

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

JUDITH M. BELLIVEAU
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MEMORANDUM

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

FROM: Judy Belliveau

DATE: October 8, 2010

RE: **Enrollment Report and Budget Ratio**

We have completed our official October 1, 2010 student count for the Department of Elementary & Secondary Education (DESE) and I have prepared the annual report for you, which includes our *FY'11 Enrollments* and the *FY'12 Budget Apportionment Ratio*. The *FY'12 Enrollment Projections* and a complete analysis of enrollments, withdrawals and other changes.

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'12 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 2010 and will not update for actual FY'11 enrollments until January, 2011.

Enrollment Projections and Actuals

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

Thus, in planning for FY'10, when the 5-year and 10-year projections were 1,634 and 1,631 respectively we were concerned that the combination of the economic downturn and the fact that

L-S had never had a decline in enrollment did not warrant a decrease in our projected enrollment and we kept FY'10 enrollment projections flat at 1,640. The actual October 1 enrollment of 1,614 students was noticeably lower and we looked at all of the factors that seemed to contribute to the change. When our FY'11 5-year and 10-year projections came in at 1,652 and 1,645 respectively, we discussed the recent trend and adjusted our projection downward to 1,630 – still anticipating an increase of 16 students over our FY'10 actual enrollments. In spite of our adjustment, there is a significant decrease in the FY'11 total enrollment. The following table depicts the changes.

GRADE	FY'11 PROJ	FY'11 ACTUAL	CHANGE
Grade 9	436	406	-30
Grade 10	420	417	-3
Grade 11	405	409	+4
Grade 12	384	377	-7
Total	1,645	1,609	-36
As Adjusted	1,630	1,609	-21

Private School Impact

While I will have a more detailed analysis at our next meeting, preliminary information indicates that 32 students who would have been incoming freshmen chose to attend private schools. An additional 10 students went to another public school, indicating that they moved out of the district or chose a charter school, and another 8 will attend a public or private school out of state. That is a total of 50 9th graders who would otherwise be attending L-S. Each year there are students who make other choices and I will compare our recent history of 8th graders who do not move up to the high school to determine the degree to which this is a more significant change.

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

/attachments

**LINCOLN-SUDBURY REGIONAL SCHOOL DISTRICT
OCTOBER 1, 2010 ON-CAMPUS ENROLLMENT**

GRADE	SUDBURY	LINCOLN	OTHER	TOTAL
9	333	44	29	406
10	334	61	22	417
11	328	52	29	409
12	<u>297</u>	<u>55</u>	<u>25</u>	<u>377</u>
TOTAL	1292	212	105	1609

BREAKDOWN OF OTHER:

METCO	91
TUITIONED IN	1
TUITIONED WAIVED*	<u>13</u>
1 Superintendent Agreement	105
7 LS employees	
4 Sudbury Public School employees	
1 Lincoln Public School employees	
0 Foreign exchange	

OCTOBER 1, 2010 LINCOLN & SUDBURY ENROLLMENT

GRADE	SUDBURY	LINCOLN	TOTAL
9	333	44	377
10	334	61	395
11	328	52	380
12	<u>297</u>	<u>55</u>	<u>352</u>
TOTAL	1292	212	1504

OUT OF DISTRICT (see Note 1)			39
SCHOOL CHOICE	1	0	1
CHARTER SCHOOL	<u>0</u>	<u>1</u>	<u>1</u>
TOTAL	1293	213	1545

Note 1: Breakdown of out of district placements by town will be provided at the meeting.

FY '12 BUDGET APPORTIONMENT RATIO

Apportionment: Based on three-year average enrollment ratio

	Lincoln -----	Sudbury -----	Total -----
October 1, 2008	241	1,320	1,561
October 1, 2009	242	1,304	1,546
October 1, 2010	213	1,293	1,506
TOTAL	----- 696	----- 3,917	----- 4,613
FY '12 Budget Ratio	15.09%	84.91%	100%

Difference from Previous Year	-0.55%	0.55%
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FY'11 Budget Ratio	15.64%	84.36%	100%
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%
FY '97 Budget Ratio	14.11%	85.89%	100%
FY '96 Budget Ratio	13.34%	86.66%	100%
FY '95 Budget Ratio	12.72%	87.28%	100%
FY '94 Budget Ratio	12.48%	87.52%	100%
FY '93 Budget Ratio	12.11%	87.89%	100%
FY '92 Budget Ratio	12.17%	87.83%	100%
FY '91 Budget Ratio	12.82%	87.18%	100%

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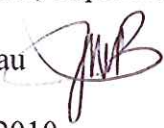
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MEMORANDUM

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

FROM: Judy Belliveau 

DATE: October 25, 2010

RE: **Enrollment Projections and Analysis**

The October 1 enrollments and the FY12 projections continue to show a leveling of the enrollments. I have included several attachments that I will explain below in more detail, but the overall result is that our enrollments will be almost flat for FY12. Our current enrollment is 1,609 and the projections, whether a 3-year average, 5-year average, or 10-year average is used, are 1,614, 1,618, and 1,612 respectively. I recommend that we use the 10-year average again because it is the most conservative and it also tracks more closely to the trend in 8th graders not moving up to L-S.

Attachment A - Comparison of Projection Scenarios

This attachment provides a three year history of the projections versus the actual enrollment. You will note that the projections in the October, 2008 and October, 2009 versions were significantly higher than our actual enrollments. In the October, 2010 versions, I added a 3-year average given the unusual changes we have experienced most recently. Interestingly, the 3-year average produces results that are more closely aligned with the 10-year rather. Again, I recommend that we use the projections from the 10-year average model shown in the following table:

GRADE	FY'12 Projection (10-Year Average)
Grade 9	393
Grade 10	403
Grade 11	412
Grade 12	404
Total	1,612

Attachment B – Enrollment History/Changes in Enrollment by Grade Level

Last year when we had a more precipitous drop in our overall enrollments at a time when we would have anticipated higher enrollments given the economy, I put some historical data together and continued it again this year.

The total Withdrawals in 2007 and 2008 were comparable, as were the enrollments, resulting in a nominal decrease overall each year. In 2009 the Withdrawals increased slightly but the Enrollments dropped by 50%. The result was a net loss of 43 students in October 2009 versus 12 in 2008. The Withdrawals in October 2010 increased again while the Enrollments held steady at the much lower level, resulting in a net loss of 49 students this year.

When this history is examined on page 2 based on withdrawals to attend private school (or not arriving at L-S in the case of 8th graders) and students enrolling at L-S coming from private schools, the biggest change is in the 8th graders not enrolling at L-S.

The third page of Attachment B provides the breakdown of the 8th graders by town and by reason who did not attend L-S this year. It is almost a 50/50 split in the number of Lincoln and Sudbury 8th graders who chose to attend private schools rather than L-S. However, on a percentage basis, close to 20% of the Lincoln 8th grade cohort went to private schools compared to 7% of the Sudbury 8th graders. I am working with Anne O'Reilly in Student Services and Donna Cakert, our Registrar, to compile this information for prior years in order to determine the historical trend by town.

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

/attachments

COMPARISON OF PROJECTION SCENARIOS

FISCAL YEAR	ACTUAL ENROLL	October, 2008 using 5-year avg	October, 2008 using 10-year avg	October, 2009 using 5-year avg	October, 2009 using 10-year avg	October, 2010 using 3-year avg	October, 2010 using 5-year avg	October, 2010 using 10-year avg
2008	1,622							
2009	1640							
2010	1614	1,634	1,631					
2011	1609	1,669	1,671	1,652	1,645	1614	1,618	1,612
2012		1,683	1,685	1,655	1,651	1604	1,610	1,605
2013		1,690	1,690	1,645	1,642	1643	1,659	1,652
2014		1,748	1,753	1,690	1,690	1596	1629	1622
2015			1,717	1627	1636			

FY'11 ENROLLMENTS BY GRADE LEVEL

(as of October 1, 2010)

	Projected	Actual	Diff
Grade 9	436	406	-30
Grade 10	420	417	-3
Grade 11	405	409	4
Grade 12	384	377	-7
Total	1,645	1,609	-36
Used	1,630	1,609	-21

FY'12 ENROLLMENT PROJECTIONS BY GRADE LEVEL

(as of October 1, 2010)

	3 Yr Avg Proj	5 Yr Avg Proj	10 Yr Avg Proj
Grade 9	398	402	393
Grade 10	397	399	403
Grade 11	413	411	412
Grade 12	406	406	404
Total	1,614	1,618	1,612

ENROLLMENT HISTORY

NET CHANGES IN ENROLLMENT - ALL REASONS

	October, 2007			October, 2008			October, 2009			October, 2010		
	Withdraw	Enroll	Net	Withdraw	Enroll	Net	Withdraw	Enroll	Net	Withdraw	Enroll	Net
9th Grade	21	23	2	36	21	-15	29	19	-10	39	9	-30
10th Grade	12	11	-1	7	10	3	17	3	-14	10	5	-5
11th Grade	11	13	2	8	9	1	10	1	-9	9	9	0
12th Grade	12	2	-10	8	7	-1	10	0	-10	16	2	-14
Total	56	49	-7	59	47	-12	66	23	-43	74	25	-49

The dramatic change in October, 2009 was contrary to the expectation that the economic downturn would result in higher enrollments in public schools

ENROLLMENT HISTORY

NET CHANGES IN ENROLLMENT - PRIVATE SCHOOL ATTENDANCE

	October, 2007			October, 2008			October, 2009			October, 2010		
	Withdraw	Enroll	Net	Withdraw	Enroll	Net	Withdraw	Enroll	Net	Withdraw	Enroll	Net
9th Grade	15	11	-4	30	6	-24	20	13	-7	28	5	-23
10th Grade	3	3	0	4	3	-1	11	0	-11	3	4	1
11th Grade	5	3	-2	4	4	0	5	0	-5	2	4	2
12th Grade	1	0	-1	4	5	1	5	0	-5	5	1	-4
Total	24	17	-7	42	18	-24	41	13	-28	38	14	-24

The unexpected increase in the number of students going to private schools from the 8th grade rather than entering L-S has remained steady during a time when the economic climate would have suggested the opposite. The net overall decline in enrollment has also remained constant over these three years.

School Year 2010-2011
8th Graders Who Did Not Attend L-S

Reason	Lincoln 75	Sudbury 366	Total 441
Private School	14 18.7%	13 3.6%	27 6.1%
Minuteman		5	5
Moving		5	5
Home School		1	1
Total	14	24	38
% of 8th Graders	18.7%	6.6%	8.6%

Note: 1 Boston student went to private school and did not attend L-S

On a percentage basis it is notable that a greater proportion of Lincoln versus Sudbury students chose private schools over L-S in 2010-11. In addition, it has been reported that this is a higher percentage for Lincoln than in the past. Historical data will be compiled to determine if this is typical or not