



# Fall 2023 10-Year Projections

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# Objectives and Agenda

## Objectives

- Provide context on recent enrollment trends and factors which inform the Fall 2023 Projections
- Review the 10-Year Fall 2023 Enrollment Projections

## Agenda

- Context
- Fall 2023 Projections
- Next Presentation: “Demographics Update”
- Q&A



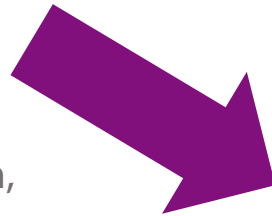
# Context



# Sources for 2024-25 Enrollment

- **Four (4) sources of enrollment information for next school year (2024-25):**
  - Special Education, English Learners, and PreK allocations from the Office of Chief Academic Officer
  - K-12 enrollment by school produced by P&E
  - Following slides will focus on K-12 enrollment

Secondary Special Education and Maximum PreK Special Education  
(Office of Special Education, Office of Chief Academic Officer)

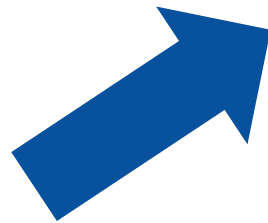


Maximum PreK Allocations  
(Office of Early Childhood, Office of Chief Academic Officer)

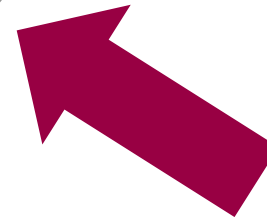


**Projected Enrollment for the 2024-25 School Year**

Overall K-12 Projections by School  
(Planning and Evaluation, Office of the Chief of Staff)



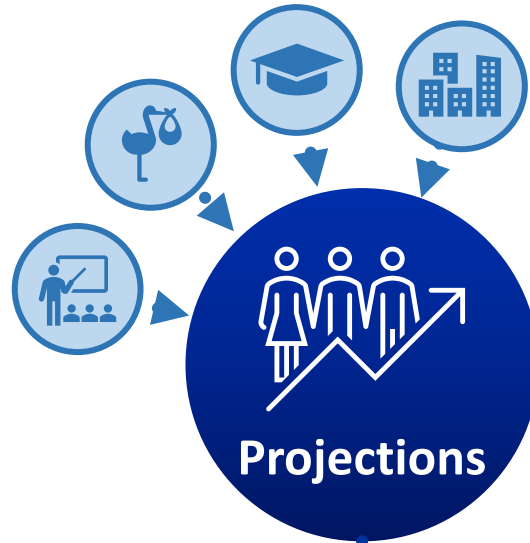
English Learners  
(Office of English Learners, Office of Chief Academic Officer)





# Stakeholders That Use Projections

APS stakeholder that use projections as part of decision-making include:

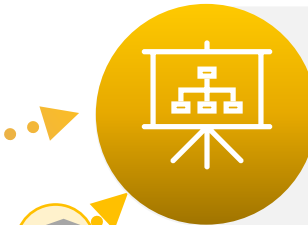


- Projections are produced independent from other APS processes.
- It is one of many data points which inform decision makers



## Budget and Finance

- Determines the budgeted funds and positions per school for the upcoming fiscal year



## Human Resources

- Determines the number of school instructors and support staff to hire by school



## Facilities and Operations

- Background information for the Capital Improvement Plan



# What is a projection?

- Not a forecast, which relies on assumptions about future events (such as recession or interest rate spike)
- K-12 enrollment projections look at recent enrollment trends and extend them forward into future years, “looking in the rear-view mirror”
  - Risk: Trends will abruptly change course (from ex. from pandemic, recession, extreme weather event)
  - Plus: Expectations can be explained by citing past trends

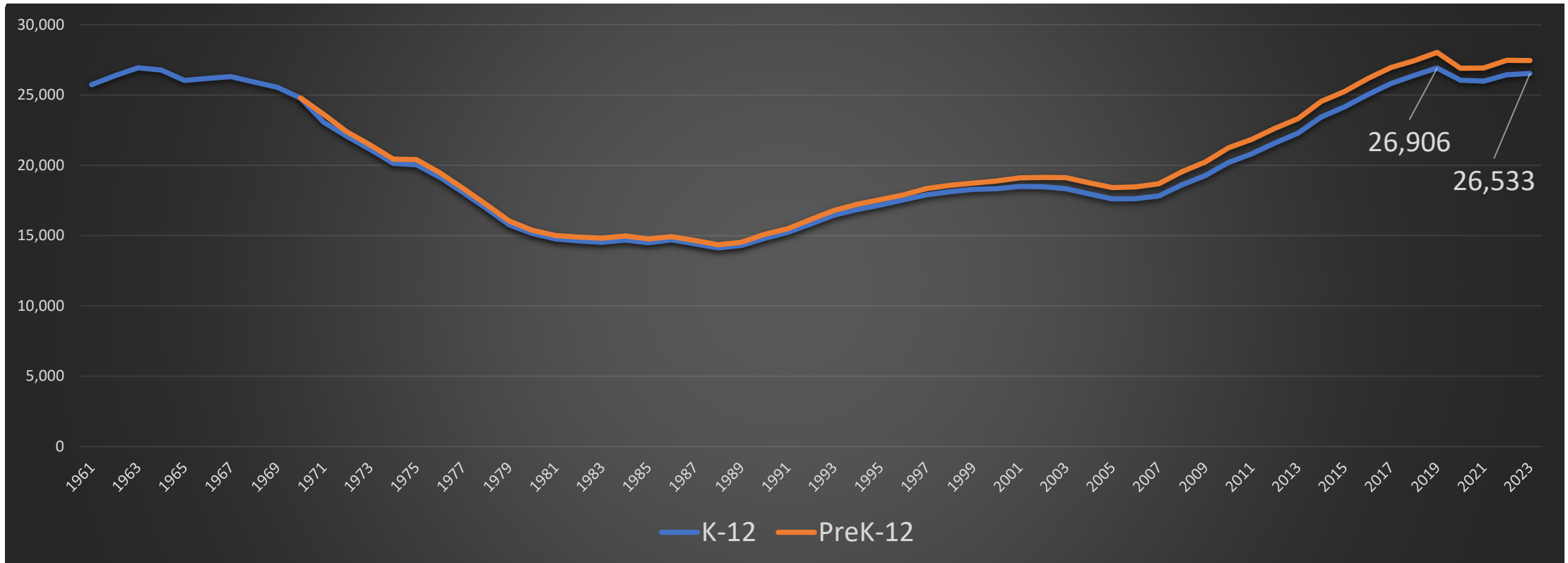


Source: Adobe Firefly Generative Ai



# APS Enrollment Trends

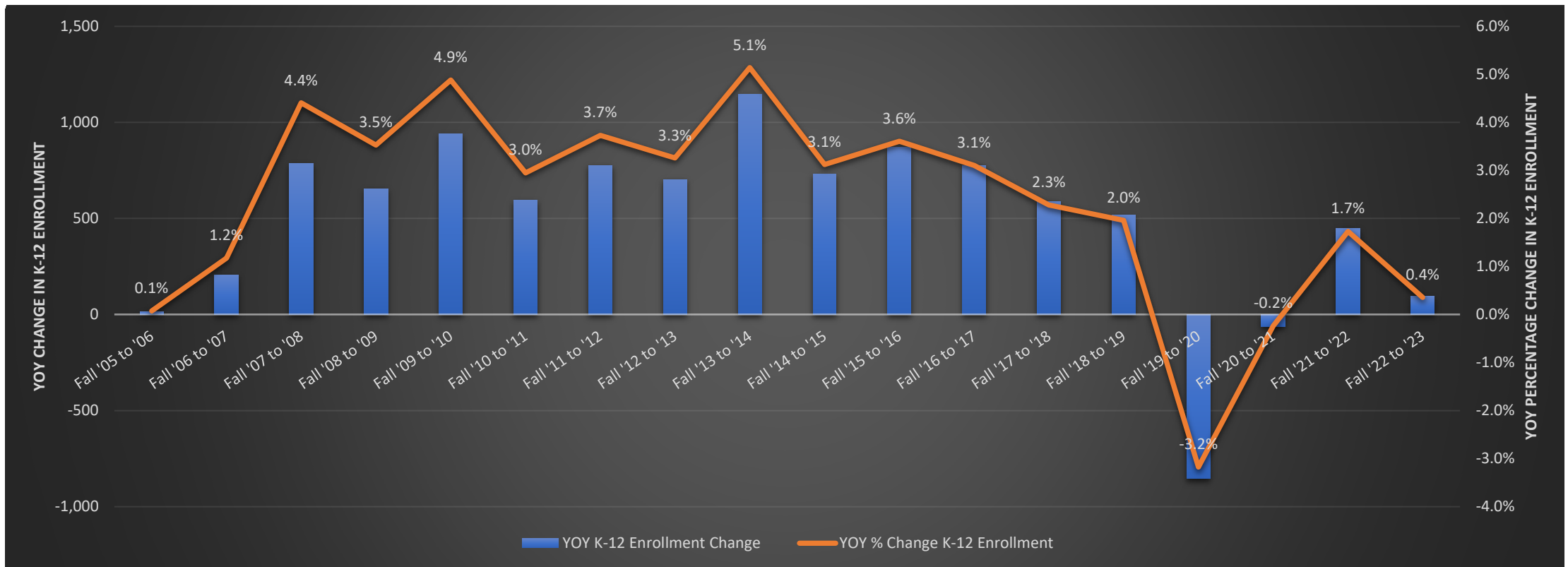
- K-12 and PreK-12 enrollment for 2023 are still below peak 2019 levels
- Within K-12 enrollment, only High School is above 2019 levels
  - Grades K-5 from 13,264 (2019) to 12,485 (2023): -779 students
  - Grades 6-8 from 6,119 to 5,875: -244 students
  - Grades 9-12 from 7,523 to 8,173: +650 students





# APS Enrollment Trends

- The pace of K-12 enrollment growth was decelerating since before the COVID pandemic
- Recent K-12 trends have been mixed: decline, growth and flat lining



## Interpreting annual growth rates from the Community Facilities Study:

2%+ indicates a high growth rate | 1-2 % indicates a medium growth | 0-1 % indicates a low growth rate

Source: Page 10 of "Fall 2023 10-Year, K-12 Enrollment Projections Report, <https://www.apsva.us/statistics/enrollment/>





# Regional Trend

- APS is not alone in having flat K-12 growth of 0.4% between Fall 2022 and 2023
- Many neighboring school systems also experienced flat growth
- Some school systems even experienced enrollment contraction

Public School System	State	Grade Level	Fall Enrollment		Change	Percent Change	Notes
			2022	2023			
Arlington Public Schools (APS)	VA	K-12	26,439	26,533	94	0.4%	<i>Births from the Virginia Dept. of Health declined by about 1.5% from 2021 to 2022</i>
Arlington Public Schools (APS)	VA	PreK-12	27,455	27,452	-3	0.0%	
Fairfax County Public Schools (FCPS)	VA	PreK-12	180,109	180,806	697	0.4%	<i>Births declined -0.6% to 12,188 for 2021-22</i>
Montgomery County Public Schools (MCPS)	MD	PreK-12	160,554	160,770	216	0.1%	
Prince Georges County Public Schools (PGCPS)	MD	K-12	131,143	131,530	387	0.3%	
Prince Georges County Public Schools (PGCPS)	MD	PreK-12	135,967	136,323	356	0.3%	
Prince William County Schools (PWPS)	VA	K-12	90,226	89,945	-281	-0.3%	<i>Our decrease is somewhat unprecedented in the last 30+ years, except for SY2020-21</i>
Loudoun County Public Schools (LCPS)	VA	PreK-12	82,233	82,125	-108	-0.1%	
Chesapeake Public Schools	VA	Unknown	39,827	39,665	-162	-0.4%	<i>Majority of the loss is at the elementary level</i>
Richmond Public Schools	VA	Unknown	21,706	21,259	-447	-2.1%	<i>Experienced +2.4% growth from 2021 to 2022</i>
Chesterfield County Public Schools	VA	K-12	63,208	63,253	45	0.1%	<i>Had seen a "post-COVID bounce", but now it is halted</i>
Chesterfield County Public Schools	VA	PreK-12	64,373	64,469	96	0.1%	
Alexandria City Public Schools	VA	K-12	15,482	n/a	n/a	n/a	<i>Experienced K-12, 1.6% growth from 2021 and 2022 (VDOE)</i>
Frederick County Public Schools	MD	K-12	45,235	45,984	749	1.7%	<i>FCPS has been growing and we are projected to continue to grow</i>
Frederick County Public Schools	MD	PreK-12	46,783	47,537	754	1.6%	
Stafford County Public Schools	VA	K-12	30,625	31,126	501	1.6%	
Frederick County Public Schools	VA	Unknown	13,968	14,178	210	1.5%	<i>Lots of housing construction</i>

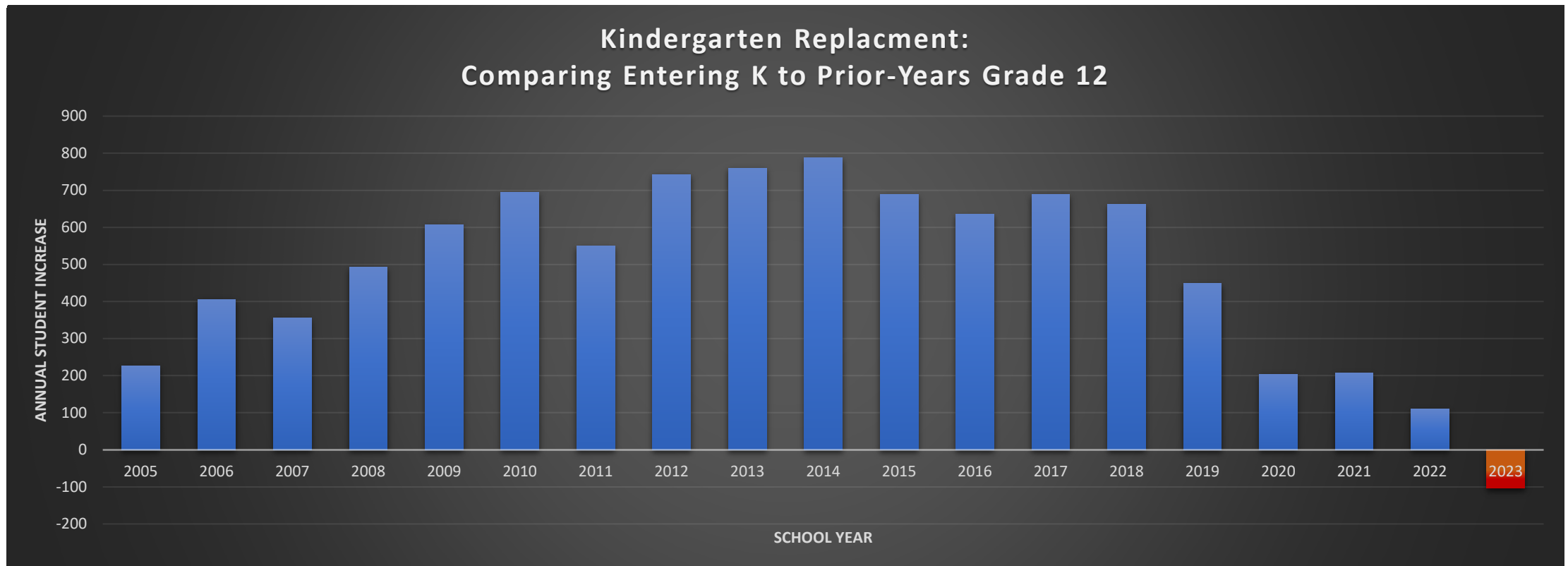
Data gathered from school districts as of October 2023.



# Why Decelerating Growth?

**Kindergarten Replacement is the difference between the number of incoming K students and the number of Grade 12 students the prior year**

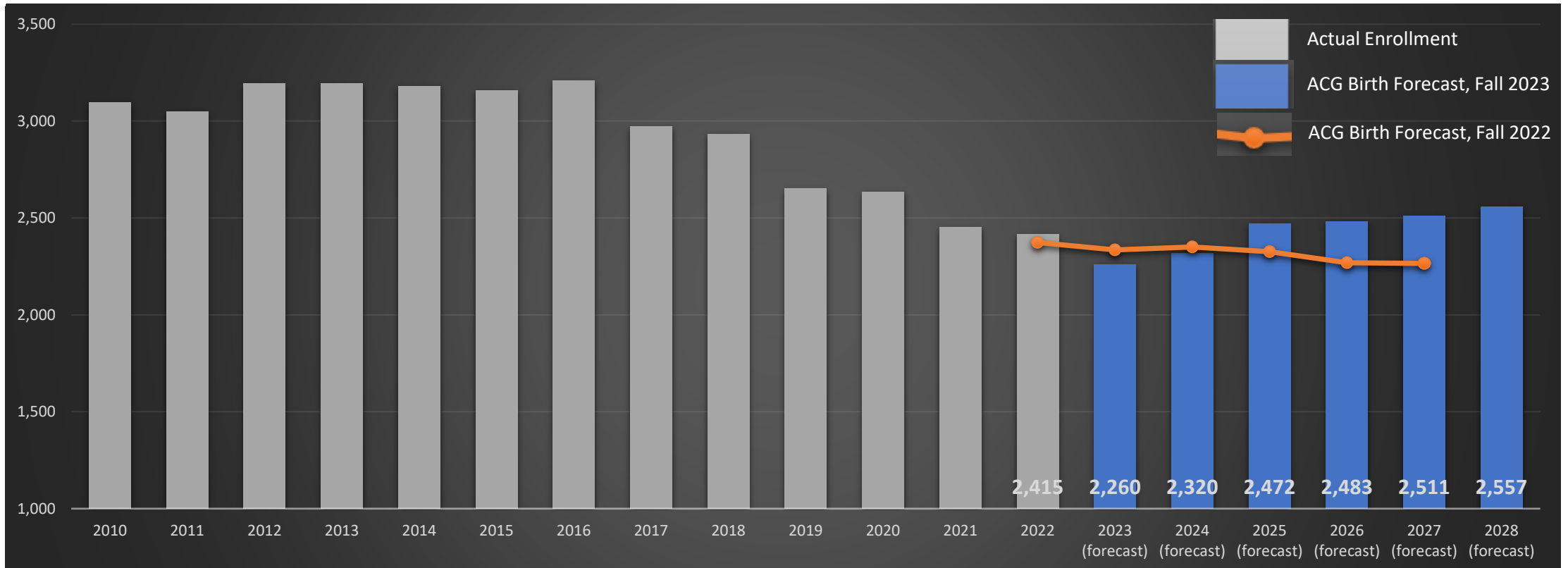
- A positive number suggests growth (*more entering kindergarten students than existing Grade 12 students*)
- A negative number suggests potential for decline (*not enough entering kindergarten students to make up for the number of exiting Grade 12 students*)





# Impact from Births

- Birth to Arlington parents peaked in 2016 and have been falling since then (grey bars)
- This trend might reverse course according to Arlington County Government (ACG)
  - ACG's latest birth forecasts (blue bars)
  - Latest birth forecast averages about 2,400 births per year for the next six years
- Future births are used to estimate future incoming K students five-years later





# Impact from Changes in Births and K Enrollment

## Birth to Kindergarten Capture Rates

*Recent rates suggest more outmigration than experienced earlier in the mid-2000's*

Birth Year	Resident Births	School Year Entering Grade K	Actual APS Grade K	Birth to Kindergarten Ratio (Capture Rate)
2006	2,561	2011-12	1,968	0.768
2007	2,778	2012-13	2,179	0.784
2008	2,924	2013-14	2,139	0.732
2009	2,935	2014-15	2,196	0.748
2010	3,097	2015-16	2,152	0.695
2011	3,049	2016-17	2,127	0.698
2012	3,193	2017-18	2,253	0.706
2013	3,195	2018-19	2,293	0.718
2014	3,181	2019-20	2,231	0.701
2015	3,160	2020-21	1,966	0.622
<b>2016</b>	<b>3,207</b>	<b>2021-22</b>	<b>1,998</b>	<b>0.623</b>
<b>2017</b>	<b>2,971</b>	<b>2022-23</b>	<b>2,006</b>	<b>0.675</b>
<b>2018</b>	<b>2,934</b>	<b>2023-24</b>	<b>1,973</b>	<b>0.672</b>

*3-year average pre-pandemic 2017-18 to 2019-20*

*0.708*

**3-year average 2021-22 to 2023-24**

**0.657**



# Impact from Housing Forecast

- **One factor that lends upwards momentum to projections is new housing** (3,754 units est. to produce about 470, K-12 students for 2024-25)
- **The housing forecast is updated each year by ACG**
- **Enrollment estimates from the housing forecast must be used with care**
  - The K-12 enrollment estimates from some new housing for the Fall 2023 projection were overestimated
  - Possible causes could be newly opened residential buildings taking longer to reach occupancy or construction delays
  - This will be researched further Spring 2024

Development in Housing Unit Forecast (Fall 2022)	Housing Type and Affordability	Actual Enrollment, Sept 30, 2023 <i>K-12</i>	Student Estimate Used in Fall 2022 Projections <i>K-12</i>	% (actual / estimate)
Vernon St Duplex	Duplex	0	0.6	0.0%
The Candence (Red Cross/Trenton St. Residential) <b>Open Dec. 2022</b>	Garden - Committed Affordable	46	64.1	71.7%
Whitefield Commons Apartments Addition	Garden - Committed Affordable	N/A	3.3	-
The Avant (1201 N Quinn St) <b>Not Open</b>	Garden - Market Rate	0	1.2	0.0%
Terwilliger Place (American Legion/APAH) <b>Sept. 2022</b>	High Rise - Committed Affordable	66	101.0	65.4%
The Terraces at Arlington View (Arlington View Terrace East) <b>Apr. 2023</b>	High Rise - Committed Affordable	39	28.1	138.8%
2000 Clarendon Blvd (Condo)	High Rise - Market Rate	4	2.5	158.7%
Alexan Fitzroy (Clarendon West Site #1 - Building 1) <b>Oct. 2023</b>	High Rise - Market Rate	0	11.7	0.0%
1900 Crystal Drive - South Building <b>Not Open</b>	High Rise - Market Rate	0	29.7	0.0%
Urba (Harris Teeter and American Service Center Phase 1) <b>late 2023</b>	High Rise - Market Rate	0	24.7	0.0%
Westmont Apartments (Westmont Shopping Center -3233 Columbia Pike) <b>Jul. 2023</b>	High Rise - Market Rate	3	35.0	8.6%
The Milton -Pentagon Centre PDSP & Final Site Plan - Phase IA <b>Jun. 2023</b>	High Rise - Mixed Income	0	19.5	0.0%
Sage Modern Apartments (Crystal City Verizon)	High Rise - Mixed Income	5	23.6	21.2%
Modera Clarendon (Washington Kirkwood) <b>May 2023</b>	High Rise - Mixed Income	19	27.8	68.4%
		<b>182</b>	<b>372.9</b>	<b>48.8%</b>

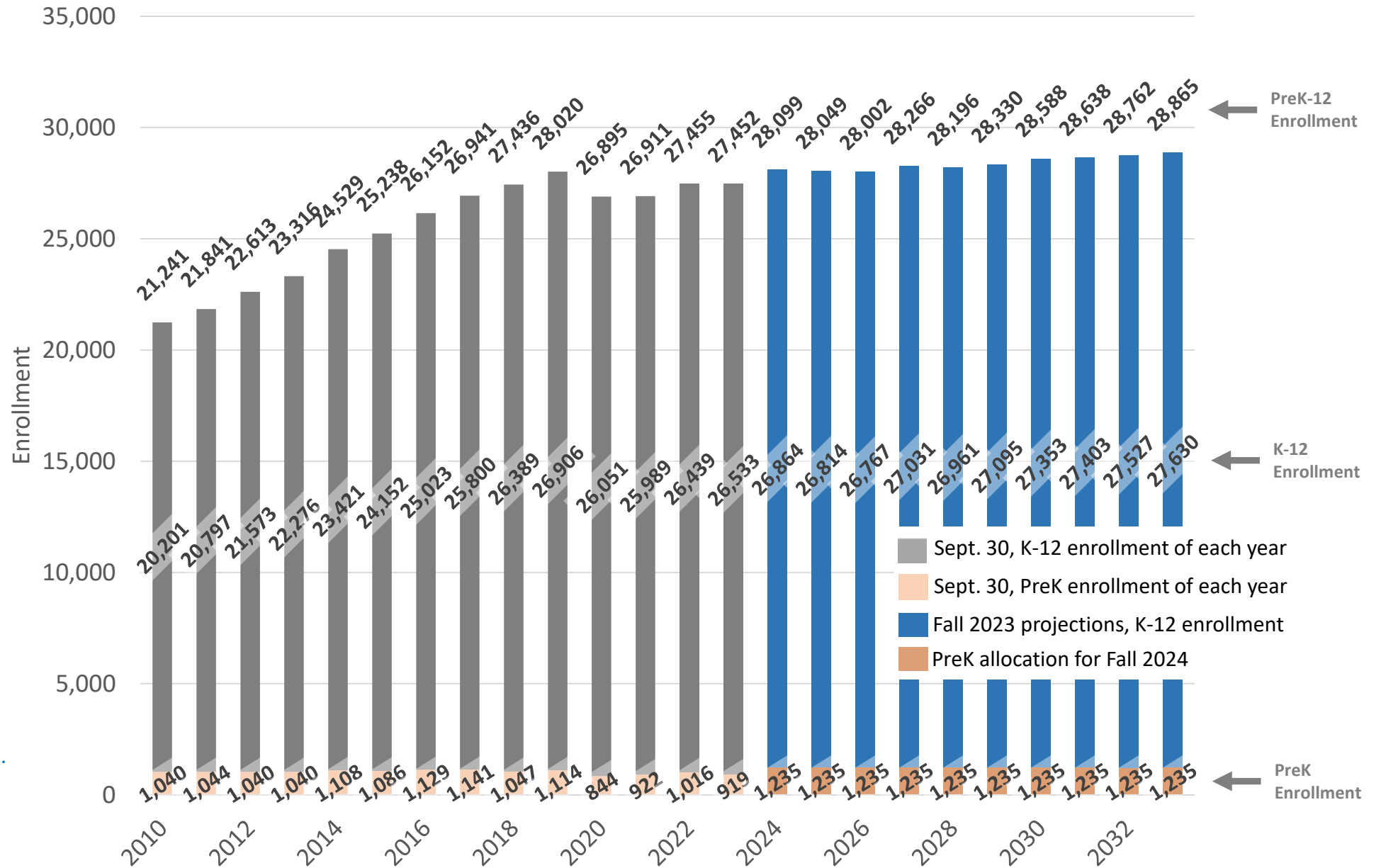




# 10-Year Fall 2023 Projections



# 10-Year Fall 2023 Projections



Source: Page 7 of  
 “Fall 2023 10-Year,  
 K-12 Enrollment  
 Projections Report,  
<https://www.apsva.us/statistics/enrollment/>



# 10-Year Fall 2023 Projections

## Comparison of Sept. 30, 2023 enrollment to Fall 2023 Projections for 2024, 2028, and 2033

School Level	Sept. 30, 2023	Projections		
		Fall 2024	Fall 2028	Fall 2033
Elementary	12,485	12,547	12,295	12,790
Middle	5,875	6,018	6,093	6,089
High	8,173	8,299	8,573	8,751
<i>Sub Total (K-12)</i>	<i>26,533</i>	<i>26,864</i>	<i>26,961</i>	<i>27,630</i>
PreK *	919	1,235	1,235	1,235
<i>Total (PreK-12)</i>	<i>27,452</i>	<i>28,099</i>	<i>28,196</i>	<i>28,865</i>

\* PreK enrollment for 2024 to 2033 is not part of the enrollment projections process described in this document. It represents budgeted PreK seats for the 2024-25 school year from the Office of Chief Academic Officer for budget and staffing purposes.

Source: Page 6 of "Fall 2023 10-Year, K-12 Enrollment Projections Report, <https://www.apsva.us/statistics/enrollment/>





# 10-Year Fall 2023 Projections

## Comparison of Sept. 30, 2023 enrollment to Fall 2023 Projections for 2024, 2028, and 2033

- *For long-term planning, the Fall 2023 projections need to be used with caution*
- *There are still a lot of unknowns about what enrollment will look like long-term, once we are fully beyond the pandemic.*

School Level	Change ('23 to '24)	% Change	Change ('23 to '28)	% Change	Change ('23 to '33)	% Change
Elementary	62	0.5%	-190	-1.5%	305	2.4%
Middle	143	2.4%	218	3.7%	214	3.6%
High	126	1.5%	400	4.9%	578	7.1%
<i>Sub Total (K-12)</i>	<i>331</i>	<i>1.2%</i>	<i>428</i>	<i>1.6%</i>	<i>1,097</i>	<i>4.1%</i>
PreK *	316	34.4%	316	34.4%	316	34.4%
<i>Total (PreK-12)</i>	<i>647</i>	<i>2.4%</i>	<i>744</i>	<i>2.7%</i>	<i>1,413</i>	<i>5.1%</i>

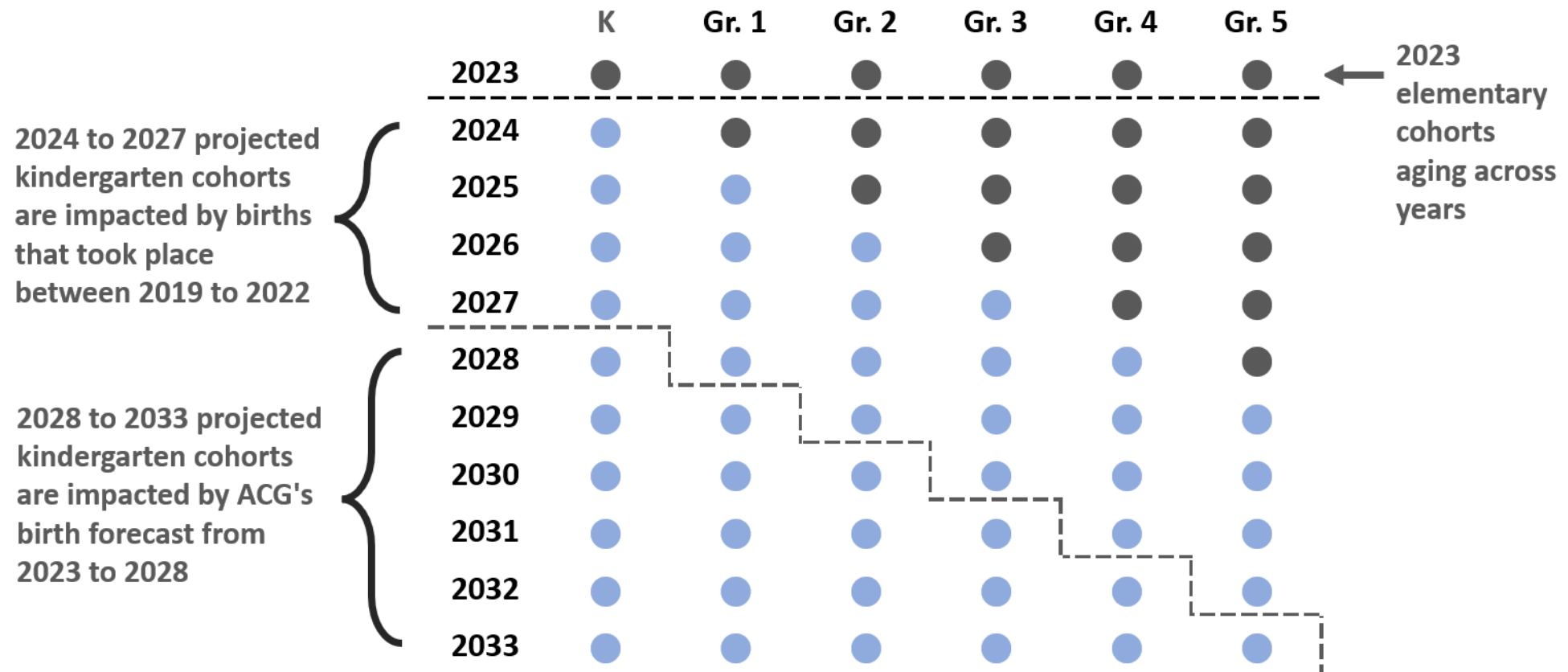
\* PreK enrollment for 2024 to 2033 is not part of the enrollment projections process described in this document. It represents budgeted PreK seats for the 2024-25 school year from the Office of Chief Academic Officer for budget and staffing purposes.

Source: Page 6 of "Fall 2023 10-Year, K-12 Enrollment Projections Report, <https://www.apsva.us/statistics/enrollment/>



# 10-Year Fall 2023 Projections

- Long-term projections should be used with caution
- Outer-year projections depend on forecasts about future births for almost all projected elementary cohorts starting in 2029



Source: Page 11 of "Fall 2023 10-Year, K-12 Enrollment Projections Report, <https://www.apsva.us/statistics/enrollment/>

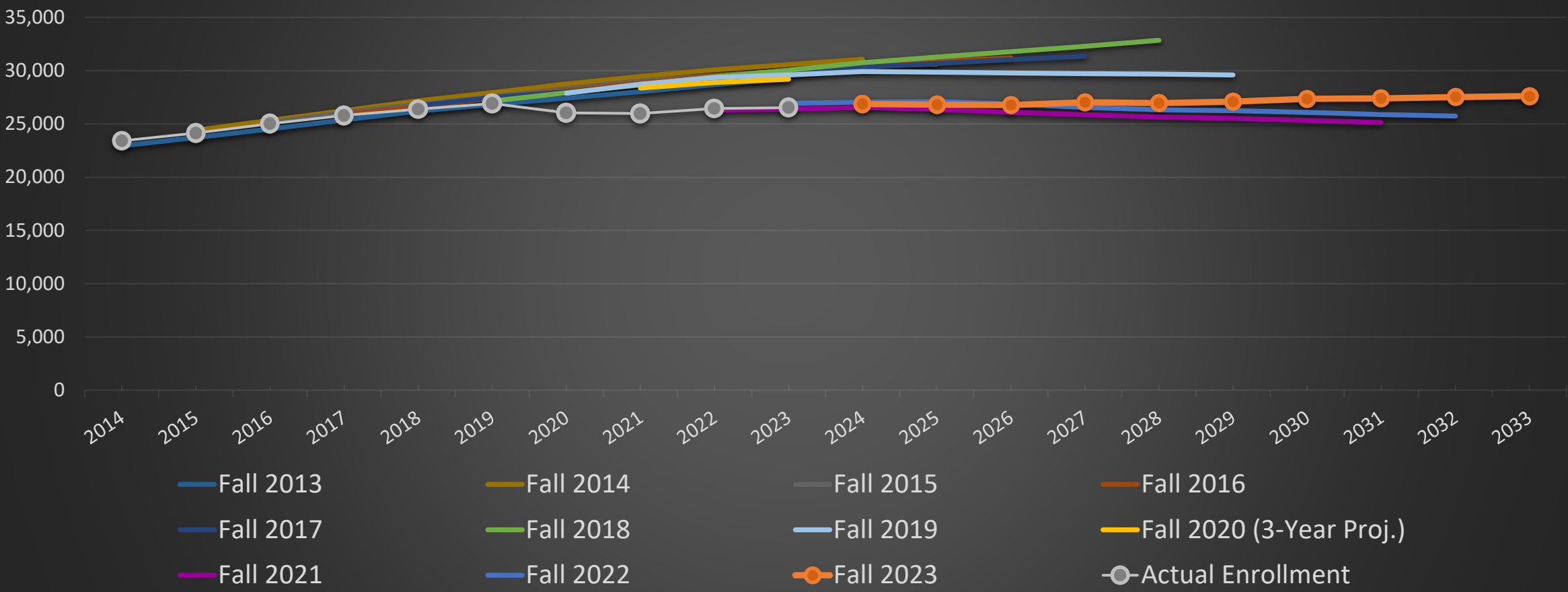


# 10-Year Fall 2023 Projections in Context

## Projections in Context: Comparing Fall 2023 K-12 Projections to Prior K-12 Projections

- The Fall 2023 enrollment projections is still among the more conservative projections
- Unlike the Fall 2021 and 2022 projections, the latest projections gradually increase over time
  - Consequence of a more optimistic birth forecast and an assumption that more births will become incoming K students 5 years later

### Comparison of Prior Projections





# Projections Accuracy for Sept. 30, 2023

## Accuracy for last year’s Fall 2022, K-12 Projections

- Actual K-12 enrollment on September 30, 2023 was 99% of projected
- The Fall 2022 Projections over-projected actual K-12 enrollment by 1%
- Possible causes for over-projections could be:
  - Slower pace for full-occupancy at market rate and mixed-income residential projections
  - Students withdrawing as part of Home Address Confirmation Process (HACP)
  - Faster decline in incoming kindergarten enrollment than anticipated
- More information on projections accuracy can be found in Attachment E of the Projections Report

	Sept. 30, 2023	Fall Projection for 2023	Difference	Accuracy
Elementary	12,485	12,720	-235	98%
Middle	5,875	5,870	5	100%
High	8,173	8,339	-166	98%
<b>K-12 Sub Total</b>	<b>26,533</b>	<b>26,929</b>	<b>-396</b>	<b>99%</b>
PreK *	919	1,221	-302	75%
<b>PreK-12 Total</b>	<b>27,452</b>	<b>28,150</b>	<b>-698</b>	<b>98%</b>

\* Reflects comparison to Spring Update to 2023-24



# Enrollment Projections, Budget and Staffing Timeline

## Enrollment Projections, Budget & Staffing Timeline

This timeline includes key dates for the development of the 2024-33 enrollment projections and milestones for the Departments of Human Resources and Finance and Management Services.



<b>OCTOBER</b>	<b>DECEMBER – JANUARY</b>	<b>JANUARY</b>
<p><b>September 30 Enrollment Snapshot</b></p> <p>The Sept. 30 official enrollment is published, which is the basis for the following school year's Fall K-12 Enrollment Projections.</p>	<p><b>Enrollment Adjustment Conversations with Principal Groups</b></p> <p>Used to adjust enrollment levels in the Enrollment Management Plan and the Spring Update to Enrollment Projections for the following school year.</p>	<p><b>10-Year Projections Report is Published</b></p> <p>Known as the Fall K-12 Enrollment Projections for the following school year and budgeted PreK seats set by the Academics Office.</p>
<b>JANUARY – FEBRUARY</b>	<b>FEBRUARY</b>	
<p><b>Preliminary Staffing Sheets</b></p> <ul style="list-style-type: none"> <li>Budget Office provides principals with staffing budget allocation sheets for the following school year based on Fall Enrollment Projections.</li> <li>Talent Acquisition and Management (TAM) provides staffing sheets based on Fall Enrollment Projections.</li> </ul>	<p><b>January 31 Enrollment Snapshot</b></p> <p>Used to prepare the Spring Update to the Enrollment Projections for the following school year.</p>	<p><b>Enrollment Management Plan is Published</b></p> <p>Includes steps APS is taking to manage enrollment for the following school year. Adjustments are used to "redistribute" students in the Spring Update to Enrollment Projections for the following school year.</p>
<b>FEBRUARY</b>	<b>MARCH</b>	
<p><b>Superintendent's Proposed Budget</b></p> <p>The Superintendent's Proposed budget is based on Fall Enrollment Projections. The proposed budget includes items such as any proposed changes to planning factors.</p>	<p><b>Spring Update to Projections</b></p> <p>The Fall K-12 Enrollment Projections and PreK allocations are updated with assumptions from the Enrollment Management Plan. This is called the Spring Update. The Budget Office sends staffing budget allocation sheets to schools based on the Spring Update to Enrollment Projections.</p>	<p><b>TAM Staffing Meetings</b></p> <p>Elementary and Secondary staffing meetings take place based on the Spring Update to Enrollment Projections, which reflect information from the Enrollment Management Plan.</p>
<b>APRIL</b>	<b>MAY</b>	
<p><b>School Board's Proposed Budget</b></p> <p>The School Board's Proposed budget is based on the Spring Update to Enrollment Projections and includes any changes in planning factors. Staffing adjustments may need to be made based upon changes proposed by the School Board.</p>	<p><b>School Board's Adopted Budget</b></p> 	

For more information, visit: [www.apsva.us](http://www.apsva.us)





# Takeaways for K-12 Projections

1. Enrollment reached a high peak in 2019 (*26,906 for K-12 and 28,020 for PreK-12*)
  - Fall 2023 enrollment is below that peak (*26,533 for K-12 and 27,452 for PreK-12*)
2. APS experience flat K-12 enrollment growth between '22 and '23 of 0.4%, this was also experienced in other Northern Virginia school systems
3. Enrollment trends are not yet telling a consistent “narrative”; enrollment trends have been mixed with declines (*'19 to '20 and '20 to '21*), growth (*'21 to '22*), and flattening (*'22 to '23*)
4. The Fall 2023 projections expect K-12 enrollment to grow by 1.2% between 2023 and 2024
  - With budgeted PreK included, PreK-12 growth is estimated at 2.4% between 2023 and 2024
5. Risks in the Fall 2023 projections include:
  - *Newly opened residential buildings taking longer to reach occupancy*
  - *The share of 2019 births becoming incoming kindergarten students falling further than anticipated*
  - *An outside external event outside APS's control (such as recession, pandemic, extreme weather event, etc.)*



# Next Presentation: “Demographics Update”