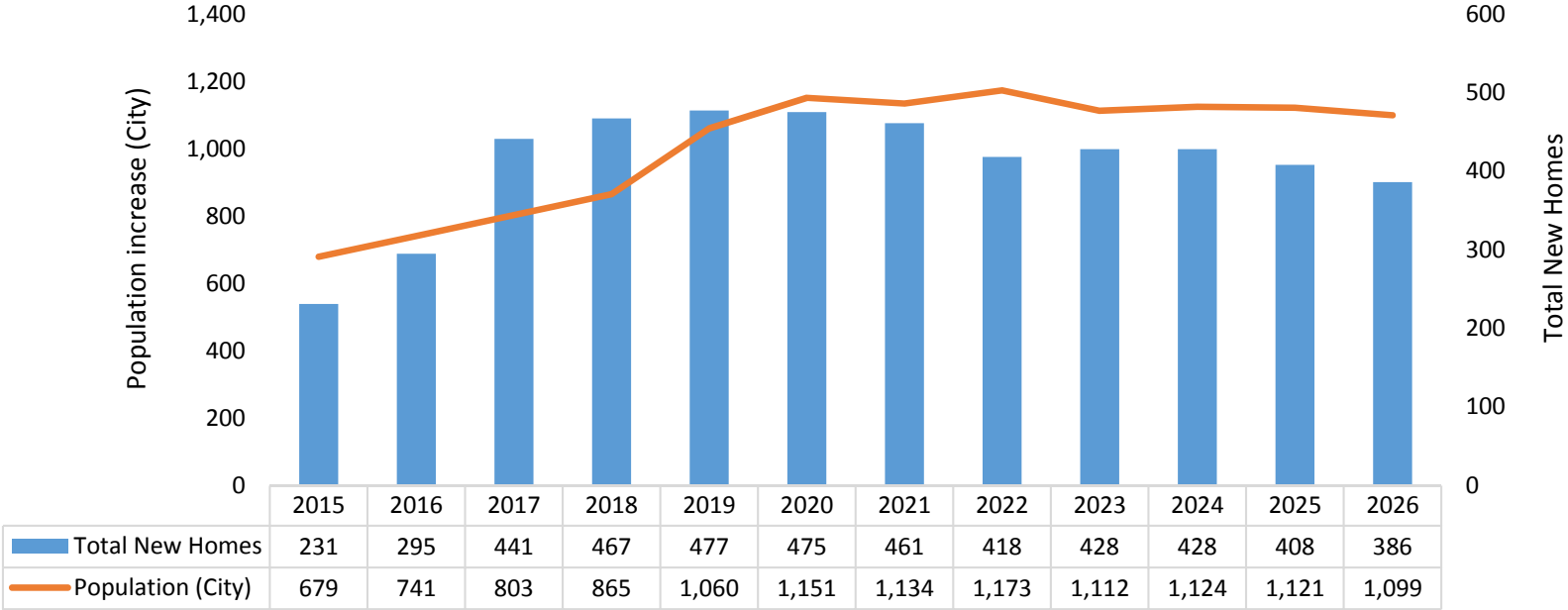
- Boerne ISD started more than 650 homes in 2015, which makes 2 straight years.
- Closings for 2015 are up 32.6% over 2014
- Inventory remains in good position for continued growth





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

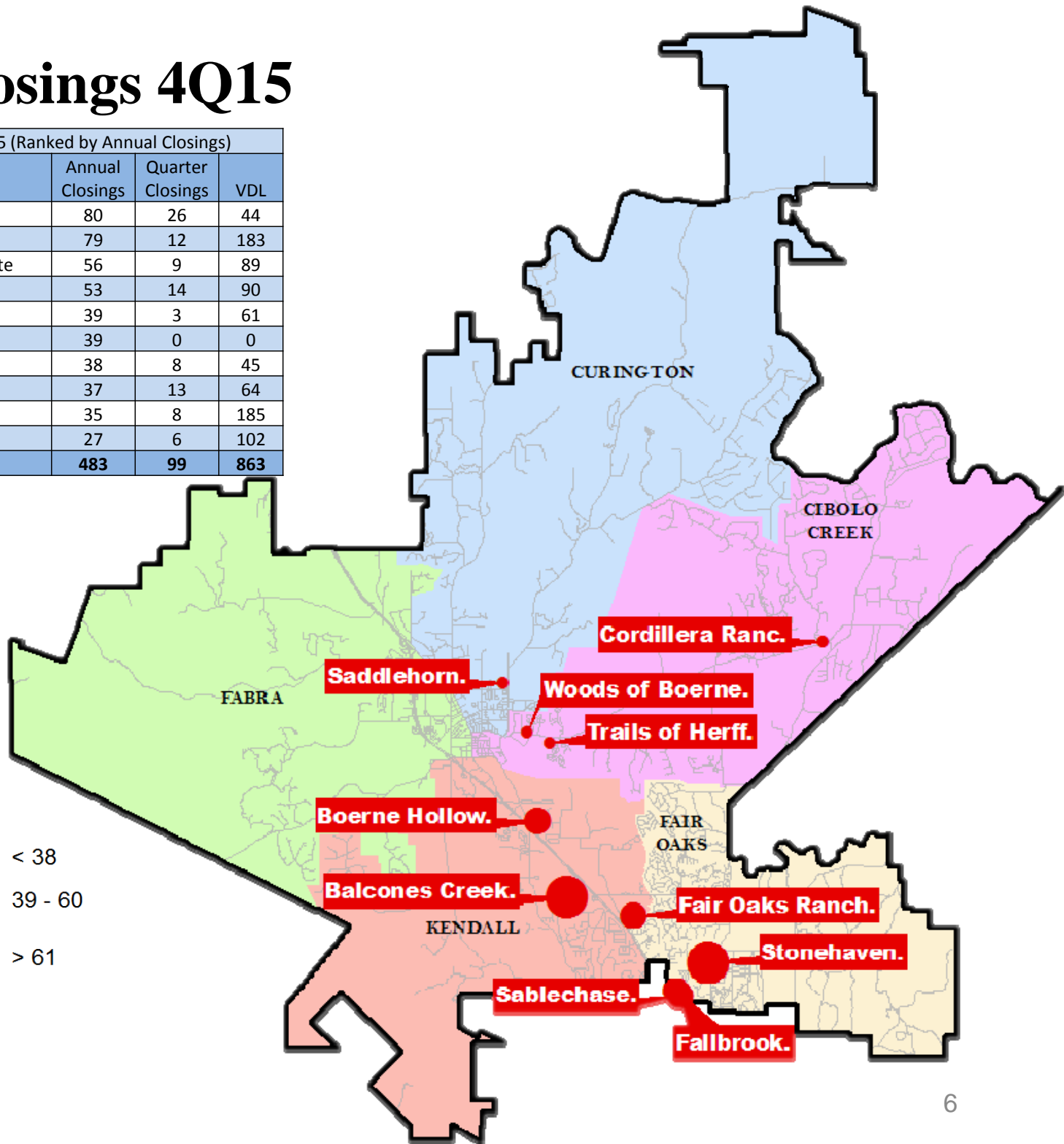
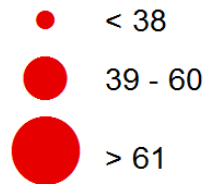




Annual Closings 4Q15

Top 10 Subdivisions - 4Q15 (Ranked by Annual Closings)

Rank	Subdivision	Annual Closings	Quarter Closings	VDL
1	Stonehaven	80	26	44
2	Balcones Creek	79	12	183
3	Fair Oaks Ranch/Front Gate	56	9	89
4	Fallbrook	53	14	90
5	Sablechase	39	3	61
6	Boerne Hollow	39	0	0
7	Saddlehorn	38	8	45
8	Trails of Herff Ranch	37	13	64
9	Cordillera Ranch	35	8	185
10	Woods of Boerne	27	6	102
TOTALS		483	99	863

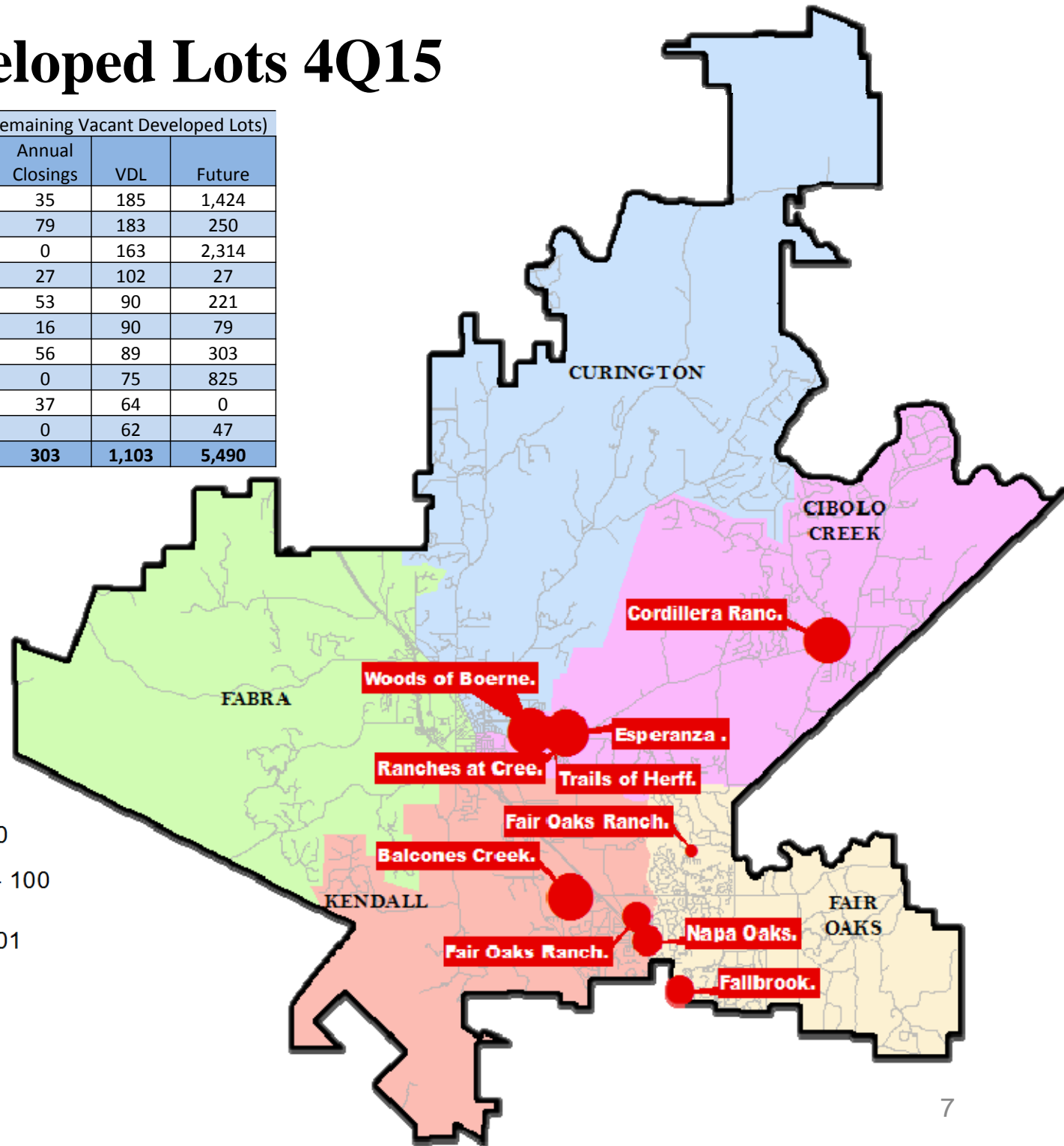




Vacant Developed Lots 4Q15

Top 10 Subdivisions - 4Q15 (Ranked by remaining Vacant Developed Lots)

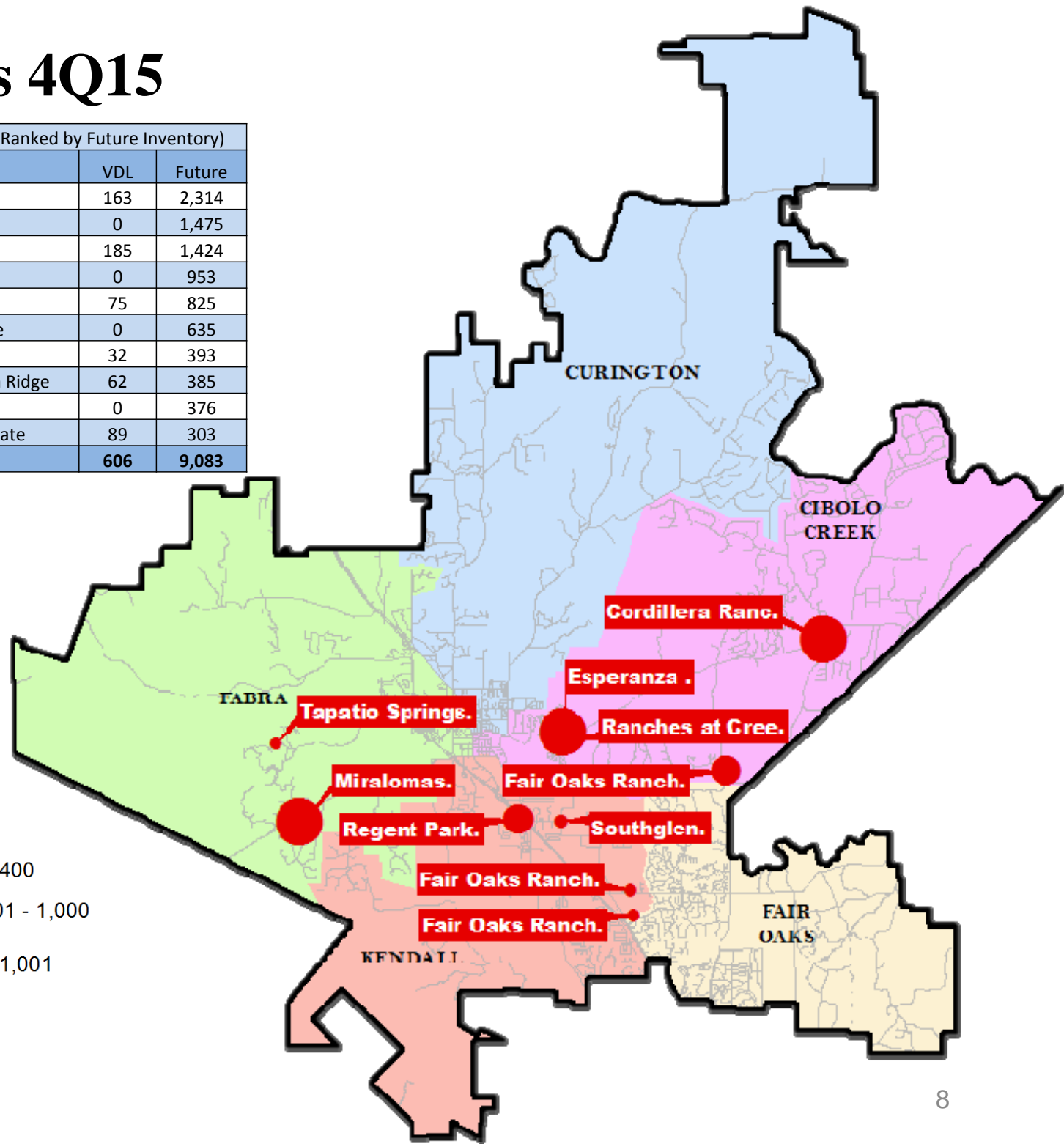
Rank	Subdivision	Annual Closings	VDL	Future
1	Cordillera Ranch	35	185	1,424
2	Balcones Creek	79	183	250
3	Esperanza	0	163	2,314
4	Woods of Boerne	27	102	27
5	Fallbrook	53	90	221
6	Napa Oaks	16	90	79
7	Fair Oaks Ranch/Front Gate	56	89	303
8	Ranches at Creekside	0	75	825
9	Trails of Herff Ranch	37	64	0
10	Fair Oaks Ranch/River Valley	0	62	47
TOTALS		303	1,103	5,490





Future Lots 4Q15

Top 10 Subdivisions - 4Q15 (Ranked by Future Inventory)			
Rank	Subdivision	VDL	Future
1	Esperanza	163	2,314
2	Miralomas	0	1,475
3	Cordillera Ranch	185	1,424
4	Regent Park	0	953
5	Ranches at Creekside	75	825
6	Fair Oaks Ranch/Reserve	0	635
7	Tapatio Springs	32	393
8	Fair Oaks Ranch/Elkhorn Ridge	62	385
9	Southglen	0	376
10	Fair Oaks Ranch/Front Gate	89	303
TOTALS		606	9,083



- < 400
- 401 - 1,000
- > 1,001








Overall Housing Data

By Elementary Attendance Zone

ELEMENTARY ATTENDANCE ZONE	Annual Starts	Quarter Starts	Annual Closings	Quarter Closings	Under Const.	Inventory	Vacant Dev. Lots	Future
Cibolo Creek Elementary	168	47	147	34	92	126	668	5,697
Curington Elementary	67	8	70	12	17	25	63	160
Fabra Elementary	7	0	20	0	7	10	44	1,991
Fair Oaks Ranch Elementary	231	49	253	60	69	122	499	594
Kendall Elementary	179	23	197	30	52	111	434	2,588
TOTALS	652	127	687	136	237	394	1,708	11,030

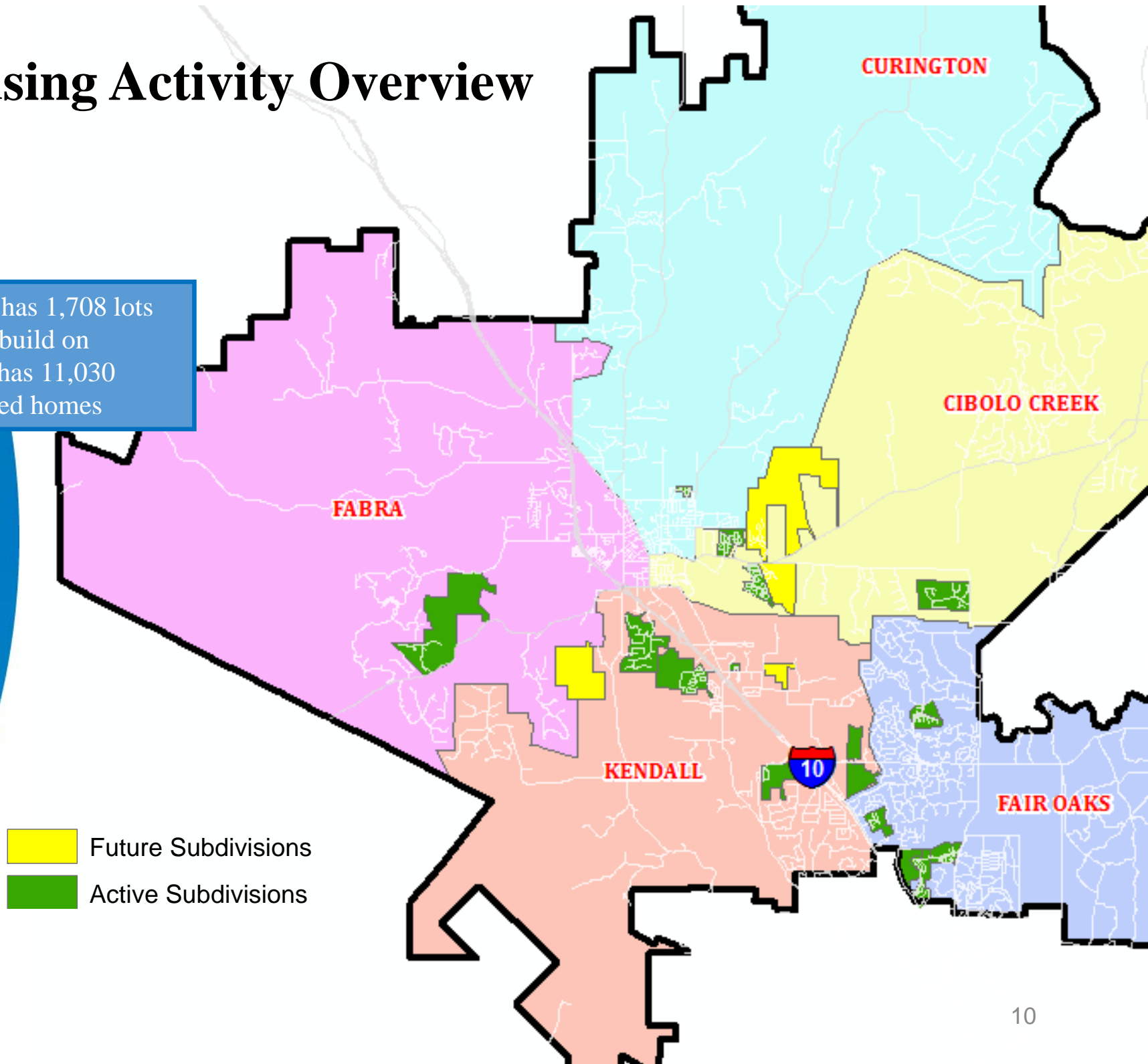
	Highest activity in the category
	Second highest activity in the category
	Third highest activity in the category





Housing Activity Overview

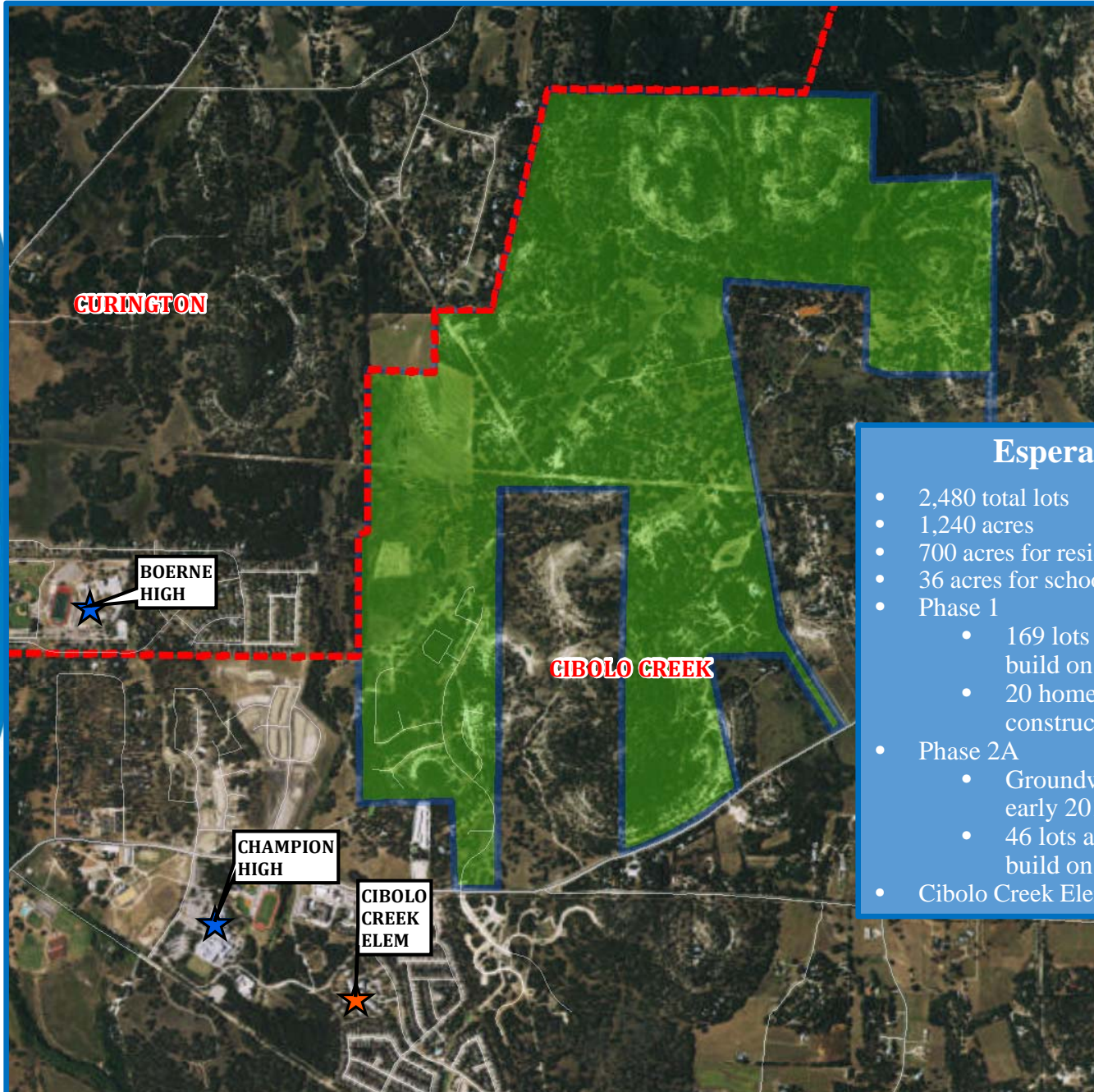
- Boerne ISD has 1,708 lots available to build on
- The district has 11,030 future planned homes





Residential Activity

Esperanza



Esperanza

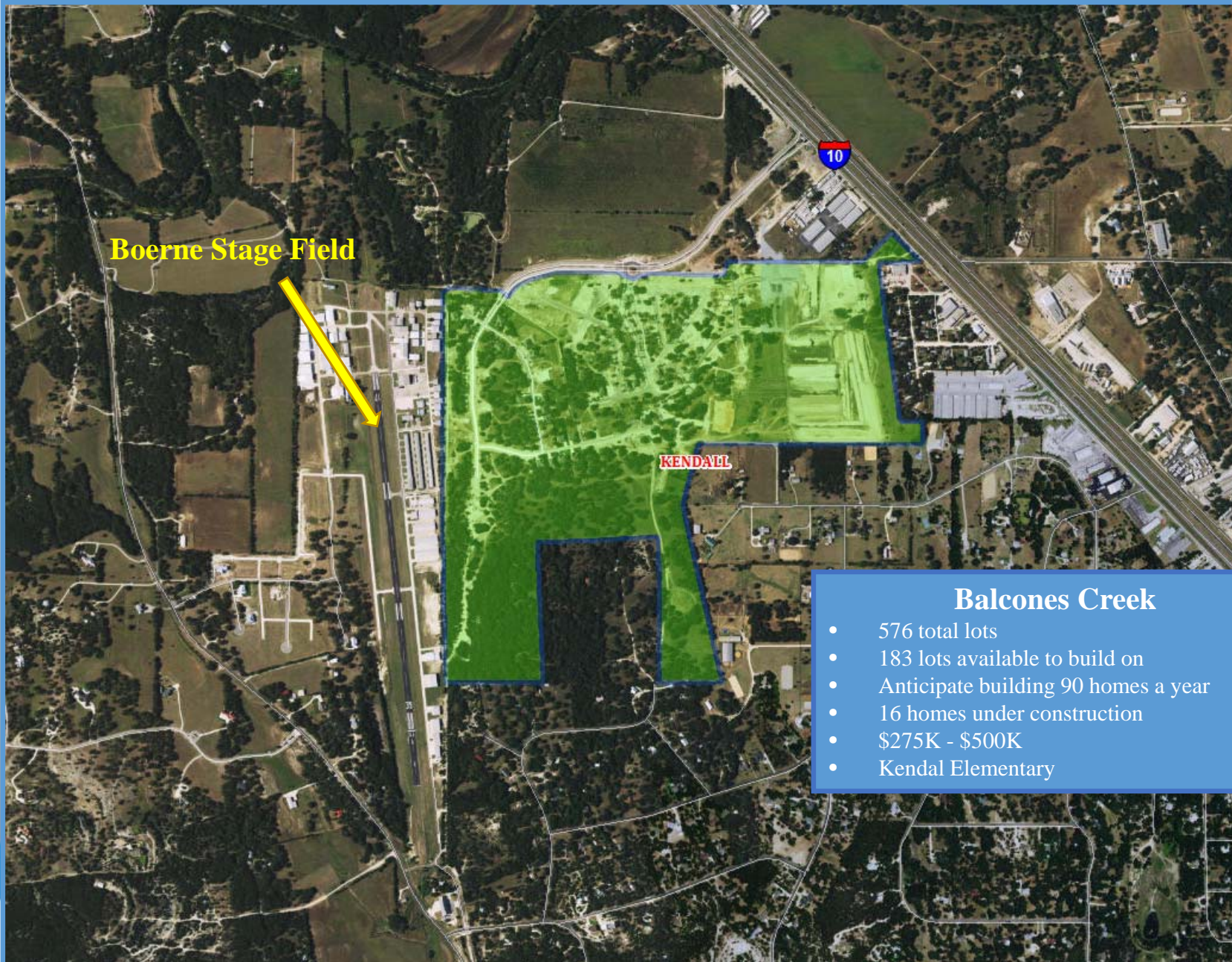
- 2,480 total lots
- 1,240 acres
- 700 acres for residential
- 36 acres for school sites
- Phase 1
 - 169 lots available to build on
 - 20 homes under construction
- Phase 2A
 - Groundwork began early 2016
 - 46 lots available to build on
- Cibolo Creek Elementary





Residential Activity

Balcones Creek



Boerne Stage Field

KENDALL

Balcones Creek

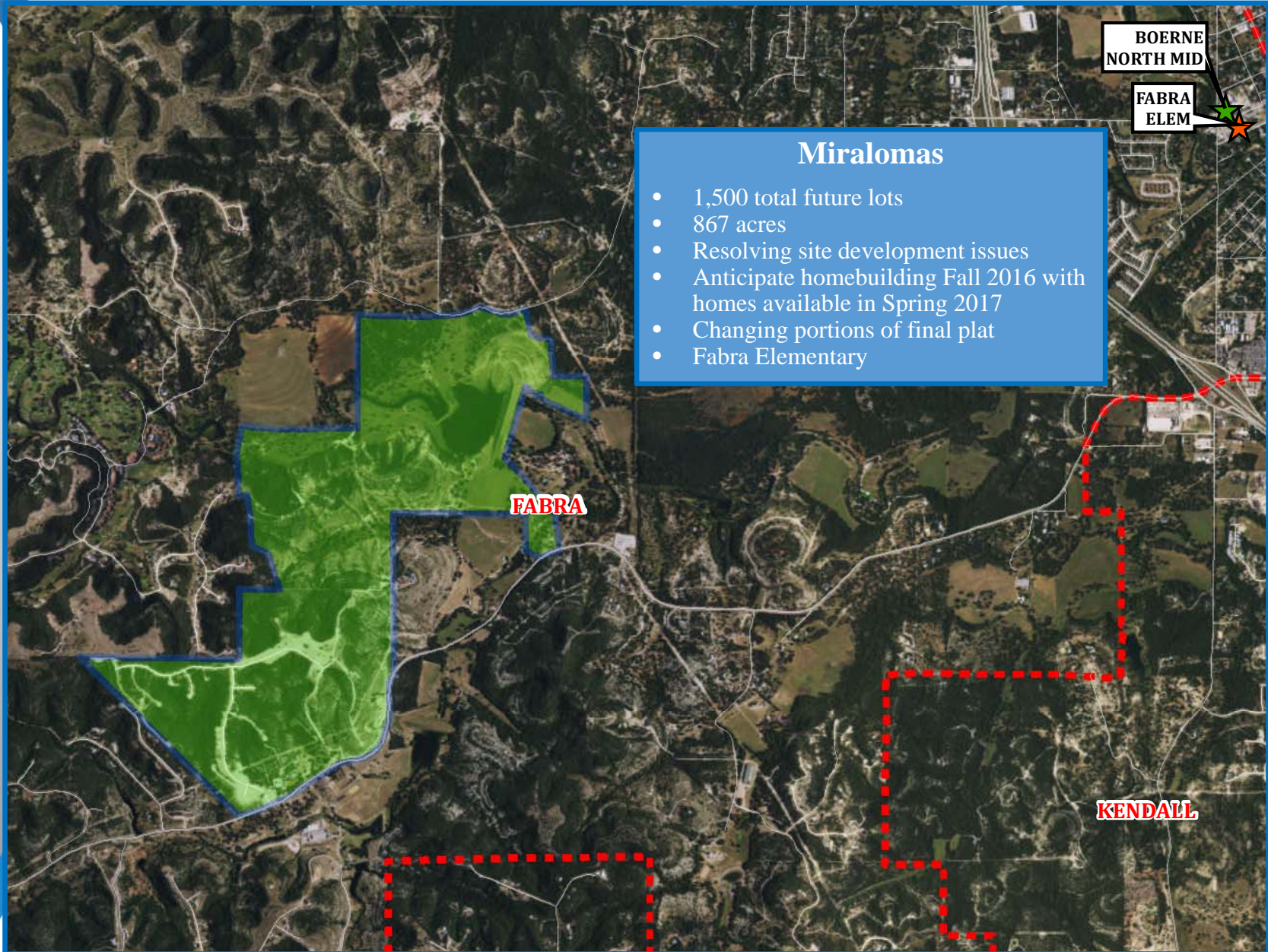
- 576 total lots
- 183 lots available to build on
- Anticipate building 90 homes a year
- 16 homes under construction
- \$275K - \$500K
- Kendal Elementary





Residential Activity

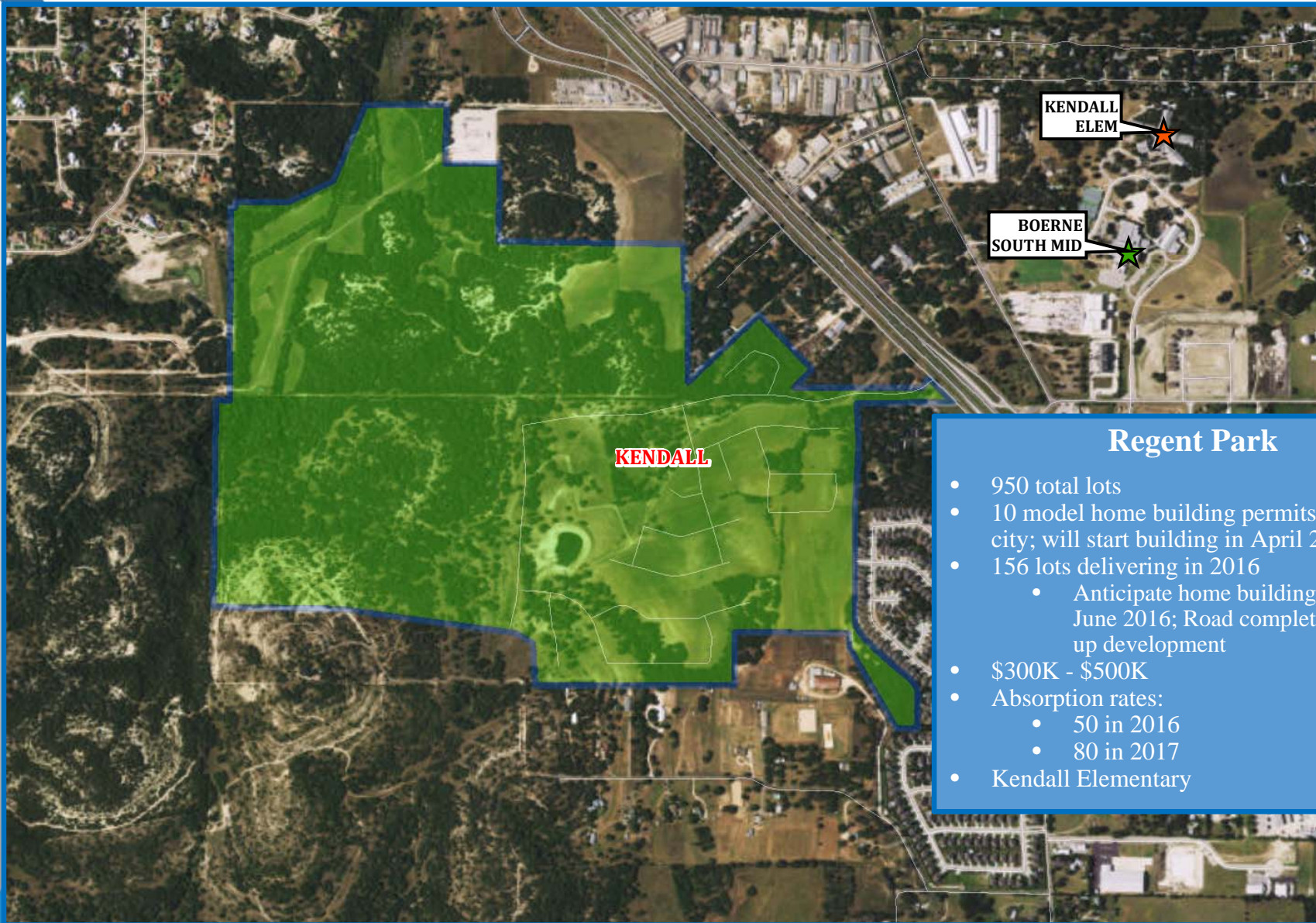
Miralomas (Previously Lerin Hills)





Residential Activity

Regent Park



Regent Park

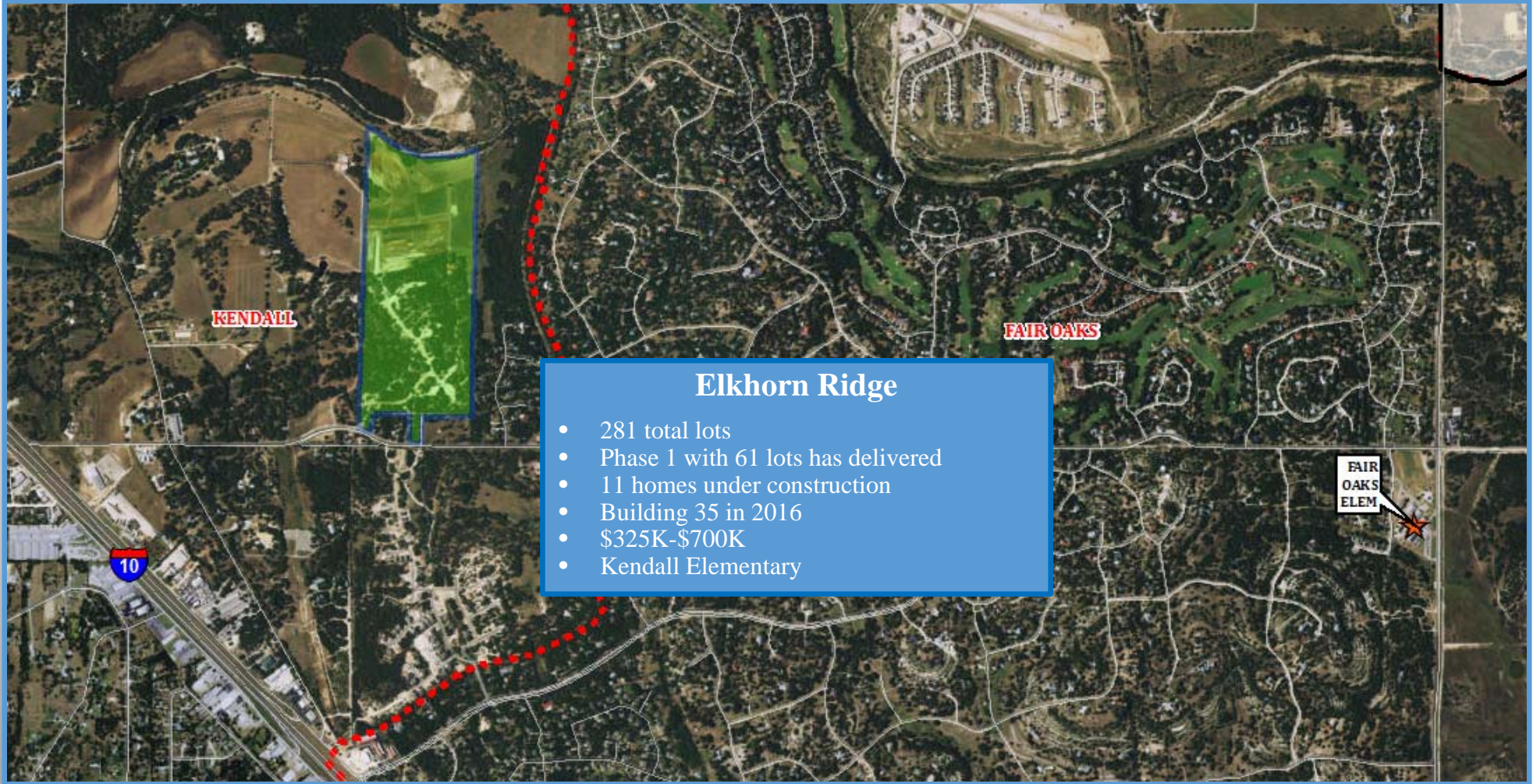
- 950 total lots
- 10 model home building permits issued by city; will start building in April 2016
- 156 lots delivering in 2016
 - Anticipate home building to begin in June 2016; Road completion has held up development
- \$300K - \$500K
- Absorption rates:
 - 50 in 2016
 - 80 in 2017
- Kendall Elementary





Residential Activity

Elkhorn Ridge



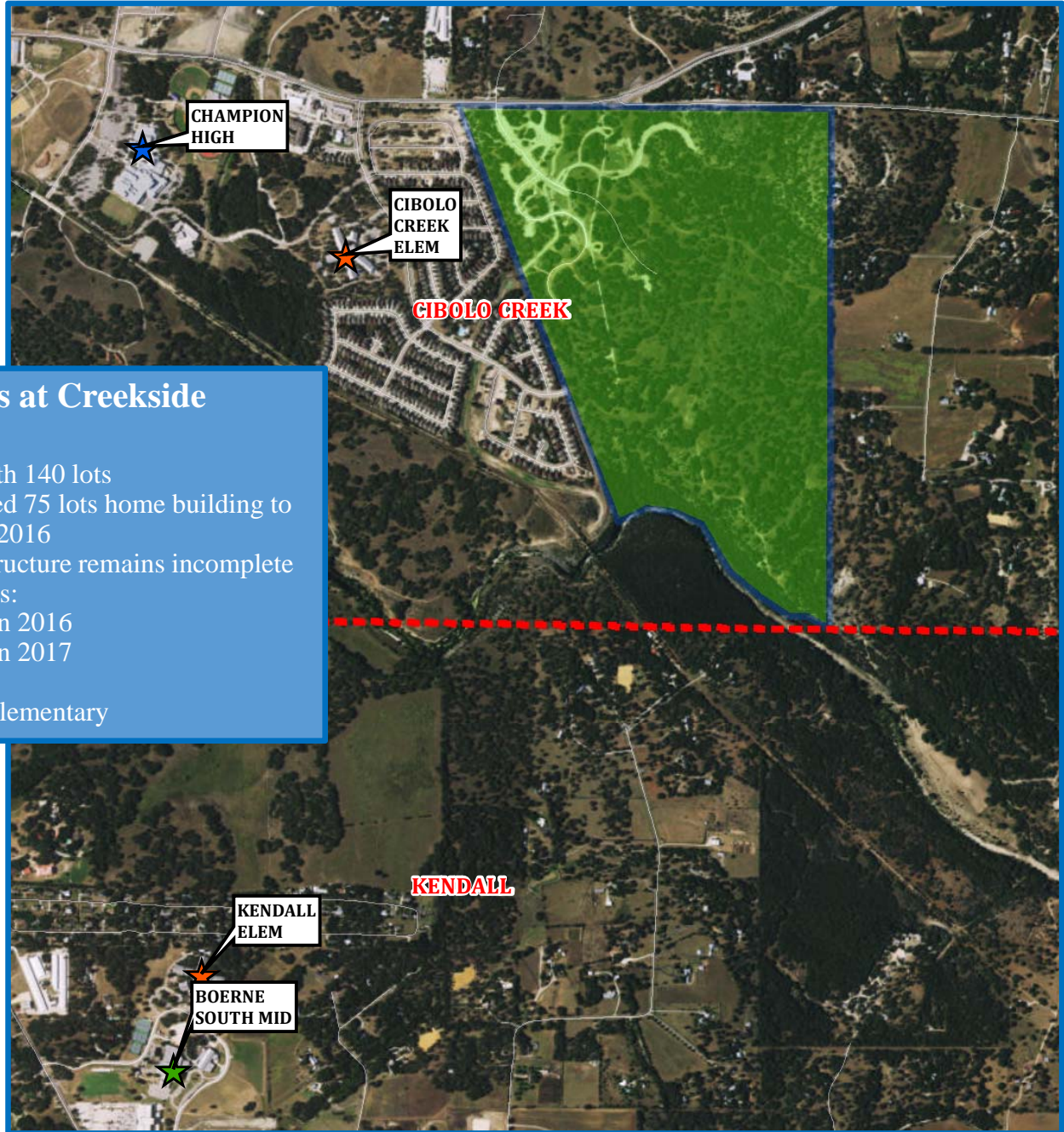
- Elkhorn Ridge**
- 281 total lots
 - Phase 1 with 61 lots has delivered
 - 11 homes under construction
 - Building 35 in 2016
 - \$325K-\$700K
 - Kendall Elementary





Residential Activity

Ranches at Creekside



Ranches at Creekside

- 868 total lots
- Phase I & II with 140 lots
- Phase I delivered 75 lots home building to begin Summer 2016
- Phase II infrastructure remains incomplete
- Absorption rates:
 - 40-45 in 2016
 - 70-80 in 2017
- \$290K+
- Cibolo Creek Elementary





Residential Activity

Southglen



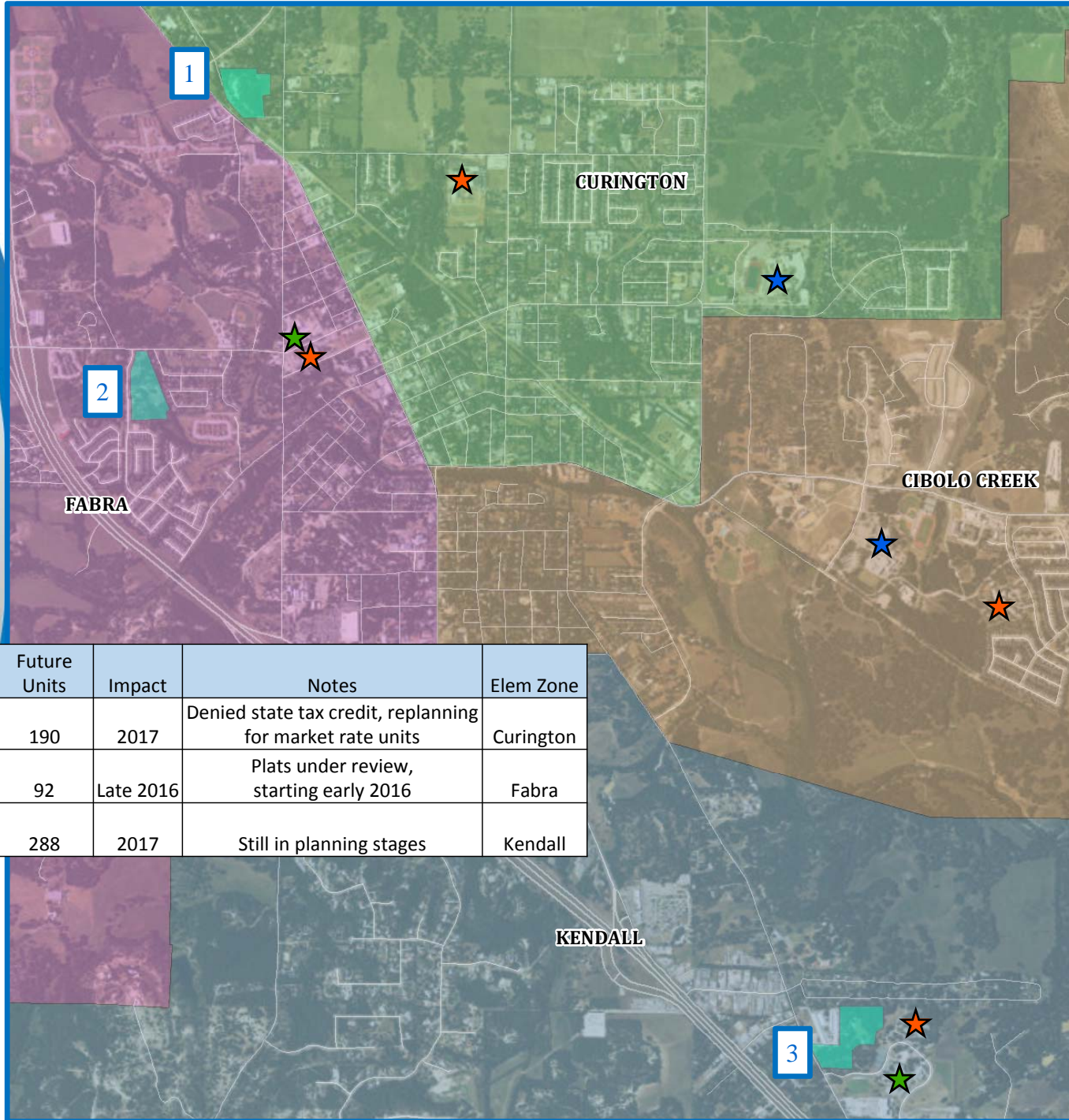
Southglen

- 375 future lots
- Phase 1 and 3 with roadway and 37 lots final plat approved 3/20/2016
- Groundwork starting summer 2016
- Homebuilding starting in late to mid 2017
- 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	575	589	608	654	665	663	660	700	712	708	689	700	647	8,620	388	4.7%
2018/19	50	605	631	629	659	716	726	711	696	740	797	696	688	668	9,012	392	4.5%
2019/20	50	638	666	668	683	708	777	778	750	734	828	783	692	657	9,412	400	4.4%
2020/21	50	682	698	708	725	741	768	833	820	790	809	812	780	663	9,879	467	5.0%
2021/22	50	717	745	740	764	776	800	824	877	864	877	795	809	745	10,383	504	5.1%
2022/23	50	750	781	788	788	816	832	858	870	925	959	861	791	773	10,842	459	4.4%
2023/24	50	782	825	834	843	844	870	892	905	919	1,025	942	858	757	11,346	504	4.6%
2024/25	50	823	836	869	885	896	907	933	940	955	1,020	1,007	939	820	11,880	534	4.7%
2025/26	50	862	881	895	914	941	955	972	984	992	1,060	1,003	1,003	897	12,409	529	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 8,600 by the fall of 2017
- 5 year growth = 2,000 students
- 2020/21 enrollment = 9,879 students
- 10 year growth = 4,530 students
- 2025/26 enrollment = 12,409 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	793	834	886	919	981	1,058	1,127	1,185	1,253
Curington Elementary	800	778	633	645	675	689	684	690	702	706	710	721	736
New Fabra Elementary	800	674	565	572	593	624	655	687	737	791	842	899	963
Fair Oaks Ranch Elementary	850	919	843	933	1,017	1,095	1,139	1,198	1,246	1,278	1,334	1,354	1,359
Kendall Elementary	750	669	657	678	726	774	826	878	926	972	1,035	1,107	1,187
ELEMENTARY TOTAL	3,950	3,806	3,404	3,579	3,804	4,016	4,190	4,372	4,592	4,805	5,048	5,266	5,498
Elementary Absolute Growth		186	-402	175	225	212	174	182	220	213	243	218	232
Elementary Percent Growth		5.14%	-10.56%	5.14%	6.29%	5.57%	4.33%	4.34%	5.03%	4.64%	5.06%	4.32%	4.41%
Boerne Middle North	875	511	730	777	823	856	879	934	952	969	994	1,044	1,086
Boerne Middle South	1,250	700	1,125	1,186	1,249	1,291	1,383	1,509	1,613	1,684	1,722	1,784	1,862
MIDDLE SCHOOL TOTAL	2,125	1,211	1,855	1,963	2,072	2,147	2,262	2,443	2,565	2,653	2,716	2,828	2,948
Middle School Absolute Growth		-15	644	108	109	75	115	181	122	88	63	112	120
Middle School Percent Growth		-1.22%	53.18%	5.82%	5.55%	3.62%	5.36%	8.00%	4.99%	3.43%	2.37%	4.12%	4.24%
Samuel V. Champion HS	1,750	1,452	1,533	1,596	1,651	1,749	1,826	1,912	2,014	2,121	2,285	2,442	2,584
Boerne HS	1,300	1,024	1,087	1,094	1,093	1,100	1,134	1,152	1,212	1,263	1,297	1,344	1,379
HIGH SCHOOL TOTAL	3,050	2,476	2,620	2,690	2,744	2,849	2,960	3,064	3,226	3,384	3,582	3,786	3,963
High School Absolute Growth		93	144	70	54	105	111	104	162	158	198	204	177
High School Percent Growth		3.90%	5.82%	2.67%	2.01%	3.83%	3.90%	3.51%	5.29%	4.90%	5.85%	5.70%	4.68%
DISTRICT TOTAL	9,125	7,493	7,879	8,232	8,620	9,012	9,412	9,879	10,383	10,842	11,346	11,880	12,409
District Absolute Growth		264	386	353	388	392	400	467	504	459	504	534	529
District Percent Growth		3.7%	5.2%	4.5%	4.7%	4.5%	4.4%	5.0%	5.1%	4.4%	4.6%	4.7%	4.5%

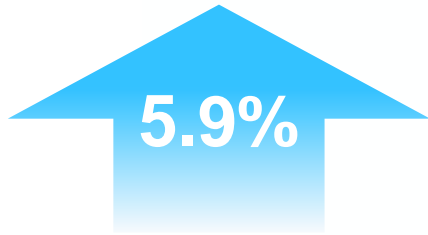




County Appraisal Values

Percent Change in Value 2014 – 2015

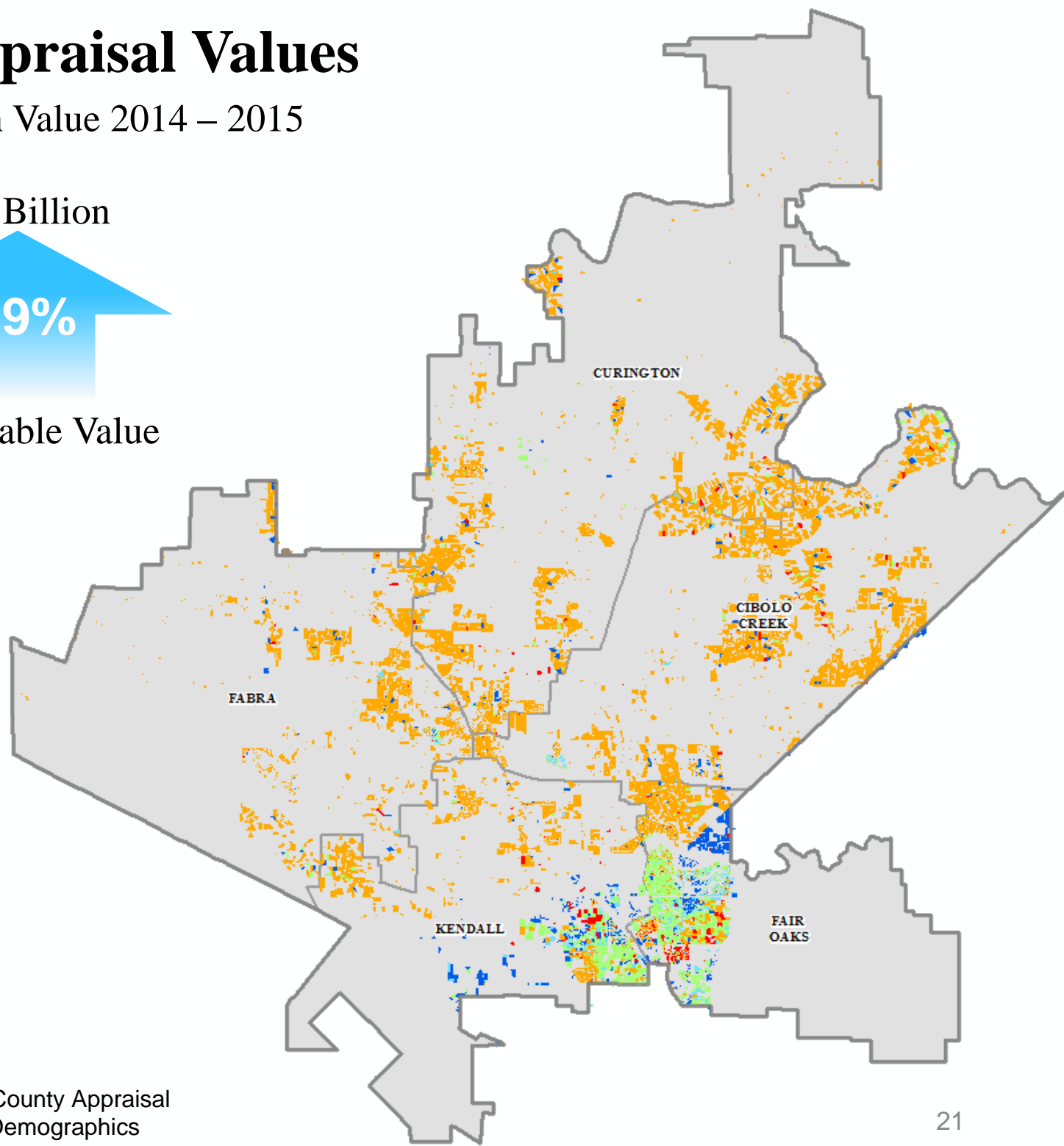
\$5.6 Billion



Net Taxable Value

Percent Change in Value

- Negative Change
- Little or No Change
- 3% to 10% Change
- 10% to 15% Change
- > 15% Change



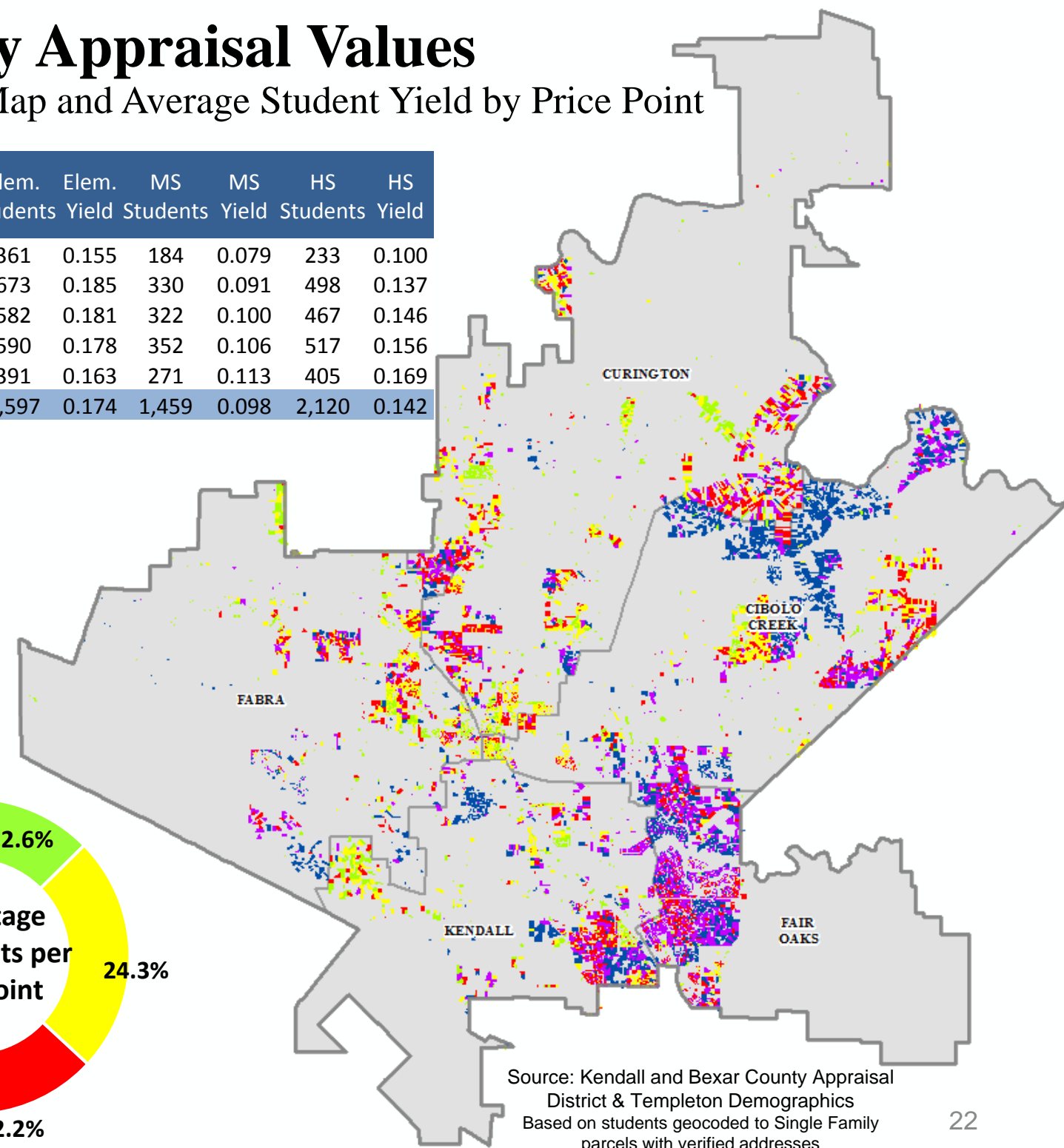
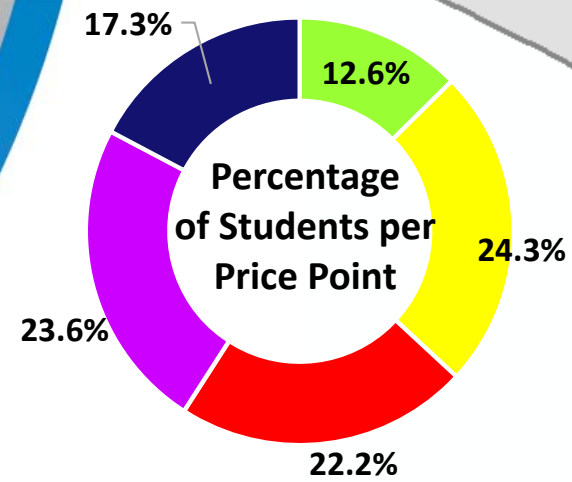
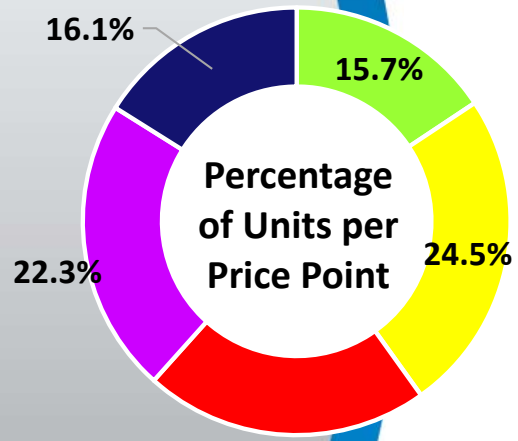
Source: Kendall and Bexar County Appraisal Districts and Templeton Demographics



2015 County Appraisal Values

Appraisal Values Map and Average Student Yield by Price Point

Legend	Appraisal Values	Units	Total Students	Total Yield	Elem. Students	Elem. Yield	MS Students	MS Yield	HS Students	HS Yield
	< \$150K	2,336	778	0.333	361	0.155	184	0.079	233	0.100
	\$150K - \$250K	3,646	1,501	0.412	673	0.185	330	0.091	498	0.137
	\$250K - \$350K	3,209	1,371	0.427	582	0.181	322	0.100	467	0.146
	\$350K - \$500K	3,321	1,459	0.439	590	0.178	352	0.106	517	0.156
	> \$500K	2,400	1,067	0.445	391	0.163	271	0.113	405	0.169
Grand Total		14,912	6,176	0.414	2,597	0.174	1,459	0.098	2,120	0.142



Source: Kendall and Bexar County Appraisal District & Templeton Demographics
Based on students geocoded to Single Family parcels with verified addresses





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: 9,879 students.
- Boerne ISD is projected to have more than 12,400 students for the 2025/26 school year.