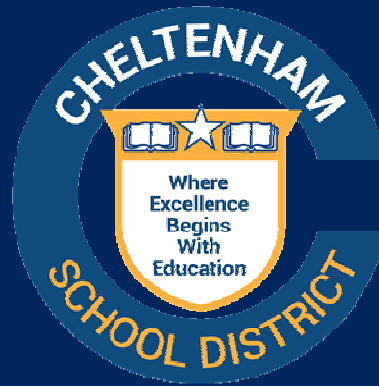


Cheltenham School District Enrollment Projections

2018-19 Update

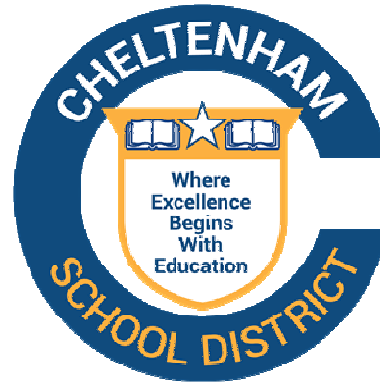


March 5, 2019

Prepared by the Montgomery County Planning Commission

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Cheltenham School District Enrollment Projections 2018-19 Update



Prepared By
The Montgomery County Planning Commission



March 5, 2019

This report is the first complete update to the original Enrollment Study prepared in November, 2016. It represents a supplement to the original study, but incorporates new data where available and recalibrates the projection model to best reflect the most recent trends and expected demographic activity affecting future enrollments

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Introduction

The Cheltenham School District experienced a period of steady growth beginning in 2009, with enrollment peaking in 2016 at 4,618 students. In the Fall of 2016, MCPC conducted its original enrollment study and projected continued growth of 391 students over ten years from 2016 to 2026. The original study identified several factors driving that historical and potential growth. These included an increase in the number of public school students coming from existing multifamily apartments, a significant rebound in housing sales activity that was resulting in more students from household turnover, and proximity to Philadelphia. These factors spoke to the situation that Cheltenham experienced a lot of growth due to their quality, diversity of housing options, and location next to an urban school district with a complicated reputation.

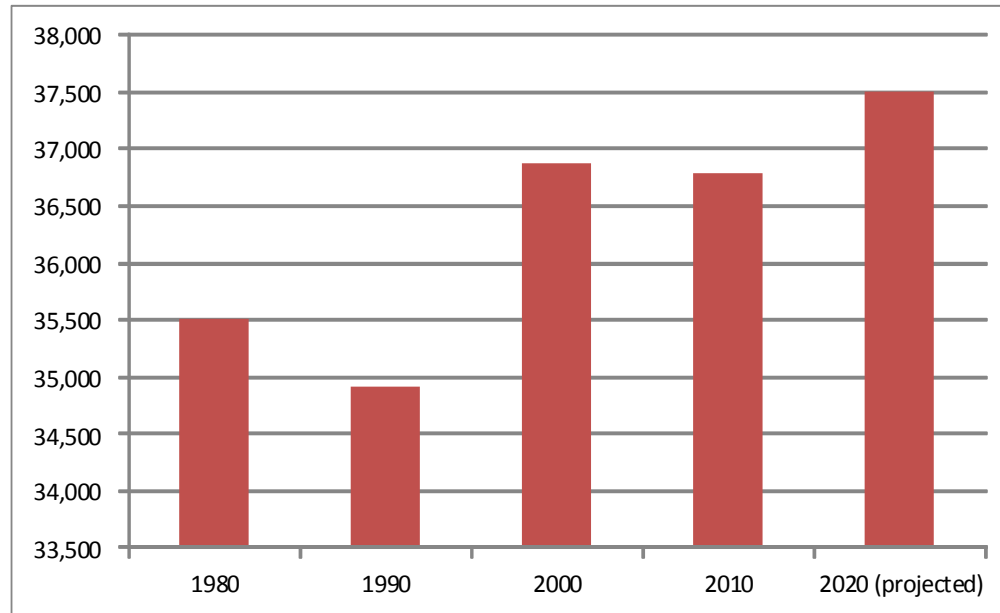
After two years from the original study, the results show a change in the enrollment trajectory of the district. The original projection did show a slight decrease in the first year, but predicted steady growth beyond until 2026. In reality, the Cheltenham School District has seen a decrease in enrollment of 340 students since the original study. Some potential reasons for the sudden shift could be an increase in private school enrollment, aging facilities, and increased residency enforcement. Also, existing multifamily student population decreased by over 18% since 2015 and up until that point it had been steadily growing.

MCPC has now prepared another complete update utilizing the most recent enrollment data (2017-18 and 2018-19) and updated data for all research factors. Due to the relatively stark change in the enrollment dynamic of the district, this report will outline three options for the district to consider. Option 1 and 2 share the same flat birth scenario and make no adjustment for future growth due to housing construction. The singular difference is in the progression rate—Option 1 takes into account the last five years of enrollment, while Option 2 takes the last three years. Option 3 increases births each year by a factor of two and also accounts for growth due to housing construction. The reason for including all three options instead of updating the originally preferred, is to help the district see as many potential futures given the relative uncertainty of whether the last two years are the beginning of a longer trend or a temporary situation.

*PART 1—SCHOOL DISTRICT
CHARACTERISTICS*

1A. School District Characteristics—Population

FIGURE 1: Population of Cheltenham School District, 1980-2020



Source: U.S. Census Bureau, except 2020 Projections (DVRPC and MCPC)

- Population in the CSD had been declining for several decades due to shrinking household sizes and slow growth typical of inner ring suburbs, however in 2000 it grew significantly before slightly dipping in 2010.
- The forecast for 2020 calls for growth of 2% from 2010. Estimates through 2017 show that the District has grown and is on track to reach its projection.
- However, total population does not necessarily correlate with school-age population and public enrollment. Up until recently, enrollment had grown in the past decade despite variability in the population.

FIGURE 2: Population Totals, 1990-2020

	1990			2000			2010			2020 (Forecasted)		
	Total	1980-1990 Change	1980-1990 Percent	Total	1990-2000 Change	1990-2000 Percent	Total	2000-2010 Change	2000-2010 Percent	Total	2010-2020 Change	2010-2020 Percent
CSD	34,923	-586	-1.7%	36,875	1,952	5.6%	36,793	-82	-0.2%	37,512	719	2.0%
Montgomery County	678,111	34,740	5.4%	748,987	70,876	10.5%	799,874	50,887	6.8%	840,934	41,060	5.1%

Source: U.S. Census Bureau, except 2020 Forecasts (DVRPC and MCPC)

1B. School District Characteristics—Age Cohorts

FIGURE 3: *Age Cohorts, CSD, 1990-2010*

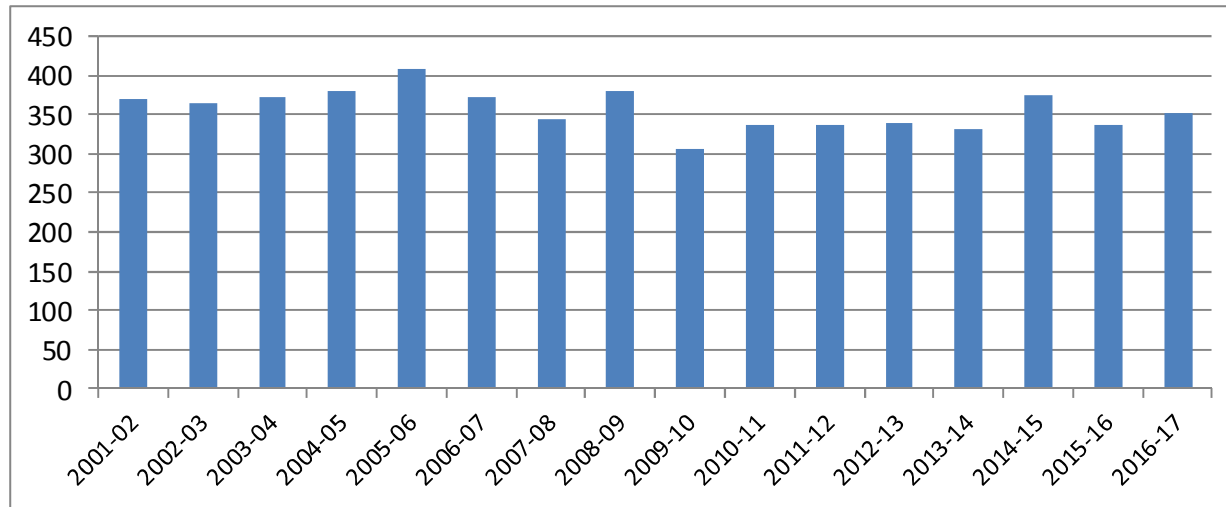
Age Cohort	1990		2000		2010		2017 Estimates (13-17)	
	Total	1980-1990 Change	Total	1990-2000 Change	Total	2000-2010 Change		
0-4	2,095	540	1,886	-209	1,937	51	1,589	PRE-SCHOOL AGES
5-17	5,138	-611	6,517	1,379	5,630	-887	5,646	SCHOOL AGES
18-24	2,873	-1,071	3,144	271	4,709	1,565	4,831	
25-34	4,744	149	4,264	-480	4,095	-169	4,675	HIGHEST FERTILITY AGES
35-44	5,406	1,726	5,304	-102	4,189	-1,115	3,936	
45-54	3,763	-610	5,493	1,730	5,329	-164	5,074	
55-64	3,900	-960	3,394	-506	4,942	1,578	5,231	
65-74	3,804	-107	3,042	-762	2,701	-341	3,380	
75 and over	3,200	358	3,831	631	3,231	-600	2,810	

Source: U.S. Census Bureau

- The school-age population (ages 5-17 when using the Census) declined from 2000 to 2010, while estimates show it has remained fairly stable since then.
- The largest adult cohorts are the 45-54 and 55-64 year olds, which still contain a good portion of the baby boom generation. Parents from this group may still be raising school-age children or they are empty nesters. Some may consider moving or downsizing with this change, which can open up more opportunity for younger families to move into the district.
- The 25-34 year old cohort has the highest fertility rates and represents the group most likely to give birth. This group declined over the last three decades, but is now swinging up as part of the millennial generation.
- The number of 18-24 year olds has also increased since 1990, but this is most likely due to growth in enrollment at colleges within the catchment.
- The 55-64 cohort shows the most growth as baby boomers have started to move into this range, and recent estimates show they are still increasing.

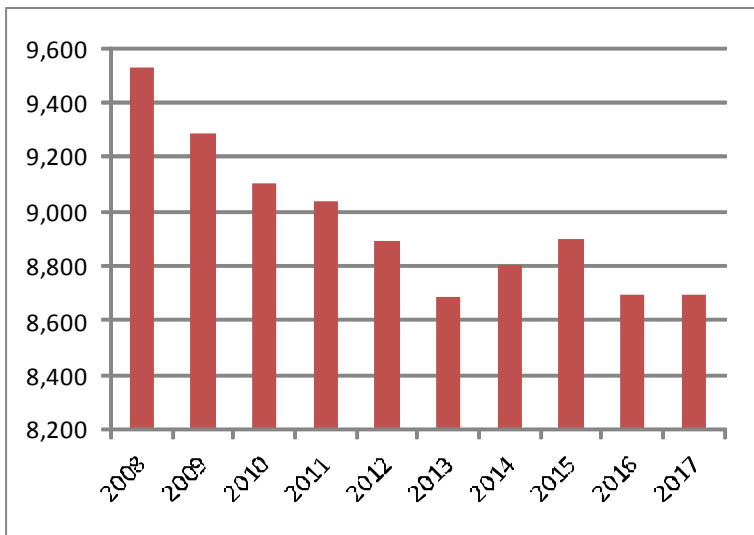
1C. School District Characteristics—Birth Patterns

FIGURE 4: Number of Live Births in Cheltenham SD by School Calendar Year (Sept.-Aug.)



Source: Pennsylvania Department of Health

FIGURE 6: Montgomery County Live Births, Annually



- Birth activity provides a window into the potential size of kindergarten classes six years later.
- Birth activity has declined slightly over time in the CSD, but at a much slower rate than most area districts and the county as a whole (Fig. 6).
- Recent birth data shows an increase in 2016-17 and the average over the last four years is greater than the preceding four year period.
- All district birth data has been calculated to match the school calendar year (Sept.—Aug.) for greater correlation accuracy.

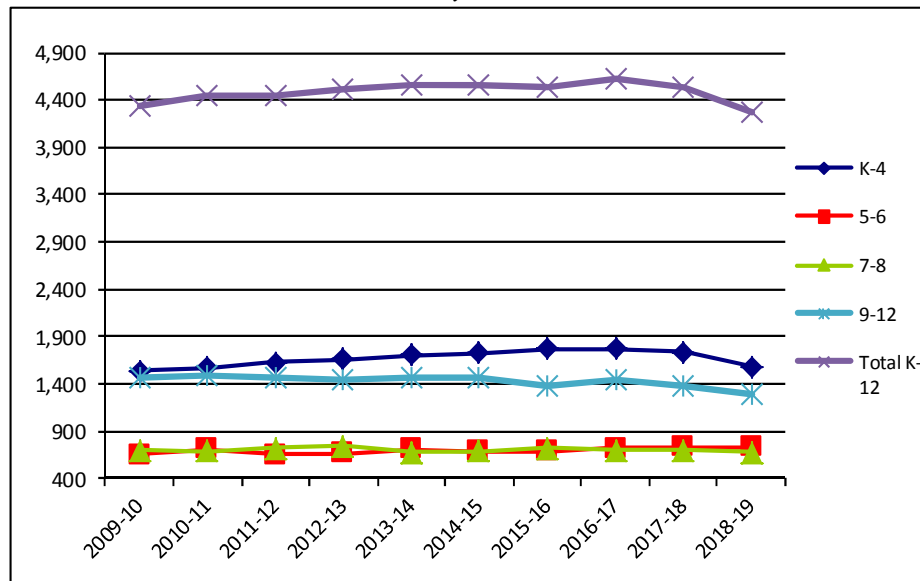
FIGURE 5: Number of Live Births in CSD by School Calendar Year (Sept.-Aug.)

School Year	CSD
1997-98	369
1998-99	370
1999-00	375
2000-01	405
2001-02	371
2002-03	366
2003-04	373
2004-05	380
2005-06	408
2006-07	372
2007-08	344
2008-09	380
2009-10	305
2010-11	336
2011-12	336
2012-13	340
2013-14	331
2014-15	374
2015-16	337
2016-17	352

Source: Pennsylvania Department of Health

1D. School District Characteristics—Enrollment History

FIGURE 7: School District Enrollment by Grade Divisions, 2009-2018



Source: Cheltenham School District (enrollment as of the 1st day of October each school year)

FIGURE 8: District Enrollment by Division, 2009-2018

Year	Total K-12	Number Change from Previous Year	Percent Change from Previous Year	Grade K-5	Grade 5-6	Grade 7-8	Grade 9-12
2009-10	4,348	84	2.0%	1,537	657	696	1,458
2010-11	4,443	95	2.2%	1,567	707	690	1,479
2011-12	4,458	15	0.3%	1,619	651	719	1,469
2012-13	4,503	45	1.0%	1,656	659	740	1,448
2013-14	4,561	58	1.3%	1,702	709	677	1,473
2014-15	4,565	4	0.1%	1,729	685	685	1,466
2015-16	4,535	-30	-0.7%	1,768	683	718	1,366
2016-17	4,618	83	1.8%	1,765	723	692	1,438
2017-18	4,528	-90	-1.9%	1,731	734	698	1,365
2018-19	4,278	-250	-5.5%	1,585	733	675	1,285

Source: Cheltenham School District (enrollment as of the 1st day of October each school year)

- Between 2009 and 2016, the district grew by 270 students. Since the 2016-17 SY, enrollment has dropped by 340.
- The largest absolute decrease is at the elementary school level with the high school losing the second most students. The last three years have seen some growth in 5-6, while 7-8 has started to decrease. The atypically large classes seen in some of the elementary schools over the last 3-5 years have all moved on from those schools into Elkins Park and Cedarbrook. These large classes have yet to be replaced by similarly sized classes resulting in overall enrollment decreases.
- At a certain point, continued growth at a grade division often begins to stabilize as all grade levels approach high figures. The ability to continue growing becomes more difficult since the entry grades must keep getting larger and larger for this to happen. Note the KG and 1st grade class sizes in Figure 9 on the following page.

1D. School District Characteristics—Enrollment History *Continued*

FIGURE 9: School District Enrollment by Grade, 2009-2018

Year	K	1	2	3	4	5	6	7	8	9	10	11	12
2009-10	309	327	287	293	321	344	313	360	336	384	384	375	315
2010-11	291	321	342	309	304	335	372	329	361	387	371	355	366
2011-12	320	311	322	342	324	306	345	390	329	421	352	362	334
2012-13	315	330	329	329	353	339	320	354	386	434	346	327	341
2013-14	356	334	352	328	332	358	351	333	344	426	354	355	338
2014-15	337	367	336	350	339	336	349	356	329	399	388	327	352
2015-16	314	350	389	345	370	348	335	357	361	346	348	353	319
2016-17	308	338	355	398	366	368	355	344	348	373	341	340	384
2017-18	332	300	346	353	400	376	358	345	353	365	351	311	338
2018-19	284	318	300	339	344	384	349	349	326	351	314	329	291

-48	-14	0	-7	-9	-16	-27	-9	-19	-2	-51	-22	-20
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Source: Cheltenham School District (enrollment as of the 1st day of October each school year)

- The above table shows the district’s enrollment figures broken out by grade level. The different colors correspond to whether a given class size increased, decreased, or stayed the same from the previous year. It is clear that in the last two years many of the district’s class sizes decreased when progressing to the next grade level. In the past, many elementary and middle school grades would increase year to year, but now they show the opposite circumstance—especially in this current enrollment year (2018-19).

1E. School District Characteristics—Private School Enrollments

FIGURE 10: Private School Enrollment According to U.S. Census Bureau

Year	Private School Students	Percent in Private School	Dataset
2000	1,216	18.4%	Census 2000, Summary File 3
2010*	845	15.3%	ACS, 5 Year Estimates,
2017*	984	17.2%	ACS, 5 Year Estimates, 2013-2017

* 5 Year Estimates from the ACS are an average of 5 years worth of sampling data

FIGURE 11: Private School Enrollment According to CSD Records

School Year	Private School Students
2010-2011	578
2011-2012	602
2012-2013	610
2013-2014	630
2014-2015	616
2015-2016	632
2016-2017	702
2017-2018	607
2018-2019	618

Source: Cheltenham School District Data

- The general trend in the county is that private school enrollment has declined since 2000, particularly since the Recession, but numbers have rebounded slightly since the economic recovery.
- Two data sources appear to show different patterns in private school students living in the district—the U.S. Census show an increase while Cheltenham SD records show recent decline. Census data is averaged over five years and tells us less about the changes within those years. Cheltenham data showed a peak in private school students in 2016 at 702 which dropped by nearly 100 within the next year.
- Some of the increase in recent years could be due to temporary conditions involving the closure of Cedarbrook Middle School. The extent of the difference between 06-10 and 13-17 Census data is questionable given the margin of error and associated census data, but an increase is clear. The district data shows a fairly variable rate between 600 and 635 students with 2016 being an outlier.
- Charter school options, including cyber charter schools, are at relatively low numbers and have remained stable since 2012 except for the 2016-17 school year.

FIGURE 12: Charter and Cyber-Charter Enrollment According to Cheltenham Records

Year	Charter
2012-2013	71
2013-2014	83
2014-2015	77
2015-2016	86
2016-2017	42
2017-2018	77

Source: Cheltenham School District Data

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PART 2—HOUSING ACTIVITY

2A. Housing Activity—Impacts of Housing—School Age Children by Type, 2010 Census Analysis

- Figure 13 shows the results of a countywide study on the characteristics of households based on housing types. The numbers indicate the average number of school-age children based on single family detached, attached (townhomes and twins), and multifamily (apartment or condo stacked units).
- Detached homes typically contain the most children per unit, while multifamily units contain far fewer children than many people expect. New detached units are more likely to have greater numbers of children than existing units, but the opposite is true for attached and multifamily homes.
- The figures for just the CSD point out some differences from the county level. The District has a slightly lower rate of school age children living in single family detached units but higher averages of school age children in the attached and multifamily home categories.

FIGURE 13: Average Number of School Aged Children by Housing Unit Type in 2010

Montgomery County			
	Single Family Detached	Single Family Attached	Multifamily
School Age Children per Household in Existing Units	0.55	0.41	0.18
School Age Children per Household in New Units	0.93	0.21	0.06

Cheltenham School District			
	Single Family Detached	Single Family Attached	Multifamily
School Age Children per Household in	0.51	0.52	0.28
School Age Children per Household in New Units *	N/A	N/A	N/A

- The study does not look at every home, only census blocks that have a single housing type are able to be characterized.

* There were no Census Blocks with new homogenous development in the CSD from 2000-2010, so data is not available for new units.

Source: Montgomery County Planning Commission

2B. Housing Activity—Impacts of Housing—Multifamily Housing

- MCPC analyzed student records matching the addresses of all multifamily properties in the district with 10 or more units across four time periods going back to 2009.
- The results in Figure 14 show that there are actually fewer students per unit than shown through the 2010 study, but that they have risen above the countywide average.
- They also reveal that these numbers had been going up and more students were living in existing apartment units than in the past. However, in the last few years the number of students originating from existing multifamily developments has come back down to near the 2009-10 level.

FIGURE 14: *Actual Cheltenham SD Data for All Multifamily Developments with 10 Units or More*

Year	Cheltenham SD Students	Units	Student / Unit
2009-10	776	4,792	0.16
2012-13	920	4,792	0.19
2015-16	982	4,792	0.20
2018-19	799	4,792	0.16

Note: Only includes public students and ratio is based on units, not households.

Source: Cheltenham SD Records and MCPC analysis

2B. Housing Activity—Impacts of Housing—Existing Multifamily Inventory

FIGURE 15: Actual CSD Data for Multifamily Developments with 10 Units or More

Name	Type	Street Address	ES	Units	Date Built	2018-19 Students / Unit Ratio	2018-19 Total*	2015-16 Total	2012-13 Total	2009-10 Total
Lynnewood Gardens	Rental	2047 Mather Way	Combo	1800	1945	0.23	421	545	526	501
The Towers at Wyncote	Rental	8460, 8470, 8480 Limekiln Pike	GL	1095	1966	0.14	155	217	186	89
Wyncote House	Rental	25 Washington Ln	GL	304	1963	0.01	3	3	1	0
Elkins Park House	Condo	7900 Old York Road	WY	237	1957	0.02	4	3	2	0
Brookview at Elkins Park	Rental	1000-7000 Brookview Pl	MY	216	1990	0.21	45	36	34	38
Church Road Condo	Condo	1600 Church Road	WY	169	1962	0.10	17	10	12	8
Melrose Station Apartments	Rental	902 Valley Road	MY	134	1955	0.43	57	63	71	63
Chelbourne Plaza	Condo	46 Township Line Rd	MY	100	1965	0.06	6	3	7	7
Briar House	Condo	8302 Old York Road	WY	98	1973	0.01	1	0	0	0
Melrose Court Apartments	Rental	7340 York Rd / 1308 Willow Ave	MY	74	1949	0.26	19	16	10	12
Breyer Estates Condominiums	Condo	100 Breyer Drive	WY	68	1985	0.00	0	4	3	0
Coventry House Apartments	Rental	7301 Coventry Ave	MY	62	1966	0.00	0	0	1	0
Hillbrook Apartments	Rental	651 Brooke Rd	GL	60	1961	0.08	5	7	4	9
Elkins Park Gardens	Rental	8000 High School Rd	MY	50	1952	0.08	4	13	14	13
Rolling Hill Apartments	Rental	26 Township Line Rd	MY	47	1967	0.23	11	17	12	10
Melrose Park House	Condo	900 Valley Road	MY	40	1982	0.00	0	0	1	2
Elkins Court	Condo	700 Elkins Avenue	WY	37	1930	0.05	2	3	4	1
Park Side Manor	Rental	7876 Spring Ave	MY	34	1950	0.44	15	4	3	1
Laurwyck Manor Apartments	Rental	22 Township Line Rd	MY	32	1960	0.28	9	14	8	7
Glenside Apartments	Rental	40 Mount Carmel Ave	GL	26	1961	0.12	3	0	1	0
Northwood Condo	Condo	650 Brooke Road	GL	25	1965	0.08	2	3	4	5
The Manor Apartments	Rental	777 Limekiln Pike	GL	21	1961	0.00	0	0	0	0
Elkins Park Apartments	Rental	415 Church Rd	WY	19	1922	0.47	9	8	5	6
Regina Rose Apartments	Rental	515 Stahr Rd	MY	12	1924	0.25	3	3	0	0
Valley Apartments	Rental	7318, 7324, 7326 Coventry Ave	MY	12	1955	0.42	5	11	7	2
Beaver View Apartments	Rental	615 Paxson Avenue	GL	10	1950	0.10	1	1	0	0
Brookside Terrace	Rental	534 E. Church Rd	MY	10	1965	0.20	2	1	4	2

*The roster used to analyze the 2018-19 SY was taken at the beginning of the year, while rosters for 2015-16, 2012-13, 2009-10 were from the end of the year.

Source: Montgomery County Planning Commission

2C. Housing Activity—Impacts of Housing—Migration

FIGURE 16: *Select Age Cohorts in CSD Area Households Related to Geographic Mobility*

Persons in households that have moved within the last year	Persons in Households	Percent of Persons in Households
People Age 1-4	179	3.7%
People Age 5-17	617	12.7%
People Age 25-34	857	17.6%
Total People	4,872	100%

Persons in households that have remained in the same house	Persons in Households	Percent of Persons in Households
People Age 1-4	1,198	3.7%
People Age 5-17	5,029	15.7%
People Age 25-34	3,818	11.9%
Total People	32,088	100%

Source: American Community Survey, 2013-2017 Estimates

- Figure 16 appears to indicate that there is a similar likelihood of pre-school age and lesser likelihood of school age children in households that have moved in the last year compared to households who have remained in place. However, these figures don't tell us who those new households are replacing. If no children were in the house before, then it would still be a net gain.
- Households that have moved into the district have a relatively high likelihood of having persons aged 25-34.

FIGURE 17: *Impact of Housing Units Sold on Enrollment*

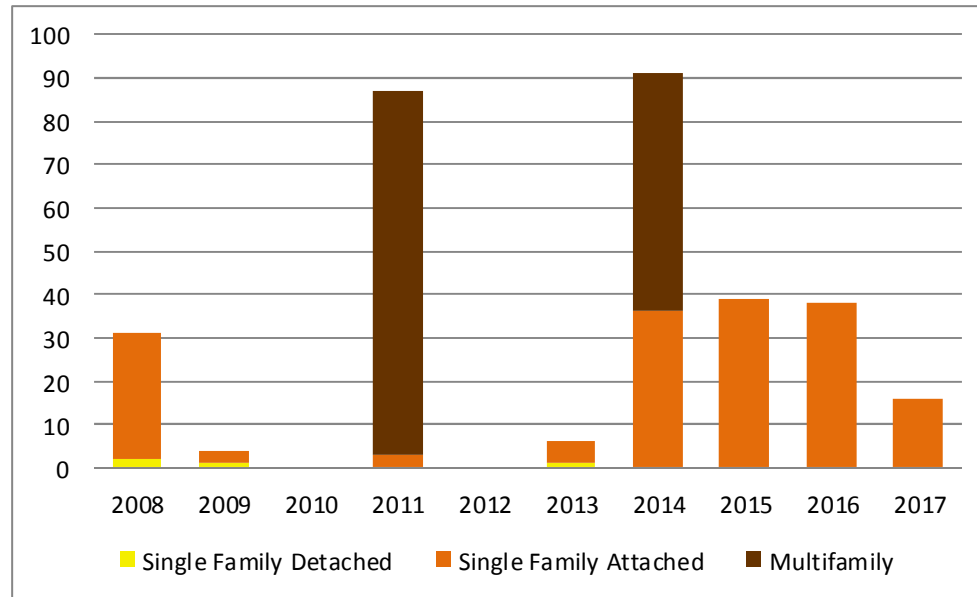
Year of Housing Units Sold	2011	2013	2015	2017
Number of Existing Units Sold	250	356	430	530
Incoming Students at Address of Units Sold	45	61	93	117
Outgoing Students at Address of Units Sold	18	43	51	82
<i>Net Change in Students from Sales Activity</i>	<i>+27</i>	<i>+18</i>	<i>+42</i>	<i>+35</i>

Source: CSD Records, MCPC Median Price Sales Reports

- MCPC compared detailed sales transactions with student address records to identify the actual number of students leaving a home as compared to those who entered after the same home was sold.
- This data shows a consistent net gain from housing sales within the school district.

2D. Housing Activity—Housing Units Built

FIGURE 18: *Housing Units Built in the CSD by Housing Type, 2008-2017*



Source: Montgomery County Planning Commission

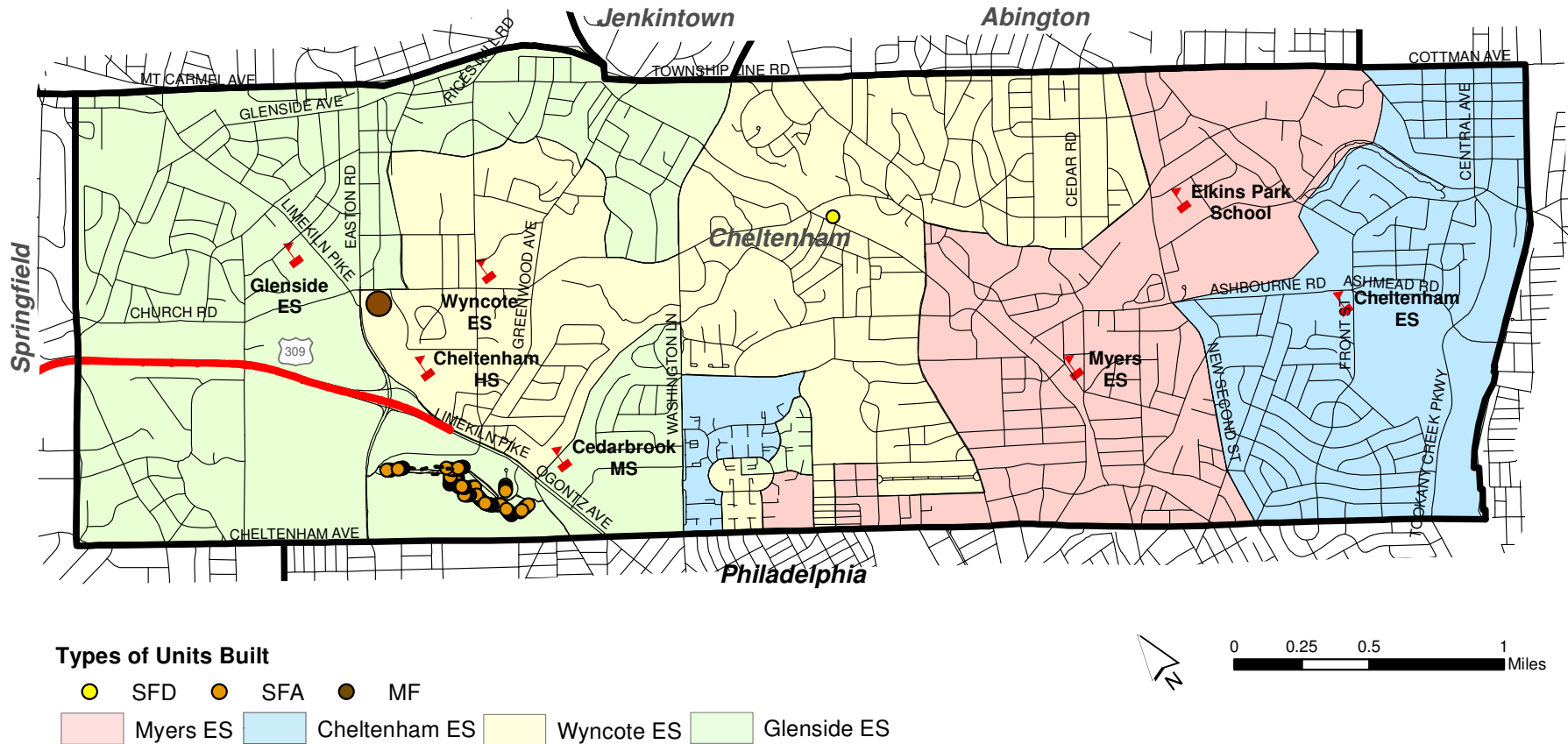
- The last five years of housing construction in the district shows an average of 31 units per year. Nearly all of the developments were single family attached units within the “Wyngate” development with “1600 Church Road” the notable MF exception. The net impact on enrollment based on these housing types averages out to approximately 7 students per year. This baseline is used to determine what additional impact will be caused by new development expected in the future should it outpace previous construction rates.
- The map on the following page identifies all units built over the last five years.

FIGURE 19: *Housing Units Built by Elementary School Boundary Areas, 2013-2017*

ES School Boundary	2013	2014	2015	2016	2017	Total 13-17
Cheltenham	0	0	0	0	0	0
Glenside	5	36	40	14	16	111
Myers	0	0	0	0	0	0
Wyncote	1	55	0	24	0	80
Total	6	91	40	38	16	191

Source: Montgomery County Planning Commission

FIGURE 20: Housing Units Built in the CSD by Housing Type, 2013-2017



2E. Housing Activity—Housing Units Proposed & Potential Table

- Figure 22 shows all known properties in play for development. Only the first grouping is considered likely based on submitted plans or approvals and discussion with township staff. The timelines are only estimates on our part. A project may move forward more quickly, or as is often the case, get delayed due to unforeseen circumstances. The second grouping ranges from potential development that may take longer to become a reality or only be theoretical at this point.

FIGURE 21: *Housing Units Proposed in the CSD, 2008-2017*

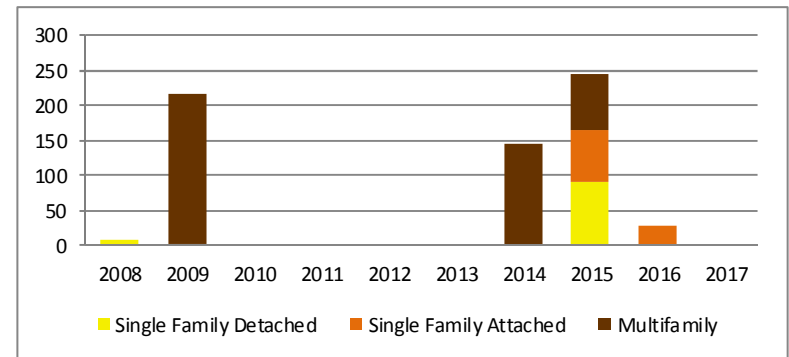
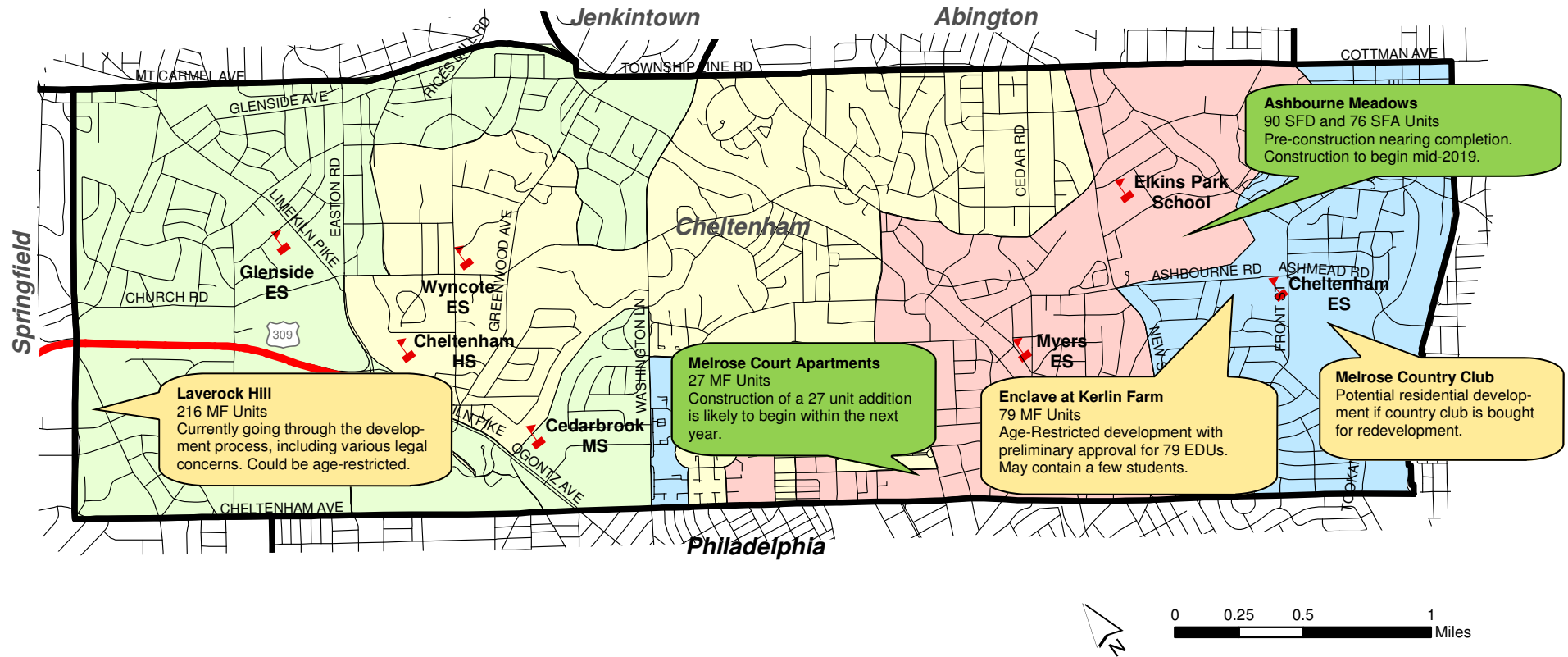


FIGURE 22: *Possible Housing Developments and Impact on Public School Enrollment*

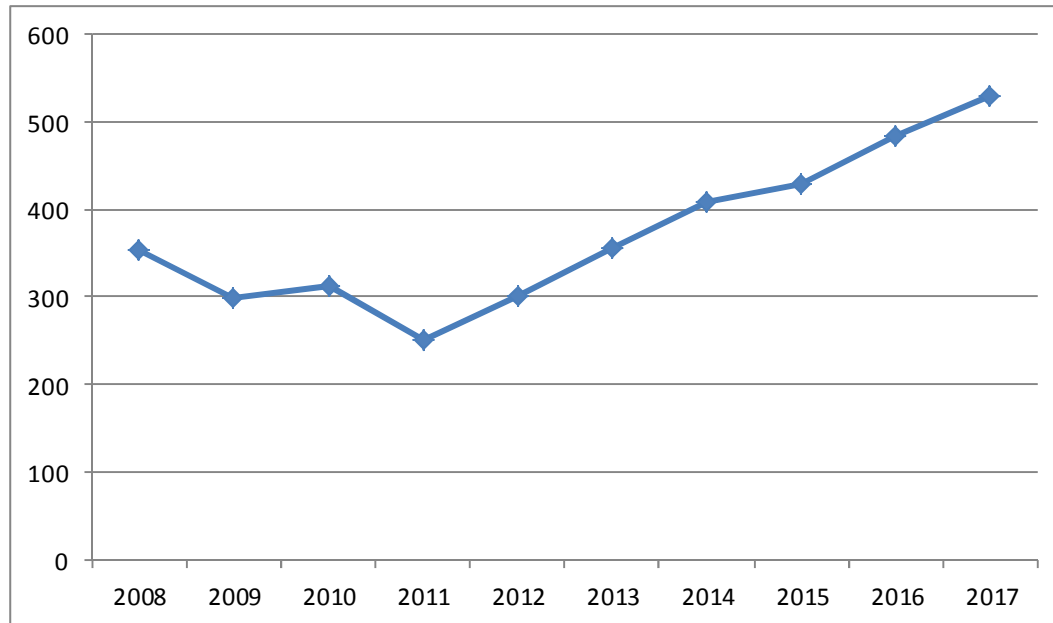
Development	Type	Total Units	Built by School Years	Notes	Public School Children Impact	Factor for School Age Children
Ashbourne Meadows	SFD	90	2020, 2021, 2022	Pre-Construction Complete—Construction to begin by mid-2019.	73	.93
Ashbourne Meadows	SFA	76	2020, 2021, 2022	Pre-Construction Complete—Construction to begin by mid-2019.	21	.31
Melrose Court Apartments (Additions)	MF	27	2020	Owner seeking to add 27 new units to the building through rehabilitation.	4	.18
Other Future Possibilities						
Laverock Hill	MF	216		Currently working its way through the development process, including various legal hurdles. Could be age-restricted.		
Melrose Country Club				Melrose Country Club is currently being explored by a number of interested parties—most hypothetical development plans revolve around housing.		
Enclave at Kerlin Farm	MF	79		Age-Restricted development to be built across from Ashbourne Meadows. Preliminary EDU's have been granted. There is some local concern that some of the occupants may potentially bring children with them.		

FIGURE 23: Proposed Housing Developments (*Expected in Green, Potential in Yellow*)



2F. Housing Activity—Housing Sales Activity

FIGURE 24: Total Housing Units Sold (Existing) at Market Rate in the CSD, 2008-2017



Source: Montgomery County Planning Commission

- Housing sales rebounded since the historic low of 2011. Since 2011, the number of sales within Cheltenham SD has grown consistently. Sales are now at a level above where they were before the recession.
- Sales have also been analyzed at the elementary school level as shown in Figure 25. Myers and Glenside have seen the most sales and Glenside has seen nearly 83% growth in sales within the last five years.

FIGURE 25: Existing Housing Units Sold by Elementary School Boundary Areas, 2013-2017

ES School Boundary	Market Rate Unit Sales—Existing Units Only					Total 13-17
	2013	2014	2015	2016	2017	
Cheltenham	74	72	76	91	90	403
Glenside	85	101	118	132	155	591
Myers	60	93	73	87	100	413
Wyncote	137	143	163	175	185	803
Total	356	409	430	485	530	2210

Source: Montgomery County Planning Commission

PART 3—DISTRICT ENROLLMENT PROJECTIONS

3A. Projections—Progression Rates

A cohort progression model is a commonly used method that relies on recent trend data to forecast the future. It uses “Progression Rates” to establish ratios that reflect what happens to a class size as it advances from one grade to the next. All grades over multiple years are calculated and averages are used to program future class sizes over the next ten years. These rates will account for most recent trends and assumes that they will continue. Adjustments can be made when warranted. For more details on the background and structure of the traditional cohort progression model, please see Part 3 of the original 2016 MCPC study.

FIGURE 25: *Grade Progression Rates Over the Last Ten Years*

School Year	B-K	K-1	1-2	2-3	3-4	4-5	5-6	6-7	7-8	8-9	9-10	10-11	11-12
2009-10	0.828	1.168	1.059	1.043	1.022	1.021	1.065	1.020	1.057	1.143	1.046	0.915	1.013
2010-11	0.766	1.039	1.046	1.077	1.038	1.044	1.081	1.051	1.003	1.152	0.966	0.924	0.976
2011-12	0.784	1.069	1.003	1.000	1.049	1.007	1.030	1.048	1.000	1.166	0.910	0.976	0.941
2012-13	0.847	1.031	1.058	1.022	1.032	1.046	1.046	1.026	0.990	1.319	0.822	0.929	0.942
2013-14	1.035	1.060	1.067	0.997	1.009	1.014	1.035	1.041	0.972	1.104	0.816	1.026	1.034
2014-15	0.887	1.031	1.006	0.994	1.034	1.012	0.975	1.014	0.988	1.160	0.911	0.924	0.992
2015-16	1.030	1.039	1.060	1.027	1.057	1.027	0.997	1.023	1.014	1.052	0.872	0.910	0.976
2016-17	0.917	1.076	1.014	1.023	1.061	0.995	1.020	1.027	0.975	1.033	0.986	0.977	1.088
2017-18	0.988	0.974	1.024	0.994	1.005	1.027	0.973	0.972	1.026	1.049	0.941	0.912	0.994
2018-19	0.835	0.958	1.000	0.980	0.975	0.960	0.928	0.975	0.945	0.994	0.860	0.937	0.936
<i>5 Year Avg.</i>	0.931	1.016	1.021	1.004	1.026	1.004	0.979	1.002	0.990	1.058	0.914	0.932	0.997

- Grade progression rates reflect the historical relationship of one class as it goes from grade to grade over time. A ratio larger than 1.0 means that the class is growing that year due to new students entering the district.
- These rates reflect all the trends that have been discussed in this study. All of these rates are tempered by the recent decline in students seen at nearly all grade levels. The five year averages help balance out some of the recent volatility with the original trend based progressions from a few years prior.

3D. Projection Results —All Grades

FIGURE 26: Projected Enrollments, OPTION 1—Base Future Birth Estimate (5-year Progression)

School Year	Births 6 Years Ago*	K	1	2	3	4	5	6	7	8	9	10	11	12	TOTAL
2019-20	328	305	288	325	301	348	345	376	350	345	345	321	293	328	4,270
2020-21	374	348	310	294	326	309	349	338	377	346	365	315	299	292	4,269
2021-22	337	314	354	317	295	334	310	342	339	373	366	334	294	298	4,269
2022-23	352	328	319	361	318	303	336	304	343	335	394	335	311	293	4,278
2023-24	346	322	333	325	362	326	304	329	304	339	355	360	312	310	4,282
2024-25	346	322	327	340	327	372	327	298	329	301	359	324	336	311	4,273
2025-26	346	322	327	334	341	335	373	320	299	326	318	328	302	335	4,261
2026-27	346	322	327	334	335	350	336	365	321	295	345	291	305	301	4,229
2027-28	346	322	327	334	335	344	351	329	366	318	313	315	271	304	4,231
2028-29	346	322	327	334	335	344	345	344	330	362	336	286	294	270	4,230

* The birth figure for each row does not pertain to births during that year, but rather the births that occurred six years prior to the projected year. The average birth-to-kindergarten ratio is then applied to get the projected kindergarten class.

- Progression Rate averages are based on **five** years.
- Future births are estimated as an average of the last five years.

School Year	Total	Annual Change
2019-20	4,270	-8
2020-21	4,269	-1
2021-22	4,269	0
2022-23	4,278	9
2023-24	4,282	4
2024-25	4,273	-9
2025-26	4,261	-12
2026-27	4,229	-32
2027-28	4,231	2
2028-29	4,230	-1

Grade K-4	Grade 5-6	Grade 7-8	Grade 9-12
1,567	721	695	1,286
1,588	687	723	1,271
1,614	652	711	1,292
1,629	639	678	1,333
1,669	633	643	1,337
1,688	625	630	1,329
1,660	694	624	1,283
1,669	702	617	1,242
1,663	681	684	1,203
1,663	689	692	1,186

3D. Projection Results —All Grades

FIGURE 27: Projected Enrollments, OPTION 2—Base Future Birth Estimate (3-year Progression)

School Year	Births 6 Years Ago*	K	1	2	3	4	5	6	7	8	9	10	11	12	TOTAL
2019-20	328	300	285	322	300	344	342	374	346	343	334	326	296	331	4,241
2020-21	374	342	300	288	322	304	341	333	371	340	351	311	307	298	4,207
2021-22	337	308	343	304	288	326	302	333	330	364	348	326	293	309	4,173
2022-23	352	321	309	347	304	292	324	294	330	324	373	324	308	294	4,143
2023-24	346	316	322	313	347	308	290	316	291	324	332	347	305	309	4,120
2024-25	346	316	317	326	312	351	306	283	313	286	332	309	327	307	4,084
2025-26	346	316	317	321	326	316	349	298	280	307	293	308	291	329	4,052
2026-27	346	316	317	321	321	331	315	340	295	275	315	273	290	293	4,001
2027-28	346	316	317	321	321	325	329	306	337	290	282	293	257	292	3,985
2028-29	346	316	317	321	321	325	323	320	304	331	298	262	276	258	3,970

* The birth figure for each row does not pertain to births during that year, but rather the births that occurred six years prior to the projected year. The average birth-to-kindergarten ratio is then applied to get the projected kindergarten class.

- Progression Rate averages are based on **three** years.
- Future births are estimated as an average of the last five years.

School Year	Total	Annual Change
2019-20	4,241	-37
2020-21	4,207	-34
2021-22	4,173	-34
2022-23	4,143	-30
2023-24	4,120	-24
2024-25	4,084	-35
2025-26	4,052	-32
2026-27	4,001	-51
2027-28	3,985	-16
2028-29	3,970	-15

Grade K-4	Grade 5-6	Grade 7-8	Grade 9-12
1,550	716	689	1,287
1,556	674	710	1,267
1,569	634	694	1,276
1,573	618	654	1,299
1,606	606	615	1,293
1,623	589	599	1,274
1,596	647	587	1,221
1,605	654	571	1,171
1,599	635	627	1,124
1,599	643	634	1,094

3D. Projection Results —All Grades

FIGURE 28: *Projected Enrollments, OPTION 3—Slight Birth Growth with Housing Adjustment*

School Year	Births 6 Years Ago*	K	1	2	3	4	5	6	7	8	9	10	11	12	TOTAL
2019-20	328	305	288	324	301	347	345	375	349	345	344	320	292	327	4,263
2020-21	374	350	312	296	327	311	351	340	378	348	367	317	301	293	4,291
2021-22	337	317	357	320	299	338	314	345	342	376	370	337	297	302	4,315
2022-23	352	333	324	366	323	309	341	309	348	341	400	340	317	298	4,348
2023-24	354	335	338	330	367	331	309	333	309	344	359	365	317	315	4,353
2024-25	356	336	340	345	331	377	332	303	334	306	363	329	341	316	4,353
2025-26	358	338	342	347	346	340	378	325	303	331	323	333	307	340	4,352
2026-27	360	340	343	349	348	355	341	370	326	300	349	296	310	306	4,334
2027-28	362	342	345	350	350	357	356	334	371	323	317	320	276	309	4,351
2028-29	364	344	347	352	352	359	358	349	335	367	341	290	298	275	4,368

* The birth figure for each row does not pertain to births during that year, but rather the births that occurred six years prior to the projected year. The average birth-to-kindergarten ratio is then applied to get the projected kindergarten class.

- Progression Rate averages are based on **five** years.
- Future births are estimated growing by 2 each year.
- An adjustment of 63 students spread over the projection results was also incorporated to account for likely housing construction.

School Year	Total	Annual Change
2019-20	4,263	-15
2020-21	4,291	28
2021-22	4,315	24
2022-23	4,348	33
2023-24	4,353	5
2024-25	4,353	0
2025-26	4,352	-1
2026-27	4,334	-18
2027-28	4,351	17
2028-29	4,368	17

Grade K-4	Grade 5-6	Grade 7-8	Grade 9-12
1,565	720	694	1,284
1,596	691	726	1,278
1,632	659	718	1,306
1,656	650	689	1,354
1,701	643	653	1,356
1,729	635	640	1,349
1,712	704	634	1,302
1,735	712	626	1,261
1,744	690	694	1,223
1,754	707	702	1,205

Conclusion

Our original study recognized some major factors driving growth in the District's student enrollment—reduced private school attendance, more students coming out of existing multifamily developments, and more students resulting from the sale of households. Two school year periods later, most of these factors have significantly shifted resulting in a different enrollment trajectory than originally projected. Private school attendance in the District likely grew the last few years. Growth in students coming from existing multifamily developments reverted, especially in large complexes like Lynnewood Gardens. In addition, all of the historically large elementary school classes observed in the original study have since moved into Elkins Park and have not been replaced by similarly sized kindergartens and first grades.

Enrollment figures over the last two school years combined with other new data has informed our perception of what is happening in the Cheltenham School District. The steady growth observed between 2009 and 2016 is difficult to sustain unless new elementary classes are larger compared to those progressing onto the middle schools. At some point all of the grade levels reach a high point and growth becomes less likely to achieve even if large class sizes are sustained. Some of the higher grade levels are still in line to receive growth bubbles that originated in aforementioned kindergarten or first grade classes 6-10 years ago.

The updated projections show a district that is likely to see overall enrollment continue its decrease unless anticipated housing is constructed, births increase, and elementary classes start to grow again. Option 1 tempers the recent pace of decline by incorporating the last five years of enrollment history in its progression rates. While Option 2 shows the most drastic decline due to the fact the progression rates are based on only the last three years. Option 3 accounts for a slight increase in births each year, some growth due to housing construction, and a five-year progression rate. This option represents the most likely future for the district and is the most finely-tuned model. Ashbourne Meadows is to begin construction in the summer of 2019 and will likely start affecting district enrollments the following school year. This development, along with continued housing churn due to sales, and possible increases in birth activity could be enough to moderate or reverse the recent trend of decline within the district.

APPENDIX—ELEMENTARY SCHOOL PROFILES

Cheltenham ES

Past Enrollment

Year	K	1	2	3	4	Total	Annual Change
2011-12	70	76	81	103	79	409	-19
2012-13	74	77	81	82	105	419	10
2013-14	90	86	86	87	88	437	18
2014-15	78	98	96	87	95	454	17
2015-16	100	85	113	99	93	490	36
2016-17	86	107	98	116	108	515	25
2017-18	92	84	106	91	113	486	-29
2018-19	80	87	89	109	86	451	-35

- Past Enrollment— A number of large classes have moved through the school in recent years, increasing enrollment significantly from where it was in 2011. However, those classes are largely gone and new classes have not been as large.
- Housing—No construction recently but Ashbourne Meadows is on the horizon, although those children could be assigned to or split between Myers. Sales have grown stronger in the past five years.

Housing Data

Year	New Units Built				Existing Units Sold			
	SFD	SFA	MF	Total	SFD	SFA	MF	Total
2013	0	0	0	0	53	21	0	74
2014	0	0	0	0	53	19	0	72
2015	0	0	0	0	58	18	0	76
2016	0	0	0	0	64	27	0	91
2017	0	0	0	0	60	30	0	90
Total	0	0	0	0	288	115	0	403

Housing Potential

Development	Type	Total Units	2019	2020	2021	2022	2023	Public School Children Impact (2019 beyond)
Ashbourne Meadows*	SFD + SFA	166		56	55	55		94 Children

* Ashbourne Meadows may be split between Cheltenham ES & Myers ES.

Glenside ES

Past Enrollment

Year	K	1	2	3	4	Total	Annual Change
2011-12	100	86	89	80	77	432	78
2012-13	91	97	91	89	92	460	28
2013-14	110	99	103	94	89	495	35
2014-15	106	107	85	101	95	494	-1
2015-16	77	107	103	94	99	480	-14
2016-17	89	82	105	108	101	485	5
2017-18	95	84	90	101	108	478	-7
2018-19	73	94	80	84	92	423	-55

Housing Data

Year	New Units Built				Existing Units Sold			
	SFD	SFA	MF	Total	SFD	SFA	MF	Total
2013	0	5	0	5	67	18	0	85
2014	0	36	0	36	81	20	0	101
2015	0	40	0	40	91	27	0	118
2016	0	14	0	14	90	42	0	132
2017	0	16	0	16	108	45	2	155
Total	0	111	0	111	440	149	2	591

Housing Potential

Development	Type	Total Units	2019	2020	2021	2022	2023	Public School Children Impact (2019 beyond)
N/A								

- Past Enrollment— Similar to Cheltenham ES, a number of large classes have moved through the school in recent years, increasing enrollment significantly from where it was in 2011. However, those classes are largely gone and new classes have generally decreased in size.
- Housing—Wyngate is nearly finished. The only new construction planned is Laverock Hill which still has some planning and legal hurdles to overcome and is likely to be age restricted. Sales have been briskly increasing the last five years (83% increase).

Myers ES

Past Enrollment

Year	K	1	2	3	4	Total	Annual Change
2011-12	77	65	66	72	79	359	0
2012-13	74	79	66	70	72	361	2
2013-14	65	65	81	61	74	346	-15
2014-15	70	66	66	76	62	340	-6
2015-16	73	80	71	70	85	379	39
2016-17	65	77	72	77	76	367	-12
2017-18	59	62	78	77	83	359	-8
2018-19	64	58	67	77	82	348	-11

- Past Enrollment— Enrollment has remained relatively stable at Myers ES. However, it has been slowly decreasing for the last three school years after peaking in 2015. Recent KDG classes have been on the smaller side.
- Housing—The only new construction planned is Ashbourne Meadows and an addition to the Melrose Court Apartments. Ashbourne Meadows has the potential to be split between Cheltenham and Myers. Sales have been growing steadily the last three years.

Housing Data

Year	New Units Built				Existing Units Sold			
	SFD	SFA	MF	Total	SFD	SFA	MF	Total
2013	0	0	0	0	44	10	6	60
2014	0	0	0	0	69	15	9	93
2015	0	0	0	0	56	8	9	73
2016	0	0	0	0	65	15	7	87
2017	0	0	0	0	75	17	8	100
Total	0	0	0	0	309	65	39	413

Housing Potential

Development	Type	Total Units	2019	2020	2021	2022	2023	Public School Children Impact (2019 beyond)
Ashbourne Meadows*	SFD + SFA	166		56	55	55		94 Children
Melrose Court Apartments (Add.)	MF	27		27				4 Children

* Ashbourne Meadows may be split between Cheltenham ES & Myers ES.

Wyncote ES

Past Enrollment

Year	K	1	2	3	4	Total	Annual Change
2011-12	73	84	86	87	89	419	-7
2012-13	76	77	91	88	84	416	-3
2013-14	91	84	82	86	81	424	8
2014-15	83	96	89	86	87	441	17
2015-16	64	78	102	82	93	419	-22
2016-17	68	72	80	97	81	398	-21
2017-18	86	70	72	84	96	408	10
2018-19	67	79	64	69	84	363	-45

- Past Enrollment— Enrollment within Wyncote has been variable since 2011—with some years gaining and others losing. However, losses have been larger the last couple of years. 2018 is the first year without a class over 90 students since 2011.
- Housing—Some homes that were built in the Wyngate development were districted to Wyncote ES. No new housing is proposed within this catchment. Sales have been growing since 2013.

Housing Data

Year	New Units Built				Existing Units Sold			
	SFD	SFA	MF	Total	SFD	SFA	MF	Total
2013	1	0	0	1	82	28	27	137
2014	0	0	55	55	85	33	25	143
2015	0	0	0	0	103	35	25	163
2016	0	24	0	24	107	35	33	175
2017	0	0	0	0	112	32	41	185
Total	1	24	55	80	489	163	151	803

Housing Potential

Development	Type	Total Units	2019	2020	2021	2022	2023	Public School Children Impact (2019 beyond)
N/A	N/A							N/A

