



2016-17 Demographic Analysis

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Enrollment Trends

Enrollments decreased slightly from 1,985 to 1,974 in 2016.

Grade-to-grade migration of last year's K-7 students into 1-8 this year was +1.2%. This is higher than the negative value recorded in 2015, but still well below 2012-2014 levels.

Major factors contributing to lower growth include ongoing effects of the Bay Area Housing Crisis:

- Increased housing prices and rents generally price out larger families and dissuade families with school age children from moving to the District.

Enrollments continue to be driven primarily by the size of incoming kindergarten and transitional kindergarten class sizes.

- The 2016 birth-to-kindergarten ratio was the lowest it has been since 2010.

Community Demographics

- Moderate population growth since 2000 (+5.8%);
- Aging community (49.3 median age);
- While the general population increased, the relevant school age population (5-14 years) remained stable (and is projected to decline over the next five years);
- High median income compared to the State, and widening each year;
- Not very ethnically diverse (76% White);
- A little over $\frac{1}{4}$ of all households have individuals under 18.

Bay Area Housing Crisis

- Throughout the Bay Area, the increase in housing prices is far outpacing growth in wages.
 - This is fueled by the influx of technology workers to high paying jobs and a lack of new development.
 - As families and individuals are priced out of San Francisco or other Bay Area communities, they raise prices in the new communities they settle in, leading to still other families being priced out there.
- Marin County is especially unaffordable.
 - The average wage earner in Marin County needs to spend about 109% of their income to afford the median home in the county.
 - 44.7% of DSD renter households spend at least 35% of their income on rent (35% is the highest level recorded by the Census).
 - The County added about 10,000 population in the last five years, but only around 500 new housing units.
- Census data for DSD through 2015 show increasing housing prices, with fewer owners and more renters. Median gross rent has increased especially rapidly.
- Zillow estimates for trends in the last year show the same trajectory:
 - Home values rose nearly 10.9% last year;
 - Rental prices increased by 28.6% since January 2014;

Student Generation

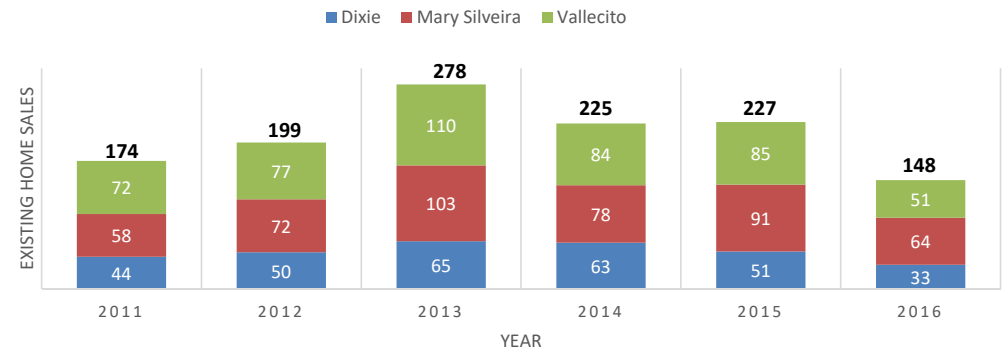
Since DSD is largely built-out, housing turnover was analyzed to determine the mobility of the population throughout the District in the various areas as well as district-wide.

- Older neighborhoods “turnover” and, as new people move into the District, younger families may replace empty households.

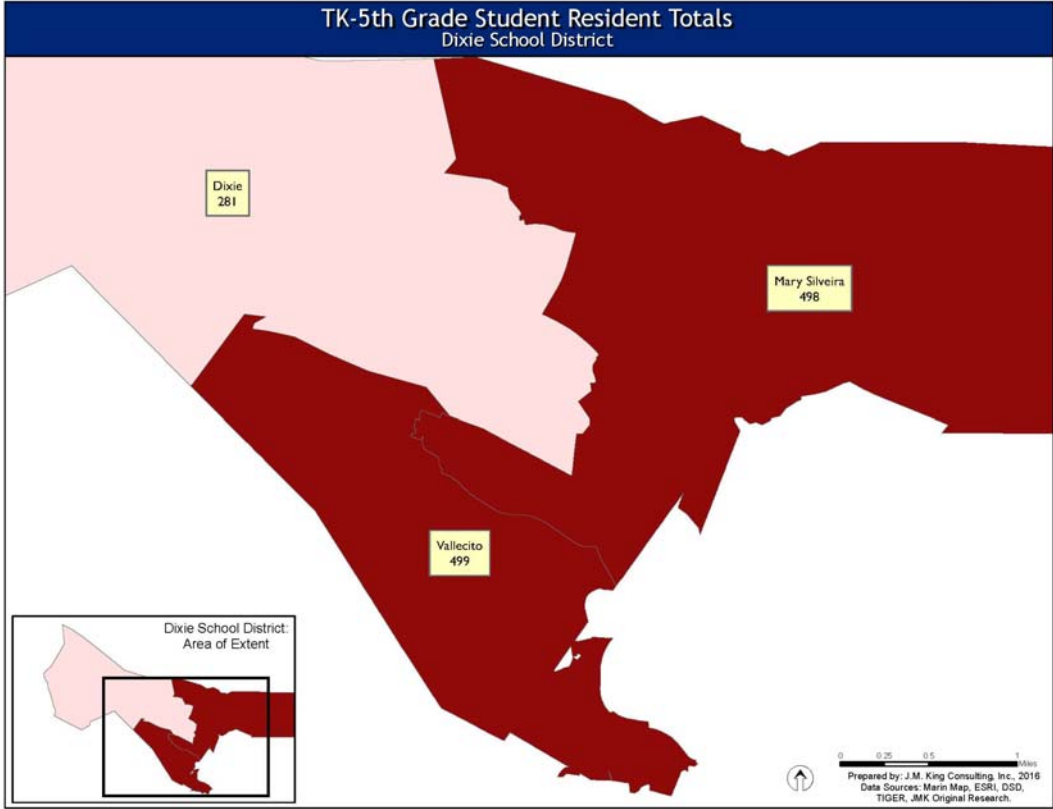
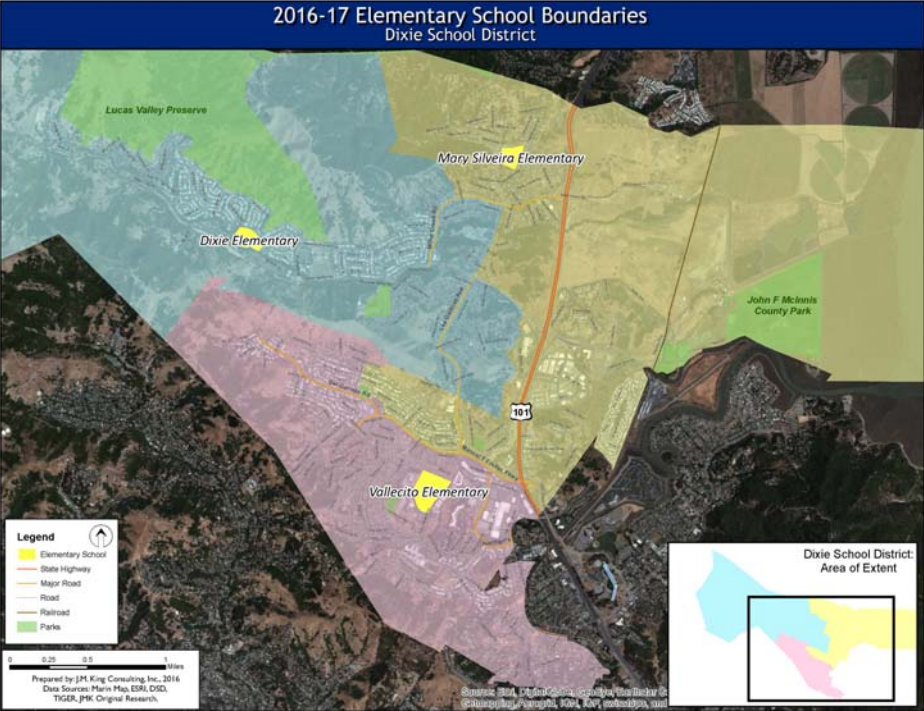
From 2011-2016, 901 single-family detached homes and 350 single-family attached homes have sold within the District. Single-family detached homes generate more students.

The Dixie Elementary School boundary has the highest student generation rate of any school boundary in the District.

Housing Type	# of Units Sold 2010-2015	Total Students	Student Generation Rate (TK-8)	TK-5	6-8
Single-Family Detached	901	405	0.450	0.356	0.093
Single-Family Attached	350	126	0.360	0.289	0.071



DSD School Boundaries and Student Residents

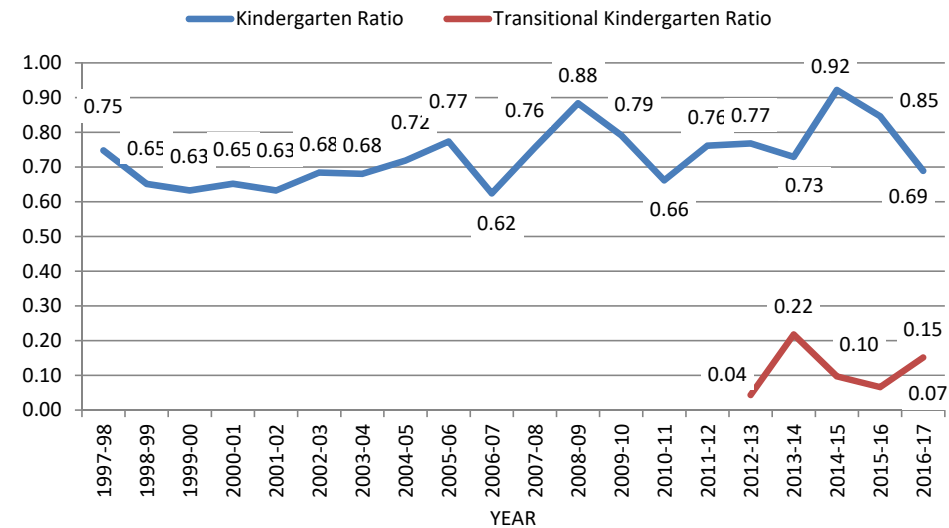
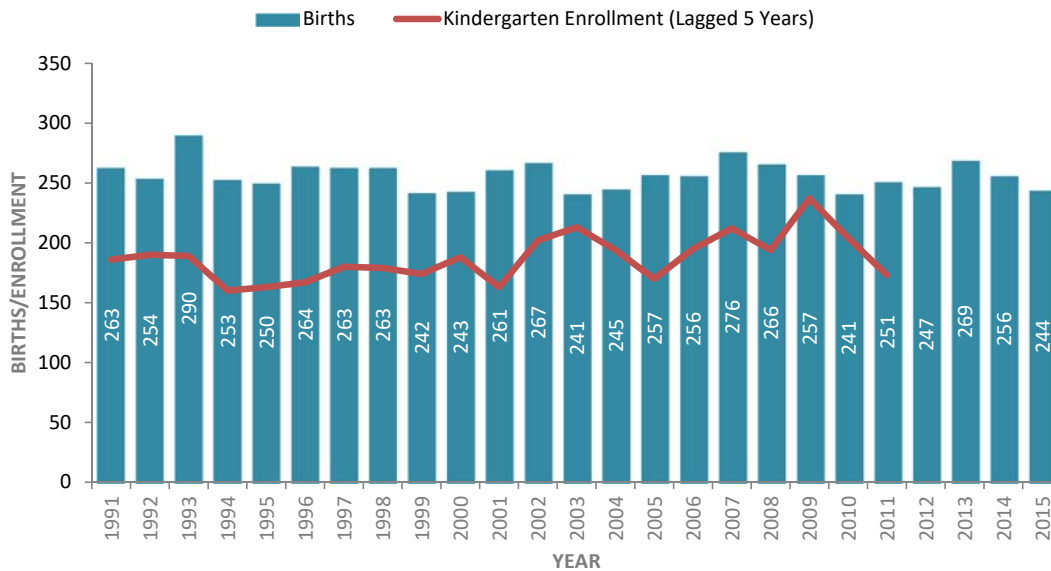


Enrollment Influencing Factor: Births

Births in DSD are generally stable, but have declined each of the last two years.

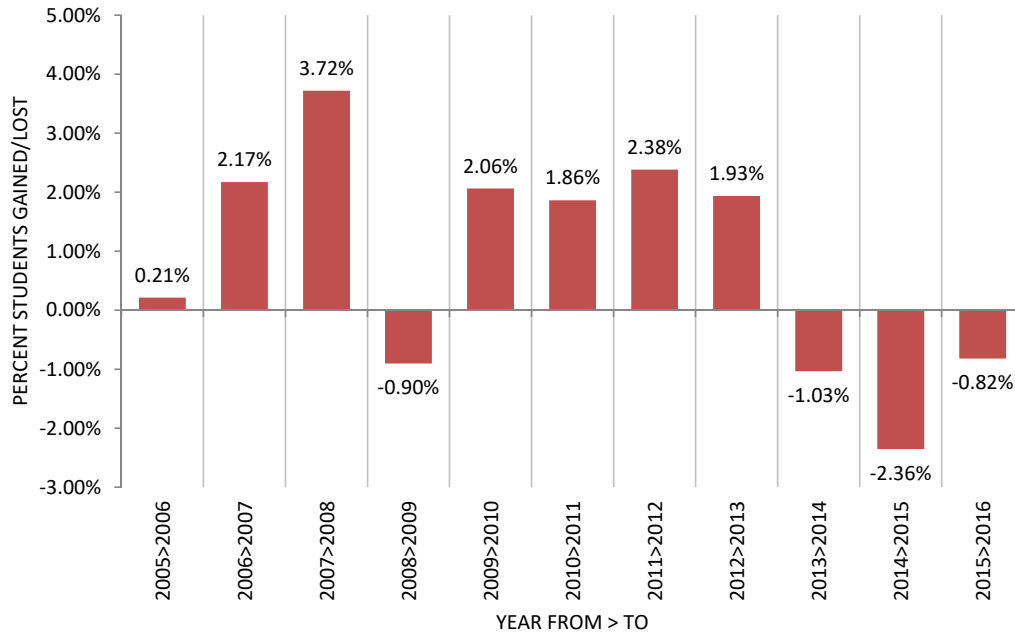
The kindergarten to birth ratio fluctuated greatly over the last few years. This year was the lowest ratio since 2010.

The transitional kindergarten to birth ratio also fluctuated as implementation of the program has been inconsistent, and has been met with differing levels of community enthusiasm. It is currently 0.15, but has been as high as 0.22 and as low as 0.07 in the last four years.



Enrollment Influencing Factor: Migration Rates

K-4>1-5



5-7>6-8



Changes to 2016-17 Enrollment Projections

Unlike past years, JMK created only two enrollment projections in 2016-17: Moderate and Conservative.

2016 DSD enrollment tracked below the Low projection from 2015.

The 2016 birth-to-kindergarten ratio was the lowest since 2010.

- This creates a small cohort that will bring total enrollment down for several years.

The Moderate projection places higher weight on the traditional stability of DSD birth-to-kindergarten ratios, creating a projection with larger future kindergarten cohorts.

The Conservative projection emphasizes the current year's low ratio to demonstrate how enrollment could look if this ratio continues for more years.

With recent trends in housing and rent prices, along with a lack of new development, there are no factors that would make likely a higher enrollment projection than the Moderate.

Enrollment Projections

Enrollment projections were prepared by calculating the kindergarten to birth ratios and migration rates.

Based on the Moderate projection, TK-8th grade enrollments are projected to decrease from 1,974 in 2016-17 to 1,971 in 2026-27, with a high of 2,001 and a low of 1,928 in that span.

- TK-5th grade enrollments are projected to increase slightly over the next two years, then decline through 2021 before beginning to increase again.
 - This is largely caused by the larger cohorts currently in 2nd and 3rd grades being replaced by smaller incoming kindergarten cohorts when they eventually move on to middle school. As births rise in the next few years, this will lead to gradually larger kindergarten classes, and these larger cohorts will in turn replace some of the smaller cohorts entering DSD now, leading to the enrollment growth at the end of the projection period.
- Enrollments of the 6th-8th grades will decline next year, as the larger cohorts currently in 7th and 8th grade matriculate out of DSD and are replaced by smaller cohorts.
 - Larger middle school cohorts will begin arriving again in 2018, however, and total 6th-8th grade enrollment is projected to be higher than current levels for all but one year after that time.

Moderate DSD Enrollment Projection

Overall, TK-8th grade enrollments are projected to decrease to 1,971 by 2026-27.

	Actual	Projected									
Grade	16-17	17-18	18-19	19-20	20-21	21-22	22-23	23-24	24-25	25-26	26-27
TK	38	26	29	31	27	29	29	29	29	29	29
K	173	195	214	207	192	196	201	203	203	203	204
1	204	174	196	215	208	193	197	202	204	204	204
2	239	209	178	201	220	213	197	201	207	208	209
3	232	241	211	179	203	222	215	199	203	209	210
4	223	239	248	218	184	209	229	221	205	209	215
5	191	222	238	246	217	183	208	227	220	204	208
6	215	202	236	252	262	229	195	220	241	234	216
7	207	214	201	235	252	261	229	195	220	241	233
8	252	208	215	202	236	253	262	230	196	221	242
<i>TK-5</i>	<i>1,300</i>	<i>1,306</i>	<i>1,315</i>	<i>1,298</i>	<i>1,252</i>	<i>1,244</i>	<i>1,276</i>	<i>1,283</i>	<i>1,272</i>	<i>1,267</i>	<i>1,280</i>
<i>6-8</i>	<i>674</i>	<i>624</i>	<i>652</i>	<i>689</i>	<i>750</i>	<i>743</i>	<i>686</i>	<i>645</i>	<i>657</i>	<i>695</i>	<i>691</i>
Total	1,974	1,930	1,967	1,987	2,001	1,987	1,962	1,928	1,928	1,963	1,971

Recommendations

Review and update this study annually to determine if projected development and enrollment trends are accurate. Should future trends deviate from those identified in the study, adjustments regarding future school facility needs and costs may be required.

- The District should closely monitor kindergarten early enrollments to determine whether 2017 enrollment is more closely following the Moderate or the Conservative projections.

The District should continue to monitor all current and potential residential development, as any new construction will generate students for the District to house.

Based upon the District's 2013-14 Facility Master Plan, total capacity is sufficient to accommodate all current and projected students.

However, the District's student population does not grow at the same rate throughout. As demonstrated in this study, student resident imbalances exist among the elementary school boundaries, and these differences are expected to widen. The District should evaluate balancing student residents by considering boundary adjustments.

- Specifically, the District should consider expanding the Dixie Elementary School boundary.

The District should continue to promote the transitional kindergarten program and may want to consider reviewing past implementations of the program when enrollment was higher.

Continue to update and apply for funding from the State School Facility Program.

Explore various programs at the State School Facility Program as well as through State and Federal Programs to determine which programs are appropriate for participation by the District.

Continue to work with the County of Marin and City of San Rafael and other agencies throughout the planning process to secure full school facility mitigation for the construction of school facilities and/or acquisition of land.

Questions?

THANK YOU.