



Fall 2023 10-Year Projections

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Objectives and Agenda

Agenda

- Context
- Fall 2023 Projections
- 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)

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

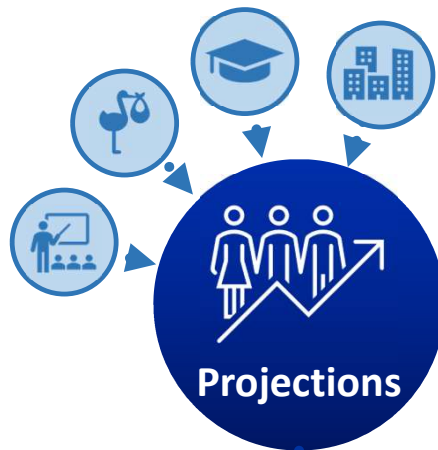
English Learners
(Office of English Learners, Office of Chief Academic Officer)





Stakeholders That Use Projections

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

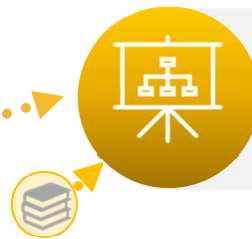


- Projections are produced independent from other APS processes.
- It is one of many data points which inform decision makers



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



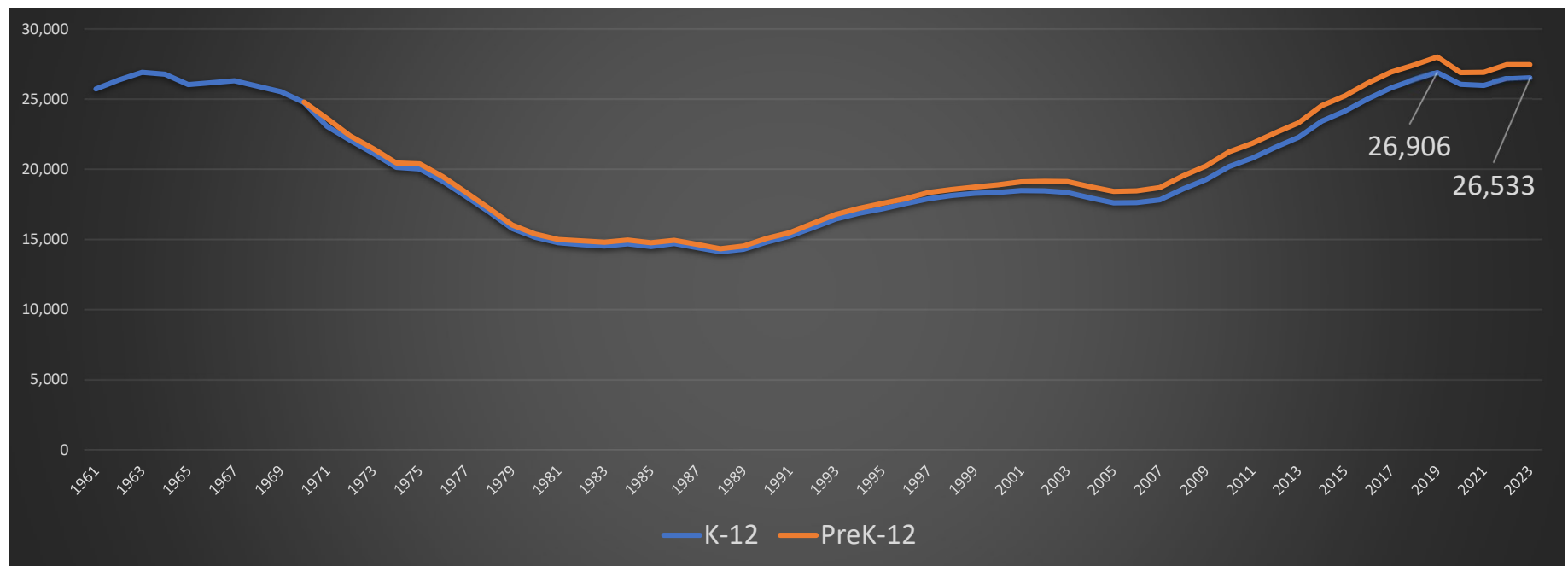
Facilities and Operations

- Background information for the Capital Improvement Plan



APS Enrollment Trends

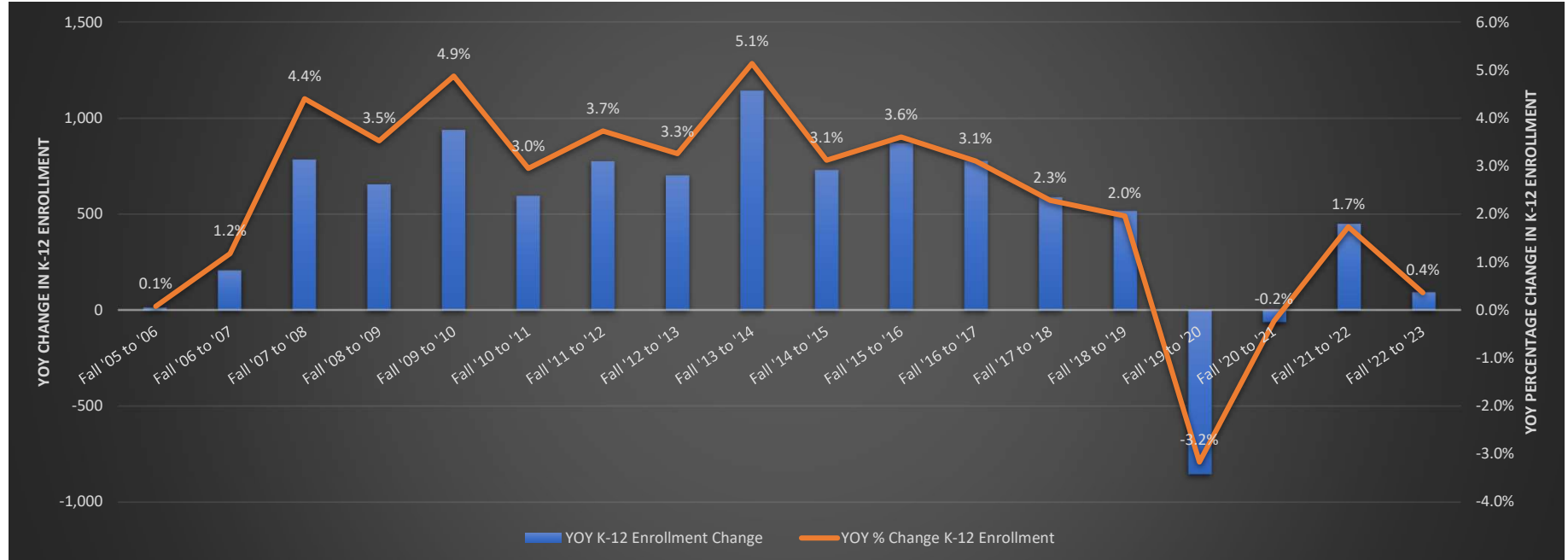
- **K-12 and PreK-12 enrollment for 2023 are still below peak 2019 levels**
- **Within K-12 enrollment, only High School is above 2019 levels**
 - Grades K-5 from 13,264 (2019) to 12,485 (2023): -779 students
 - Grades 6-8 from 6,119 to 5,875: -244 students
 - Grades 9-12 from 7,523 to 8,173: +650 students





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

		Grades K to 12			
School System	2022-2023	2023-2024	Change	Percent Change	
Northern Virginia Counties	Falls Church City	2,444	2,540	96	3.9%
	Alexandria City	15,482	15,752	270	1.7%
	Fairfax County	175,820	176,093	273	0.2%
	Loudoun County	81,116	81,082	-34	0.0%
	Prince William County	89,188	88,812	-376	-0.4%
	Manassas Park City	3,298	3,269	-29	-0.9%
	Manassas City	7,418	7,350	-68	-0.9%
	Stafford County	30,570	31,052	482	1.6%
	Frederick County	13,826	14,034	208	1.5%
	Chesterfield County	62,998	63,189	191	0.3%
	Culpeper County	8,201	8,209	8	0.1%
	Fauquier County	10,671	10,666	-5	0.0%
	Richmond City	20,365	20,137	-228	-1.1%

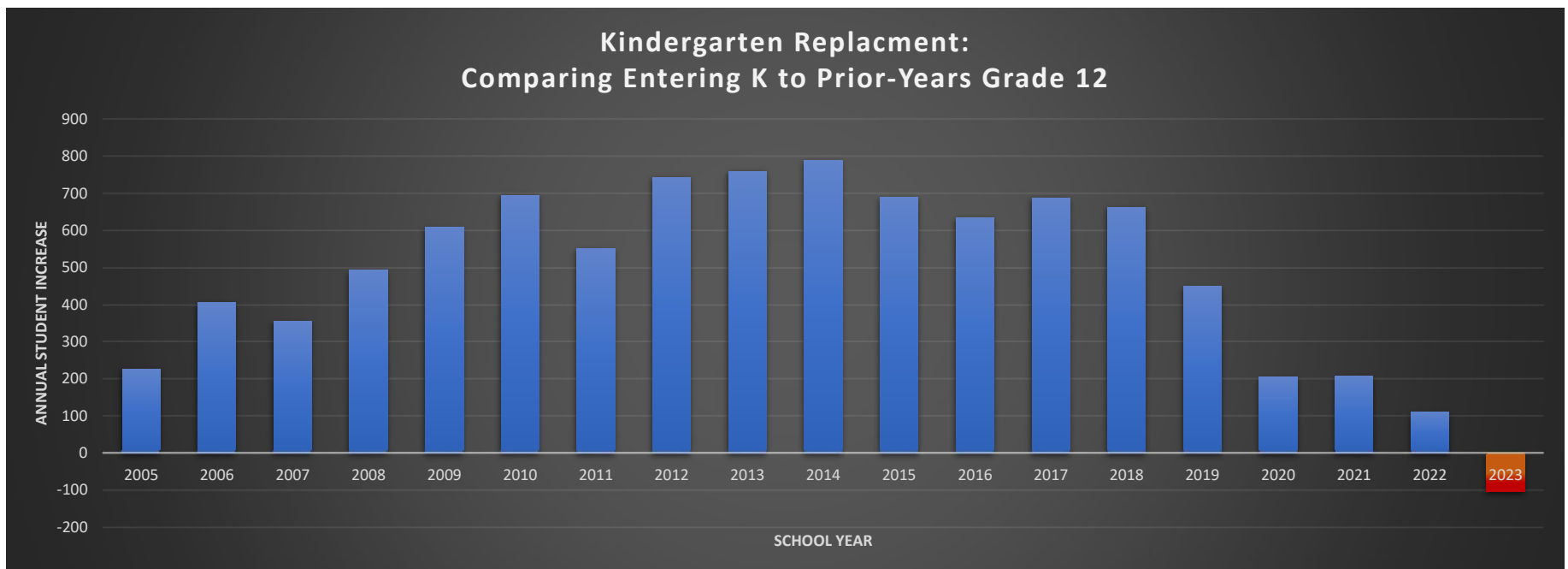
Source: Virginia Department of Education (VDOE), Fall Membership Data for 2022-23 and 2023-24, Grades K-12. Downloaded April 4, 2024.



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*)

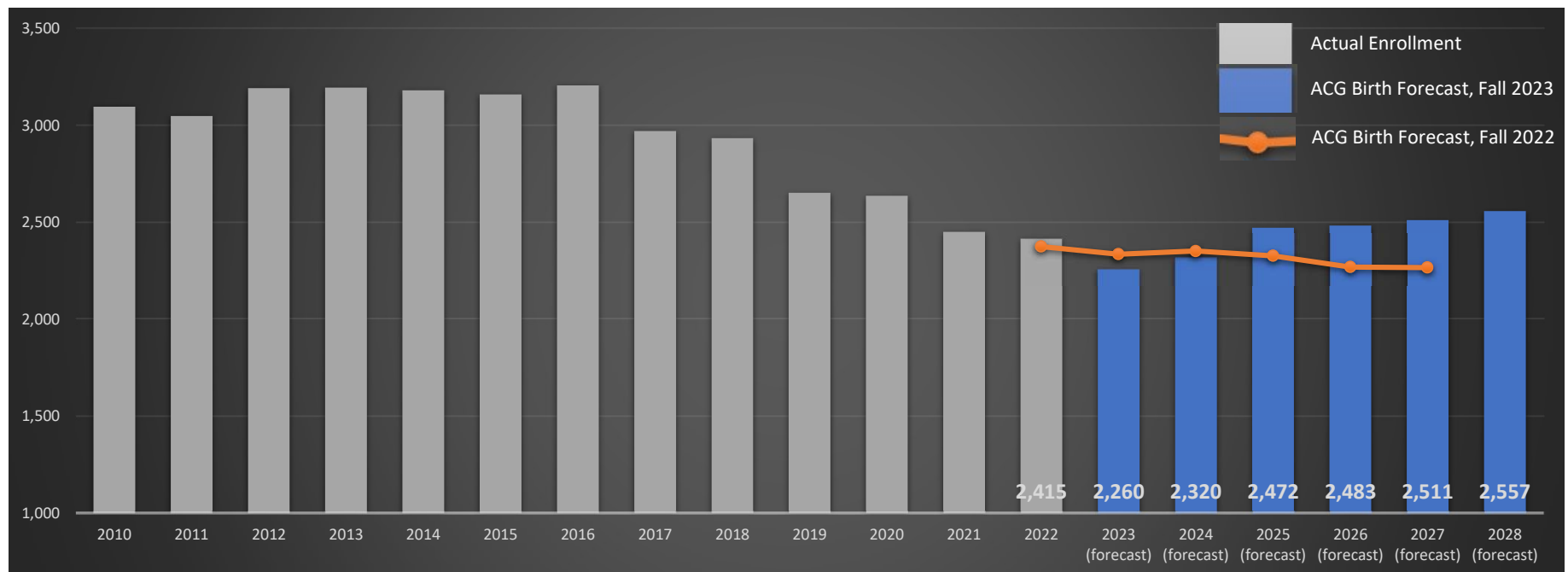


Source: Page 9 of "Fall 2023 10-Year, K-12 Enrollment Projections Report, <https://www.apsva.us/statistics/enrollment/>



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



Source: Page 18 of "Fall 2023 10-Year, K-12 Enrollment Projections Report, <https://www.apsva.us/statistics/enrollment/>



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
2016	3,207	2021-22	1,998	0.623
2017	2,971	2022-23	2,006	0.675
2018	2,934	2023-24	1,973	0.672

3-year average pre-pandemic 2017-18 to 2019-20 0.708

3-year average 2021-22 to 2023-24 **0.657**

Source: Page 19 of "Fall 2023 10-Year, K-12 Enrollment Projections Report, <https://www.apsva.us/statistics/enrollment/>



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) Open Dec. 2022	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) Not Open	Garden - Market Rate	0	1.2	0.0%
Terwilliger Place (American Legion/APAH) Sept. 2022	High Rise - Committed Affordable	66	101.0	65.4%
The Terraces at Arlington View (Arlington View Terrace East) Apr. 2023	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) Oct. 2023	High Rise - Market Rate	0	11.7	0.0%
1900 Crystal Dirve - South Building Not Open	High Rise - Market Rate	0	29.7	0.0%
Urba (Harris Teeter and American Service Center Phase 1) late 2023	High Rise - Market Rate	0	24.7	0.0%
Westmont Apartments (Westmont Shopping Center -3233 Columbia Pike) Jul. 2023	High Rise - Market Rate	3	35.0	8.6%
The Milton -Pentagon Centre PDSP & Final Site Plan - Phase IA Jun. 2023	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) May 2023	High Rise - Mixed Income	19	27.8	68.4%
		182	372.9	48.8%

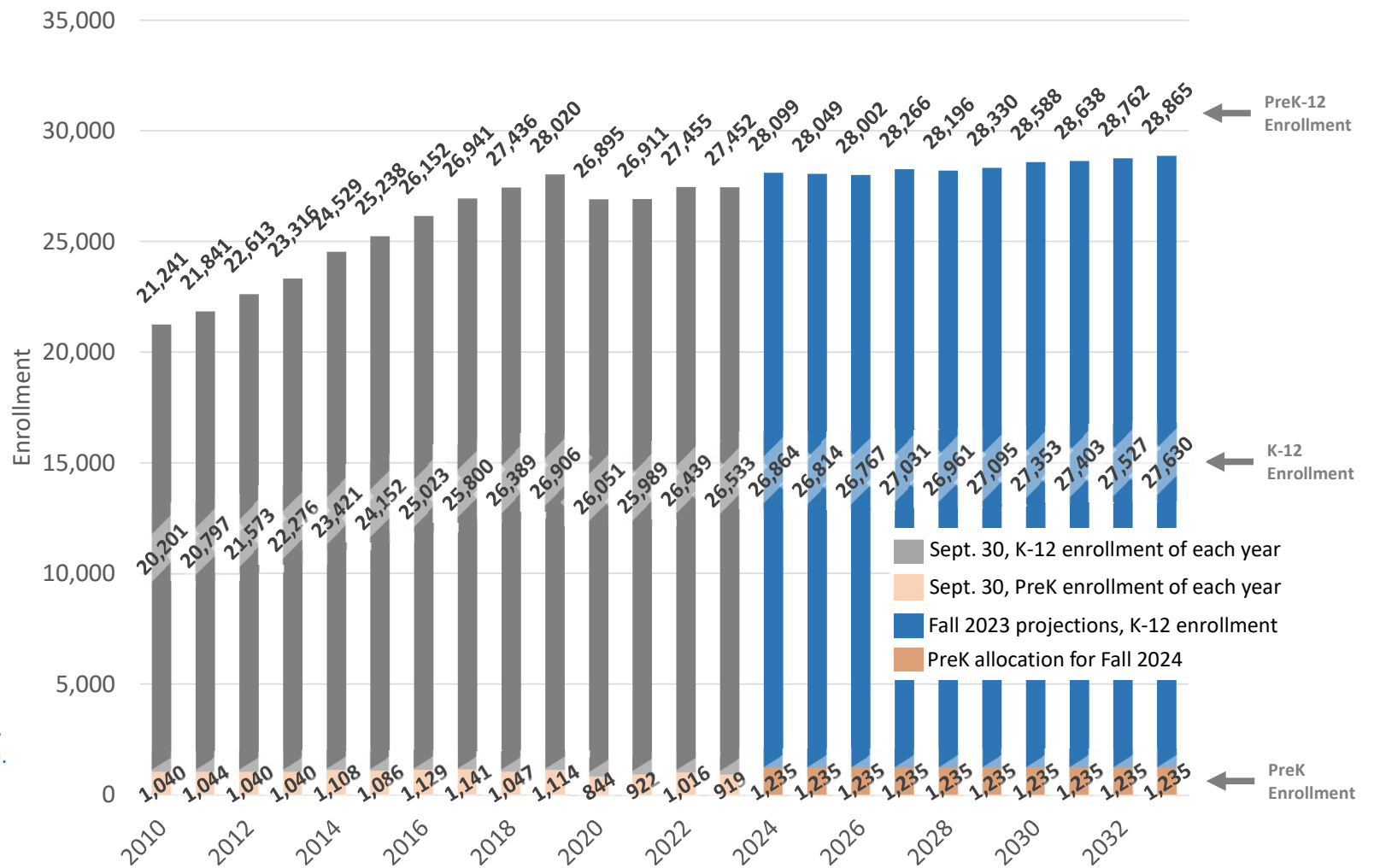




10-Year Fall 2023 Projections



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>

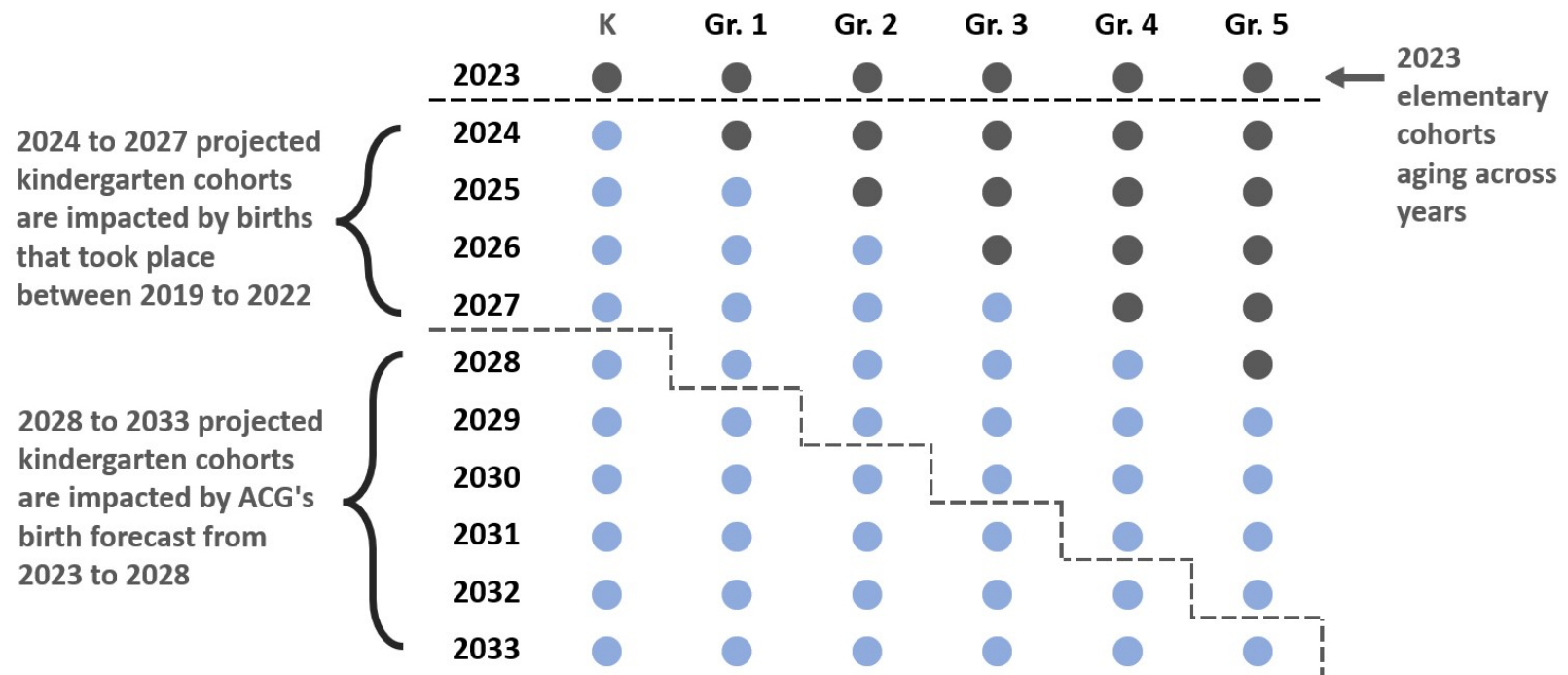
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Source: Page 6 of "Fall 2023 10-Year, K-12 Enrollment Projections Report, <https://www.apsva.us/statistics/enrollment/>



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/>

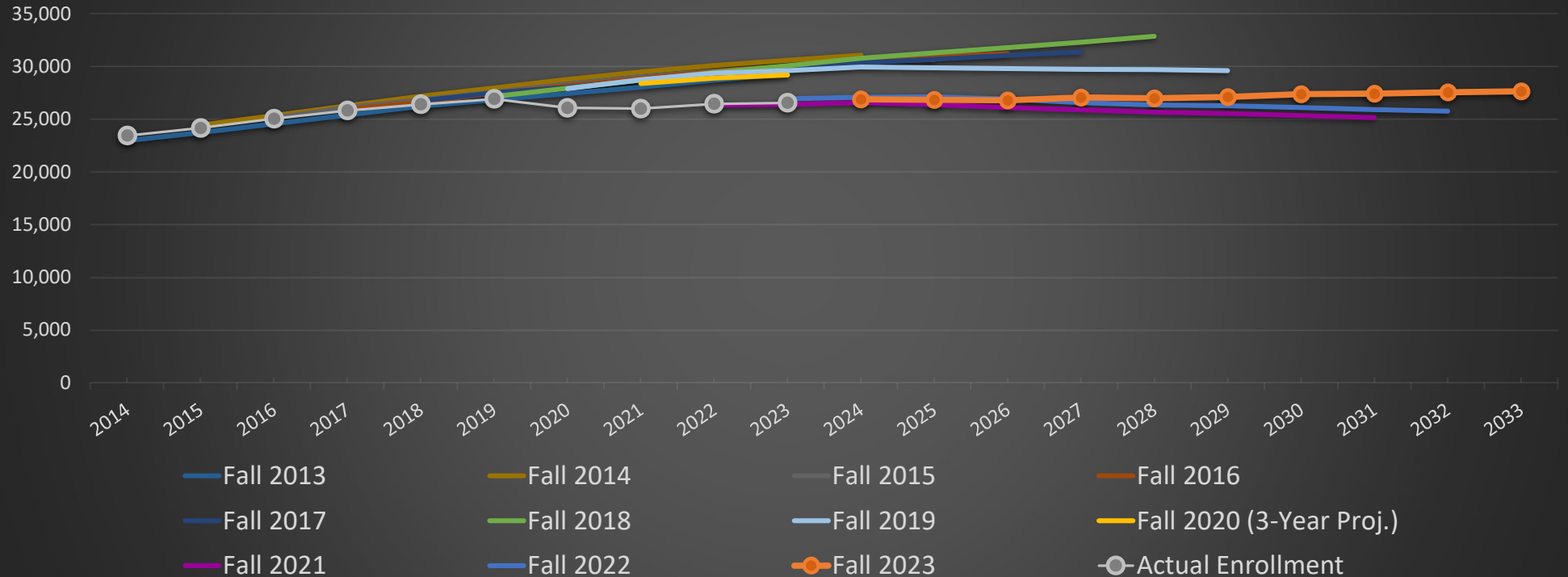


10-Year Fall 2023 Projections in Context

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%
K-12 Sub Total	26,533	26,929	-396	99%
PreK *	919	1,221	-302	75%
PreK-12 Total	27,452	28,150	-698	98%

* 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.



OCTOBER	DECEMBER - JANUARY	JANUARY
<p>September 30 Enrollment Snapshot</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>Enrollment Adjustment Conversations with Principal Groups</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>10-Year Projections Report is Published</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>
JANUARY - FEBRUARY	FEBRUARY	
<p>Preliminary Staffing Sheets</p> <ul style="list-style-type: none"> Budget Office provides principals with staffing budget allocation sheets for the following school year based on Fall Enrollment Projections. Talent Acquisition and Management (TAM) provides staffing sheets based on Fall Enrollment Projections. 	<p>January 31 Enrollment Snapshot</p> <p>Used to prepare the Spring Update to the Enrollment Projections for the following school year.</p>	<p>Enrollment Management Plan is Published</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>
FEBRUARY	MARCH	
<p>Superintendent's Proposed Budget</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>Spring Update to Projections</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>TAM Staffing Meetings</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>
APRIL	MAY	
<p>School Board's Proposed Budget</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>School Board's Adopted Budget</p>	



For more information, visit: 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.)*