



ESCHBACHER
CONSULTING, LLC

Denver Enrollment Landscape

Winter 2022

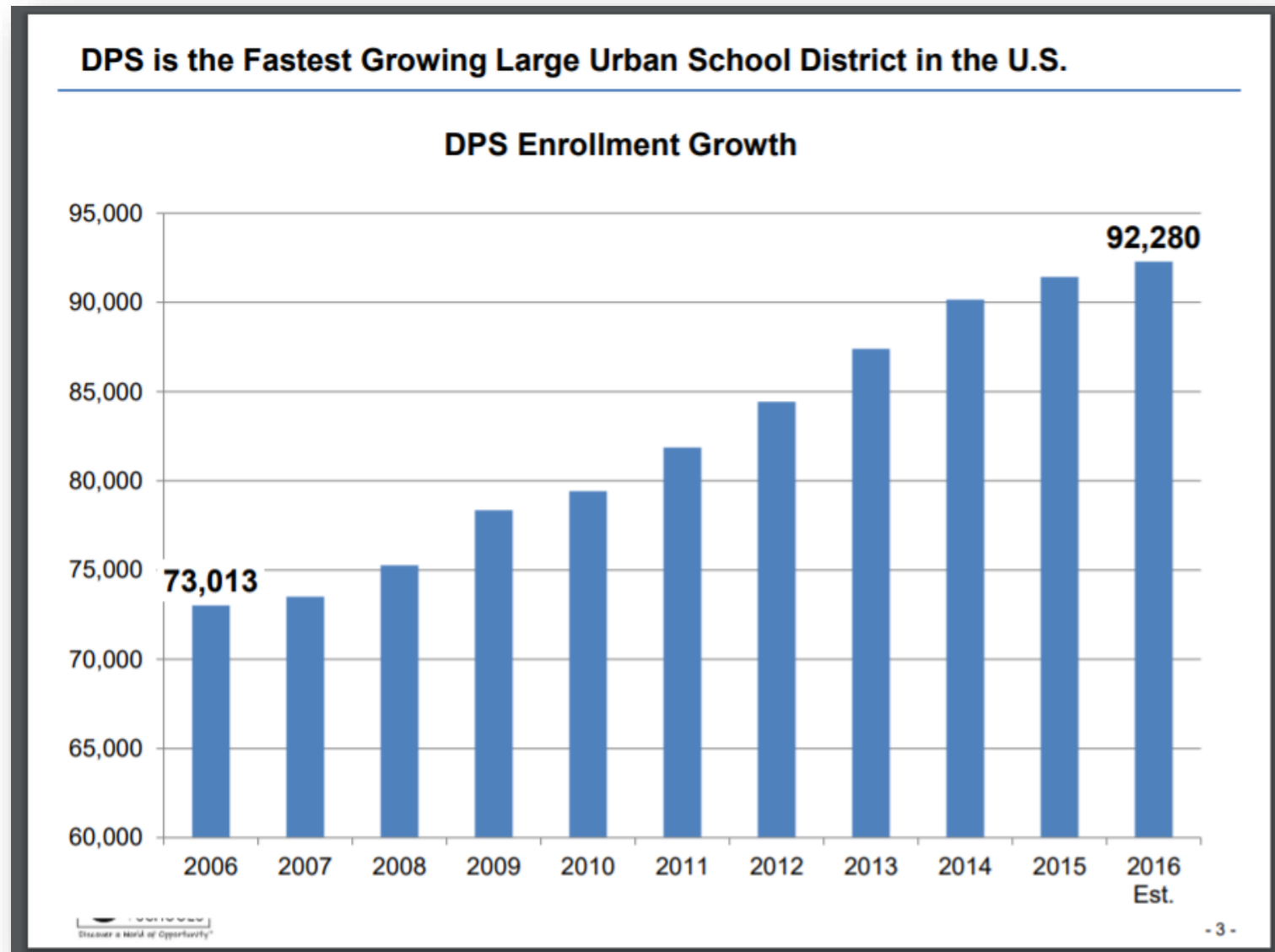
Goals of Today's Discussion

Provide key education stakeholders with an overview of city-wide dynamics that are impacting the student population in Denver and what it might mean for future enrollment in the district and the sustainability of the family of schools.

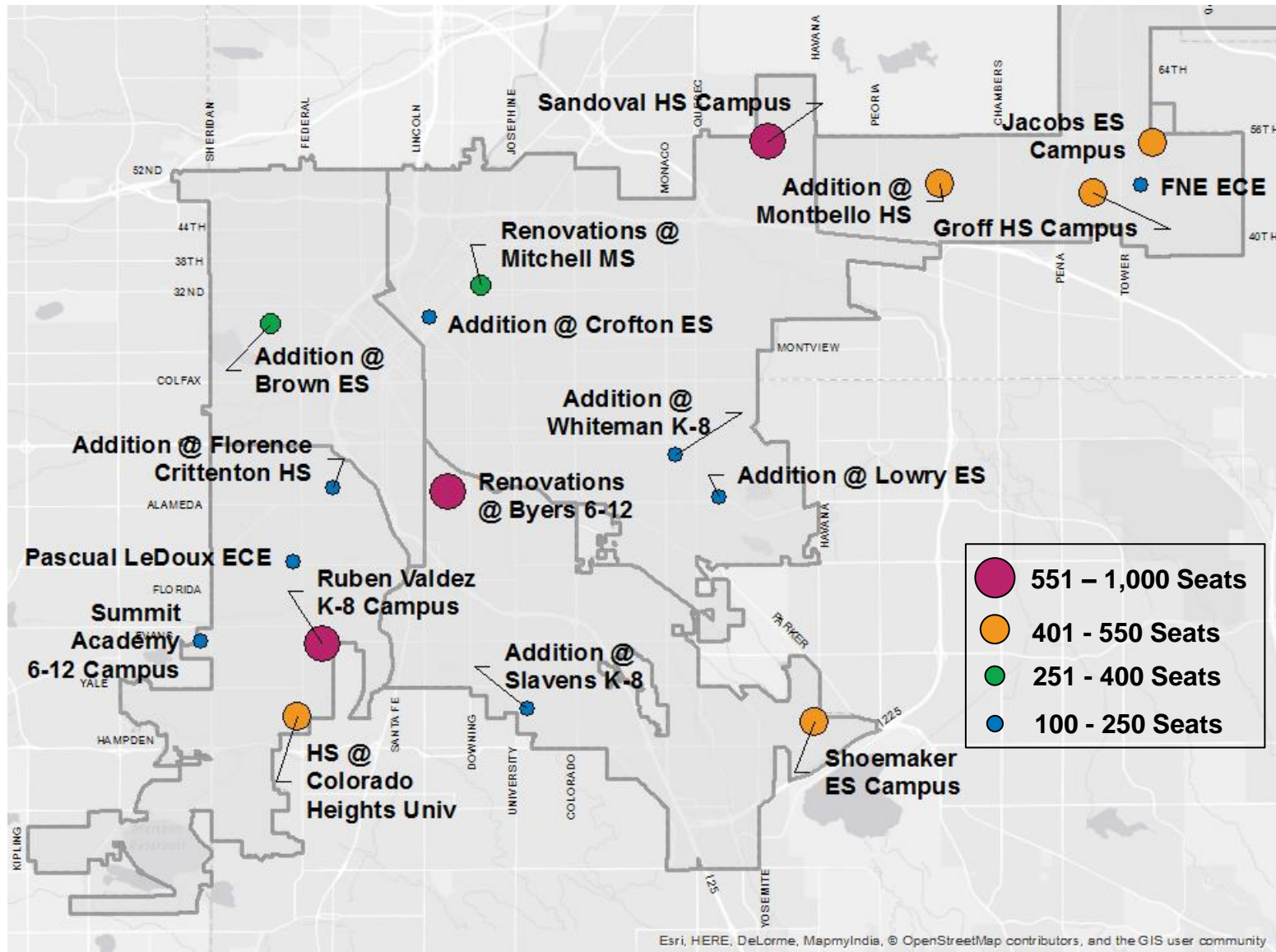
Disclaimer: The insights provided in this analysis are gleaned through serving as the Executive Director of Planning & Enrollment for Denver Public Schools and through providing advisory services to educational organizations in Atlanta, Austin, Cleveland, Fort Worth, Indianapolis, Nashville, New Orleans, and Oakland.

The opinions and insights expressed in this analysis are solely those belonging to Eschbacher Consulting. They do not purport to reflect the opinions or views of Denver Public Schools, RootEd, or any other organization.

Let's start in 2016, when district enrollment had increased roughly 20,000 students over 10 years



2012 Bond Capacity Projects added over 7,200 new seats in every region of the city to meet growth needs



Student Populations vs. District Enrollment

Central to understanding how enrollment has declined in Denver Public Schools is differentiating the student population versus enrollment



Student Population is the number of 5-18 year olds living in the City of Denver.

The **primary factors** influencing this are:

- Birth Rates
- Residential development
- Housing prices
- Migration of families in and out of the city



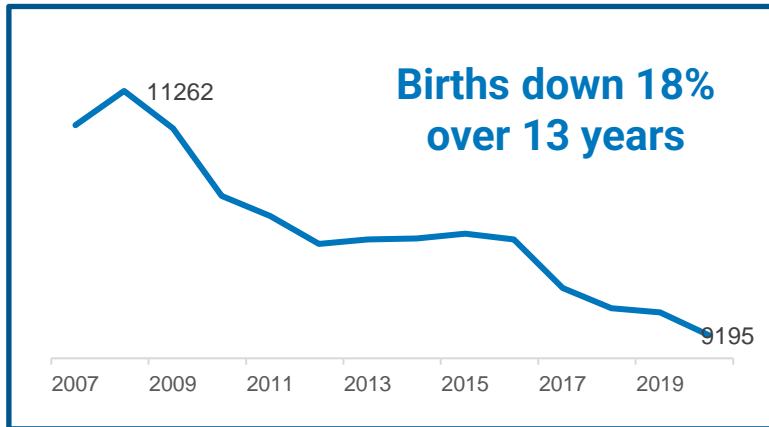
District enrollment is the number of students attending DPS.

While the **student population is the starting point**:

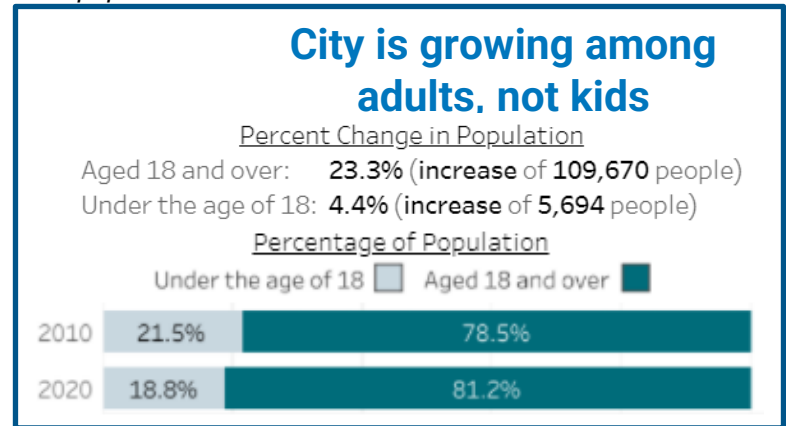
- Denver residents choosing DPS
- Denver residents choosing private schools or other districts
- Residents of other districts choosing DPS

Summary of student population factors

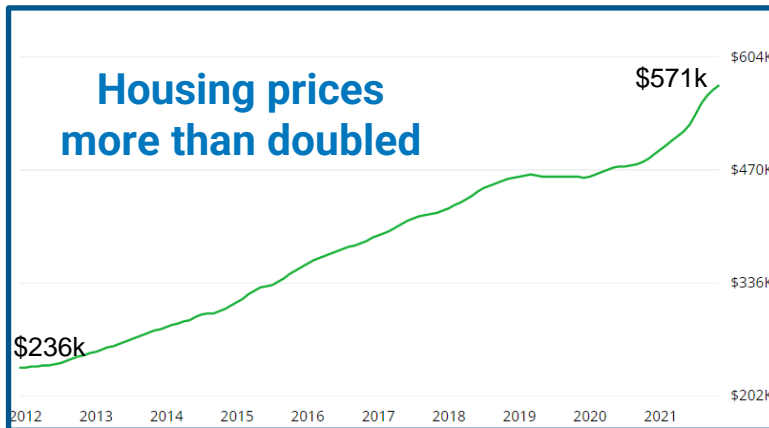
of births to mothers with primary address in Denver¹



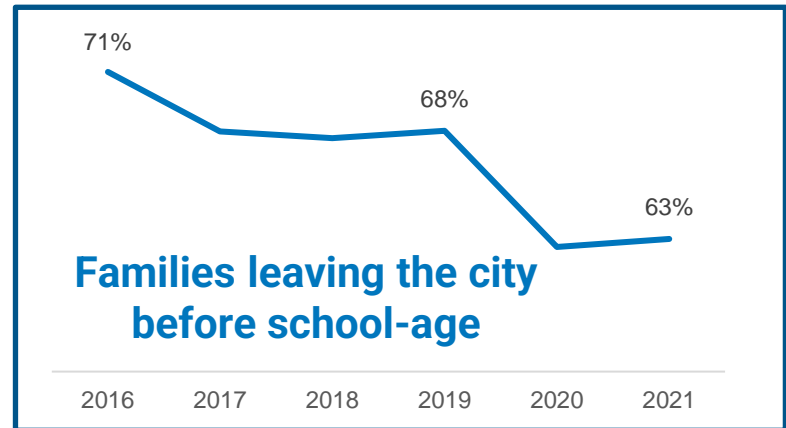
% of population under 18 in 2010 vs. 2020³



Average housing price by year²

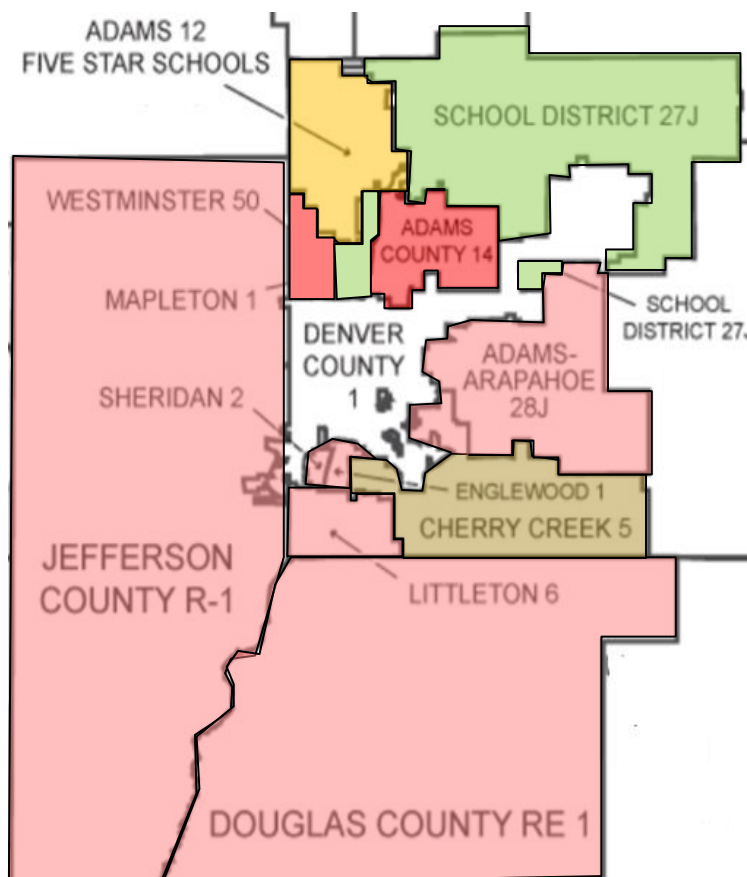


% of Denver births enrolled in DPS kinder 5 years later⁴

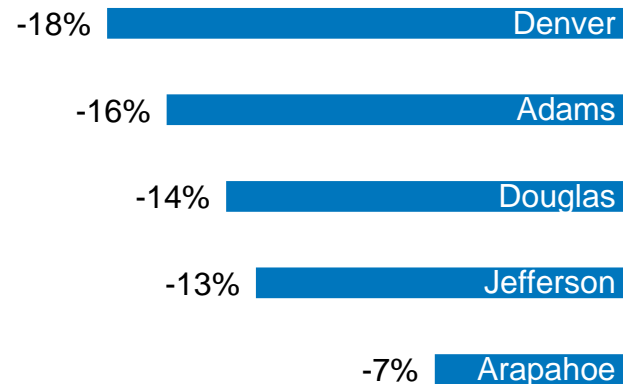


Denver's experience is similar to neighboring districts

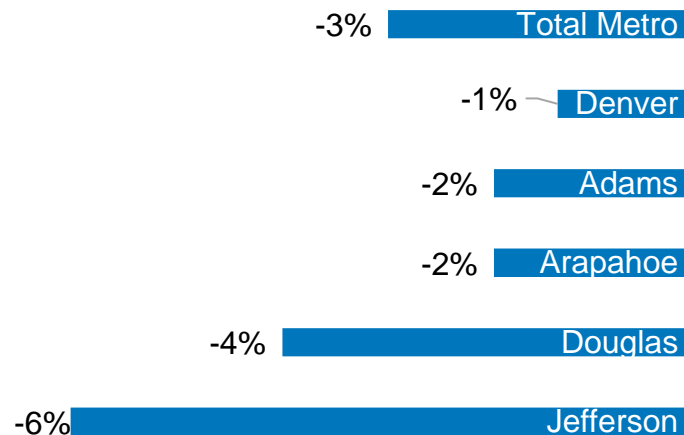
% change in K-12 enrollment: 2016 to 2020



Birth Rates: 2007 to 2020



K-12 Enrollment: 2016 to 2020

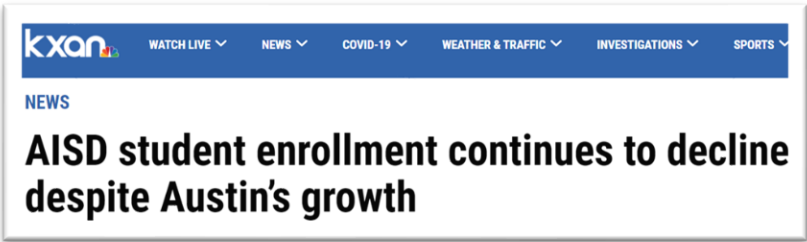
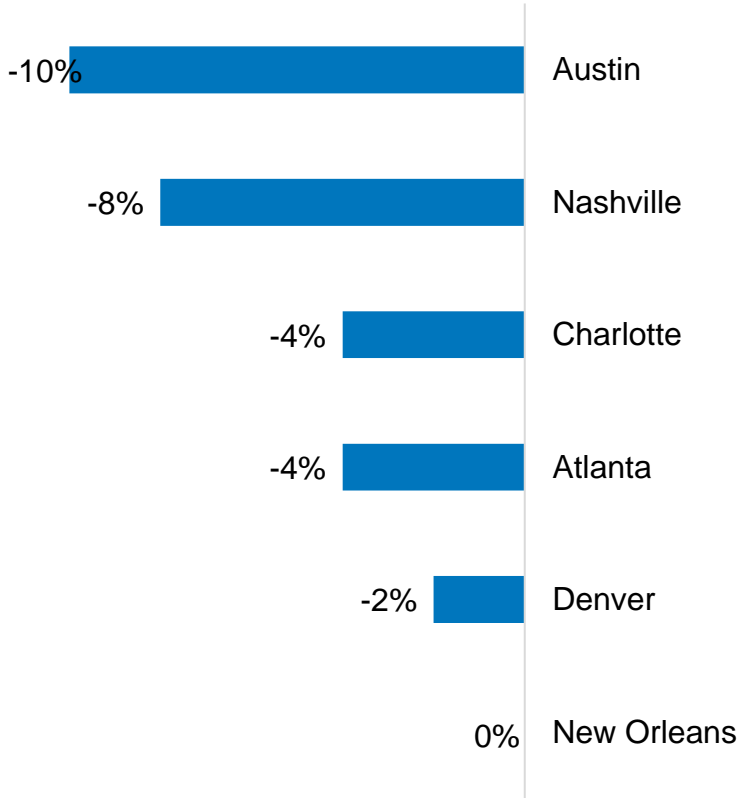


Denver's experience is also like peer cities nationwide

National

the cities that have also attracted the most new residents are those with high housing prices and less accessibility to families, leading to enrollment declines

% change in K-12 enrollment: 2016 to 2021



Philly school enrollment continues decline, surge

By Neena Hagen and Dale Mezzacappa | Nov 24, 2021, 10:52am EST



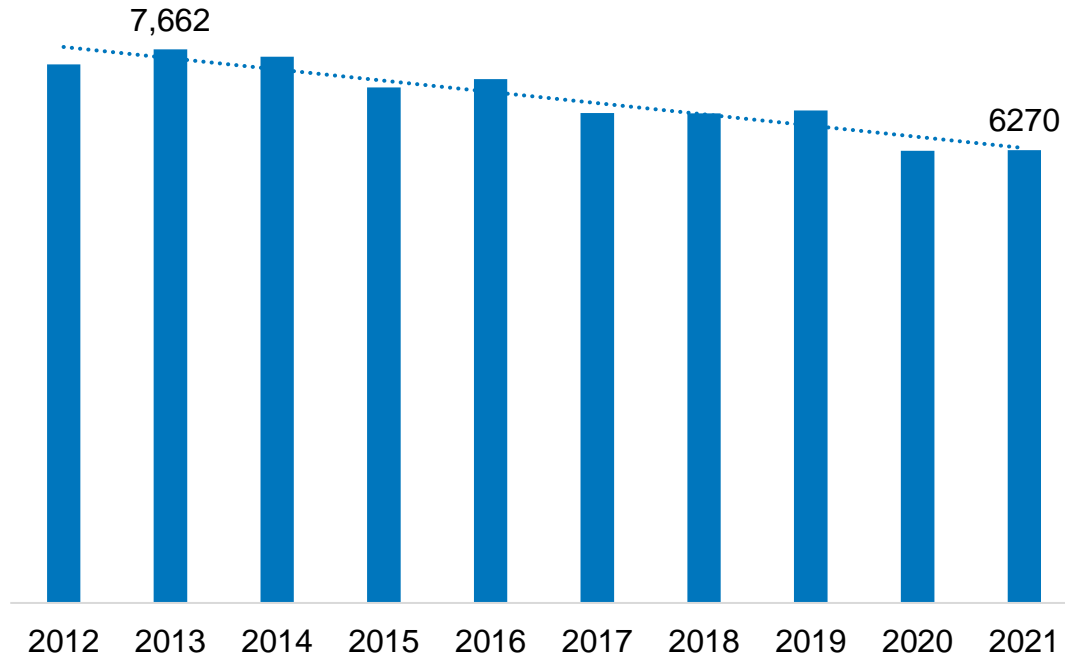
With 1.9% enrollment drop, NYC schools have lost 64,000 students since pandemic started

By Alex Zimmerman | Oct 29, 2021, 2:59pm EDT



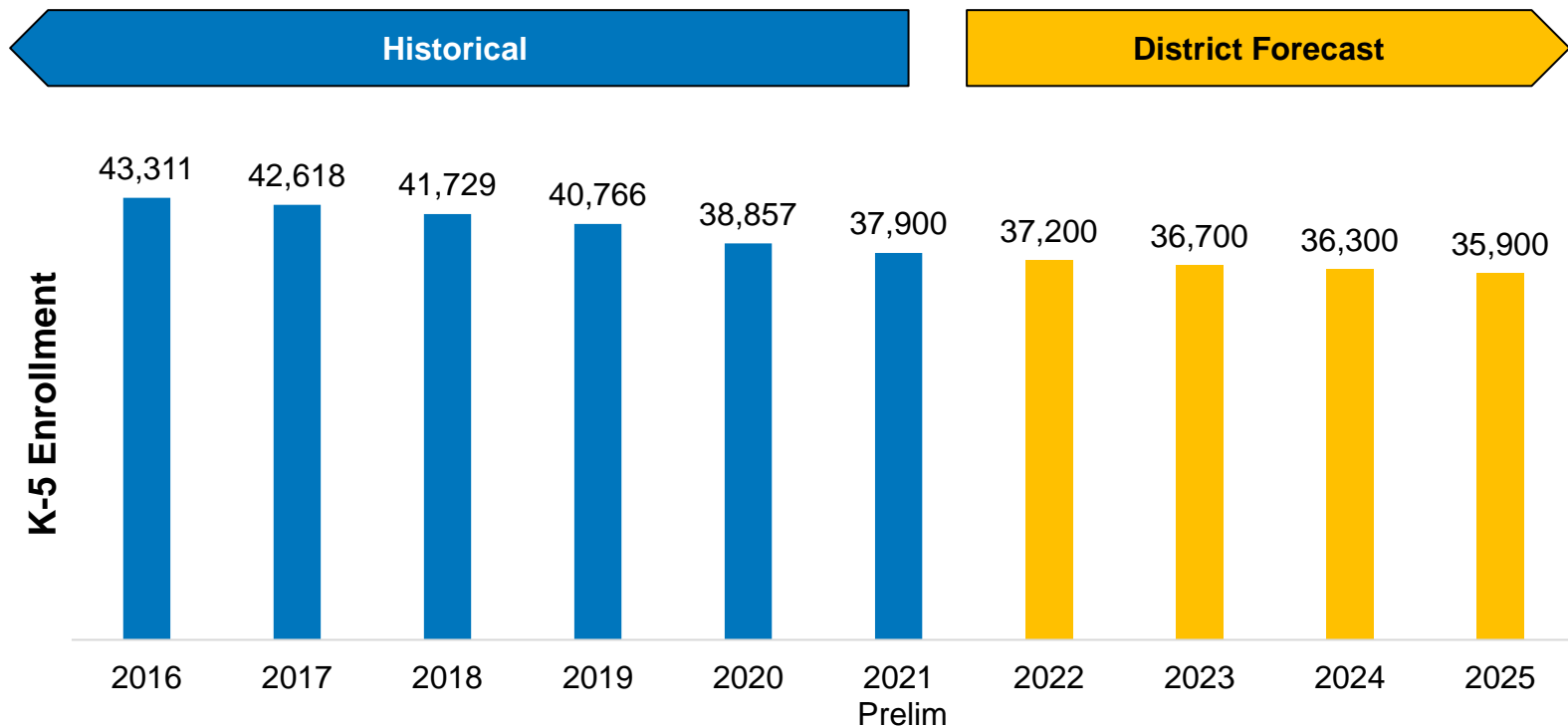
Kinder enrollment peaked 8 years ago

DPS Kinder October Count



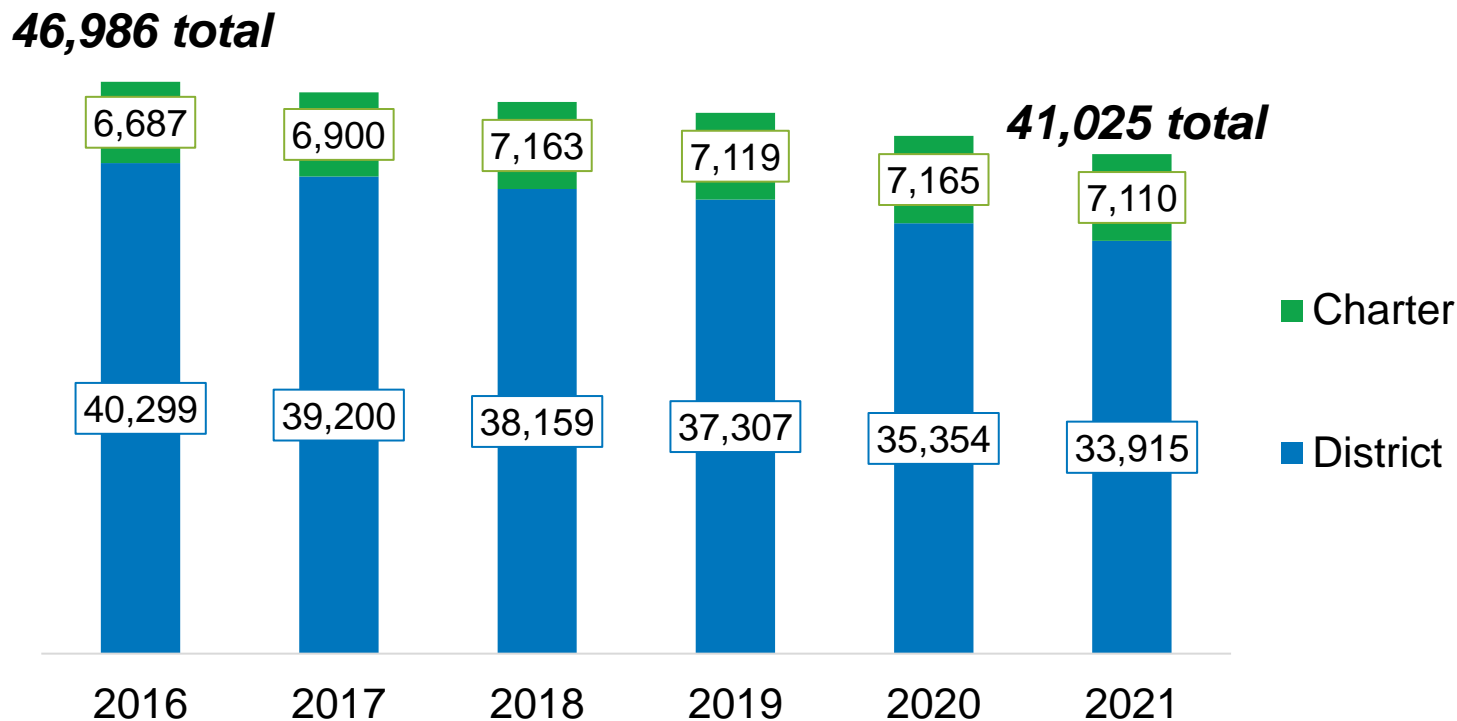
- Though overall DPS K-12 enrollment peaked in 2019, kinder enrollment peaked back in 2013 and has steadily decreased. This ties very directly to birth rates peaking in 2007 and declining during the Great Recession.
- Cohorts of students moving through the district decrease every year, so understanding how cohorts are entering the system is key to planning future enrollment levels.

District-wide Elementary School Trends



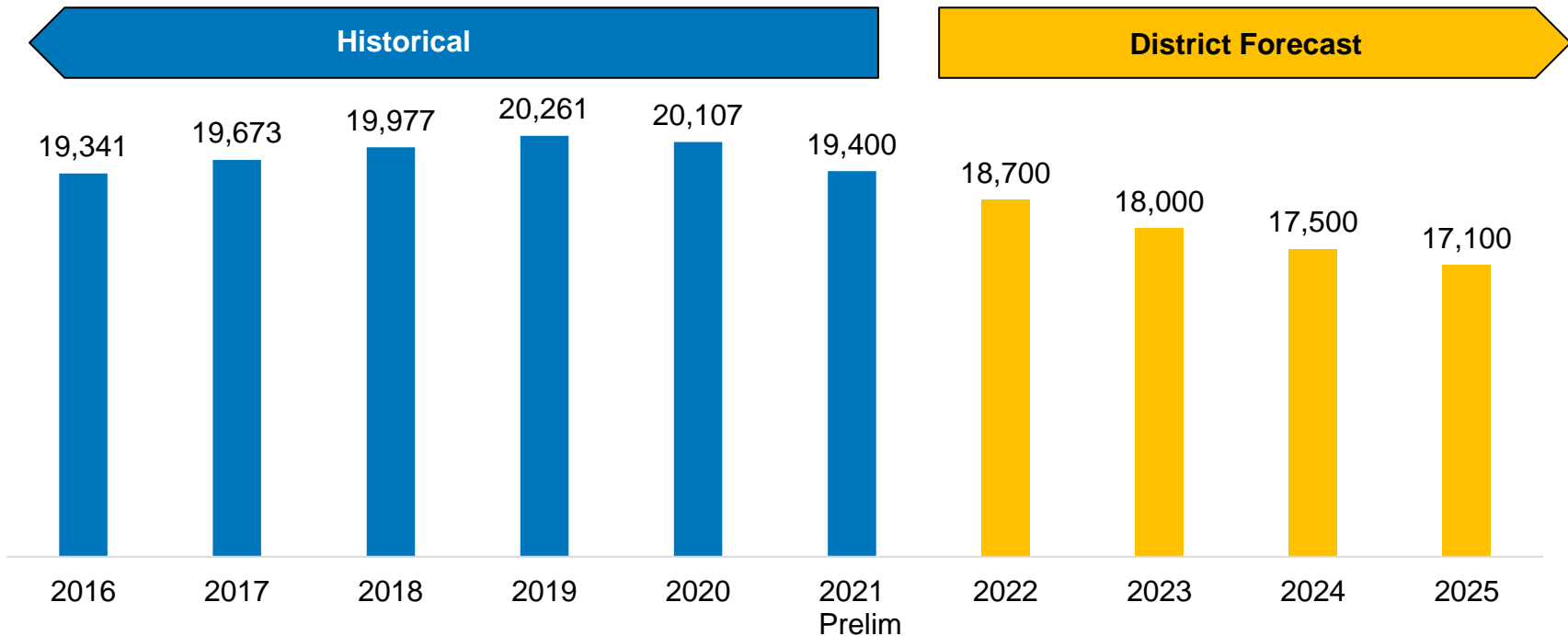
- Enrollment has declined more than 5,000 students since 2016, the equivalent of 17 average-sized elementary schools no longer enrolling in the system.
- Since 2016, only 2 schools have closed while another 2 have opened.
- Enrollment is forecast to continue declining over the next 4 years, with estimates at roughly 2,000 additional students, or an equivalent of another 7 elementary schools.

Elementary declines are not related to charter expansion



- Since 2016, overall elementary and K-8 enrollment declined ~6,000 students. During this time, Charters increased only 400 students, explaining 7% of the district decline.
- Over the last 5 years, the number of K-12 private school students in Denver declined from 8,560 to 6,104, suggesting declining student populations are the primary driver for lower enrollment, not choice patterns to other options.

District-wide Middle School Trends



- After years of steady district-wide middle school enrollment, 2021 saw enrollment drop more than 700 students.
- This is **not** COVID related, but rather the result of city-wide elementary declines that are now matriculating as smaller 5th grade cohorts to middle schools.
- Looking forward, the district's forecast is a 12% decline over the next four years.
- High schools are forecast to remain roughly flat, so will not be detailed in this analysis.

Dynamics Impact Schools Differently



Geography:

Central Region and west side of the city are declining at much higher rates than the east side



Demand

Parent choice is leading some schools to remain full even in declining regions, while other nearby schools drop precipitously

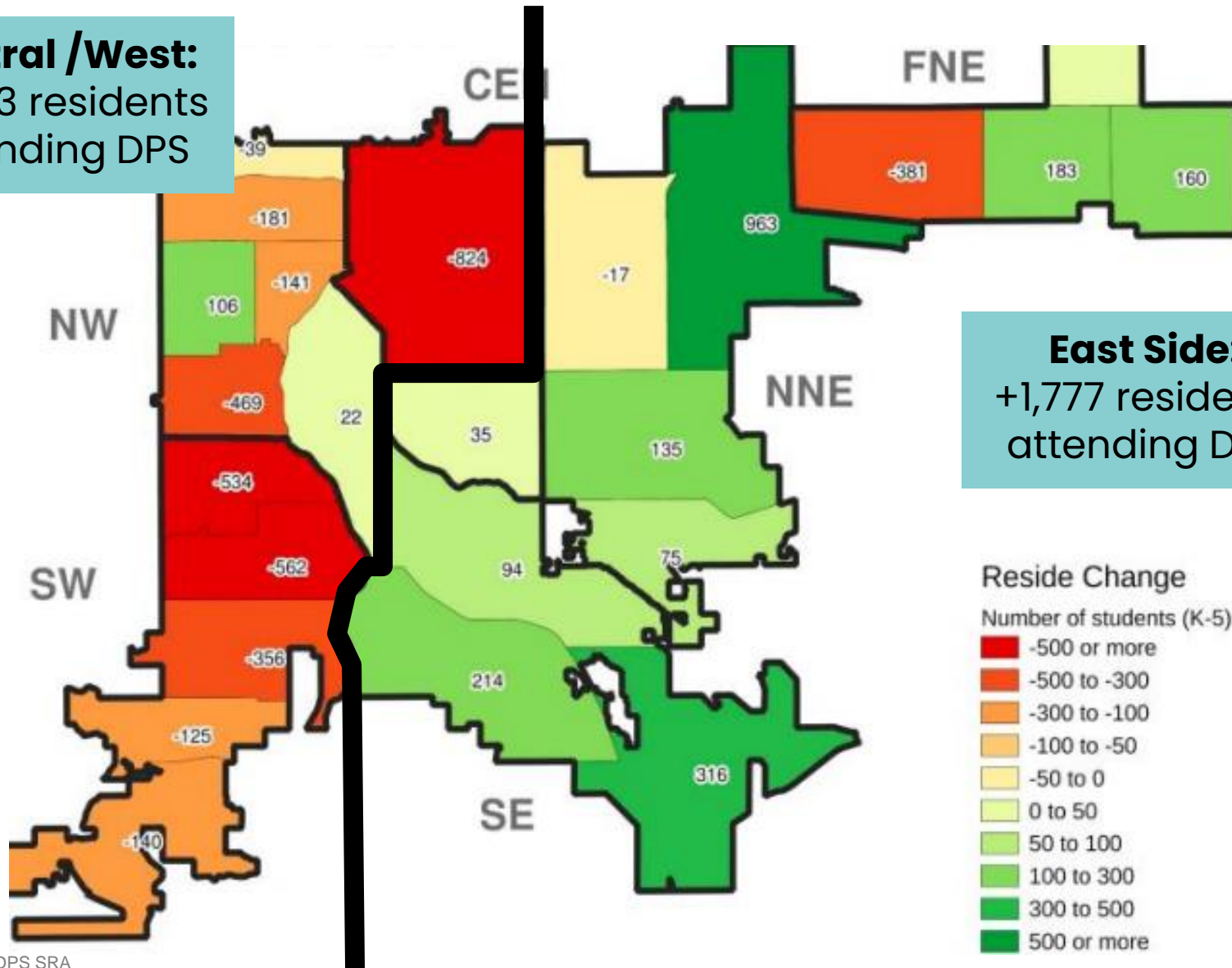


Grade Levels

DPS forecasts 5% further elementary declines, 12% middle school declines, while high schools will peak in 2022 and then begin declining

2015 to 2020 K-12 Declines Based on Student Residence

Central /West:
-3,243 residents
attending DPS

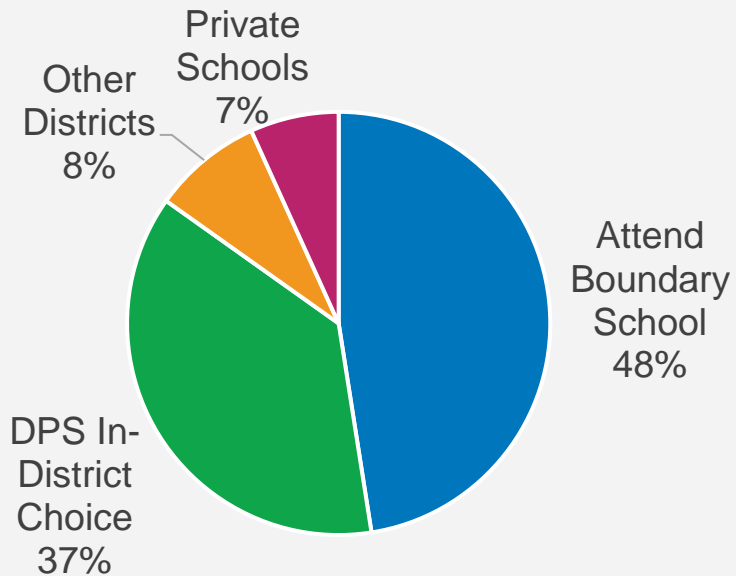


East Side:
+1,777 residents
attending DPS

Prevalence of family choice across Denver schools



Students are more likely to exercise choice than attend their neighborhood school



More students transfer to another district-run school (33k) than a charter (18k). Another 7,000 transfer to other districts while 6,000 attend private schools. 6,300 students transfer in from outside DPS.



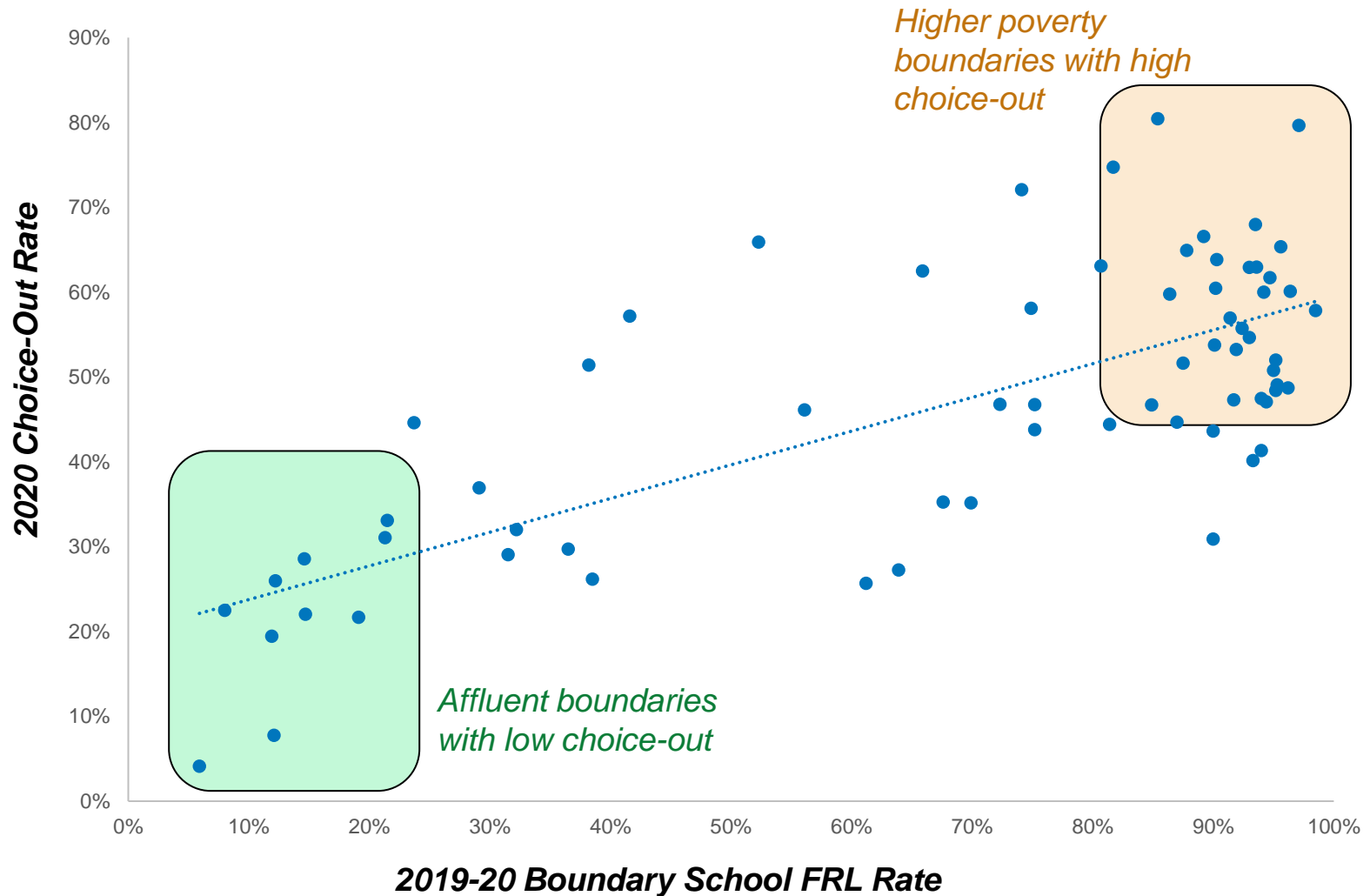
Students of color participate and benefit from SchoolChoice at a higher rate than their White peers.



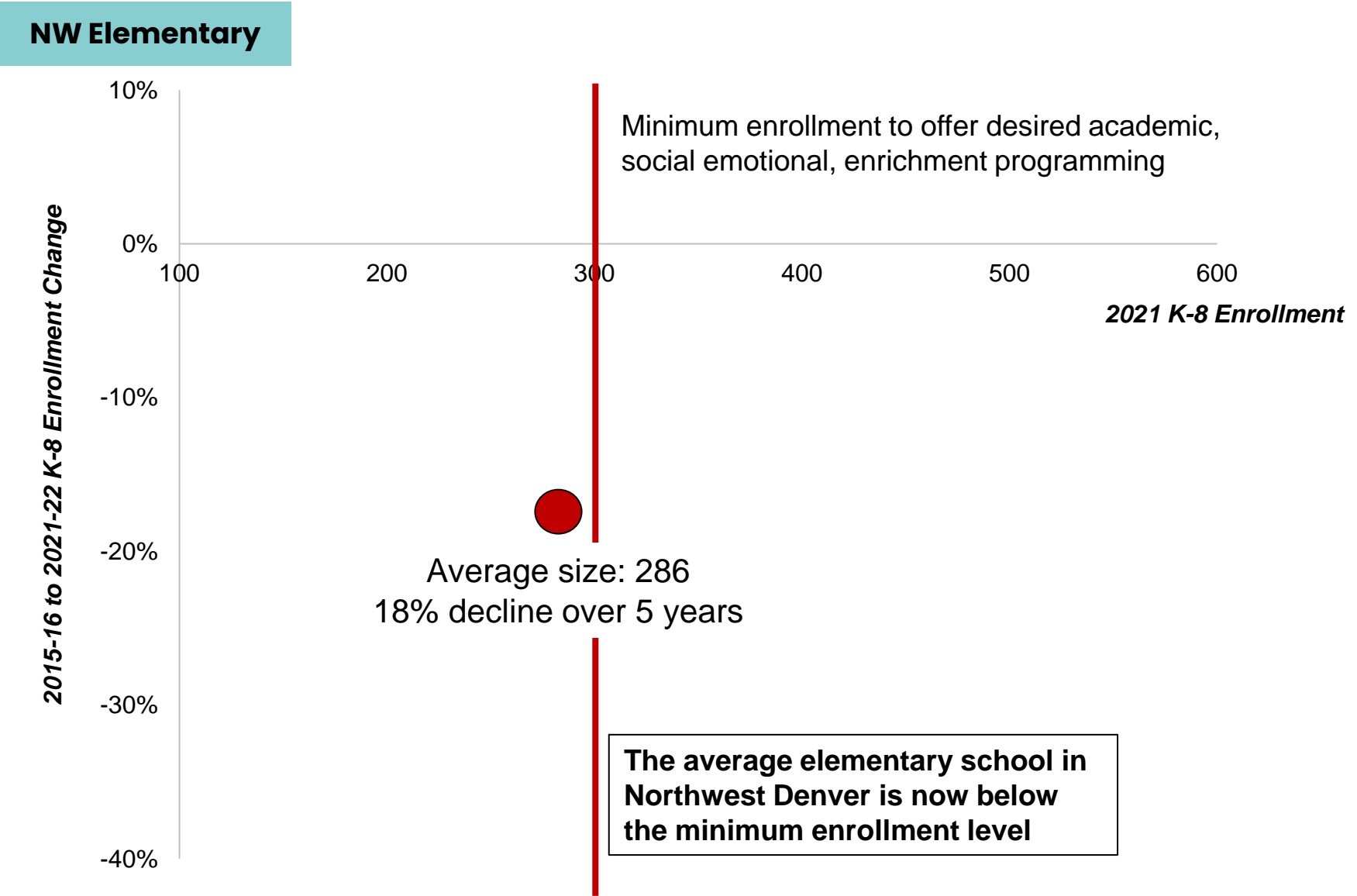
The housing market is a primary factor impacting SchoolChoice, where the most affluent neighborhoods are attending their boundary school at the highest rates, thereby participating in choice through the purchase of their home

Elementary choice closely ties to boundary income levels

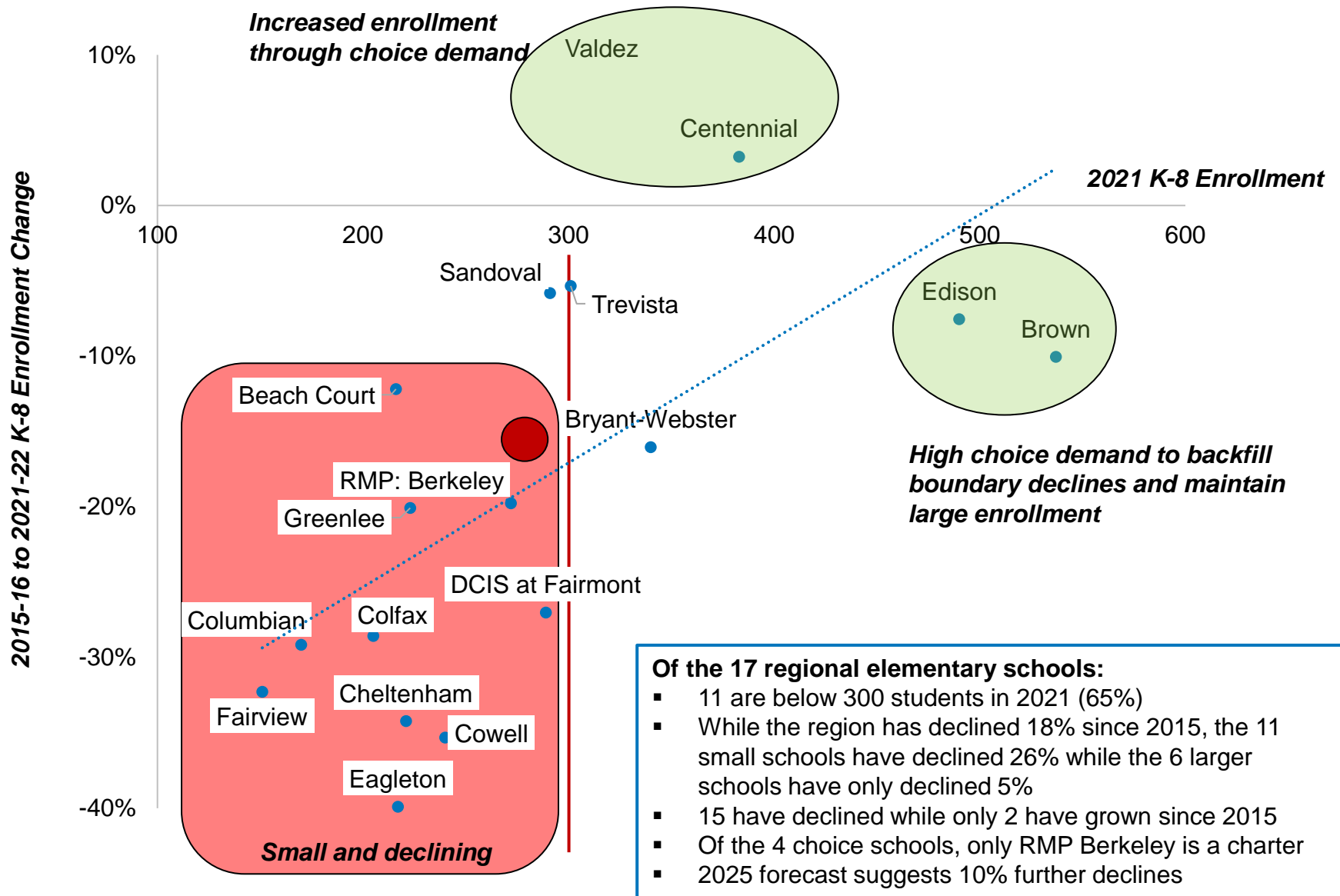
Higher poverty neighborhoods are utilizing SchoolChoice at higher rates than affluent neighborhoods who already “participated” in choosing their school through the housing market.



Regional example of enrollment trends at the school level



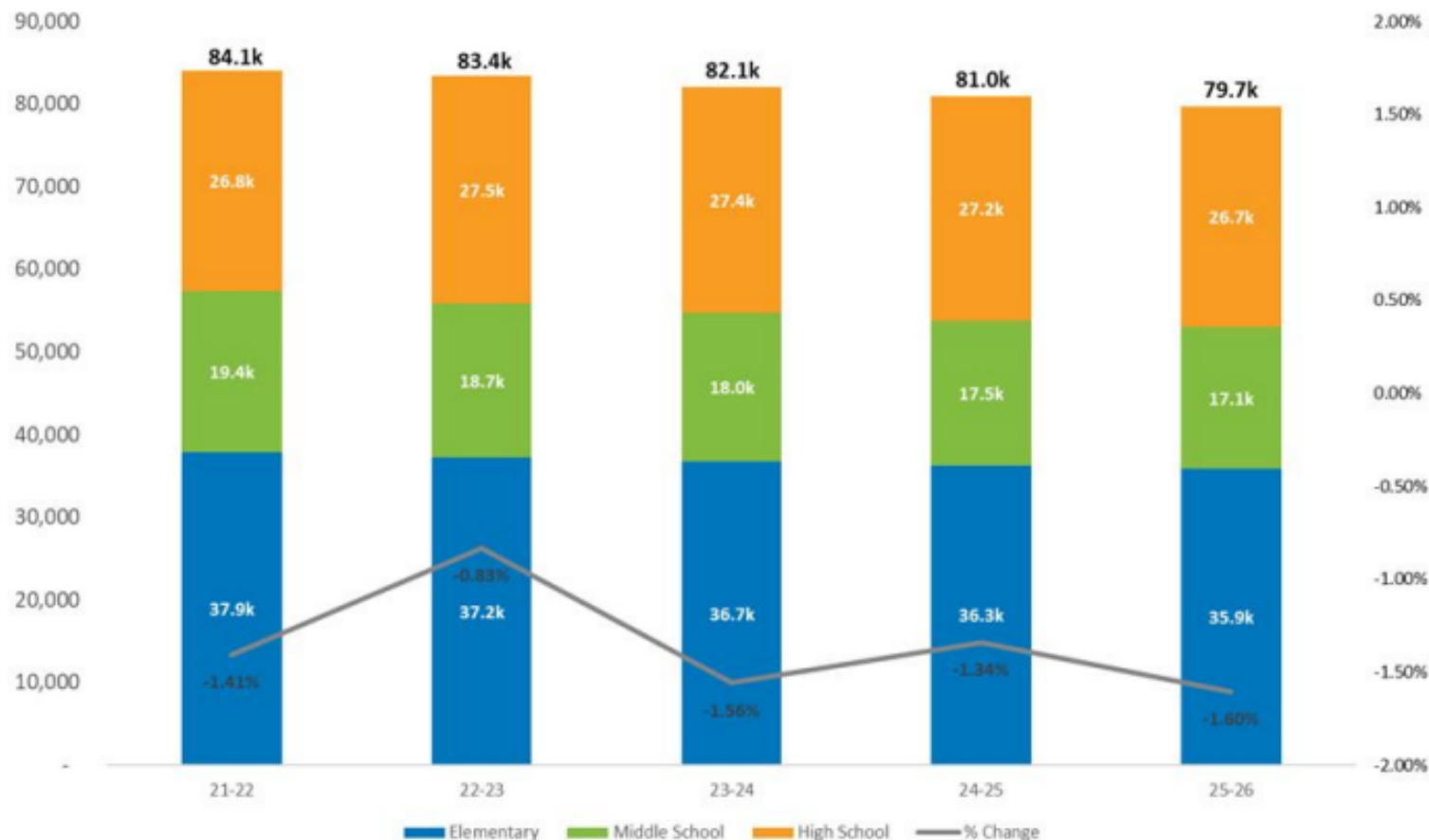
Regional example of enrollment trends at the school level



Enrollment Fall 2021 and Forward Looking

K-12 Only - Excludes ECE

Long-Term Enrollment Forecasts by Ed Level



- The spring Strategic Regional Analysis (SRA) forecasted a 6% decline in **K-12** enrollment through school year 25-26
- Estimated **K-12** enrollment across all DPS schools, including charter schools, by 25-26 is just under 80,000

*Numbers from 21-22 are estimates and not official October count membership, which is not finalized until December

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Elementary Enrollment Sustainability Insights



- 2021 elementary enrollment declined an additional 1,000 students, on top of roughly 2,000 student decline last fall. Total declines since 2014 exceed 5,000 students, or 14%. This is the equivalent of 17 average schools closing, yet over this time, only 2 closed while 2 opened.



- DPS is forecasting further elementary decline of 2,000 students by 2025, the equivalent of roughly 7 more elementary schools.



- It's a tale of two cities for declines by region. The Southwest (-31%), Northwest (-23%), and Central (-22%) regions have declined heavily, while the east side is steady.



- 53% of students attend a school other than their neighborhood school, making a large impact on school-level trends. Even in declining regions, some charters and district schools stay flat, while other nearby schools drop faster.



- Roughly half of schools on the west side are below 300 students, including 10 non-profit schools. Of the 46 elementary schools below 300 students this fall, 36 have declined over the last 2 years, with 15 declining more than 50 students.



- When considering a “technically correct solution” for right-sizing the portfolio, roughly 20 elementary schools could close by 2025 to bring the portfolio to a sustainable level. The limited board appetite likely leads to ongoing saturation risks.

Middle School Enrollment Sustainability Insights



- After years of steady increases, enrollment dropped 700 students in 2021. Importantly, this is **not** COVID-related, it is due to smaller elementary cohorts matriculating.



- Given the size of current elementary cohorts, middle school enrollment is forecast to drop roughly 2,300 further students by 2025, or 12%.



- With more than half the city (including nearly all high-poverty areas) in enrollment zones, family demand for schools will likely keep higher demand schools flat, while less popular schools are likely to decline. Charters are on both sides of the demand dynamics, depending on region of the city.



- Like elementary, the Central region (75% of schools), Northwest (36%), and Southwest (36%) regions are projected to higher rates of smaller secondary schools below 300 students, while the other regions have greater sustainability.



- When considering a “technically correct solution” for right-sizing the portfolio, roughly 7 middle schools could close by 2025 to bring the portfolio to a sustainable level.

Final Key Lessons to Share



- Enrollment declines are due to fewer children living in Denver due to the lowest birth rates in the history of our country combined with the highest housing prices in the history of our city. These are outside DPS's control.



- Declining student populations are a trend also seen in most neighboring districts as well as peer urban districts across the county.



- Enrollment declines are very likely to continue across all grade levels.



- Schools will be impacted differently given their location in the city, relative demand, grade level, and ability to adapt to changing demographics.



- More than half of families participate in a form of school choice, with the most frequent choice being families attending a different district-run school.



- Given enrollment trends and for schools to offer the academic, social emotional, and enrichment programming that students deserve, there likely need to be a sizable number of consolidations to allow schools to have sustainable enrollment levels.