

**LINCOLN-SUDBURY REGIONAL SCHOOL DISTRICT**  
**390 LINCOLN ROAD**  
**SUDBURY, MASSACHUSETTS 01776-1409**

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**MEMORANDUM**

TO: Lincoln-Sudbury School Committee  
Scott Carpenter, Superintendent/Principal

FROM: Judy Belliveau

DATE: October 8, 2009

RE: **Enrollment Report, Budget Ratio, and Enrollment Projections**

We have completed our official October 1, 2009 student count for the Department of Elementary & Secondary Education (DESE) and I have prepared the annual report for you, which includes our *FY'10 Enrollments*, our *FY'11 Projections* and the *FY'11 Budget Apportionment Ratio*.

Attachment A of the Enrollment Report identifies the students on campus, including our METCO and tuition-waived students. These figures are used in our enrollment projections. Attachment A also breaks out the on-campus students, out-of-district placements, choice and charter school students by residency in Lincoln or Sudbury. These figures are used to compute the FY'11 Budget Apportionment Ratio (Attachment B). Please note that the school choice and charter school numbers could change since the DESE provides that information based on enrollments in the spring of 2009 and will not update for actual FY'10 enrollments until January, 2010.

**Enrollment Projections and Actuals**

In our FY'08 planning, we were concerned that the 5-year and 10-year projections of 1,623 and 1,626 respectively were too low and we adjusted the enrollment projection to 1,638. Actual enrollment came in at 1,622.

In our FY'09 planning we then used the 5-year projection of 1,629 (10-year was similar at 1,627) and our enrollment came in at 1,640.

In planning for this year, the 5-year and 10-year projections were 1,634 and 1,631 respectively. If you recall, when we discussed the projections last Fall, the concern about the economy and the fact that L-S had never had a decline in enrollment resulted in a consensus that we might experience students returning to the high school and should keep the enrollment flat at 1,640. Our current enrollment of 1,614 students as of October 1, 2009 is noticeably lower than the 1,640 as well as lower than what we had projected last year using both 5-year and 10-year averages.

I have reviewed the 5-year and 10-year projections for FY'11 (Attachment C) and looked at the history of our 5- and 10-year projections. Although we used the 5-year projection in the last two years (modified for FY'10 as noted), and neither model has been perfect because of the economic and individual family issues, the 10-year projection model appears to be more reliable in most years. The 10-year model provides the more conservative estimate for FY'11 at 1,645 – an increase of 31 students over our FY'10 actual October 1<sup>st</sup> enrollment. Although there is an increase in the total enrollment projected due to a smaller graduating class (392) replaced by a larger incoming 9<sup>th</sup> grade (441), each grade level actually decreases. Below is a table demonstrating the projected cohort changes.

Grade				
8	9	10	11	12
441	423	409	390	392
	436	420	405	384
	-5	-3	-4	-6

It is always a risk to go too high or too low since enrollments drive our staffing budget. The fiscal climate could change and houses could begin to sell with more children coming into the district – or not. My inclination is to adjust the projected enrollment from 1,645 to a mid-point between this projection and our current actual of 1,614. A projected enrollment of 1,630 is still an increase of 16 students overall.

### Private School Impact

There are many reasons students enroll or withdraw from L-S, such as job transfers of parents, divorce, family illness/caretaking, and so on. Given the significant drop off in our enrollments I analyzed the changes in our October enrollments for 2007 (FY'08), 2008 (FY'09), and 2009 (current FY'10), specifically looking at the movement of students to and from private schools. The following are the net changes in enrollment each year based on students who withdrew to attend private school or those who enrolled at L-S having previously been in private school. Note that the “Withdraw” column for 9<sup>th</sup> grade reflects those who left at the end of 8<sup>th</sup> grade for private school who would have otherwise come to L-S; the withdrawals for 10<sup>th</sup> grade are students who left at the end of 9<sup>th</sup> grade and didn't move into 10<sup>th</sup>, etc. The “Enroll” column for

9<sup>th</sup> grade includes students who were in private school in 8<sup>th</sup> grade but enrolled at L-S for 9<sup>th</sup> grade; were in private school in 9<sup>th</sup> grade and enrolled at L-S for 10<sup>th</sup> grade, etc.

	October, 2007			October, 2008			October, 2009		
	Withdraw	Enroll	Net	Withdraw	Enroll	Net	Withdraw	Enroll	Net
9th	15	11	-4	30	6	-24	20	13	-7
10th	3	3	0	4	3	-1	11	0	-11
11th	5	3	-2	4	4	0	5	0	-5
12th	1	0	-1	4	5	1	5	0	-5
<b>Total</b>	<b>24</b>	<b>17</b>	<b>-7</b>	<b>42</b>	<b>18</b>	<b>-24</b>	<b>41</b>	<b>13</b>	<b>-28</b>

The decision of 30 8<sup>th</sup> graders to attend private school in 2008 (FY'09) rather than attend L-S is particularly striking (double the number in 2007) and might, for at least some students, be attributed to the budget reductions affecting class size, teacher loads, classroom support and sports/activities. It is also noteworthy that an additional 11 students from that same cohort withdrew at the end of 9<sup>th</sup> grade rather than proceed to 10<sup>th</sup> grade at L-S. Again, the reduction of a house and other budget reductions compounding those made in FY'09 could have had an effect on the decision of some parents to send their children to private school. I will be reviewing the withdrawal forms to determine if there is any pattern as to the reason students withdrew.

I look forward to discussing this report with you on Tuesday.

/attachments

**LINCOLN-SUDBURY REGIONAL SCHOOL DISTRICT**

**OCTOBER 1, 2009 ON-CAMPUS ENROLLMENT**

<b>GRADE</b>	<b>SUDBURY</b>	<b>LINCOLN</b>	<b>OTHER</b>	<b>TOTAL</b>
9	339	60	24	423
10	325	56	28	409
11	303	60	27	390
12	<u>308</u>	<u>57</u>	<u>27</u>	<u>392</u>
<b>TOTAL</b>	1275	233	106	1614

**BREAKDOWN OF OTHER:**

METCO	91
TUITIONED IN	1
TUITIONED WAIVED*	<u>14</u>
1 Superintendent Agreement	106
5 L-S employees	
6 SPS employees	
1 LPS employees	
1 Foreign exchange	

**OCTOBER 1, 2009 LINCOLN & SUDBURY ENROLLMENT**

<b>GRADE</b>	<b>SUDBURY</b>	<b>LINCOLN</b>	<b>TOTAL</b>
9	339	60	399
10	325	56	381
11	303	60	363
12	<u>308</u>	<u>57</u>	<u>365</u>
<b>TOTAL</b>	1275	233	1508
<b>OUT OF DISTRICT</b>	25	8	33
<b>SCHOOL CHOICE</b>	3	0	3
<b>CHARTER SCHOOL</b>	<u>1</u>	<u>1</u>	<u>2</u>
<b>TOTAL</b>	1304	242	1546

Note 1: 2 of Lincoln's 8 Out of District placements have moved but L-S is responsible for the tuitions for this school year.

Note 2: Lincoln student is reported to have withdrawn from the charter school in June; State currently has him enrolled but may update at a later point. He has not registered at L-S.

# FY '11 BUDGET APPORTIONMENT RATIO

Apportionment: Based on three-year average enrollment ratio

	Lincoln	Sudbury	Total
October 1, 2007	245	1,302	1,547
October 1, 2008	241	1,320	1,561
October 1, 2009	242	1,304	1,546
<b>TOTAL</b>	<b>728</b>	<b>3,926</b>	<b>4,654</b>
<b>FY '11 Budget Ratio</b>	<b>15.64%</b>	<b>84.36%</b>	<b>100%</b>

## Difference from Previous Year

**0.15%**

**-0.15%**

FY '10 Budget Ratio	15.49%	84.51%	100%
FY '09 Budget Ratio	15.19%	84.81%	100%
FY '08 Budget Ratio	14.67%	85.33%	100%
FY '07 Budget Ratio	14.19%	85.81%	100%
FY '06 Budget Ratio	14.33%	85.67%	100%
FY '05 Budget Ratio	14.73%	85.27%	100%
FY '04 Budget Ratio	15.09%	84.91%	100%
FY '03 Budget Ratio	15.33%	84.67%	100%
FY '02 Budget Ratio	15.33%	84.67%	100%
FY '01 Budget Ratio	15.99%	84.01%	100%
FY '00 Budget Ratio	15.91%	84.09%	100%
FY '99 Budget Ratio	15.81%	84.19%	100%
FY '98 Budget Ratio	14.98%	85.02%	100%

**ATTACHMENT C**

**COMPARISON OF PROJECTION SCENARIOS**

<b>YEAR</b>	<b>ACTUAL</b>	<b>October, 2007 using 5-year avg</b>	<b>October, 2007 using 10-year avg</b>	<b>October, 2008 using 5-year avg</b>	<b>October, 2008 using 10-year avg</b>	<b>October, 2009 using 5-year avg</b>	<b>October, 2008 using 10-year avg</b>
2008	1,622						
2009	1640	1,629	1,627				
<b>2010</b>	<b>1614</b>	<b>1,629</b>	<b>1,635</b>	<b>1,634</b>	<b>1,631</b>		
2011		1,676	1,684	1,669	1,671	1,652	1,645
2012		1,708	1,716	1,683	1,685	1,655	1,651
2013		1,713	1,729	1,690	1,690	1,645	1,642
2014			1,796	1,748	1,753	1,690	1,690
2015			1,766		1,717	1627	1636

**FY'10 ENROLLMENTS BY GRADE LEVEL  
(as of October 1, 2009)**

		<b>Projected</b>	<b>Actual</b>	<b>Diff</b>
<b>Grade</b>	<b>9</b>	<b>422</b>	<b>423</b>	<b>1</b>
<b>Grade</b>	<b>10</b>	<b>421</b>	<b>409</b>	<b>-12</b>
<b>Grade</b>	<b>11</b>	<b>393</b>	<b>390</b>	<b>-3</b>
<b>Grade</b>	<b>12</b>	<b>398</b>	<b>392</b>	<b>-6</b>
	<b>Total</b>	<b>1,634</b>	<b>1,614</b>	<b>-20</b>
	<b>Used</b>	<b>1,640</b>	<b>1,614</b>	<b>-26</b>

**FY'11 ENROLLMENT PROJECTIONS BY GRADE LEVEL  
(as of October 1, 2009)**

		<b>5 Yr Avg Proj</b>	<b>10 Yr Avg Proj</b>
<b>Grade</b>	<b>9</b>	<b>444</b>	<b>436</b>
<b>Grade</b>	<b>10</b>	<b>417</b>	<b>420</b>
<b>Grade</b>	<b>11</b>	<b>404</b>	<b>405</b>
<b>Grade</b>	<b>12</b>	<b>387</b>	<b>384</b>
	<b>Total</b>	<b>1,652</b>	<b>1,645</b>