

Greater Leander Chamber of Commerce Monthly Membership Luncheon

Mid-Year Economic Update

Kirk D. Clennan, CEcD
Director, Economic Development
City of Leander



Tuesday, 28 July 2009

Outline

City of Leander

Department Updates

Development Partners

Public Sector

Private Sector

Community Numbers

Observations



City Council

Bond Rating increase from Baa to A3
with Moody's and from BBB+ to A- with
Standard and Poor's

Extended ETJ for a total of 61.51
square miles

City limits – 22.57 square miles

ETJ – 38.94 square miles



City Manager

Brushy Creek Regional Utility Authority
Regional Water Treatment Plant
Transmission and Raw Water System
implementation

Staff development to 160 employees

Web site improvements



Regional presentations on transportation and land use

Capital Improvement Projects

Engineering

Project Name: Bagdad Road North and FM 2243 Paving Improvements

Project Description: Signalized intersection at FM 2243 and Bagdad Road will widen roadway to five lanes with center left turn and storm water quality treatment system. Road improvements will be made 1000 feet north and 500 feet east and west of the intersection with 360 feet of transition pavement plus an additional 2200 feet of vegetative filter strips.

Location: Bagdad Road extends from FM 2243 to approximately 1,000 feet north with an additional 360 linear feet north of vegetative filter strips for storm water quality.

Revised Budget: \$ 2,013,372 (under construction, expected to be complete by November 2009)

Project Name: Bagdad Road Side Walks

Project Description: Phase 1: Western ROW - High School to Crystal Falls Parkway.

Phase 2: Western ROW - Crystal Falls Parkway to Bledsoe Park.

Phase 3: Eastern ROW - Kettering Drive to Crystal Falls Parkway.

Location: Bagdad Road from Leander High School to Bledsoe Park.

Revised Budget (20% of total project cost): \$ 92,774 (on hold due to TXDoT letting schedule)

Federal Grant Money (80% of total project cost): \$ 337,360

Project Name: County Glen Drainage

Project Description: County Glen area storm sewer, curb; gutter roadways, detention; water quality improvements on selected streets to alleviate local flooding.

Location: County Glen Subdivision Sections southeast of Bagdad and County Glen Drive.

Revised Budget: \$ 198,197 (Design Budget)



Capital Improvement Projects

Engineering (cont.)

Project Name: East Crystal Falls Parkway Street and Drainage Improvements

Project Description: Four-lane divided arterial roadway (MAD 4) including signage, pavement markings, traffic light signalization, drainage, and water quality improvements, and railroad crossing upgrades.

Location: Phase 1 – under construction from US 183A to Ronald Reagan Boulevard. Phase 2 – under design; utility relocation underway from US 183 to US 183A (includes railroad crossing improvements).

Revised Budget: \$ 8,541,576 Phase 1 and Phase 2

Project Name: Public Works Facility

Project Description: Additional 50' X 80' building with electrical and Sign Shop modifications including climate controlled fabrication room and storage.

Location: 805 Municipal Drive.

Revised Budget: \$ 279,634

Project Name: Sonny Drive Extension

Project Description: A two-lane roadway with an additional turn lane at Hwy. 183. The project includes a signalized intersection, Capital Metro Railroad crossing signal controls, and in-line storm water quality treatment system.

Location: Sonny Drive extended between Leander Road and US Hwy. 183.

Revised Budget: \$ 1,016,853 (final signal timing design from Capital Metro; expected bid by November 2009; begin construction January 2010; complete in September 2010)



Capital Improvement Projects

Engineering (cont.)

Utility CIP Project Report

Project Name: Wastewater Masterplan

Project Description: Prepare a Wastewater Master Plan for the City limits of Leander and ETJ through 2027. Evaluate treatment options, participation in the Brushy Creek regional wastewater system, create CIP list of projects with cost estimates, review possible regional system participation in the South San Gabriel basin, modifications required for the proposed TOD area, evaluate possible developments in the Crystal Falls area.

Revised Budget: \$ 78,630

Project Name: Water Masterplan

Project Description: Prepare a Water Master Plan for the City limits of Leander and ETJ through 2027. Prepare water models for entire service area for the current system, and projected systems in 2012, 2107 and 2027. Evaluate delivery options from proposed regional water system, create CIP list of projects with cost estimates, modifications required for the proposed TOD area, prepare models for new developments, assist the City with modeling and evaluating areas with pressure issues, evaluate possible developments in the Crystal Falls area.

Location: City of Leander and Leander ETJ.

Revised Budget: \$ 49,958 (Pending outcome of Wedemeyer track Development Agreement)



Capital Improvement Projects

Engineering (cont.)

Project Name: Block House Creek Wastewater Interceptor

Project Description: Design 24 to 30-inch wastewater interceptor to serve the Block House Creek drainage basin including the Cold Springs development, and to abandon the Horizon Park Lift Station.

Location: Runs from southeastern area of Leander's ETJ (Brushy Creek) to the Horizon Park Lift Station generally following along the alignment of Block House Creek.

Revised Budget: \$ 664,424 (design budget), Segment 1 Construction Bid - \$2,700,200, Segment 2 Estimated Construction Bid - \$645,732. Future Segment 3 Estimated Construction Cost - \$1,000,000.

Project Name: Brushy Creek North Wastewater Interceptor

Project Description: Design 30 to 36-inch wastewater interceptor to serve the Brushy Creek drainage basin including future Sarita Valley Ranch subdivision. Ultimately, this will also convey diverted flows from Leander Wastewater Treatment Plant to the Brushy Creek Regional System.

Location: Southeastern portion of Leander's ETJ along Brushy Creek between Ronald Reagan and southern limit of Leander's ETJ.

Revised Budget: \$ 375,573 (design budget), Estimated Construction Cost - \$3,100,000 (based on today's bid climate)



Urban Design Office

Present Comprehensive Planning Update Committee (CPUC) findings

Transit Village Partners will submit an increased mixed-use density comprehensive planning update in-and-around the Capital MetroRail Station

Design, engineer, bid and construct the following:

- Leander "T" (Mel Mathis Avenue), extension of CR 273

- San Gabriel Parkway from US 183 to US 183-A

- CR 269 extension

- Toll Lane completion from FM 1431 north passed FM 2243



Planning

Google Map Application that identifies developments

A+ FEDERAL CREDIT UNION

Site Development Permit

11255 Old 2243 West

Proposed Credit Union – under construction

Approximately 3,882 square feet

B&B BODY AND PAINT

Site Development Permit

Leander Heights 3, Lots 3 & 4, Block A

Proposed Auto Body & Paint shop – under construction

Approximately 20,888 square feet

BAGDAD FALLS

Site Development Permit

Final Plat

906 & 908 Crystal Falls Pkwy

Proposed Water Quality/Detention Improvements for future commercial development – under review

BAGDAD MEADOWS

Site Development Permit

100 Bagdad Road

Construction of Office/Warehouse Building – construction complete

Approximately 31,500 square feet

BAGDAD ROAD CONVENIENCE STORE

Site Development Permit

Greener Acres, Lot 1

Proposed Convenience Store/Retail Fueling Facility – under construction

Approximately 3,500 square feet



Planning (cont.)

COUNTY GLEN PLAZA

Site Development Permit
Highway Village Unit Two, Lots 54 & 55
Proposed Commercial/Retail Center – under construction
Approximately 15,970 square feet

E CRYSTAL FALLS PKWY – WASTEWATER FORCEMAIN

Site Development Permit
Proposed Waste Water Force Main

GATEWAY AT LEANDER – LOT 7

Site Development Permit
1395 N. Hwy 183
Proposed Retail Center – under construction
Approximately 11,470 square feet

LISD BENBROOK RANCH SUBDIVISION

Concept Plan
Proposed approximately 170.764 acres for school use
Under Review

LISD STADIUM IMPROVEMENTS

Site Development Permit
3301 S. Bagdad Road
School Stadium Renovations – under construction

MCDONALDS

Site Development Permit
1445 N. Hwy 183 – construction complete
Approximately 4,260 square feet



Planning (cont.)

SARITA VALLEY PRELIMINARY PLAT

Preliminary Plat

Proposed approximately 779 single-family residential lots, 683 multi-family units, 33.32 acres commercial, and 64.63 acres parkland

Under Review

SPEEDY STOP

Site Development Permit

101 S. Hwy 183

Addition of fuel pumps – under review

TILE WAREHOUSE

Site Development Permit

21600 Nameless Road

Proposed Warehouse – under review

Approximately 7,500 square feet

WRENCH FUNERAL HOME

Site Development Permit

1200 S. Bagdad Road

Proposed Funeral Home – under construction

Approximately 4,340 square feet



Economic Development

- ✓ Emails sent from 5 January 2009 thru 20 July 2009 – more than 95,000
- ✓ Commercial/Industrial prospect responses to the Governor's Office, Greater Austin Chamber of Commerce, Site Selectors and Companies – 42
- ✓ The community replied to 16 Requests for Information that total more than 8,300 employees, \$1.8 billion in capital investment, 450 acres of commercial/industrial development and 3.9 million square feet of facilities
- ✓ Freeport Exemption
- ✓ Public Art Ordinance and Committee Development
- ✓ Wild Timber Design and Aquatic Industries closures
- ✓ Attended ICSC RECon (59 leads)
- ✓ Development of a 140 lead restaurants
- ✓ Amended Primary Employer's Directory and Site/Facility Inventory with Google Map application
- ✓ Entrance Monument Sign collaboration
- ✓ Co-hosted the Dallas Federal Reserve
- ✓ Coordinating Leander's 3rd Cruise In for October
- ✓ Visited six existing companies about business expansion
- ✓ Began participation in the Texas State University Certified Public Manager's continuing education program
- ✓ Participated in the Greater Austin Chamber of Commerce Federal Advocacy Initiative
- ✓ Speaking engagements to SMPS and other Real Estate professional groups



Parks & Recreation

Benbrook Ranch Park broke ground on a skate park, which will be finished in the next few months. The facility will be open during regular park hours and will not have an admission cost. Skateboarders and in-line skaters are welcome.

Parks & Recreation Programs (All are in Bledsoe Park)

Suddenlink Full Moon Concerts

Sons of the Revolution (7 August)

The Glen Collins Band (2 October)

Bluegrass Festival, 4th Annual (26 September)

Movies in the Park

High School Musical 3: Senior Year *presented by Austin Java*
(Sept. 4)

Bolt *presented by Randolph-Brooks FCU* (Sept. 18)

Tale of Despereaux *presented by Randolph-Brooks FCU* (Oct. 9)

Randolph-Brooks FCU will also be presenting movies on Oct. 23rd
& Nov. 6th

Suddenlink 4th Annual Bluegrass Festival (26 September)



Crystal Falls Golf Club

The first half of 2009 has challenged the golf course. This contrasts with 2008 activity. The golf industry has experienced a tough time as well. However, the City's municipal golf course is doing much better than other golf operations. Sometimes being smaller and familiar can be an asset.

The weather has also compounded the slowed economy. Up until 12 June the course held its own. At that time, for what ever reason Mother Nature's mood changed. The relentless heat and lack of rain has had a major affect on facilities. Play dropped off significantly due to extreme heat and lack of rainfall. Turf conditions have suffered. A sluggish economy is one thing but the weather controls golf operation's success or failure. We need rain. In spite of this, things still remain positive.

Crystal Falls had thirteen outside charity and benefit tournaments along with the Annual Hill Country Amateur Championship. This was a huge success. While play has dropped off a little, memberships have increased and first time guests have come back for more. The Senior Golf Association has grown tremendously and is now larger than our Men's Golf Association. Junior activity has also increased. When Mother Nature decides to cooperate again, things will be even better.

There are eight outside events scheduled along with junior golf camp, the Senior's Golf Association and Men's Golf Association Tournaments.



Public Safety

Fire Department Activities

Complete ISO Review with expected 7-16 percent decrease in property insurance of Commercial Business in the City and 9-11 percent decrease of residents in the city to home owners policy.

Complete Construction of New Fire Department Facilities

Increase Fire Prevention Efforts with inspections and education

Maintain a 33% Cardiac Arrest Resuscitation Rate, Return of pulse and breathing of patients that are not breathing and have no heart beat in the City of Leander (National Average is 12%)

Increase Community Preparedness for Disasters with implementing a new alerting system to registered citizens of dangerous situations by sending pertinent messages to e-mail, text, and pagers.

Provide Community Awareness of Safety Practices and Fire Department Operations with a Citizens Fire Academy in September of 2009.

Bond Project Name: Fire Department Fleet

Project Description: Unit

Pumper

Mini Pumper

Heavy Rescue

Command

Air/Power/LGT

Trailer

Manufacturer

Pierce (in service)

Pierce (in service)

Horton (in service)

Horton (in service)

Foster (in service)

Location: 201 North Brushy.

Revised Budget: \$ 1,321,910

Project Name: Fire Admin and Training

Project Description: This project includes Fire Department administration building, Station No. 3 and Training Center.

Location: Sonny Drive at Hwy. 183.

Revised Budget: \$ 2,900,000



Public Safety (cont.)

Police

Sworn Officers: 30

Vehicles: 13

Recognition: Commission on Accreditation for Law Enforcement Agencies (CALEA)

Total Station: forensic mapping survey equipment for use at crime scenes and collisions. Officer Wilcox has been trained in collision reconstruction.

Radio information: The new radio system allows interoperability between Leander Police Department and all Williamson and Travis County police agencies, as well as the Leander Fire Department. The system includes event channels; a channel was used for Liberty Fest for all city employees. The system allows direct contact with other agencies during mutual aid events. In case of major emergency or disaster the system includes joint task force channels.

Citizens Police Academy: one class per year, roughly nine weeks, that meets once per week. Contact Officer Luana Wilcox, 512.528.2832

National Night Out: Wednesday, 5 August 2009 from 6:00 p.m. to 9:00 p.m.

Project Name: Police and Fire Communications

Project Description: Public Safety Dispatch (800mghz Radio System) includes County-Wide trunk system, two-position console, PD subscribers (50 units), FD subscribers (110 units), CAD/RAM.

Location: 705 Leander Drive.

Revised Budget: \$ 2,033,707

Project Name: Police Training Facility

Project Description: Expansion of shooting range from 25 yards to 50 yards, complete original safety baffling of 25 yard range, training obstacle course to include surveying, site work, excavation, sub-grade, asphalt pathway, course fixtures, and shooting station with bullet trap.

Location: 705 Leander Drive.

Revised Budget: \$ 228,792



Public Sector

Central Texas Regional Mobility Authority (CTRMA)

The 183-A toll road has gone completely cashless. The Mobility Authority utilizes license plate recognition technology to send a toll bill to customers who do not have a TxTag.

183A became the fourth cashless toll road in Texas. The move reduces operating costs, improves safety and vehicle emissions.

Design work has begun on an extension of 183A from FM 1431 to just north of FM 2243, approximately 4.5 miles. As part of the extension project the Mobility Authority will consider a change to the tolling structure that might allow a toll reduction at the Park Street Main Plaza.

The Mobility Authority continues to work on development of more than \$1.5 billion in additional transportation projects serving the region.



Public Sector (cont.)

Capital Metropolitan Transportation Authority (Capital Metro)

Ridership today – for the spring it was approximately 187 one-way or 374 round trip from Leander only.

Fun Facts (year-to-date) – May Express ridership is down about 5% which includes Lakeline and Tech Ridge routes as well.

Estimated Rail Trips per day – Capital Metro estimates there will be 1,700-2,000 trips per day for the entire rail system (not just Leander).

Train schedule – during peak morning at approximately (5:40 a.m. to 8:40 a.m.) and evening hours (3:45 p.m. to 6:45 p.m.) only every 30 minutes. As ridership and demand increases, Capital Metro will look into expanded service. For specific schedule times visit <http://allsystemsgo.capmetro.org/capital-metrorail-schedule.shtml>. The tentative schedule allows for seven southbound trips and three northbound trips in the morning, and then seven northbound trips and three southbound trips in the afternoon -- each weekday. The frequency will be every 30 minutes. Note: The schedule is subject to change based on real-time testing along the entire 32-mile line.

Vehicles – six trains, hold 200 people (108 seated), 100% ADA compliant

Travel Time – approximately 57 minutes from Leander to Downtown Station

Station amenities – metal canopies, ticket vending machines, signage, lighting, benches, windscreens and accessible ramps.



Fare – \$1.00 for one zone and \$1.50 for two zones. For specific information, please visit <http://allsystemsgo.capmetro.org/capital-metrorail-fares.shtml>

Park & Ride – 634 Spaces in Leander

Public Sector (cont.)

Williamson County

Roads

Updated Transportation Plan: The Commissioners Court has spent several months working on an updated County Transportation Plan. The last plan was created in 1999. The new plan will encompass what roads should be built or improved over the next twenty-five years, as well as various transit options, to help address expected growth.

US 183 San Gabriel River to SH 29: This road project is being financed through the state's pass-through financing program. The improvements will include a new bridge over the South San Gabriel River and construction of a four-lane arterial roadway with shoulders, and wide depressed median. Construction is estimated to begin in fall of 2009 and completed in the summer of 2011.

Reveille Boulevard: Reveille Boulevard is a new roadway that will connect US 183 to CR 269. The road is scheduled to start construction in January 2010 and be completed approximately one year later.

FM 1431 Improvements: On June 8th, the Capital Area Metropolitan Planning Organization (CAMPO) Policy Board unanimously awarded \$7,058,000 for construction of improvements to FM 1431 between 183A and Cottonwood Creek Trail. The project includes the construction of wide shoulders on both sides of the roadway and a raised median with safer access points to the commercial and retail business in 1890 Ranch as well as other businesses in the area. The engineering for the project is being jointly funded by the City of Cedar Park and Williamson County.



Public Sector (cont.)

Williamson County

Buildings

The County will construct a new annex building in Round Rock. It will be named the J.B. & Hallie Jester Williamson County Annex, located on Old Settler's Boulevard, just east of Sunrise Road. The new site is about two miles from the current Round Rock Annex and is approximately 29,000 square feet. It will house Precinct One Commissioner, Justice of the Peace, Constable and the Tax Assessor/Collector's Round Rock Office. The tax office will be the first in the county to offer a drive through window for ease in paying property taxes, vehicle license fees and other business. Also, a large community room, which will include kitchen facilities for public meetings and usage is planned. An additional smaller building, approximately 6,500 square feet, will house an Emergency Medical Services (EMS) substation as well as a Sheriff's Office substation. The Williamson County and Cities Health District and Adult Probation offices will remain at their current location at 211 Commerce Cove, Round Rock. The Juvenile Probation Office also will move back into the original Round Rock Annex.

Parks

Construction of Quarry Splash Pad at Williamson County Southwest Regional Park: The County is adding a water play area for children of all ages to the Southwest Regional Park. This feature is designed to reflect the natural landscape of the area and its former use as a rock quarry. The feature will be constructed using some natural rock from the site. It is being designed by RVi Planning and Landscape Architecture. In addition to the water play area, there will be a restroom, large picnic shelter, several small birthday shelters and additional parking. It is anticipated to be completed in summer 2010 and will cost \$1.7 million.

Williams Tract Park: BWM Group was hired to complete a conceptual master plan for the County's newest park located between Leander and Liberty Hill at the intersection of CR 282 and CR 284. The park land is comprised of 1,011 acres and is located along the south fork of the San Gabriel River. Future park land will be developed as a passive park with hiking and biking trails and other amenities.



Public Sector (cont.)

Austin Community College (ACC)

MISSION – provide open access to quality higher education and career training and ability to address the immediate needs of the business community.

Acquire 50-100 acres in the Leander area for a future campus

Gateway to higher education and workforce training in Central Texas. The college enrolls nearly 34,000 credit students each semester.

Projected enrollment growth is nearly 40,000 by 2015, 45,000 by 2020, and nearly 50,000 by 2025.

Among the largest community colleges in the nation, ACC produces the backbone of the local workforce. On average 96% of community college students live, learn and remain in their community to work here.

In-district students pay only \$39 per semester hour.



Public Sector (cont.)

Leander Independent School District

School Year

2008/2009 – 28,370

2009/2010 projected enrollment – 29,869 (an increase of 5.3% over '08-'09)

Schools that will open this fall

Ronald Reagan Elementary School located near Henry Middle School and Vista Ridge High School.

River Ridge Elementary School located off of N. Quinlan Park Rd.

Vandegrift High School (near 3M off 2222)

2009/2010

23 elementary schools will exist in Leander ISD by 2010

New John Gupton Stadium (near Vista Ridge High School), with a seating capacity of 10,000, opens August 2010.

Lt. Matthew Vandegrift High School (the 5th LISD high school) opens near the Four Points Middle School (middle school #7 in LISD) facility.

Both campuses will be located off of 620 and 2222.

Four Points MS will open and VHS will re-open in their respective buildings for the 2010/2011 school year.

Leander ISD's student population is projected to surpass 50,000 by 2017 – although the district receives new demographic reports every year, and the current projections are subject to change.

This is the eighth summer that Leander ISD has gone to a four-day workweek schedule for summer operations. The work schedule was instituted in the summer of 2001 to save energy costs and maximize taxpayer dollars.

Leander ISD saved more than \$300,000 via Friday shutdowns last summer, and a total of approximately \$800,000 when all energy management techniques were counted. (This includes limiting LISD's summer programs to as few campuses as possible, maximizing energy cost savings.)

In addition, Leander ISD earned 31 ENERGY STAR Building Labels from the United States Environmental Protection Agency. Since working with the ENERGY STAR program, LISD has saved over \$10.1 million in utility costs.



LISD joined the E3 Alliance (Education Equals Economics). E3 is a group representing a cross section of business, government, community and education leaders designed to explore ways to set education priorities that will drive systemic change over the next decade in Central Texas. The partnership is designed to ensure that our education systems are preparing us for future economic strength in an increasingly globally competitive world where the strength of the U.S. is waning.

Private Sector

The Forum (HEB)

A+ Federal Credit Union's construction across from The Forum on 2243 began

Leander Smiles (Dental Office) opens July 2009

HEB is currently in negotiations with three users to lease up to 9,100 square feet

Gateway at Leander (Lowe's)

Kohl's stocked the store in September and opened in October

Lowe's continues to grow with the community since its opening Tuesday, 25 March 2008

McDonald's and IBC Bank/Austin Java continue to be successful

AT&T, Dunkin' Donuts and Great Clips will anchor 11,000 square feet out front

Leander Transit Village

Torti Gallas is approx. 90% done with the Master Plan

CR 269 and CR 273 have been the focus over the last year – these roadways provide access

Engineering continues on both projects with construction to begin at the end of 2009

Capital Metro and the City coordinate developments with each other

Leander has approved Phase I which includes Capital Metro and land South

Villages of Messina

Site – 342 acres

Number of residential units – 700-plus

Commercial acreage – 90 acres

The Villages will include one elementary school

Continue to discuss options with builders

Deliver lots in late 2009, early 2010

Very optimistic about rail station opening



Private Sector (cont.)

XParkUSA

This Sports & Destination Center Development received site development approval to start construction. The process of putting all the funding mechanisms in place has begun and hopefully the ground-breaking will be in the near future.

The Action Sport Venues currently in the Master Plan include:

Approximately 30,000 square foot Clubhouse that will include 12,000 square feet of Action Sports retail shops, food court with several different national QSR's, and large covered Patio & Deck for event viewing;

A 2,500 fixed-seat amphitheater with a total capacity of 15,000 for musical events, ceremonies and other private- or City-wide occasions;

A Spray Park for guests of all ages to beat the heat;

Eight sand beach volleyball courts along the water for recreational and tournament play;

An Action Sports Instructional Camp with overnight stay facilities for up to 150 students;

Two state of the art skateboard parks;

Two state of the art Bicycle Motocross (BMX) areas for racing American Bicycle Association (ABA) Olympic style) and Freestyle jump events;

A fifteen acre paintball facility with Speedball, open-terrain and themed courses;

A split-lane flat track race course for Mini Sprints and Motorcycle speedway style events;

An eight acre open event area for future events like car shows or music festivals; and

An AMA Sanctioned motocross race facility, beginner track, ATV track and Department of Public Safety (DPS) training area.

XParkUSA has traveled to Jacksonville, Florida to discuss the possible addition of a NASCAR style racing venue with the group that just acquired the rights to several of these properties.

XParkUSA is extremely excited about this park and its progress.

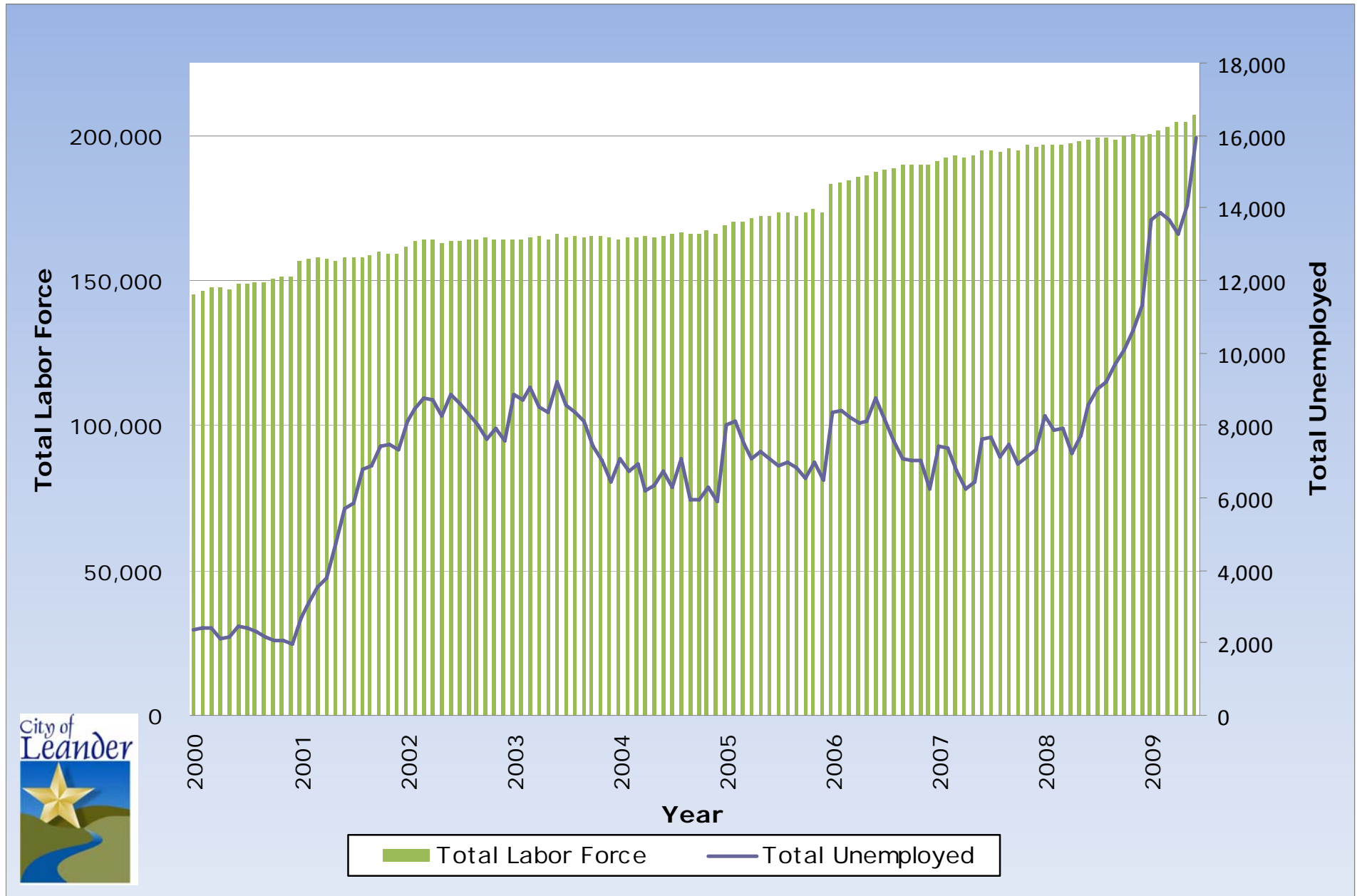


County Glen Shopping Center

Kumon learning center will locate 1,113 sf in the middle of the building. There are roughly 5,000 sf left on each side and 5,830 sf in the smaller building.

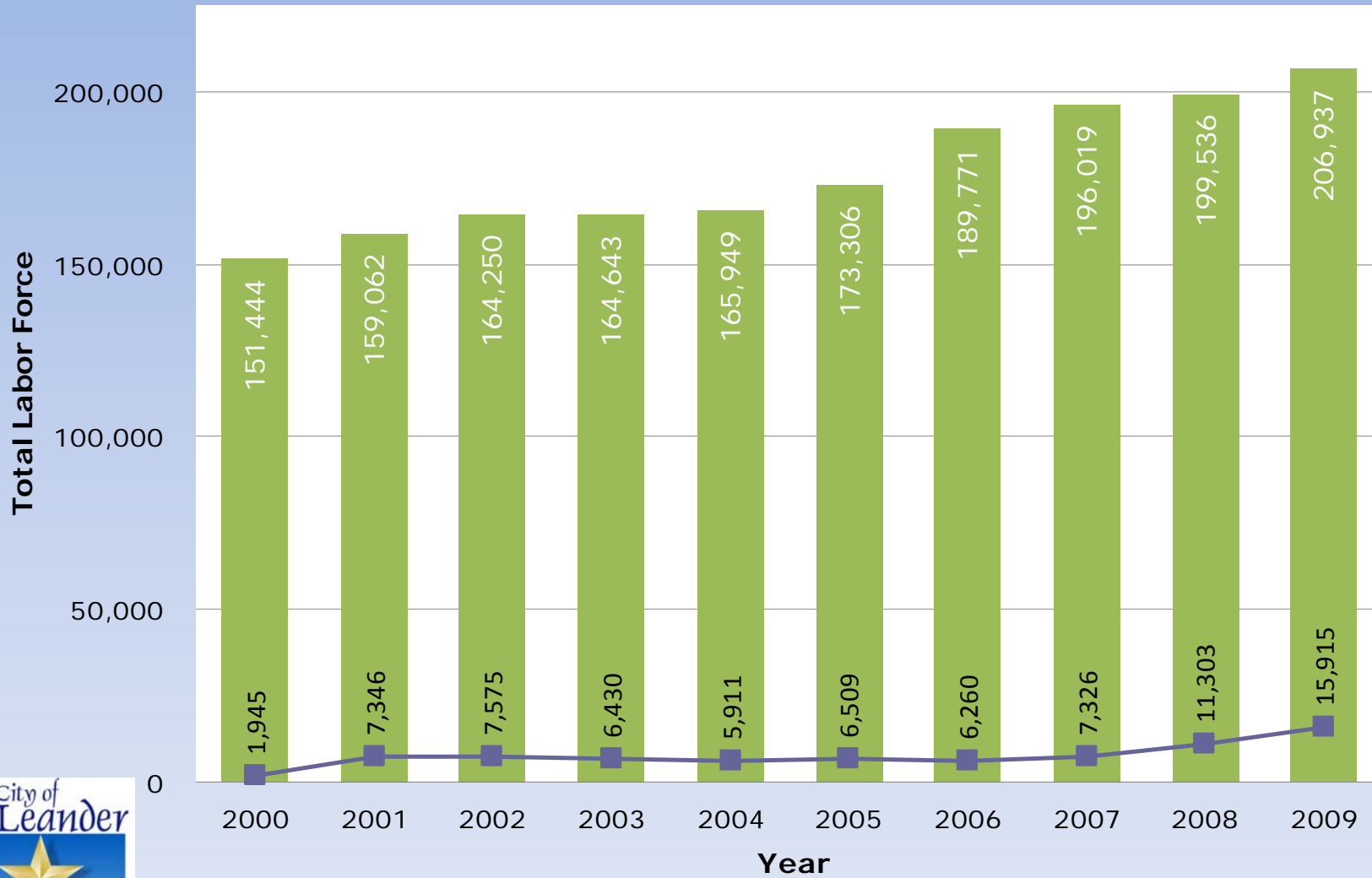
Total Labor Force

(monthly – heads-in-beds)



Total Labor Force

(annually – heads-in-beds)



■ Total Labor Force ■ Total Unemployed

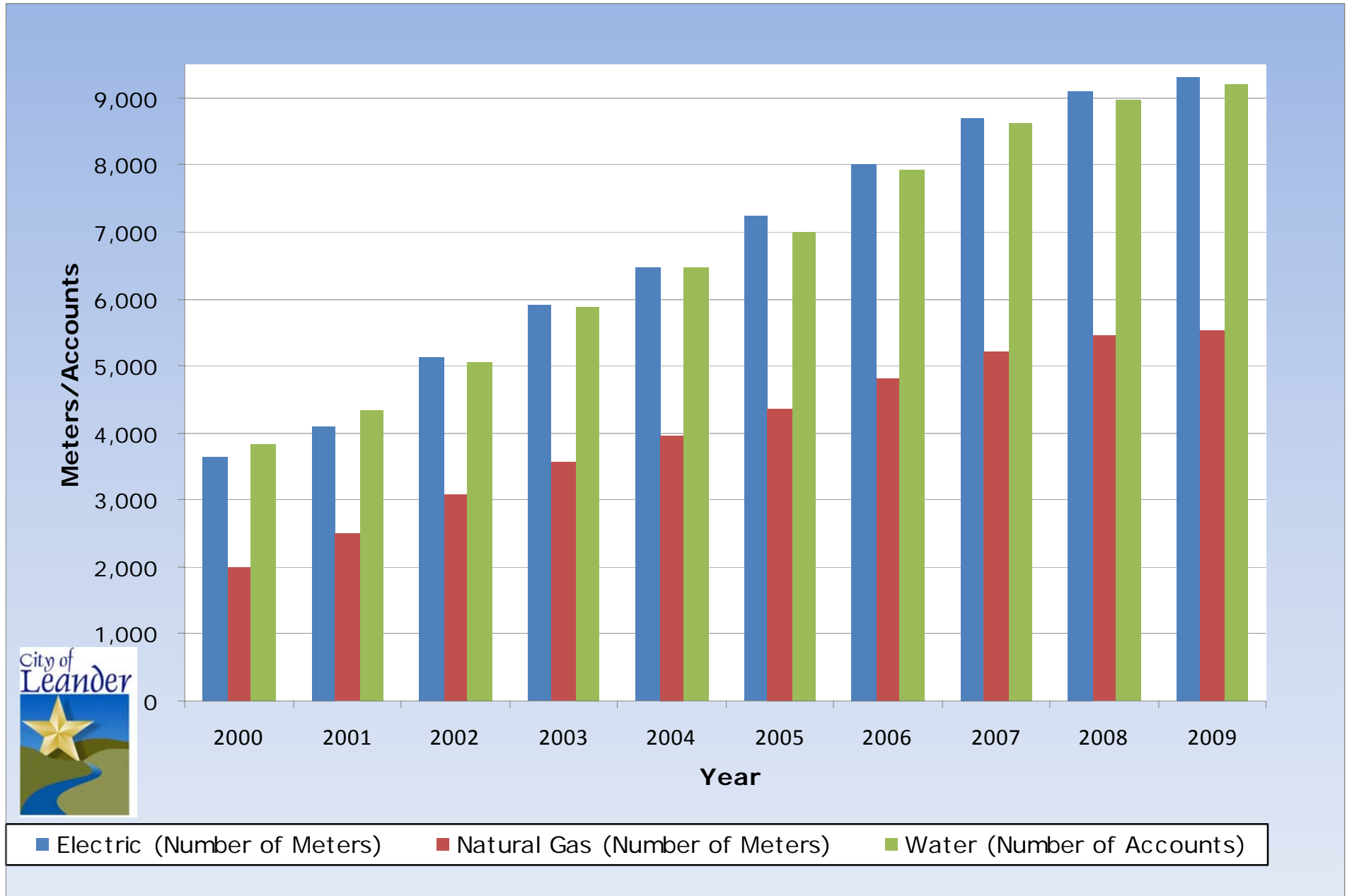
Total Labor Force

(annually – heads-in-beds with percentages)



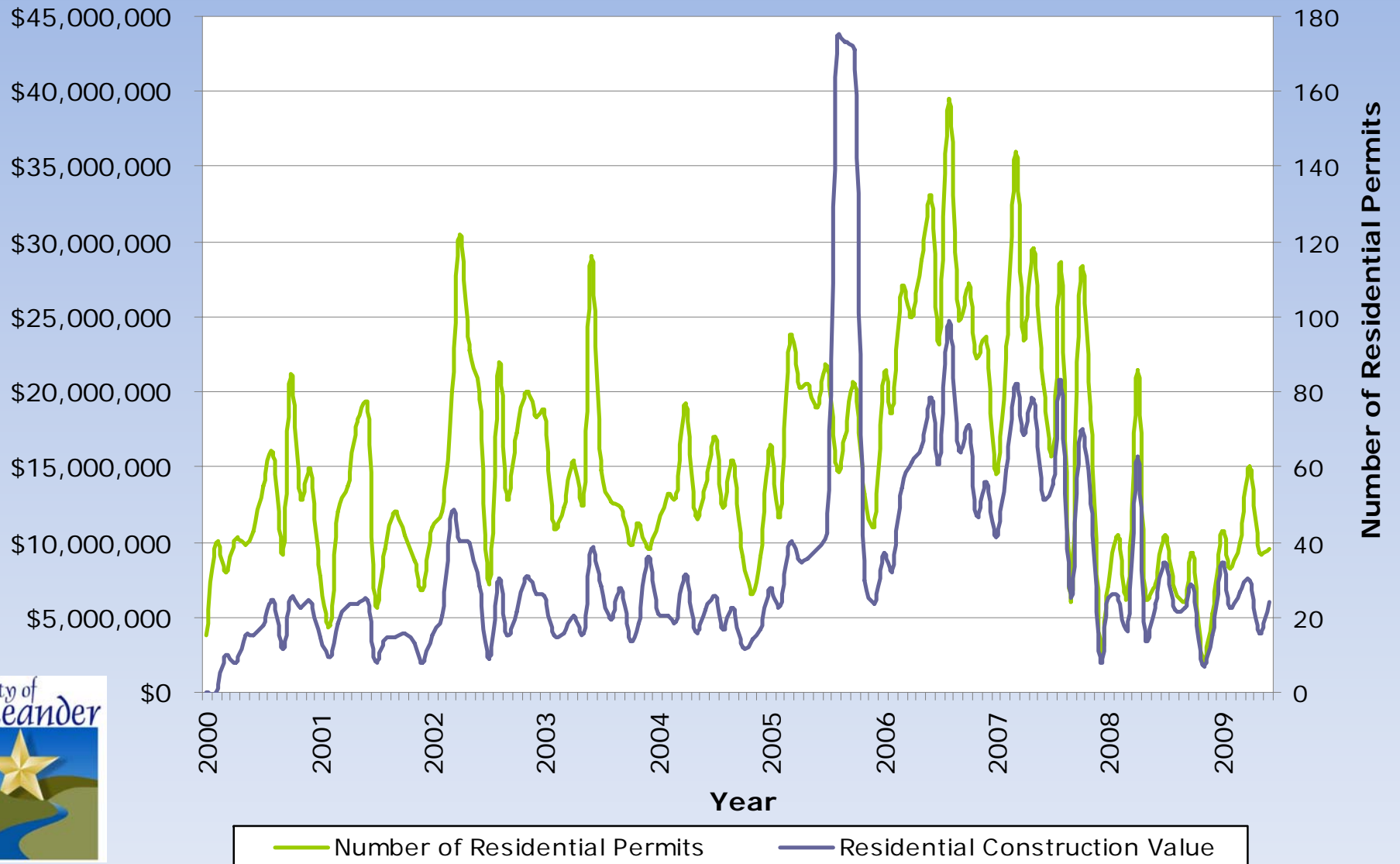
Utilities – Active Meters

(annually – electric, natural gas and water)



Residential Construction Value & Permits

(monthly)



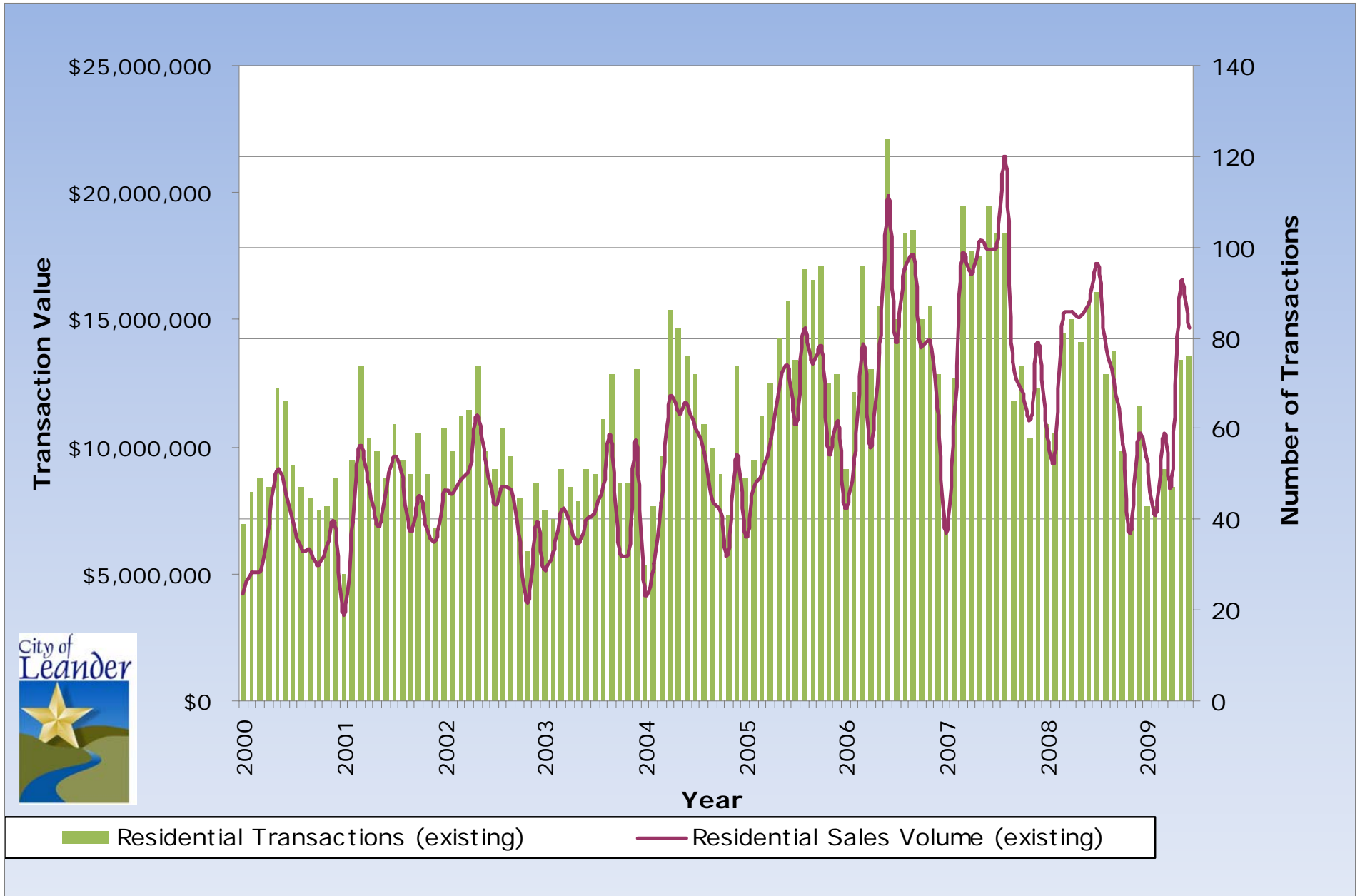
Residential Construction Value & Permits

(annually)



Residential Transactions

(monthly existing – sales volume and number)



Residential Transactions

(annually existing – sales volume and number)



Residential Strategies, Inc.

Leander Market Analysis

Leander		
Most Active Subdivisions		
<u>Subdivision</u>		<u>Starts</u>
1 Summerlyn		99
2 Westview Meadows		85
3 Benbrook Ranch		78
4 Highlands at Crystal Falls		74
5 Cold Springs		59
Most Active Builder Programs		
<u>Subdivision</u>	<u>Builder</u>	<u>Starts</u>
1 Westview Meadows	Centex	85
2 Benbrook Ranch	DR Horton	78
3 Summerlyn	Pulte	70
4 Cold Springs	Centex	45
5 Westwood	KB Home	34
Lots Delivered 2Q09		
<u>Subdivision</u>	<u>Total Lots</u>	<u>Size</u>
Summerlyn	59	50'x120'

Highlands of Crystal Falls/Lakeview Ranch

Magnolia Creek

Market Area Annual Statistics (3Q08-2Q09)					
		<u>MOS</u>			<u>MOS</u>
Annual Starts	498	--	U/C Houses	160	3.7
Annual Closings	526	--	F/V Houses	104	2.4
Vacant Developed Lots	1,129	27.2	Models	23	0.5
Lots Under Development	0	--	Total New Home Inv	287	6.5
Ann Lots Delivered	233	--			
			Median Price	\$184,704	
			Average Price	\$218,462	
			Est \$ Volume (Starts)	\$91,982,592	



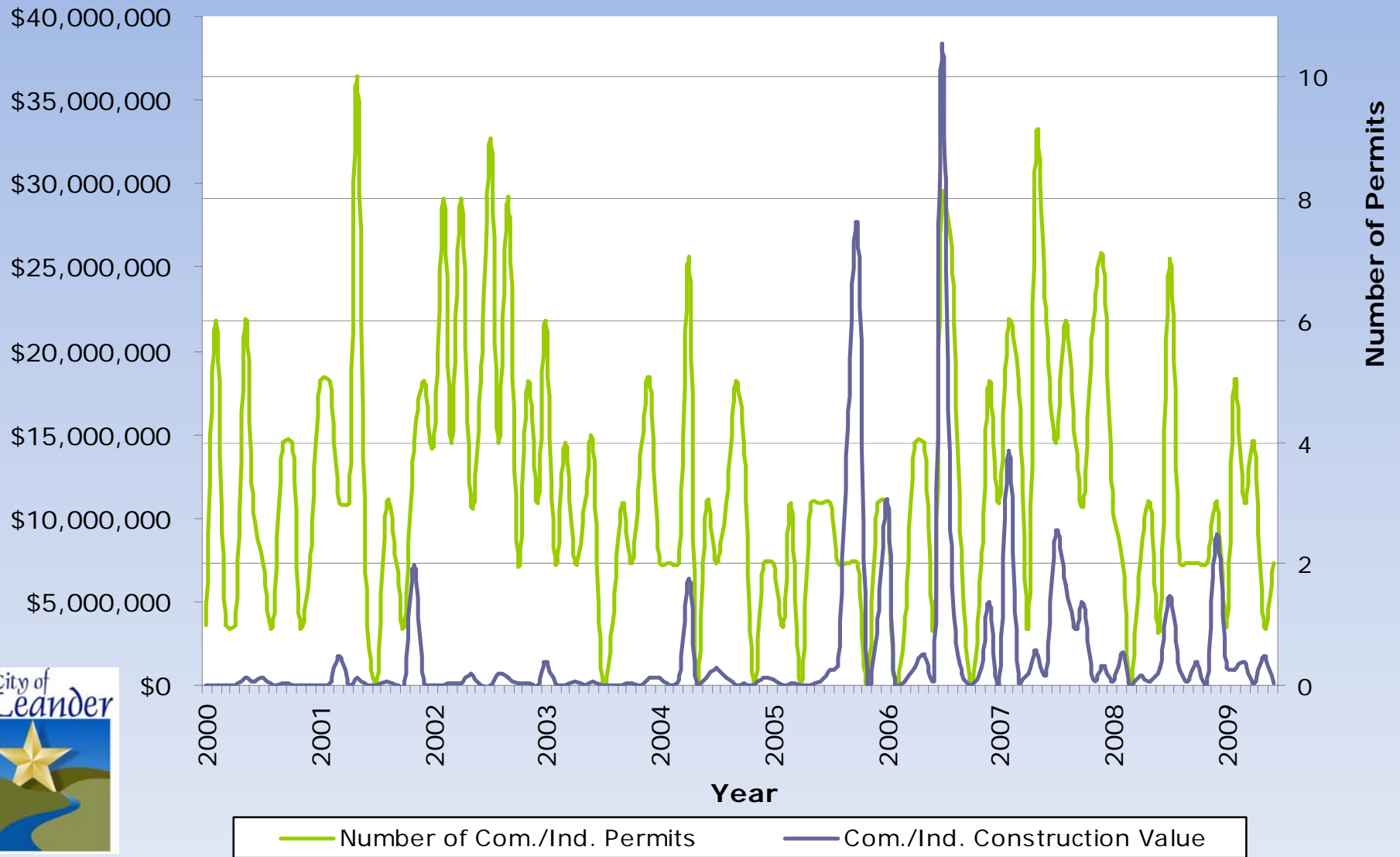
Residential Strategies, Inc.

Leander Market Analysis (cont.)

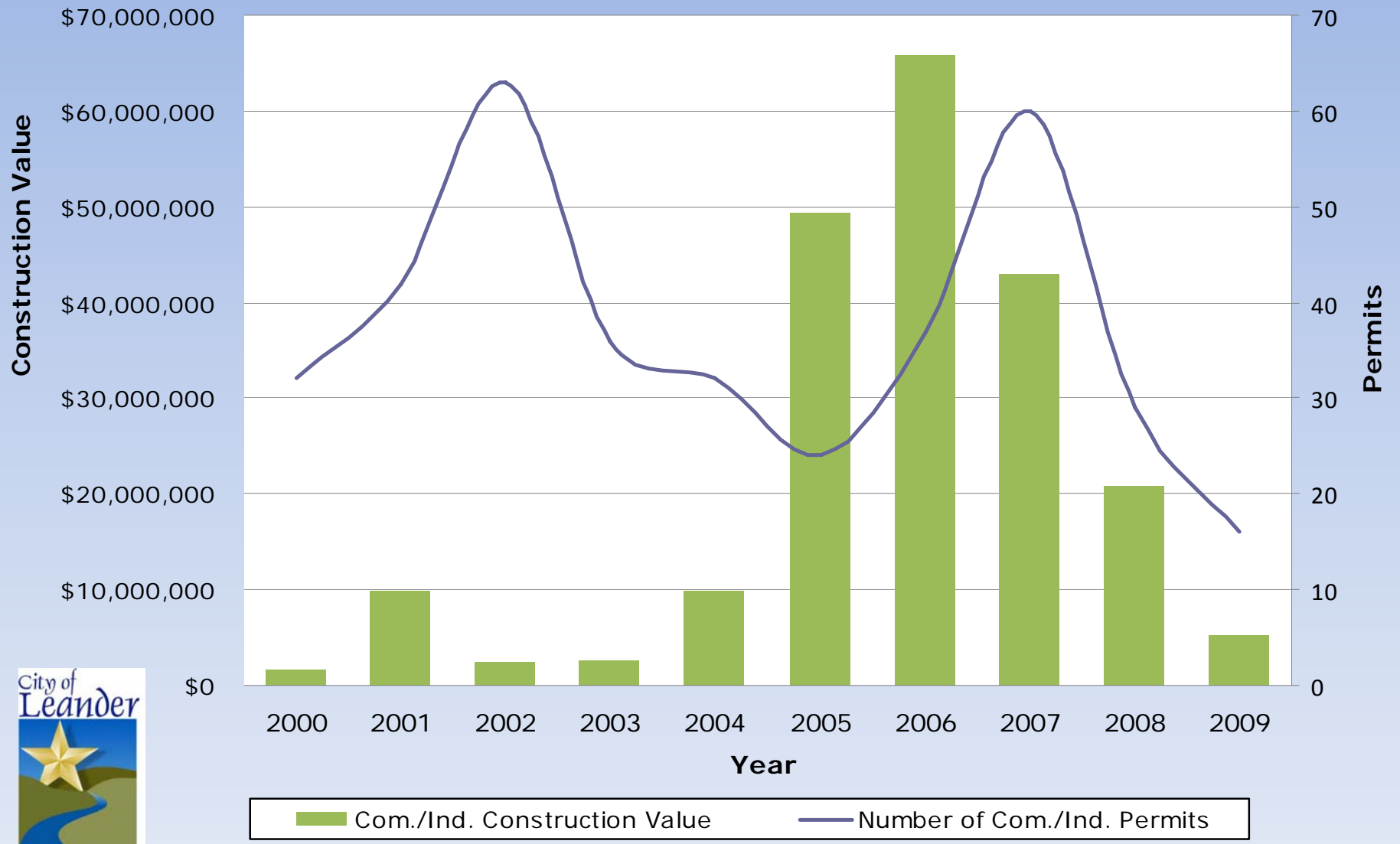


Commercial/Industrial Construction Value & Permits

(monthly)



Commercial/Industrial Construction Value & Permits (annually)



Economic Indicators (very big picture)

Economic Indicator	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009 First Half	Nine-and-a-Half Year	Average
											Economic Indicator Changes	Annual % Change
* Total Labor Force	151,444	159,062	164,250	164,643	165,949	173,306	189,771	196,019	199,536	206,937	55,493	new labor force
Annual Percent Change		5.03%	3.26%	0.24%	0.79%	4.43%	9.50%	3.29%	1.79%	3.71%		3.56%
* Percent (%) Unemployed	1.28%	4.62%	4.61%	3.91%	3.56%	3.76%	3.30%	3.74%	5.66%	7.69%		
Annual Percent Change		259.60%	-0.14%	-15.32%	-8.80%	5.44%	-12.17%	13.30%	51.57%	35.77%		36.58%
* Total Unemployed	1,945	7,346	7,575	6,430	5,911	6,509	6,260	7,326	11,303	15,915		
Annual Percent Change		277.69%	3.12%	-15.12%	-8.07%	10.12%	-3.83%	17.03%	54.29%	40.80%		41.78%
** Electric (Number of Meters)	3,649	4,096	5,133	5,899	6,465	7,238	8,009	8,700	9,100	9,322	5,673	new electric meters
Annual Percent Change		12.25%	25.32%	14.92%	9.59%	11.96%	10.65%	8.63%	4.60%	2.44%		11.15%
> Natural Gas (Number of Meters)	1,991	2,507	3,095	3,570	3,956	4,364	4,806	5,203	5,448	5,536	3,545	new gas meters
Annual Percent Change		25.92%	23.45%	15.35%	10.81%	10.31%	10.13%	8.26%	4.71%	1.62%		12.28%
^^ Water (Number of Accounts)	3,841	4,342	5,044	5,886	6,461	6,995	7,942	8,618	8,977	9,208	5,367	new water meters
Annual Percent Change		13.04%	16.17%	16.69%	9.77%	8.26%	13.54%	8.51%	4.17%	2.57%		10.30%
^^ Com./Ind. Construction Value	\$1,507,325	\$9,788,833	\$2,417,560	\$2,645,356	\$9,862,000	\$49,345,300	\$65,737,000	\$42,989,368	\$20,926,860	\$5,260,712	\$210,480,314	new com./ind. invest.
Annual Percent Change		549.42%	-75.30%	9.42%	272.80%	400.36%	33.22%	-34.60%	-51.32%	-74.86%		114.35%
^^ Number of Com./Ind. Permits	32	42	63	36	32	24	37	60	29	16	371	new com./ind. permits
Annual Percent Change		31.25%	50.00%	-42.86%	-11.11%	-25.00%	54.17%	62.16%	-51.67%	-44.83%		2.46%
^^ Residential Construction Value	\$43,521,514	\$46,804,427	\$81,156,079	\$68,592,836	\$59,449,833	\$203,433,750	\$182,095,305	\$168,571,210	\$74,825,666	\$38,334,013	\$966,784,633	new residential invest.
Annual Percent Change		7.54%	73.39%	-15.48%	-13.33%	242.19%	-10.49%	-7.43%	-55.61%	-48.77%		19.11%
^^ Number of Residential Permits	562	515	856	678	606	840	1,258	987	396	251	6,949	new residential permits
Annual Percent Change		-8.36%	66.21%	-20.79%	-10.62%	38.61%	49.76%	-21.54%	-59.88%	-36.62%		-0.36%
^^ Total Construction Value	\$45,028,839	\$56,593,260	\$83,573,639	\$71,238,192	\$69,311,833	\$252,779,050	\$247,832,305	\$211,560,578	\$95,752,526	\$43,594,725	\$1,177,264,947	com./ind./res/ investment
Annual Percent Change		25.68%	47.67%	-14.76%	-2.70%	264.70%	-1.96%	-14.64%	-54.74%	-54.47%		21.64%
~ Residential Transactions (existing)	594	628	662	628	725	904	1,033	999	849	335	7,357	residential transactions
Annual Percent Change		5.72%	5.41%	-5.14%	15.45%	24.69%	14.27%	-3.29%	-15.02%	-60.54%		-2.05%
~ Residential Sales Volume (existing)	\$75,640,568	\$90,428,989	\$97,011,303	\$86,985,696	\$103,837,645	\$132,755,183	\$163,084,379	\$178,383,416	\$152,675,429	\$67,005,674	\$1,147,808,282	residential sales
Annual Percent Change		19.55%	7.28%	-10.33%	19.37%	27.85%	22.85%	9.38%	-14.41%	-56.11%		2.82%
^^ Sales Tax Receipts	\$471,561	\$493,204	\$516,103	\$514,749	\$658,967	\$895,146	\$1,088,628	\$1,420,941	\$1,656,810	\$826,675	\$8,542,784	sales tax receipts
Annual Percent Change		23.75%	4.59%	-0.26%	28.02%	35.84%	21.61%	30.53%	16.60%	-50.10%		10.16%
^^ Golf Rounds								31,479	33,912	15,840		
Annual Percent Change									7.73%	-53.29%		-5.06%

Economic Indicators

January thru June 2009

Total Labor Force	206,937
Percent (%) Unemployed	7.69%
Total Unemployed	15,915
Electric (Number of Meters)	9,322
Natural Gas (Number of Meters)	5,536
Water (Number of Accounts)	9,208
Com./Ind. Construction Value	\$5,260,712
Number of Com./Ind. Permits	16
Residential Construction Value	\$38,334,013
Number of Residential Permits	251
Total Construction Value	\$43,594,725
Existing Residential Transactions	335
Existing Sales Volume	\$67,005,674
Sales Tax Receipts	\$826,675
Golf Rounds	15,840



Observations

Williamson County added 55,493 people to its labor force since January 2000. This represents a 26.82% increase over 114 months.

Leander added 5,673 electric meters since January 2000. This represents a 60.86% increase over 114 months.

Leander added 3,545 natural gas meters since January 2000. This represents a 64.04% increase over 114 months.

Leander added 5,367 water meters since January 2000. This represents a 58.29% increase over 114 months.

Leander experienced \$210,480,314 in commercial/industrial capital investment over 114 months.

Leander issued 371 commercial/industrial permits over 114 months. This equates to 3.25 permits per month.

Leander experienced \$966,784,633 in residential capital investment over 114 months.

Leander issued 6,949 residential permits over 114 months. This equates to almost 61 permits per month.

Leander experienced \$1,177,264,947 in total capital investment over 114 months. This equates to more than \$10.3 million in monthly investment.

Leander experienced 7,357 residential transactions (existing) over 114 months. This is roughly 65 transactions per month.

Leander experienced \$1,147,808,282 in existing residential transaction value over 114 months.

Leander collected \$8,542,784 in sales taxes over 114 months. This is roughly \$74,937 per month.



Observations (cont.)

What has Leander done in the first six months of 2009?

Added 222 new electric meters

Added 88 new natural gas meters

Added 231 new water meters

Added 16 new commercial/industrial permits (or 55.17% of 2008's total)

Added \$5.2 million in new commercial/industrial investment (or 25.14% of 2008's total)

Added 251 new residential permits (or 63.38% of 2008's total)

Added \$38.3 million in new residential investment (or 51.23% of 2008's total)

Added \$43.5 million in total capital investment (or 45.53% of 2008's total)

Experienced 335 existing residential transactions (or 39.46% of 2008's total)

Experienced just over \$67 million in existing residential transactions (or 43.89% of 2008's total)

Added \$826,675 in sales tax receipts (or 50.10% of 2008's total)

Played 15,840 rounds of golf, so far, in spite of the weather (or 46.71% of 2008's total)



THANK YOU
for the continued
interest and investment
in Leander



Kirk D. Clennan, CEcD
Director, Economic Development
City of Leander
(512) 528-2852
www.leandertx.org

Tuesday, 28 July 2009