

BRAZOSPORT INDEPENDENT SCHOOL DISTRICT

Long Range Facilities Planning Committee
2014 Bond Program
Meeting #3

April 24, 2014



AGENDA

- Chair's Welcome
- Demographic Report
 - Templeton Demographics
- Master Schedule/Meeting Overview
- Meeting Schedule

Demographic Report

*Brazosport
Independent
School
District*



Demographic
Study
April 2014

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


TEMPLETON
DEMOGRAPHICS

Economic Conditions

- Texas nonfarm employment growth was up 2.3% in 4Q13, well above the U.S. increase of 1.5%. (BLS/TWC)
- The state's unemployment rate has been at or below the national rate for 7 consecutive years. (State Comptrollers Office)
- Texas' \$18.7 billion in exports for November 2013 represented more than 18% of all U.S. exports, a percentage that has been steadily increasing since 2009. (Census Bureau and Wisetrade)
- In 2011, Houston became the 5th largest MSA in the country behind DFW, Chicago, Los Angeles and New York City. (City Journal – Winter 2013)

Unemployment rates - Texas Labor Market Information (March 2014)

- U.S. 6.8%
- Texas 5.3%
- Houston MSA 5.2%
- Lake Jackson 5.0%

Lake Jackson positioned for strong employment growth with Dow Chemical expansion.

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National Economic Overview

Texas has **4** of the top 10 fastest growing MSAs!

1. Austin-Round Rock-San Marcos TX
2. Houston-Sugar Land-Baytown, TX
3. Dallas-Fort Worth-Arlington, TX
4. Raleigh-Cary, NC
5. Salt Lake City, UT
6. Seattle-Tacoma-Bellevue, WA
7. Provo-Orem, UT
8. Phoenix-Mesa-Glendale, AZ
9. San Antonio-New Braunfels, TX
10. Portland-Vancouver-Hillsboro, OR-WA

Source: Forbes

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Brazoria County Economic Overview

Indicator	Value
Annualized Job Creation (4,700 March 2014 year over year)	3.2%
Unemployment (5.5% March 2014 year over year)	-1.0%
Texas Oil & Gas Production (Fiscal 1014 year over year)	40%
Median List Home Price (\$188,500)	7.7%
Existing Home Inventory (4.6 Month's Supply)	-16%

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Brazoria County Economic Overview

Dow Chemical Innovation Center-Lake Jackson

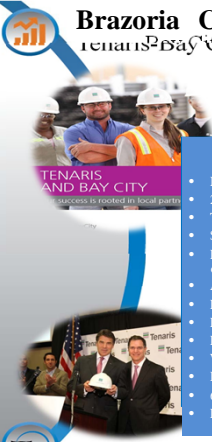
**DOW CHEMICAL
NEW TEXAS INNOVATION CENTER**

- Set to replace current R&D facility in Freeport
- Currently under construction (started in Dec. 2013)
- Site sits on approximately 50 acres
- 5 total buildings totaling 900,000 square feet
 - 2 R&D buildings
 - Administrative/Office Building
 - Visitor Center
 - Employee Amenities Center
- New facility will create new job opportunities
- Spur more development in Lake Jackson area
- Phase I construction set to be complete in early 2015
- Phase I = administrative office building
- Phase II = remaining buildings completion in 2016
- Dow plans to move 2,000 employees into the center
- Located in heart of Lake Jackson near Highway 288 and Abner Jackson Parkway

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Brazoria County Economic Overview

TENARIS Bay City



TENARIS

- Main headquarters in Argentina and Luxembourg
- 27,000 employees worldwide
- Tenaris-USA based in Houston
- \$10B in annual net sales worldwide
- Provide seamless and welded line products for use in offshore, onshore, and deepwater pipelines
- Announcement made on 02-15-13
- Located in Matagorda County in Bay City
- First seamless pipe mill in United States
- Estimated investment \$1.5B
- Will address growing demands in the energy industry
- Direct economic influence on area
- 600 new direct manufacturing jobs
- Expected to open in 2016


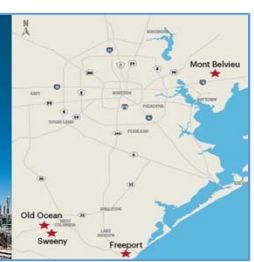



Tenaris-Bay City Site Location

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Brazoria County Economic Overview

Phillips 66 – Freeport

Phillips 66 – New Freeport Terminal

- \$1 Billion investment in the Freeport terminal
- Terminal is for shipping fuel from plants in Sweeny, Old Ocean and Mont Belvieu to overseas customers
- Expecting to begin construction in first half of 2015
- Targeting mid-2016 for operations to begin

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Brazoria County Economic Overview

Freeport LNG– Freeport



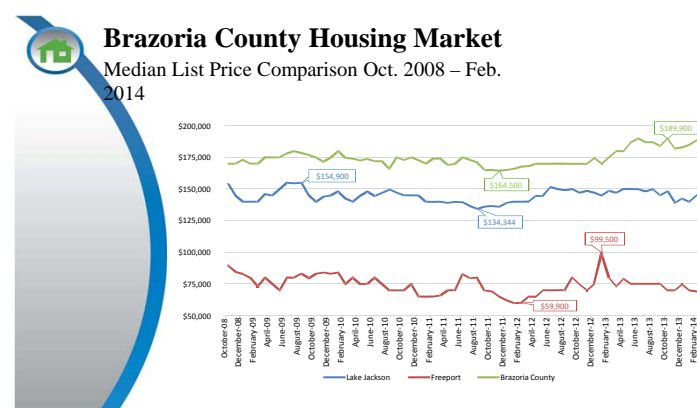
Freeport LNG's Expansion

- 3 new "trains" that convert natural gas to liquid natural gas on Quintana Island
- Expecting to begin construction in 2014
- Total investment will be \$14 billion and will employ more than 3,500 workers during the 4-5 year construction period and 160 permanent jobs on the site

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Brazoria County Housing Market

Median List Price Comparison Oct. 2008 – Feb. 2014



Month	Lake Jackson	Freeport	Brazoria County
October 08	\$154,900	\$75,000	\$189,900
February 09	\$154,900	\$75,000	\$189,900
June 09	\$154,900	\$75,000	\$189,900
October 09	\$154,900	\$75,000	\$189,900
February 10	\$154,900	\$75,000	\$189,900
June 10	\$154,900	\$75,000	\$189,900
October 10	\$154,900	\$75,000	\$189,900
February 11	\$154,900	\$75,000	\$189,900
June 11	\$154,900	\$75,000	\$189,900
October 11	\$154,900	\$75,000	\$189,900
February 12	\$154,900	\$75,000	\$189,900
June 12	\$154,900	\$75,000	\$189,900
October 12	\$154,900	\$75,000	\$189,900
February 13	\$154,900	\$75,000	\$189,900
June 13	\$154,900	\$75,000	\$189,900
October 13	\$154,900	\$75,000	\$189,900
February 14	\$154,900	\$75,000	\$189,900

Source: Zillow Real Estate Data

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Brazoria County Housing Market

Multiple Listing Service – YTD SFD Activity & Inventory

	Jan-14	%Change
YTD Sales	55	-16%
Average Price	136,000	0.5%
Median Sell Price	123,000	-2.0%
Listings	444	-14%
DOM	88	-44%
Monthly Supply	4.6	-15%

Source: Texas A&M Real Estate Center

Houston New Home Ranking Report


ISD Ranked by Annual Closings – 4Q13

Rank	District Name	Annual Starts	Annual Closings	YOL	Future
1	Katy ISD	3,760	3,544	3,203	4,450
2	Cypress-Fairbanks ISD	3,062	3,057	3,427	6,242
3	Fort Bend ISD	3,102	2,914	3,043	5,508
4	Houston ISD	3,326	2,543	2,811	3,194
5	Conroe ISD	2,213	1,950	2,931	3,892
6	Lamar ISD	1,978	1,741	2,395	3,431
7	Klein ISD	1,700	1,591	1,908	4,332
8	Humble ISD	1,349	1,264	1,938	4,373
9	Tomball ISD	1,104	1,158	2,017	2,001
10	Clear Creek ISD	735	663	1,176	707
11	Alvin ISD	667	660	1,337	3,493
12	Spring ISD	523	472	1,135	2,929
13	New Caney ISD	538	436	656	2,204
14	Aldine ISD	373	399	1,509	3,724
15	Magnolia ISD	480	361	817	2,301
16	Pasadena ISD	271	301	388	371
17	Dickinson ISD	333	293	591	573
18	Spring Branch ISD	355	291	394	623
19	Goose Creek ISD	297	291	870	367
20	Montgomery ISD	368	270	717	1,761

33	Santa Fe ISD	31	43	63	50
34	La Porte ISD	84	36	96	9
35	Brazosport ISD	42	31	179	364
36	Stafford	34	19	11	0
37	Texas City ISD	24	17	184	357
Totals		28,233	25,627	38,663	70,233

Active Housing Developments

College Park



- City of Clute
- 74 lots approved
- 13 of 74 are currently under construction
- 200 additional lots possible
- Griffith Elementary

Active Housing Developments

Audubon Woods Three



- City of Richwood
- Last large subdivision within the City of Richwood
- 62 single-family residential homes
- City Manager anticipates all 62 homes to be constructed in 2014
- \$195K-\$210K
- Polk Elementary

Active Multi-Family Developments

New Multi-Family



New Multi-Family 2014

- City of Lake Jackson
- 240 unit luxury style apartments
- Under construction
- Water and sewer installed
- Complete in late 2014
- Roberts Elementary Zone

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Active Housing Developments

Woodshore Development



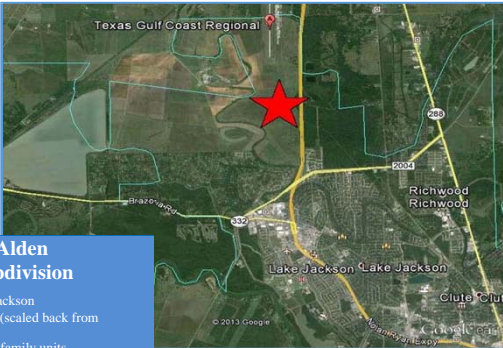
Woodshore Development

- City of Clute
- Located at Oyster Creek & Dixie Drive
- 290 total lots
- 6 phases over 6 years with approximately 50 homes per year
- Section 6 has approximately 40 townhomes
- Dirt work has begun
- Ogg Elementary Zone

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Future Housing Developments

Alden Subdivision



Alden Subdivision

- City of Lake Jackson
- 1300 total lots (scaled back from 2200 units)
- 500-600 multi-family units
- 987 total acres
- Development not likely for 3-5 years
- Brannen Elementary Zone

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Future Housing Developments

Future Homes



Future Homes

- City of Lake Jackson
- Possible 900 future homes
- 400 acres
- No time frame for development
- Brannen Elementary Zone

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Future Multi-Family Developments The Paladium Group

The Paladium Group

- City of Lake Jackson
- Tax credit apartment complex
- Not approved as of March 2014
- 150 total units
- 120 tax credit units and 30 market rate units
- If approved, would impact district in late 2015 or early 2016
- Brannen Elementary Zone

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Student Density Map

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Enrollment History

Year (Oct 1)	EE/PreK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	Total %
2009/10	547	925	973	940	863	1,004	922	903	941	927	1,072	992	876	876	12,861		
2010/11	578	941	925	955	929	954	976	886	908	957	1,089	915	896	844	12,727	-124	-1.0%
2011/12	525	896	975	924	930	924	945	950	907	889	1,067	923	900	756	12,551	-186	-1.5%
2012/13	540	898	953	977	930	932	908	950	974	894	1,048	970	865	703	12,542	-9	-0.1%
2013/14	520	915	881	914	958	909	931	920	945	962	986	925	927	876	12,289	-253	-2.2%

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

Cohort Analysis

Cohort	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th
3-yr Avg	0.991	1.012	0.994	0.983	0.995	0.991	1.003	1.011	0.988	1.132	0.880	0.959	0.802
2010/11	1.017	1.000	0.982	0.988	0.991	0.966	0.961	0.994	1.017	1.175	0.854	0.903	0.963
2011/12	0.995	1.036	0.999	0.963	0.995	0.991	0.990	1.024	0.990	1.115	0.848	0.981	0.944
2012/13	0.959	1.018	1.002	1.006	1.013	0.983	1.005	1.015	0.986	1.179	0.909	0.937	0.781
2013/14	1.019	0.981	0.980	0.981	0.977	0.959	1.013	0.995	0.988	1.103	0.883	0.956	0.782

Roll-up Analysis

Roll-up	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth
2013 cohort	932	898	863	916	936	908	943	915	933	1,061	870	884	724	12,305	-84
3-yr avg	907	926	875	919	953	901	934	930	933	1,080	867	887	744	12,385	-4

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Race/Ethnicity and Economically Disadvantaged

Year (Oct 1)	Total	Hispanic	American Indian or Alaska Native	%	Asian	%	White	%	Two or more races	%	Native Hawaiian/Other Pacific Islander	%	Economically Disadvantaged	%
2009/10	12,861	5,786	44	0.3%	226	1.8%	5,472	42.5%					7,272	56.5%

2013/14 Student Race/Ethnicity Totals

MORE THAN ONE, 277, 2.2%

Economically Disadvantaged

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Ten Year Forecast By Grade Level

Year (Oct.)	EE/PreK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total	Total Growth	Total %
2009/10	547	925	973	940	963	1,004	922	903	941	927	1,072	992	876	876	12,861		
2010/11	578	941	925	955	929	954	970	886	898	957	1,089	915	896	844	12,737	-124	-1.0%
2011/12	525	936	895	924	920	924	945	960	907	889	1,067	923	900	756	12,551	-186	-1.5%
2012/13	540	998	953	977	930	932	908	950	974	894	1,048	970	865	703	12,542	-9	-0.1%
2013/14	520	915	881	934	958	908	931	920	945	962	986	925	927	876	12,389	-153	-1.2%
2014/15	520	914	936	875	925	956	900	936	926	930	1,064	880	902	739	12,402	13	0.1%
2015/16	520	941	933	931	894	928	945	911	937	910	1,028	960	857	724	12,420	18	0.1%
2016/17	520	959	965	938	949	901	933	958	914	922	1,001	927	930	691	12,509	89	0.7%
2017/18	520	978	927	971	951	965	888	943	965	899	1,017	899	903	753	12,609	100	0.8%
2018/19	520	993	984	943	962	967	956	897	938	949	991	916	876	726	12,619	10	0.1%
2019/20	520	987	1,000	981	952	975	955	967	886	924	1,045	892	891	707	12,683	64	0.5%
2020/21	520	996	997	1,000	989	950	963	965	862	872	1,020	940	870	720	12,765	82	0.6%
2021/22	520	1,005	1,004	990	987	1,006	940	975	857	948	961	910	913	702	12,826	61	0.5%
2022/23	520	1,005	1,023	1,006	998	996	995	950	967	943	1,048	865	895	738	12,946	120	0.9%
2023/24	520	1,019	1,018	1,023	1,006	1,006	985	1,004	943	952	1,041	942	846	721	13,026	80	0.6%

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

- Brazosport ISD will reach 12,500 enrollment in 2016/17.
- 5 year growth = 230 students
- 2018/19 enrollment = 12,619
- 10 year growth = 637 students
- 2023/24 enrollment = 13,026



Five Year Forecast By Elementary and Middle School Campus

Brazosport ISD	History	Current	FALL ENROLLMENT PROJECTIONS									
Elementary (EE-4th)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Bocies Elementary	559	546	539	520	493	496	497	491	490	498	497	495
Brannen Elementary	465	464	472	484	519	571	592	623	651	679	710	741
Key Elementary	523	518	490	458	451	488	459	453	453	458	453	452
Polk Elementary	470	471	466	495	509	483	479	477	482	488	479	476
Griffitt Elementary	517	531	540	542	590	628	623	643	653	683	716	742
Long Elementary	473	473	480	481	473	459	455	454	480	440	442	436
Flaming Elementary	362	368	359	361	363	378	374	375	388	383	372	374
Robert's Elementary	591	535	512	500	505	486	493	503	501	501	506	501
St. Austin Elementary (EE-6th)	291	271	270	260	264	243	246	266	261	262	270	270
ITW Oge Elementary	442	434	440	471	505	519	533	531	520	535	533	540
Velasco Elementary	623	605	640	652	653	688	687	676	675	653	650	636
Total Elem.	5,316	5,197	5,208	5,224	5,305	5,400	5,428	5,494	5,529	5,579	5,610	5,664
Elementary Growth	27	-119	11	16	81	95	28	66	35	30	31	54
Middle School (5th-6th)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Lanier Middle School	500	482	451	467	496	500	500	504	507	507	500	516
Racco Middle School	808	817	821	836	819	761	751	751	760	776	783	814
Total M.S.	1,308	1,279	1,273	1,302	1,315	1,260	1,251	1,275	1,277	1,284	1,313	1,331
Middle School Growth	-33	-29	-6	30	13	-55	-10	24	2	7	28	18

- Brannen, Ogg and Polk elementary schools will reach over 500 students in the fall of 2016.
- Lanier Middle School will be back up to 500 students in the fall of 2017.



Five Year Forecast By Secondary Campus

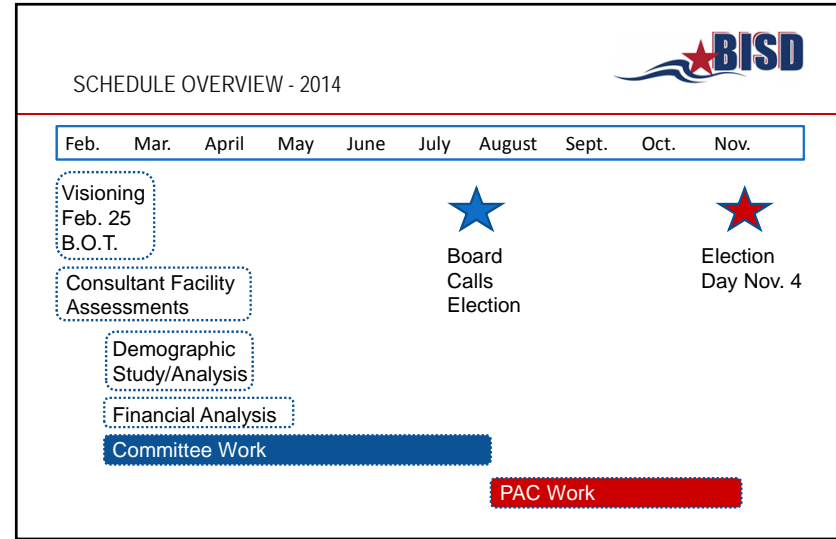
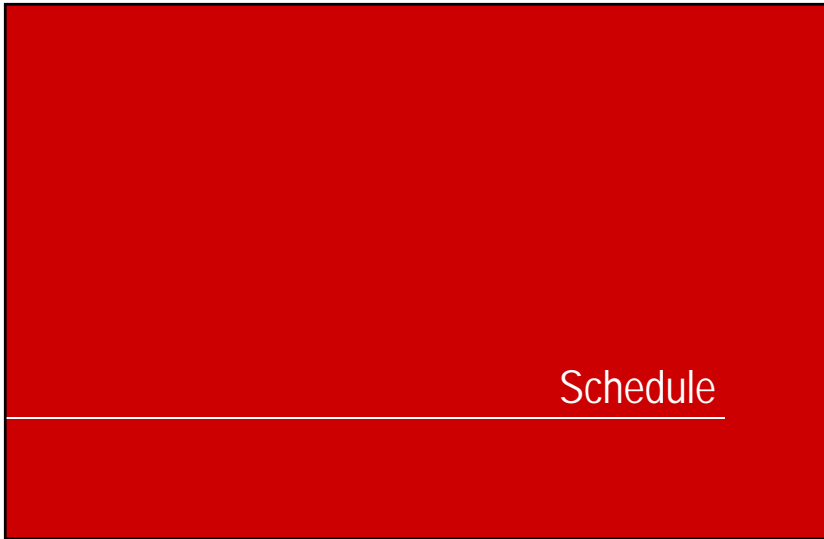
Brazosport ISD	History	Current	FALL ENROLLMENT PROJECTIONS									
Intermediate School (7th-8th)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Clute Intermediate (5th-8th)	907	844	919	931	952	962	1,004	1,033	1,074	1,085	1,097	1,103
Freeport Intermediate	493	566	564	521	515	526	550	539	540	583	575	554
Lake Jackson Intermediate	908	850	814	834	830	849	838	769	756	761	768	785
Total Int.	2,308	2,260	2,297	2,285	2,301	2,337	2,392	2,340	2,370	2,429	2,440	2,443
Intermediate Growth	49	52	43	-12	16	36	55	-52	30	59	12	3
High School (9th-12th)	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Brazosport High School	1,008	972	1,008	1,056	1,059	1,074	1,058	1,034	1,062	1,051	1,080	1,110
Brazoswood High School	2,429	2,423	2,458	2,384	2,371	2,379	2,332	2,382	2,369	2,335	2,345	2,321
Lighthouse Learning - ALC	139	109	109	109	109	109	109	109	109	109	109	109
High School Learning - GAIP	34	49	49	49	49	49	49	49	49	49	49	49
Total H.S.	3,610	3,553	3,624	3,608	3,588	3,611	3,548	3,574	3,589	3,534	3,583	3,589
H.S. Growth	-57	-57	71	-16	-20	23	-63	26	15	-55	49	6
Total Enrollment	12,842	12,389	12,402	12,420	12,509	12,609	12,683	12,765	12,826	12,946	13,026	
Total Growth		-453	13	18	89	100	10	64	61	120	81	

- Clute Intermediate will reach over 1,000 students in the fall of 2018.



Summary

- Houston area economy will continue to be one of the strongest in the country for job and population growth.
- Lake Jackson and Freeport are in position to see large job growth in the next 2-6 years.
- Dow Chemical started construction on 5 new buildings in Lake Jackson to hold 2,000 employees.
- Tenaris is opening a new plant in Bay City bringing 600 full time jobs by the end of 2016.
- Natural gas facilities expanding in the area adding jobs and over 14 billion in value to the area.
- New housing will need to come on-line to house the increase in jobs. New housing is position for growth in the northern portion of the district.
- Fall 2014 enrollment growth of 0.1% with an increase of 13 students. Fall 2014 enrollment = 12,402.
- Five year enrollment growth of 230 with Fall 2018 enrollment = 12,619.
- Ten-Year enrollment growth 637 with Fall 2023 enrollment = 13,026.
- District in position to evaluate campuses to gain efficiencies and prepare for enrollment growth.



MEETING DATES

- FIRST MEETING
 - Thursday, 3/27/14: 6:00-7:30pm at the Brazoswood 9th Grade Center Buc Room
- SECOND MEETING
 - Thursday, 4/10/14: 6:00-7:30pm at Ogg Elementary School
- THIRD MEETING
 - Thursday, 4/24/14: 6:00-7:30pm at the Brazoswood 9th Grade Center Buc Room
- FOURTH MEETING
 - Wednesday, 5/14/14: 6:00-7:30pm at location TBD
- FIFTH MEETING
 - Tuesday, 5/27/14 : 6:00-7:30pm at location TBD
- SIXTH MEETING
 - Thursday, 6/12/14: 6:00-7:30pm location TBD

Additional meetings as needed

- Tours: Saturday bus tour of all facilities – recommend 5/17/14