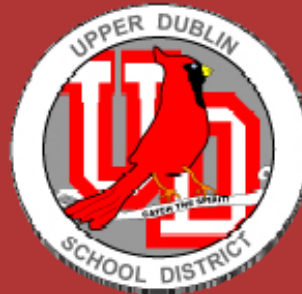




School District of Upper Dublin Enrollment Projections



School District of Upper Dublin

Enrollment Projections



Prepared By
The Montgomery County Planning Commission



August 2014

Board of School Directors

Art Levinowitz, President
Joseph Chmielewski, Vice President
Vanessa Good
Gwanita Hester
Joan Ryder Ludwig
Debbie Mendelson
Michael Resnick
Sara Johnson Rothman
Mark Sirota

Superintendent
Dr. Deborah S. Wheeler

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Introduction

School districts can only plan for their future if they have some idea of what that future will entail. The number of students that will need to be served by district facilities is the key variable that must be understood in order to make prudent decisions.

Montgomery County and much of the region is in a cautious period following a historic housing price bubble and the subsequent bursting of that bubble followed by the Great Recession. An extended recovery period is still going and shows signs of improvement, but some of the population is still hampered by long-term unemployment and slow job creation.

Overall, the housing market has improved over the last two years, and development proposals are on the rise again. Mature suburbs, such as Upper Dublin Township may start to see renewed interest in residential development, but it may be less focused

on traditional single family detached housing and more concentrated on denser infill-oriented housing types, including townhomes and multifamily apartment style living.

This report gives an overview of the population and housing characteristics within the School District of Upper Dublin (UDSD) in order to establish the conditions that have formed the most recent enrollment trends. Future enrollments will depend largely upon the following factors:

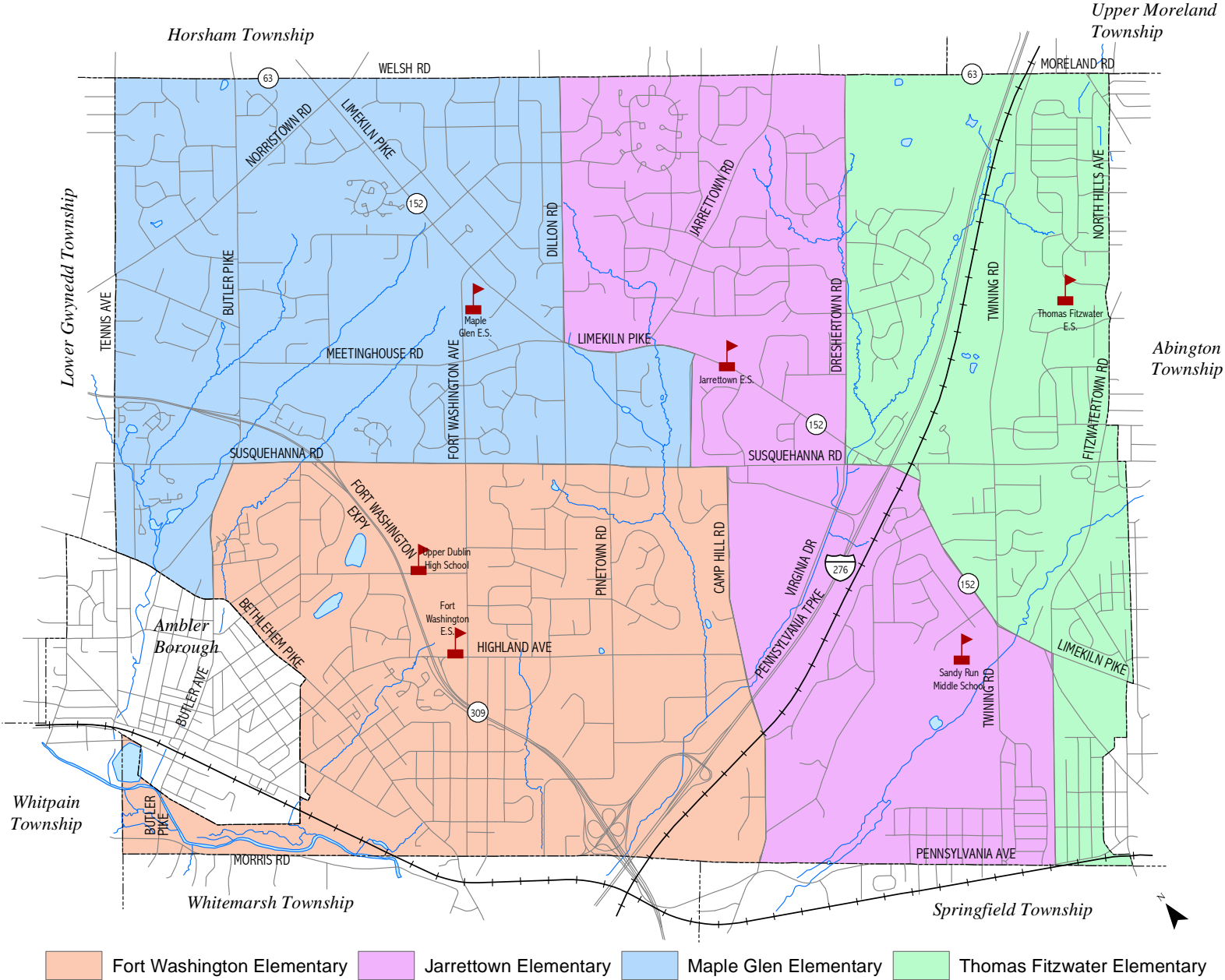
- Recent and future births
- Housing construction
- Moves in and out of the school district
- Private, charter, home, and cyber school growth

The following study employs the use of a Cohort Progression Model to account for the above factors and form projections for each grade level over the next ten years. No model is perfect when it comes to predicting the future, but given the right data, an accurate projection for the next five years is expected.

Projections should not be considered a final product with the completion of the model. Additional data and analysis, including housing and population forecasts, characteristics of households by housing types, geographic mobility by age cohorts, and housing sales activity, are also presented in this study to provide a useful context with the projections. This context also provides the basis for using the projections beyond just the next school year. The study provides the important data points that should be reviewed every year to determine if unanticipated activity is occurring and how that might influence the projections and actual enrollments down the line.



FIGURE 1: District School Locations and Boundary Areas



Summary of Key Findings

The general trend in future enrollments for the School District of Upper Dublin calls for a gradual decline over the next ten years. While birth activity and new construction will most prominently influence the rate of decline, the district should see enrollment drop between seven and twelve percent over the next ten years. The following factors are determining this trend:

- Births in Upper Dublin Township have declined substantially over the last four years. This is a pretty common trend in the region, and it will cause kindergarten classes to shrink from recent sizes beginning in another year or two.
- Births will gradually recover, but the extent is uncertain. The age cohort of 25-34 year old females is expected to rise through the current decade. A younger bubble of the population will move into this range and begin having children. If the economy improves, there could also be an increase in the rate of births.
- The UDSD consistently sees its class sizes increase as they age through the system, indicating a higher rate of transfers into the district.
- Private school enrollment from students living in Upper Dublin have declined over the decade. Some of these students may have entered back into the public school system.
- There should be some growth stemming from new housing construction in Upper Dublin over the next three to four years. While residential construction has been very limited over the last ten years, current proposals that are likely to be built could provide between 50 to 75 additional students in the coming years.
- Residential sales activity has been on the rise the last two years in Upper Dublin after reaching historical lows during the crash of national housing markets starting in 2008. A greater

churning of households is likely to bring younger households into the area, although they may not make an immediate impact on enrollment.

Projections

Three scenarios of future enrollments that are based on the level of birth increases in the township have been developed. A fourth scenario makes adjustments to the most likely of the birth scenarios in order to account for an increase in housing construction. This fourth scenario is recommended as the most realistic projection.

- The brunt of the enrollment decline will occur at the elementary school level over the next five years with overall K-5 students dropping by twelve percent. The second five years will drop less dramatically and could even increase if births pick up faster than expected or additional new family-style housing is constructed.
- Enrollment at the middle school will actually increase over the next five years by about six percent as some of the larger current elementary grades move into the middle school grades. However, enrollment will fall back down more dramatically towards the end of the ten year study period.
- The high school will remain fairly stable over the next five years before seeing some growth in years six through ten. The birth declines of the last four years will not begin to affect high school enrollments until after the next ten years have passed.



*School District
Characteristics*

Part

1

School District Characteristics

Population

Birth Patterns

School District Enrollment

Alternative School Enrollment

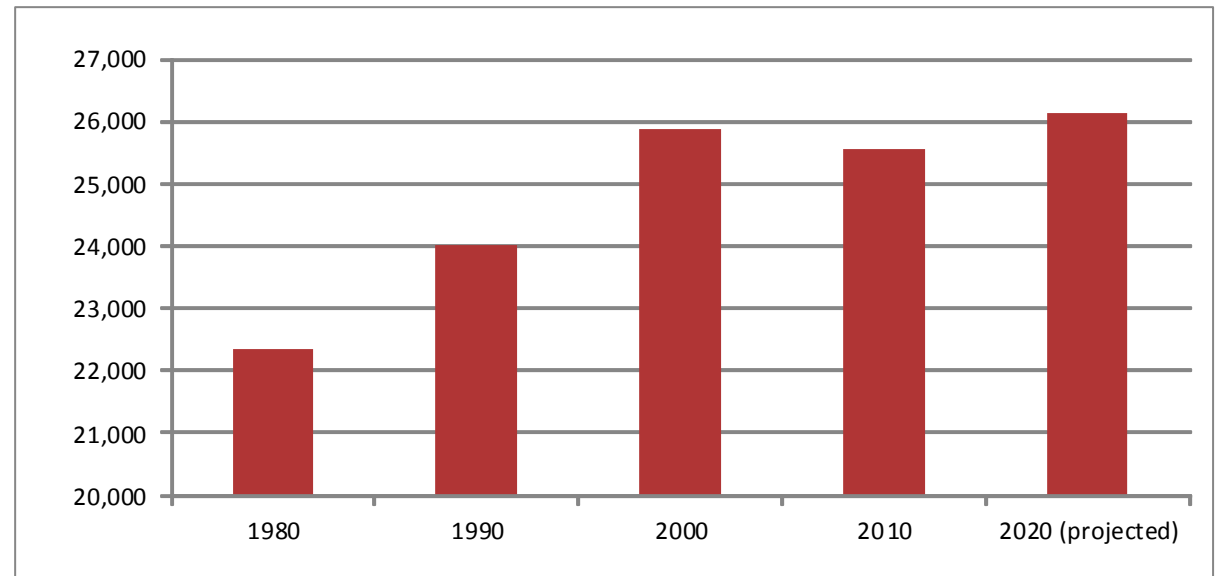
Population

Upper Dublin Township experienced a slight decline in population from 2000 to 2010. While the township's most rapid period of growth occurred in the 1960s, it had been moderately growing over the following decades until the 2000s. Growth in those ten years was prohibited by continuing declines in average household size, and the fact that the township is closer to becoming built out resulting in fewer opportunities for new development. The housing crash and recession during the second half of the decade also restricted the potential for growth.

Despite the decline, regional projections are calling for the population to once again increase by 2020. In fact, population estimates from the U.S. Census Bureau already show the population to have reached the 2020 projection in 2013, so growth will likely exceed the projection.

These recent changes are still relatively small, and the more general trend is that population in Upper Dublin will continue to remain stable. Furthermore, it is important to recognize that population totals do not necessarily reflect changes in the numbers of school-age children or public school enrollment figures. While the population of Upper Dublin is not expected to vary widely from where it is today, shifts in the age cohorts within that population will have distinct effects on the numbers of school age children in the future.

FIGURE 2: Population of Upper Dublin Township, 1980-2020



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

FIGURE 3: 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 |
| Upper Dublin Twp. | 24,028 | 1,680 | 7.5% | 25,878 | 1,850 | 7.7% | 25,569 | -309 | -1.2% | 26,118 | 549 | 2.1% |
| Montgomery County | 678,111 | 34,740 | 5.4% | 748,987 | 70,876 | 10.5% | 799,874 | 50,887 | 6.8% | 823,564 | 23,690 | 3.0% |

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

Age Cohorts and School Age Children

Age data from the last three decennial censuses reveal patterns in how the demographics of Upper Dublin have changed. The cohort that best represents school age children is the 5-17 year old group. This cohort increased during the 1990s but then declined, although to a lesser degree, from 2000 to 2010. These figures include all children, not just public school students, but it is no surprise that the enrollment for the district as a whole dropped by 3.2% from 2000 to 2010. The younger cohort, 0-4 year olds (pre-school age), was also lower in 2010 than it was in 2000. This snapshot reveals an

indication that recent and current entrants into the school system may not be as strong in numbers as they were a decade ago.

The remaining cohorts show that the population aged 45-64 years old has become a bubble where there are disproportionately more people in these age ranges. These ages roughly account for the baby boomers and the cause for why places like Upper Dublin and Montgomery County are said to be home to an aging population. These people may still have children in their households or have seen them move out in recent years. The effect is that there may be fewer

children per household as these people age, but that effect will also be countered by seniors moving to other types of housing or downsizing, providing opportunities for younger families to move in.

The ages in between the previous cohorts mentioned, the 25-44 year old population, declined in 2010. These people are the most likely to have babies and their decline heralds a period of lower birth activity, which can ultimately result in fewer students enrolling for school six years later. However, the cohorts coming up behind the 25-44 year olds could create a recovery from the lower birth activity as they settle into homes and have children of their own.

This shifting of age cohorts over time is only one part of the picture when it comes to explaining and predicting what will happen with school enrollment, but it is a good place to start when considering why enrollments cycle up and down over time.

FIGURE 4: Age Cohorts, Upper Dublin Township, 1990-2010

| Age Cohort | 1990 | | 2000 | | 2010 | |
|-------------|-------|------------------|-------|------------------|-------|------------------|
| | Total | 1980-1990 Change | Total | 1990-2000 Change | Total | 2000-2010 Change |
| 0-4 | 1,537 | 449 | 1,558 | 21 | 1,300 | -258 |
| 5-17 | 4,325 | -1,104 | 5,538 | 1,213 | 5,182 | -356 |
| 18-24 | 2,214 | -433 | 1,276 | -938 | 1,464 | 188 |
| 25-34 | 3,295 | 479 | 2,311 | -984 | 1,940 | -371 |
| 35-44 | 4,165 | 1,128 | 4,269 | 104 | 3,306 | -963 |
| 45-54 | 3,212 | -6 | 4,599 | 1,387 | 4,602 | 3 |
| 55-64 | 2,596 | 239 | 2,788 | 192 | 3,888 | 1,100 |
| 65-74 | 1,716 | 672 | 2,051 | 335 | 2,073 | 22 |
| 75 and over | 968 | 256 | 1,488 | 520 | 1,814 | 326 |

Source: U.S. Census Bureau

School District Characteristics

Population

Birth Patterns

School District Enrollment

Alternative School Enrollment

Birth Patterns

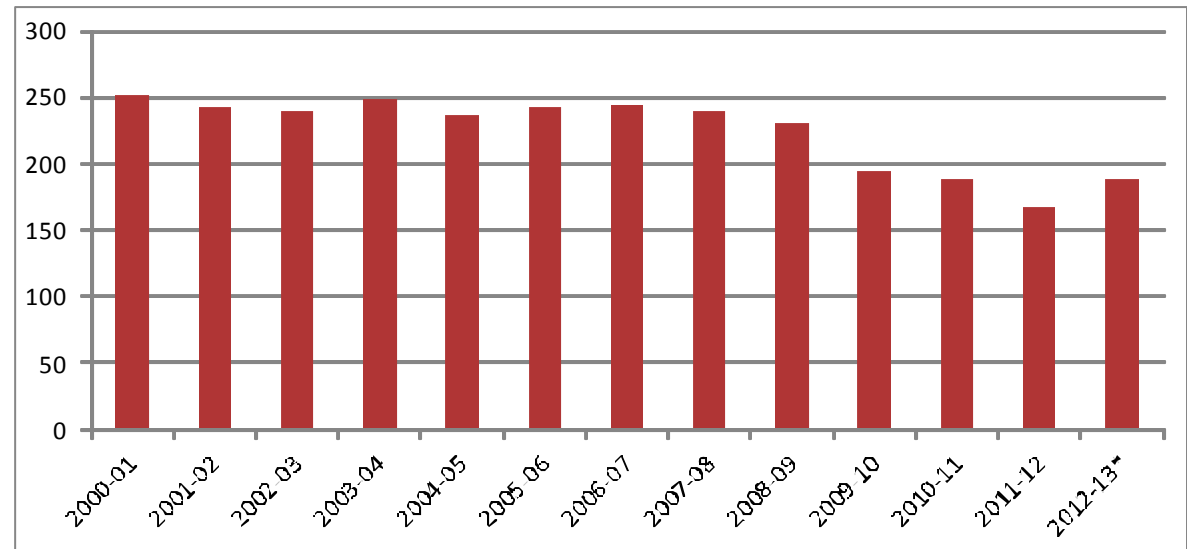
The number of births in an area is a critical component to projecting future enrollments in a school district. While some families will migrate over time, births provide a beginning indicator of the potential size of future kindergarten classes. This relationship will be detailed in the cohort progression model (p. 25), but it is important to note that birth data can give a preview of what will happen with entering students over the first five years of the projection period. Also note that annual birth totals are aligned to match the school calendar year (September—August) in order to make the most accurate correlations to future kindergarten classes.

The trend for live births since 2000 in Upper Dublin shows that the average number of births from the 2000 to 2008 school years was 242 births. The number of births were remarkably consistent during

that time period falling within a range of 230 to 252. During the 2009 through 2012 school years, births have failed to register above 200. This recent decline is not just relative to Upper Dublin. Countywide, birth totals began falling at around the same time.

Has the downturn in the economy starting with the Great Recession in 2008 driven this decline in births? Logically, it would make sense for some to defer or delay decisions to have children based on economic uncertainty in one's life. Some studies have looked at national population bases, both the United States and globally, and determined that overall fertility rates do decline with downturns in the economy. Upper Dublin is a relatively small place and exists within the context of larger economies, but the timing of the decline is right in line with the economic downturn. Some other municipalities in the county have experienced a decline in births, but they were

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



* Births during the 2013 months in the 2012-2013 school year were estimated due to state data being unreleased at the time of this report.
Source: Pennsylvania Department of Health

less consistent with the timing of the Recession. Some drops occurred several years before the Recession and some occurred as late as two or three years later. The economy can have an impact as it influences factors such as housing construction and sales activity, but it alone should not be considered the cause for the recent decline in births at the local level.

Attempting to pinpoint the causes of change in birth totals over time is difficult, but another clue comes from looking at the population of child-bearing age women. According to the Pennsylvania Department of Health, birth activity in Montgomery County is at its highest when potential mothers are between the

FIGURE 6: Number of Live Births in Upper Dublin Township by School Calendar Year (Sept.-Aug.)

| School Year | Upper Dublin |
|-------------|--------------|
| 2000-01 | 252 |
| 2001-02 | 242 |
| 2002-03 | 240 |
| 2003-04 | 249 |
| 2004-05 | 236 |
| 2005-06 | 242 |
| 2006-07 | 244 |
| 2007-08 | 239 |
| 2008-09 | 230 |
| 2009-10 | 195 |
| 2010-11 | 189 |
| 2011-12 | 168 |
| 2012-13 | 189 |

Births during the 2013 months in the 2012-2013 school year were estimated due to state data being unreleased at the time of this report.

Source: Pennsylvania Department of Health

ages of 25-34. The population of women in that age group from Upper Dublin dropped from 1,189 in 2000 to 997 in 2010, a loss of 16.1 percent. Figure 7 identifies age cohorts for females of child-bearing age.

This data also suggests that on a purely demographic basis, births may not remain at the current low levels for long. Females within the age 15-24 groups increased by 28 percent in 2010. Looking out to 2020, the bubble in the younger cohorts will be aging into higher fertility rates, potentially raising birth figures closer to the averages of the last decade.

Of course, the actual 15-24 year olds living in Upper Dublin at the time of the data collection are going through an extreme period of flux as many of them graduate high school and go to college, or otherwise move out of their parents' homes. Many things may happen to prevent them from becoming a 25-34 year old resident of Upper Dublin. However, the bubbles in the so-called baby boomers and echo boomers also exist at the county and regional levels. The general increase in people of that age will still likely impact the number of 25-34 year olds in Upper Dublin even if they are not the same residents that lived here as 15-24 year olds.

FIGURE 7: Females of Child-Bearing Age in Upper Dublin, 2000 and 2010

| Age Cohort | 2000 Females | 2010 Females |
|-------------|--------------|--------------|
| Age 15 - 19 | 605 | 874 |
| Age 20 - 24 | 415 | 433 |
| Age 25 - 29 | 459 | 484 |
| Age 30 - 34 | 730 | 513 |
| Age 35 - 39 | 988 | 777 |
| Age 40 -44 | 1,284 | 962 |

Source: U.S. Census Bureau

Birth Rates

Birth rates are a different statistic than live births. An increase or decrease in actual births could be explained by concurrent growth or decline in the population base, but birth rates average out the number of live births per 1,000 persons in an area. The statistics in Figure 9 confirm that the trend of lower birth activity is a recent occurrence beginning closer to 2010 and not being caused by an overall reduction in population.

FIGURE 8: Birth Rates (Births Per 1,000 Population) in Upper Dublin Township by Calendar Year (Jan.-Dec.)

| Calendar Year | Upper Dublin | Montgomery County |
|---------------|--------------|-------------------|
| 2002 | 8.1 | 12.2 |
| 2003 | 10.2 | 12.7 |
| 2004 | 9.8 | 12.3 |
| 2005 | 8.2 | 12.1 |
| 2006 | 9.8 | 12.3 |
| 2007 | 9.9 | 11.9 |
| 2008 | 8.8 | 12.1 |
| 2009 | 8.1 | 11.7 |
| 2010 | 7.9 | 11.4 |
| 2011 | 6.9 | 11.2 |
| 2012 | 6.7 | 11.0 |

Sources: Pennsylvania Department of Health, U.S. Census Bureau

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Population

Birth Patterns

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Alternative School Enrollment

School District Enrollment

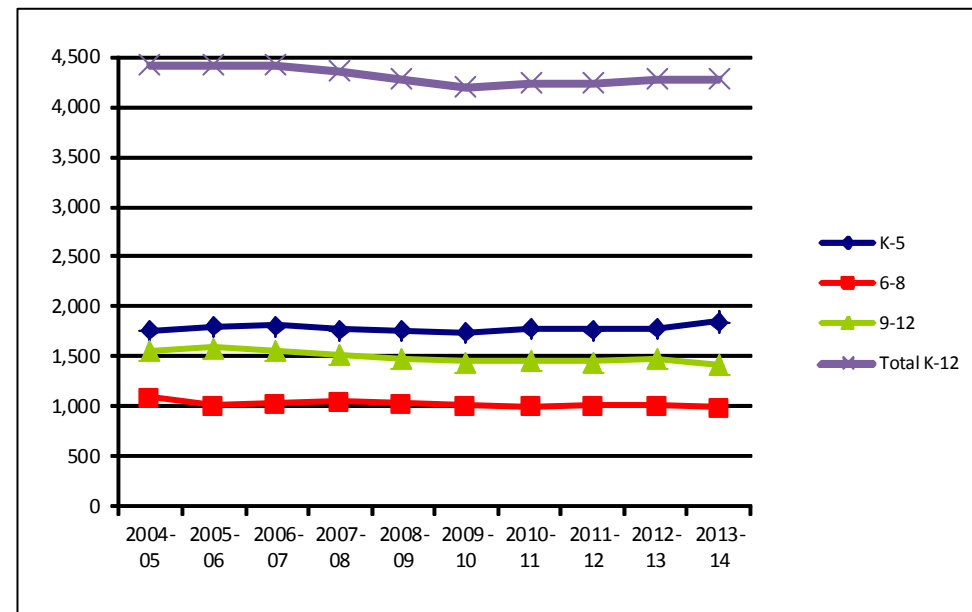
Over the last ten years, district enrollment has declined by 3.3 percent, but it has actually been fairly stable compared to some other districts. The prior decade saw some growth and the district has seen a net gain in students over the last twenty years. The stability of the district's enrollment is demonstrated in Figure 10 where enrollment did not change by more than 1.8 percent in any given year. Most recently, enrollment has increased during two of the last four years. The big question to be answered by this study is whether the overall declining trend in the decade will continue, or are enrollments preparing to cycle back upwards over the next few years?

The first place to look for that answer comes from breaking down the figures by general school levels as indicated in Figure 9. Elementary school enrollment, grades K-5, has remained fairly flat with moderate

fluctuation, although it has risen over the last two years and the largest gain of the decade occurred during the most recent school year, 2013-2014. Middle school enrollment, grades 6-8, has also remained steady, but unlike the elementary school enrollment, the slight trend has been to decrease over the decade. Whereas elementary levels went up by almost a hundred over the decade, middle school levels went down by almost the same amount. The high school enrollment, grades 9-12, declined a bit more than the middle school level, losing over one hundred students during the decade.

The numbers do not reveal any dramatic changes, but the district may see slightly larger elementary class sizes moving through the system as smaller than usual upper grade classes exit. However, it will depend on other factors, including the recent decline in births, to determine the overall impact on enrollments.

FIGURE 9: School District Enrollment by Grade Divisions, 2004-2013



Source: School District of Upper Dublin (enrollment as of October 1 each year)

FIGURE 10: District Enrollment by Division, 2004-2013

| Year | Total K-12 | Number Change from Previous Year | Percent Change from Previous Year | Grade K-5 | Grade 6-8 | Grade 9-12 |
|---------|------------|----------------------------------|-----------------------------------|-----------|-----------|------------|
| 2004-05 | 4,415 | | | 1,763 | 1,088 | 1,564 |
| 2005-06 | 4,414 | -1 | 0.0% | 1,803 | 1,014 | 1,597 |
| 2006-07 | 4,414 | 0 | 0.0% | 1,816 | 1,035 | 1,563 |
| 2007-08 | 4,346 | -68 | -1.5% | 1,769 | 1,051 | 1,526 |
| 2008-09 | 4,266 | -80 | -1.8% | 1,758 | 1,030 | 1,478 |
| 2009-10 | 4,198 | -68 | -1.6% | 1,741 | 1,010 | 1,447 |
| 2010-11 | 4,243 | 45 | 1.1% | 1,787 | 996 | 1,460 |
| 2011-12 | 4,241 | -2 | 0.0% | 1,771 | 1,014 | 1,456 |
| 2012-13 | 4,279 | 38 | 0.9% | 1,783 | 1,013 | 1,483 |
| 2013-14 | 4,268 | -11 | -0.3% | 1,854 | 993 | 1,421 |

Source: School District of Upper Dublin (enrollment as of October 1 each year)

FIGURE 11: District Enrollment by Grade, 2004-2013

| Year | K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |
|---------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| 2004-05 | 231 | 304 | 271 | 303 | 337 | 317 | 320 | 359 | 409 | 412 | 392 | 402 | 358 |
| 2005-06 | 273 | 275 | 315 | 284 | 312 | 344 | 341 | 321 | 352 | 411 | 405 | 387 | 394 |
| 2006-07 | 268 | 317 | 283 | 327 | 297 | 324 | 347 | 356 | 332 | 361 | 418 | 403 | 381 |
| 2007-08 | 231 | 284 | 326 | 284 | 336 | 308 | 335 | 359 | 357 | 349 | 352 | 419 | 406 |
| 2008-09 | 246 | 249 | 293 | 330 | 292 | 348 | 316 | 349 | 365 | 356 | 349 | 361 | 412 |
| 2009-10 | 272 | 278 | 246 | 300 | 344 | 301 | 342 | 323 | 345 | 373 | 366 | 347 | 361 |
| 2010-11 | 273 | 310 | 286 | 253 | 313 | 352 | 311 | 357 | 328 | 367 | 375 | 368 | 350 |
| 2011-12 | 286 | 299 | 307 | 294 | 268 | 317 | 350 | 309 | 355 | 341 | 364 | 373 | 378 |
| 2012-13 | 290 | 290 | 310 | 319 | 302 | 272 | 335 | 366 | 312 | 386 | 353 | 367 | 377 |
| 2013-14 | 300 | 306 | 304 | 310 | 329 | 305 | 276 | 348 | 369 | 325 | 381 | 346 | 369 |

Source: School District of Upper Dublin (enrollment as of October 1 each year)

School District Characteristics

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Alternative School Enrollment

Alternative School Enrollment

Potential alternative schooling choices include private schools, charter/cyber schools, and homeschooling. Enrollment in these schools are enumerated from several data sources and do not always have a consistent historical record. Further confusing matters is that charter and most cyber schools are also considered public schools.

Private Schools

The U.S. Census Bureau and its American Community Survey (ACS) provides some comprehensive data on public versus private school enrollment, which is probably the most straightforward assessment of trends. However, these figures are still estimates with a margin of error and they rely upon the accuracy of individuals filling out questionnaires. Figure 12 shows the available data that can be compared from the Census and ACS. The data indicates that private school enrollment has declined within the district since 2000 by 17.8 percent. This more rapid decline compared to the public schools indicates a negative change in the popularity of private school as an option for Upper Dublin residents.

The School District of Upper Dublin also keeps data on residents that attend private school through its

FIGURE 12: Private School Enrollment According to U.S. Census Bureau

| Year | Private School Students | Dataset |
|-------|-------------------------|----------------------------------|
| 2012* | 864 | ACS, 5 Year Estimates, 2008-2012 |
| 2000 | 1,051 | Census 2000, Summary File 3 |

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

monitoring of district bus records which includes public and private school students. However, the data is incomplete as it only recognizes students who are using the district’s public busses. The bus data in Figure 13 goes back to the 2004-05 school year and shows an even steeper decline in private school attendance based on those that use the bus for transportation. The annual data also shows that the drops became more significant after the 2008-09 school year.

FIGURE 13: Private School Enrollment According to UDSD Bus Records

| School Year | Private School Students |
|-------------|-------------------------|
| 2012-13 | 483 |
| 2011-12 | 529 |
| 2010-11 | 586 |
| 2009-10 | 686 |
| 2008-09 | 724 |
| 2007-08 | 737 |
| 2006-07 | 781 |
| 2005-06 | 823 |
| 2004-05 | 855 |

Source: School District of Upper Dublin Bus Records

* Only recognizes private school students that opt for UDSD bus transportation.

Charter / Cyber Schools

Charter schools are still considered public in that they usually have free tuition and are funded with public dollars. However, they are independently operated and students are not considered in the district enrollment figure. According to the School District of Upper Dublin, there were 15 students living in the district in 2013-14 that enrolled in cyber charter schools, which are a form of home-based virtual charter schools. These types of schools are relatively new options in the area, first appearing less than ten years ago. The district's records show that there were 20 charter students in 2010-11 and that charter school enrollment is expected to go back up to 22 students for the 2014-15 school year.

Homeschooling

The last alternative, which is not considered public schooling, is homeschooling where the parent is responsible for educating the child. District records show that there were 43 students being homeschooled within the UDSD during the 2013-2014 school year. This number has been rising over the last five years going up from 28 in 2009-10. The district did not have earlier data, but the Pennsylvania Department of Education has records available from 1998 to 2006. That data shows homeschooling levels in Upper Dublin to be consistently around 20 students during that time period. This doubling of the number of homeschooled students has not been typical in Montgomery County. While these levels should be monitored, the relatively low numbers still have a minimal impact on the overall enrollment in the district.

Housing Activity

Part 2

Housing Activity

Impacts of Housing on Enrollment

Housing Units Built

Housing Units Proposed

Housing Sales

Impacts of Housing on Enrollment

School Age Children by Housing Type

The average number of school age children in a residential unit depends on the type of residential unit. MCPC reviews the latest census data and compares it to county property records as part of its report titled, “Characteristics of the Population in New and Existing Housing Units”. The latest report, based on the 2010 Census, contains the average number of school age children in single family detached, attached (townhomes and twins), and multifamily (apartments or multiple units in a structure) housing types. The data is also analyzed in terms of new and existing units. The results of the study (Figure 14) show that a newly constructed single family detached home is over 15 times more likely to contain a school age child than multifamily units. The difference is less stark when considering all existing units, but there are clearly more children found in detached units than in multifamily units, with single family attached units falling in between the other two.

The methodology for the report was replicated to just focus on data within Upper Dublin. While there were not enough new units to develop representative figures, it was still revealed that the disparity between school age children between detached units and other housing types is similar to countywide levels for existing units. Multifamily and Attached homes in the township may be slightly less likely to have children than the county. These factors can be used to make estimates on the impact of different housing types in terms of school age children.

Migration of Households

The connection between new housing units and new population is fairly clear, although it also depends on the type of units. The impact of household movement in and out of any existing housing unit is a less certain connection. This impact is incorporated into the cohort progression model in terms of the recent past and how it relates to enrollments. However, it would also be useful to look at sales data of homes and come to an understanding of what might happen with school age children where sales activity increases for one reason or another.

FIGURE 14: Average Number of School Aged Children by Housing Unit Type

| 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 |
| Upper Dublin Township | | | |
| | Single Family Detached | Single Family Attached | Multifamily |
| School Age Children per Household in Existing Units | 0.64 | 0.39 | 0.15 |
| School Age Children per Household in New Units | NA | NA | NA |

Source: Montgomery County Planning Commission

The American Community Survey offers data on geographic mobility of households and the age composition of those households. Figure 15 shows a breakdown of households that have remained within the same house as the year prior and households that have moved within the last year. This latter group would constitute the characteristics of people who are purchasing homes or moving into rental units.

The results show that the percentage of school age children is higher in homes that are occupied by the same household as the year before. Therefore, recently sold homes will contain fewer school age children than homes that have not been sold. A sudden increase in home sales should not be

construed as having an immediate positive impact on school enrollment.

Eventually, a boost in housing sales may still provide a positive impact on enrollments. Pre-school age children (1-4 years old) are found at a higher percentage in recently sold homes than in homes that have not been sold. Many of these children will enter the public school system over the next five years. Also, persons age 25-34 are the most likely to conceive children. A household that has just moved into an Upper Dublin home is more likely to contain members of this age group, therefore increasing the likelihood that new children will be born into the district.

Age-Restricted Housing

Age-restricted housing refers to housing developments that place minimum limits on the age of residents but still offers independent living. The age limit is usually set at 55 years old and above. This housing does not include assisted living units or nursing care beds although some age-restricted developments are actually continuing care environments where all three types of living are present—independent, assisted, and nursing—allowing residents to transfer into more dependent care as needed. Age-restricted developments can feature any type of housing, single family or multifamily, but the housing is designed to facilitate an older population and meet their needs.

Age-restricted housing became popular in Montgomery County beginning in the mid to late 1990s and continues to be a prominent type of residential development today. Since 1996, about 22 percent of all units proposed in the county have been age-restricted.

In Upper Dublin Township, there are 283 age-restricted units (all multifamily) spread across two developments, Fort Washington Estates (a continuing care facility with nursing and assisted living options) and the recently built Dublin Terrace.

These types of housing are important to recognize as they can account for residential and population growth. While some school children can still be found in these developments, there are fewer of them than in units that are not age-restricted. Therefore, residential proposals that are built as age-restricted units will have a minimal effect on school enrollments.

FIGURE 15: *Percentage of Children in UDSD Area Households Related to Geographic Mobility*

| | Total Persons | Persons Age 1-4 | | Persons Age 5-17 | | Persons Age 25-34 | |
|--|---------------|-----------------|------------------|------------------|------------------|-------------------|------------------|
| | | Number | Percent of Total | Number | Percent of Total | Number | Percent of Total |
| Persons in households that have moved within the last year | 1,444 | 67 | 4.6% | 259 | 17.9% | 251 | 17.4% |
| Persons in households that have remained in the same house | 24,180 | 997 | 4.1% | 5,182 | 21.4% | 1,457 | 6.0% |

Source: American Community Survey, 2008-2012 Estimates

Owner / Renter Occupied

Housing in Upper Dublin Township is predominately owner occupied—87 percent of all occupied units. This is a higher rate of home ownership than in the county as a whole, which is 73 percent. However, rental housing as a percentage has increased since 2000 when the Township was 89 percent owner occupied. Generally, the rental market has been stronger in recent years as the housing market declined after the bubble burst in 2007. This may have contributed to an increase in conversions of owner occupied properties to rental properties.

An upswing in rental housing can have varying socioeconomic effects in a population, but it is not

expected to result in more school age children. Data from the 2010 Census (Figure 16) suggests that children under the age of 18 are more likely to be found in owner occupied housing than they are in renter occupied housing.

FIGURE 16: *Presence of Children in Owner Occupied and Renter Occupied Housing Within Upper Dublin*

| | Percent of Housing with Children Under 18 |
|-------------------------|---|
| Owner Occupied Housing | 39% |
| Renter Occupied Housing | 23% |

Source: U.S. Census Bureau, 2010 Census

Housing Activity

Impacts of Housing on Enrollment

Housing Units Built

Housing Units Proposed

Housing Sales

Housing Units Built

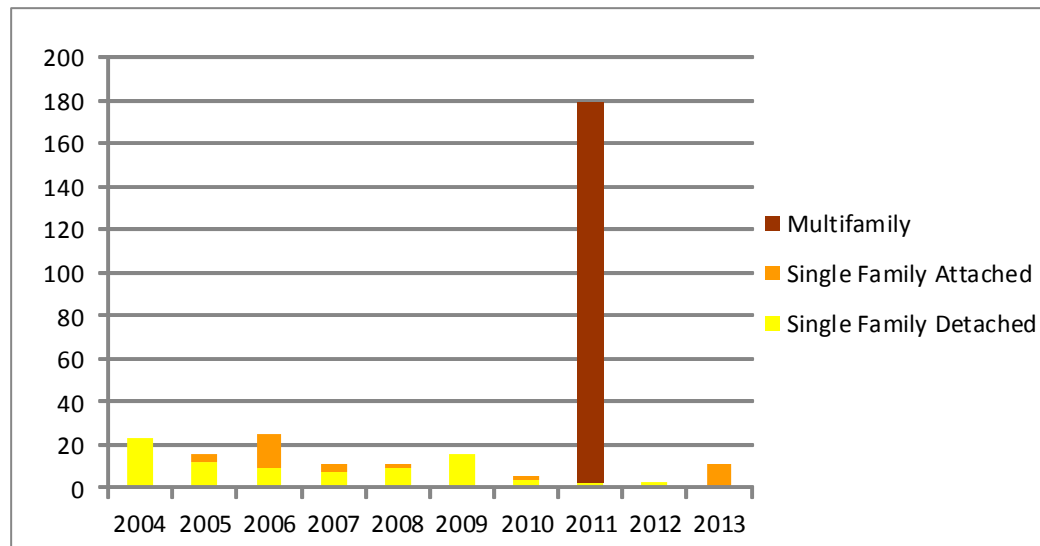
Residential construction activity in Montgomery County has hit historic lows since around 2008 after the housing market bubble burst and the Great Recession followed. With the exception of an age-restricted development in 2011, construction in Upper Dublin has also been slow since that time. However, unlike many suburban municipalities, there was not much activity in Upper Dublin even during the housing boom. Upper Dublin is a mature suburb with a relatively small amount of developable land remaining, but redevelopment opportunities still exist. With a few exceptions, most future building activity is going to be based on redevelopment or reuse of currently nonresidential land.

Since 2004, an average of 32 units per year have been built in the township, but this statistic is misleading since 192 units were built as part of the Dublin Terrace Apartments. The impact on school

enrollment from this development is minimal because it is age-restricted for residents 55 years and older. Therefore, an average of only 13 units have been built per year in Upper Dublin if the Dublin Terrace development is not included. This is the average construction figure that will be considered when recent and future enrollments are analyzed.

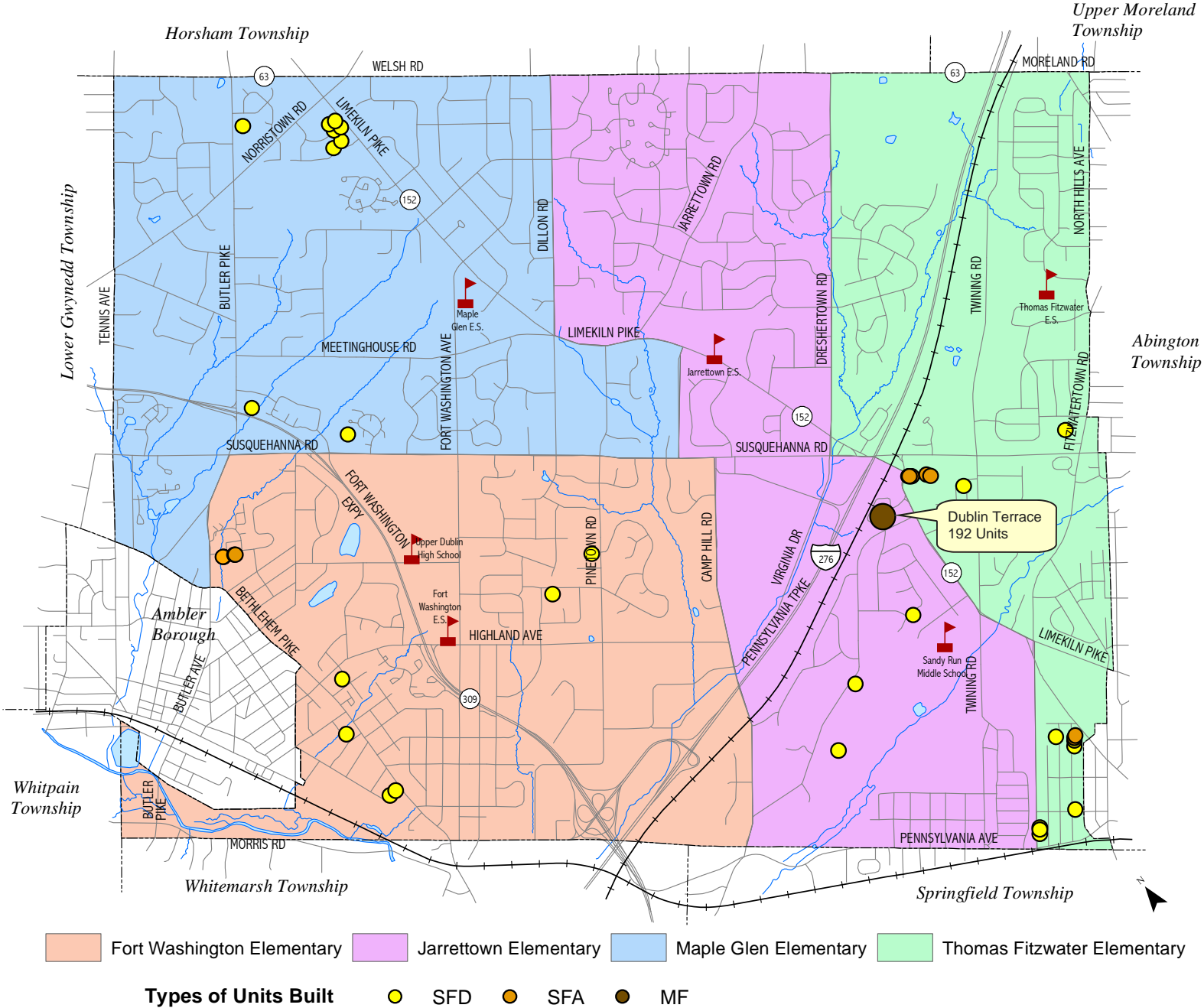
The map in Figure 18 on the following page shows the most recent developments in Upper Dublin, recognizing all units built from 2009 through 2013. Except for the multifamily units of Dublin Terrace, all of the other new units have been single family detached homes, twins, or townhomes. Most of the units are fairly isolated from each other, with the exception of the large 5,000 square foot homes on Herold Ct., and the initial units built as part of the Dublin Court Townhomes in 2013.

FIGURE 17: *Housing Units Built in Upper Dublin by Housing Type, 2004-2013*



Source: Montgomery County Planning Commission

FIGURE 18: Housing Units Built in Upper Dublin, 2009-2013



Housing Activity

Impacts of Housing on Enrollment

Housing Units Built

Housing Units Proposed

Housing Sales

Housing Units Proposed

Despite the low construction figures, there have been a few properties receiving developer interest in the last ten years, and some of them look like they will be realized over the next three years. If these units get built, they will bring additional students into the district above the recent historical averages of new students based on limited new housing. The models in Part Three contain alternative scenarios to account for these potential developments.

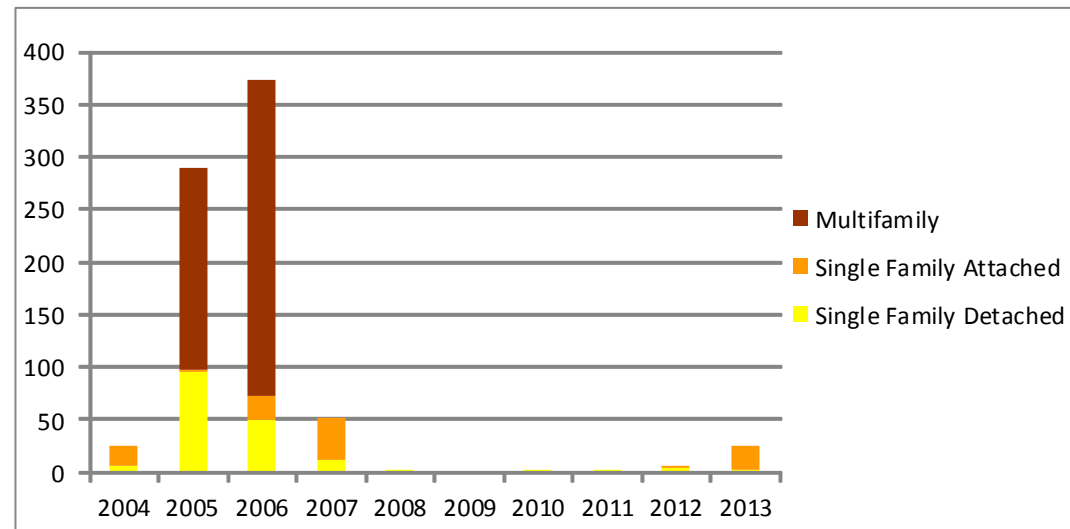
The chart in Figure 19 reflects the submission of land development proposals to the Township as well as the Montgomery County Planning Commission. Proposals are only counted once, so the lack of submissions after 2007 does not necessarily mean that there has been no developer activity since then. Plans will often go through multiple submissions and variations as the process takes place.

Figure 20 on the following page shows the locations of each development proposal that has a good chance

of being constructed over the next three years. One property not reflected in the chart but noted on the map is the largest proposal in terms of units, the proposed redevelopment and preservation of the St. Mary’s Villa property on Bethlehem Pike. Redevelopment of the site has been discussed publicly, but the township is still negotiating the zoning required to allow the proposed density and reuse of the site. The impacts in terms of potential schoolchildren from the St. Mary’s property or any of the other proposed developments is detailed on page 33.

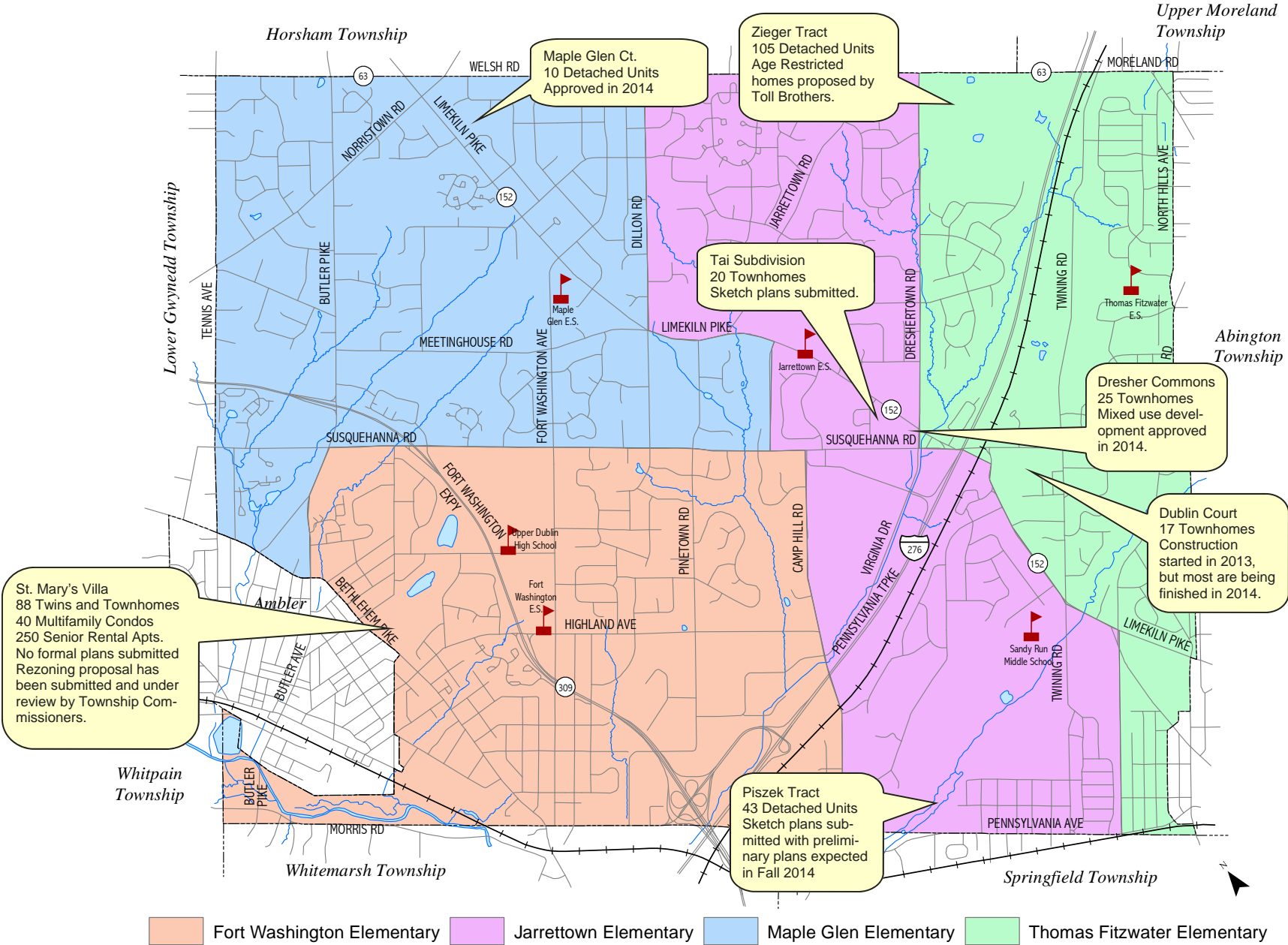
It should also be noted that the township has recently adopted a Transferable Development Rights Overlay District (TDR) that would allow for some new multifamily residential uses in the Fort Washington Office Campus. While no proposals have been submitted, any residential development under the TDR is expected to be designed for young professionals and less conducive to families.

FIGURE 19: *Housing Units Proposed in Upper Dublin, 2004-2013*



Source: Montgomery County Planning Commission

FIGURE 20: Currently Proposed Housing Developments



Housing Activity

Impacts of Housing on Enrollment

Housing Units Built

Housing Units Proposed

Housing Sales

Housing Sales

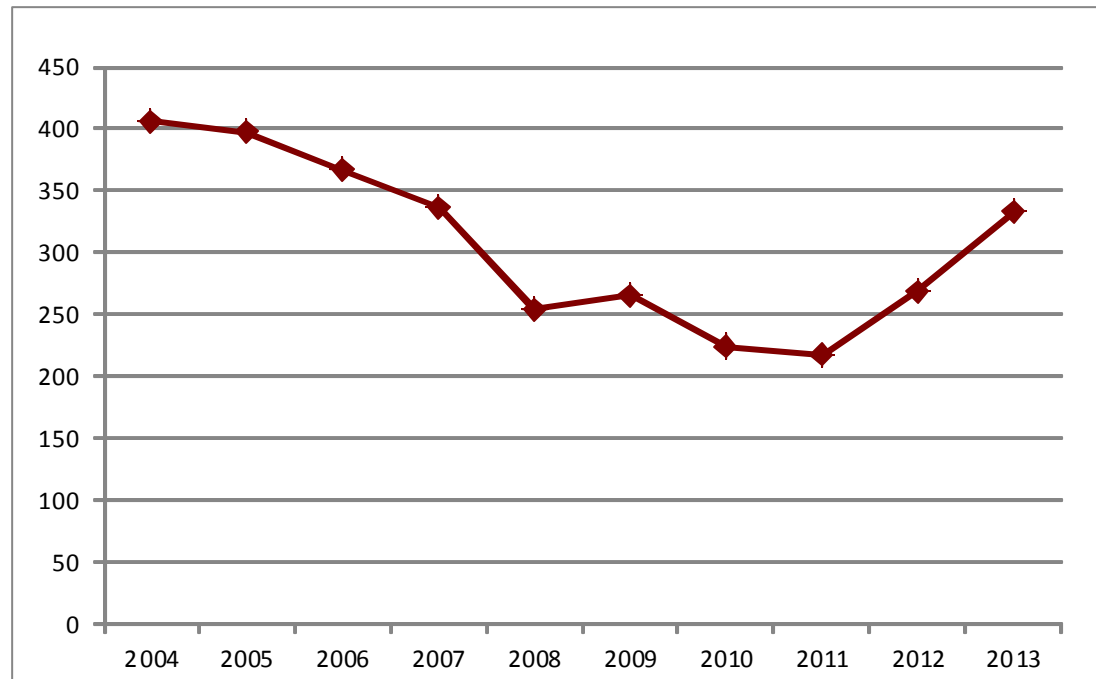
Market-rate housing sales activity in Upper Dublin has followed a pattern similar to countywide sales activity. The number of units sold peaked at very high levels in the early to mid 2000s before the housing boom crashed and the economy entered a recession. Sales levels continually declined to historically low levels through 2011. During this collapse, home values flattened out and often depreciated as financial markets tightened up for potential buyers.

The last two years have shown a substantial recovery in Upper Dublin with the number of sales growing in Upper Dublin by 53 percent from 2011 to 2013. The

county also began to recover in this time period, but it only increased by 31 percent.

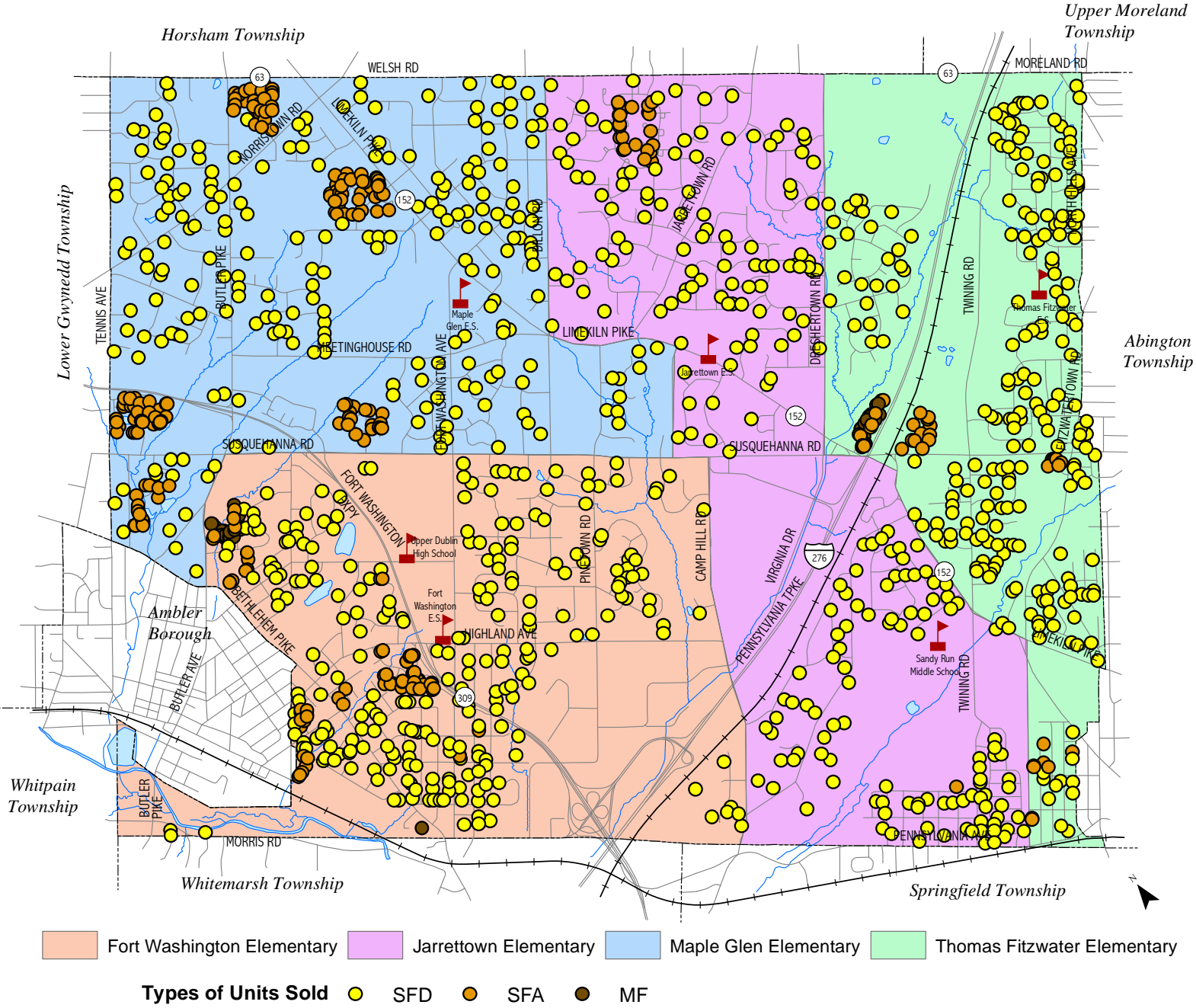
The impact of the decline in sales is that it can slow down migration activity in an area that features 87 percent of its housing stock as owner-occupied housing. While it was demonstrated on pages 15-16 that housing transfers do not necessarily bring more school age children with them, they do provide for a churning of households that should result in a greater number of child-bearing age women. The data is not strong enough to link housing sales directly with birth totals, but the Township has seen births drop considerably in the last four years after this sustained period of housing sales decline. The recent recovery, should it continue, may also be one factor that could help birth levels start to go up as well.

FIGURE 21: Existing Housing Units Sold in Upper Dublin, 2004-2013



Source: Montgomery County Planning Commission

FIGURE 22: Existing Housing Units Sold in Upper Dublin, 2009-2013



*District Enrollment
Projections*

Part

3

District Enrollment Projections

Cohort Progression Model

Projected Enrollment Summaries

Indicators of Projection Change

Cohort Progression Model

The method used in this study to calculate projections for each grade level is known as the Cohort Progression Model, which is also referred to as Cohort Survival in some applications. This is a fairly common approach and one used by the state and other districts in formulating projections. However, it should always be used with caution and presented in context with the other variables offered in this report. In some districts there will be cause for adjustments to the model based on changing factors in population growth or migration.

The nature of the model allows it to integrate trend activity across a number of variables. Birth rates have the most obvious impacts in the model, but the changes that take place account for trends in population migration, housing construction, sales, and alternative schooling choices, such as private, charter, or homeschooling opportunities.

The model is fairly straightforward in its method. It tracks each class in a given year and measures the change in that class from one year to the next. Then it applies an average of changes over a specified time period to determine the percentage of a given grade likely to “progress” to the next grade in future years. A six year average was used for the School District of Upper Dublin since it would account for enrollment patterns from the 2007 through 2013 school years. The lowest and highest progression rates over the six years were withheld from the calculated averages to eliminate unexplained extremes within the period.

Figure 23 displays all of the progression rates for each grade transition from the last six school years. The average is calculated to arrive at a basic trend that will be applied for each projected year. Any progression rate that is greater than 1.0 indicates that a class *increased* in size from one year to the next as it also moved up a grade level. Progression rates that are lower than 1.0 indicate that a class *decreased* in size. For example, the first grade class of the 2008

school year decreased in size when it entered the second grade in 2009 at a rate of 0.988. Using actual enrollment figures, the class went from 249 to 246 students during that period. The following year in 2010, it entered the third grade and this time it increased at a rate of 1.028. In 2011, it entered the fourth grade and increased even more at a rate of 1.059, gaining 15 students by the enrollment figures.

Looking at the whole range of progression rates (Figure 23), UDSD shows a unique pattern in that every grade level has increased in size when taken on average. This reveals that the district has been experiencing a higher ratio of transfers into the district versus those leaving. While it is not unusual to see grade levels for well-regarded school districts show a net positive increase in students as a class progresses, the consistency of expansion from kindergarten to twelfth grade is greater than found in most districts. Usually, drops in class size are seen in the high school grades, but even those have grown in Upper Dublin.

Birth-to-Kindergarten Ratio

The projection of future enrollments in the model requires that we apply the trends in progression rates to future classes as they go from one grade to the next. However, the kindergarten class for each year does not have an enrollment figure for its prior year since those children would be in preschool or home care outside of the district system. Therefore, we must use live birth data to identify ratios of births to kindergarten. The birth data comes from a given past year and is then applied to the kindergarten class that would follow six years later in order to capture the same children at each end of the ratio. For instance, a birth-to-kindergarten ratio for the 2013-14 school year uses birth data from 2007-08 as the numerator and divides it by the kindergarten enrollment in 2013 to form the rate (1.255) shown in Figure 23.

The ratios of births to kindergarten in Upper Dublin are surprisingly higher than 1.0, meaning that more children are filling up the kindergarten class than

FIGURE 23: Grade Progression Rates Over the Last Six Years

| School Year | Birth-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 |
|-------------|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 2008-09 | 1.025 | 1.078 | 1.032 | 1.012 | 1.028 | 1.036 | 1.026 | 1.042 | 1.017 | 0.997 | 1.000 | 1.026 | 0.983 |
| 2009-10 | 1.092 | 1.130 | 0.988 | 1.024 | 1.042 | 1.031 | 0.983 | 1.022 | 0.989 | 1.022 | 1.028 | 0.994 | 1.000 |
| 2010-11 | 1.157 | 1.140 | 1.029 | 1.028 | 1.043 | 1.023 | 1.033 | 1.044 | 1.015 | 1.064 | 1.005 | 1.005 | 1.009 |
| 2011-12 | 1.182 | 1.095 | 0.990 | 1.028 | 1.059 | 1.013 | 0.994 | 0.994 | 0.994 | 1.040 | 0.992 | 0.995 | 1.027 |
| 2012-13 | 1.189 | 1.014 | 1.037 | 1.039 | 1.027 | 1.015 | 1.057 | 1.046 | 1.010 | 1.087 | 1.035 | 1.008 | 1.011 |
| 2013-14 | 1.255 | 1.055 | 1.048 | 1.000 | 1.031 | 1.010 | 1.015 | 1.039 | 1.008 | 1.042 | 0.987 | 0.980 | 1.005 |
| Average** | 1.155 | 1.090 | 1.022 | 1.023 | 1.036 | 1.020 | 1.017 | 1.037 | 1.007 | 1.042 | 1.006 | 1.001 | 1.006 |

* The birth-to-kindergarten ratio uses birth data six years prior to the indicated school year, thus drawing the relationship between children born and the year they would actually enter kindergarten.

** The average is calculated with minimum and maximum value (shaded in red) removed from each set of progression.

were born in the township six years earlier.

Typically, this ratio will be lower than 1.0 and well below the average grade-to-grade ratios.

One beneficial aspect of a birth-to-kindergarten ratio is that it allows the model to integrate real data into the first five years of the projection period. In other words, projections of kindergarten classes for the first five years, through the 2018 school year, can account for real changes in birth patterns that have occurred from 2008 to 2013. The downside is that an estimated birth figure must be used for any projection beyond the 2018 school year.

Projection Periods

Due to the distinction between using real birth data and the need to estimate beyond five years, enrollment projections are divided into two periods. The primary period covers the first five school years from 2014 to 2018, and the secondary period covers the next five school years from 2019 to 2023. There is a higher degree of accuracy expected during the primary period than in the secondary period. Recent trends are more likely to continue in the short term before outside factors can influence a change in patterns, but the use of the birth data gives a more dependable start to projecting the size of kindergarten classes in the future.

Estimated Births

The projection of kindergarten classes after 2018 requires the use of estimated birth figures for the next five years. A simple approach to estimate these births is to use an average of the most recent birth figures and extend it through the end of the projection period. In Upper Dublin Township, the average number of births over the last three years was 182. This is the figure used to formulate the ten year district projection in Option 1 in Figure 24 on the following page.

The increasing numbers of child-bearing age females along with greater home sales activity supports the idea that births will be cycling back up from their recent historically low level. A second birth estimate was created using a wider window of recent data. Option 2 in Figure 25 uses the average number of births over the last six years, which was 202 births. This model starts with a lower increment and progressively gets larger through the 2017 school year with 211 births projected. The average for the five future years is still 202 births. This incremental strategy also reflects anticipated changes in age demographics that are expected to result in greater numbers of females of child-bearing age through 2020.

A third birth estimate was created using an earlier window of higher birth data. This estimate acknowledges the average number of births between 2000 and 2008, which was 242 births. Birth levels were consistently higher and the housing market was in better shape during this time period. Option 3 in Figure 26 uses the incremental approach so that births ultimately reach the average figure of 242 births by the 2017 school year.

Housing Adjustment

The models for Options 1-3 are based on recent activity including housing construction. As discussed on pp. 17-18, construction affecting school age enrollment in Upper Dublin Township has been rather limited over the last decade, averaging 13 units per year (10 detached, and 3 attached). A review of proposed development on pp. 19-20 indicates that development over the next 3-4 years is expected to exceed this pace. Option 4 in Figure 27 makes adjustments to the preferred birth model (Option 2) to account for the additional construction that will bring more public school children into the system. The influx of new students in the district coming from new housing is also spread over time and across different grade levels. See page 33 for details on the adjustments made.

SCHOOL DISTRICT OF UPPER DUBLIN

Projected Enrollments

Figures 24, 25, 26, and 27 offer four variations of grade by grade projections over the next ten years. The first three scenarios are differentiated by the estimates of future births as explained on the preceding page. Since these future birth estimates

only begin to impact kindergarten enrollment beginning with the 2019 school year, the first five years, or primary period are identical for each of the first three scenarios. Option One is based on birth activity remaining consistent with the low numbers of the last three years. Option Two uses a higher birth estimate based on the last six years and makes the increases incremental. Option Three assumes a

FIGURE 24: Projected Enrollments, OPTION 1—Base Future Birth Estimate

| School Year | Births 6 Years Ago* | K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | TOTAL |
|-------------|---------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| 2014-15 | 230 | 266 | 327 | 313 | 311 | 321 | 336 | 310 | 286 | 350 | 384 | 327 | 381 | 348 | 4,261 |
| 2015-16 | 195 | 225 | 289 | 334 | 320 | 322 | 328 | 341 | 322 | 288 | 365 | 387 | 327 | 384 | 4,233 |
| 2016-17 | 189 | 218 | 245 | 296 | 342 | 332 | 329 | 333 | 354 | 324 | 300 | 367 | 387 | 329 | 4,157 |
| 2017-18 | 168 | 194 | 238 | 251 | 303 | 354 | 338 | 335 | 346 | 356 | 337 | 302 | 368 | 389 | 4,111 |
| 2018-19 | 189 | 218 | 211 | 243 | 257 | 314 | 361 | 344 | 347 | 348 | 371 | 339 | 302 | 370 | 4,026 |
| 2019-20 | 182 | 210 | 238 | 216 | 249 | 266 | 320 | 368 | 357 | 349 | 363 | 374 | 340 | 304 | 3,952 |
| 2020-21 | 182 | 210 | 229 | 243 | 221 | 258 | 271 | 325 | 381 | 359 | 364 | 365 | 374 | 342 | 3,942 |
| 2021-22 | 182 | 210 | 229 | 234 | 249 | 229 | 263 | 276 | 337 | 384 | 374 | 366 | 365 | 376 | 3,893 |
| 2022-23 | 182 | 210 | 229 | 234 | 239 | 258 | 234 | 267 | 286 | 340 | 400 | 377 | 366 | 367 | 3,807 |
| 2023-24 | 182 | 210 | 229 | 234 | 239 | 248 | 263 | 238 | 277 | 288 | 354 | 402 | 377 | 369 | 3,728 |

FIGURE 25: Projected Enrollments, OPTION 2—Expanded Future Birth Scenario

| School Year | Births 6 Years Ago* | K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | TOTAL |
|-------------|---------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| 2014-15 | 230 | 266 | 327 | 313 | 311 | 321 | 336 | 310 | 286 | 350 | 384 | 327 | 381 | 348 | 4,261 |
| 2015-16 | 195 | 225 | 289 | 334 | 320 | 322 | 328 | 341 | 322 | 288 | 365 | 387 | 327 | 384 | 4,233 |
| 2016-17 | 189 | 218 | 245 | 296 | 342 | 332 | 329 | 333 | 354 | 324 | 300 | 367 | 387 | 329 | 4,157 |
| 2017-18 | 168 | 194 | 238 | 251 | 303 | 354 | 338 | 335 | 346 | 356 | 337 | 302 | 368 | 389 | 4,111 |
| 2018-19 | 189 | 218 | 211 | 243 | 257 | 314 | 361 | 344 | 347 | 348 | 371 | 339 | 302 | 370 | 4,026 |
| 2019-20 | 193 | 223 | 238 | 216 | 249 | 266 | 320 | 368 | 357 | 349 | 363 | 374 | 340 | 304 | 3,965 |
| 2020-21 | 197 | 228 | 243 | 243 | 221 | 258 | 271 | 325 | 381 | 359 | 364 | 365 | 374 | 342 | 3,973 |
| 2021-22 | 202 | 233 | 248 | 248 | 249 | 229 | 263 | 276 | 337 | 384 | 374 | 366 | 365 | 376 | 3,949 |
| 2022-23 | 207 | 239 | 254 | 253 | 254 | 258 | 234 | 267 | 286 | 340 | 400 | 377 | 366 | 367 | 3,895 |
| 2023-24 | 211 | 244 | 260 | 260 | 259 | 263 | 263 | 238 | 277 | 288 | 354 | 402 | 377 | 369 | 3,854 |

* 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.

return of birth levels to the 2000-2008 period before they started declining.

Option Four represents the most likely birth scenario (Option Two) and makes adjustments to account for an expected increase in housing construction compared to the last ten years. These adjustments are made across all of the grade levels during

each year of the study period to replicate when new students will be added into the district. School age children factors by housing type and public school enrollment versus alternative schools are integrated into the adjustments. See page 33 for further details on the adjustments made.

FIGURE 26: Projected Enrollments, OPTION 3—Higher Future Birth Estimate

| School Year | Births 6 Years Ago* | K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | TOTAL |
|-------------|---------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| 2014-15 | 230 | 266 | 327 | 313 | 311 | 321 | 336 | 310 | 286 | 350 | 384 | 327 | 381 | 348 | 4,261 |
| 2015-16 | 195 | 225 | 289 | 334 | 320 | 322 | 328 | 341 | 322 | 288 | 365 | 387 | 327 | 384 | 4,233 |
| 2016-17 | 189 | 218 | 245 | 296 | 342 | 332 | 329 | 333 | 354 | 324 | 300 | 367 | 387 | 329 | 4,157 |
| 2017-18 | 168 | 194 | 238 | 251 | 303 | 354 | 338 | 335 | 346 | 356 | 337 | 302 | 368 | 389 | 4,111 |
| 2018-19 | 189 | 218 | 211 | 243 | 257 | 314 | 361 | 344 | 347 | 348 | 371 | 339 | 302 | 370 | 4,026 |
| 2019-20 | 199 | 230 | 238 | 216 | 249 | 266 | 320 | 368 | 357 | 349 | 363 | 374 | 340 | 304 | 3,972 |
| 2020-21 | 209 | 241 | 250 | 243 | 221 | 258 | 271 | 325 | 381 | 359 | 364 | 365 | 374 | 342 | 3,995 |
| 2021-22 | 220 | 254 | 263 | 256 | 249 | 229 | 263 | 276 | 337 | 384 | 374 | 366 | 365 | 376 | 3,992 |
| 2022-23 | 231 | 267 | 277 | 269 | 262 | 258 | 234 | 267 | 286 | 340 | 400 | 377 | 366 | 367 | 3,969 |
| 2023-24 | 242 | 279 | 291 | 283 | 275 | 271 | 263 | 238 | 277 | 288 | 354 | 402 | 377 | 369 | 3,967 |

FIGURE 27: Projected Enrollments, OPTION 4—Housing Adjustment With Expanded Future Birth Scenario

| School Year | Births 6 Years Ago* | K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | TOTAL |
|-------------|---------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| 2014-15 | 230 | 266 | 327 | 313 | 311 | 321 | 336 | 310 | 286 | 350 | 384 | 327 | 381 | 348 | 4,261 |
| 2015-16 | 195 | 226 | 289 | 335 | 320 | 323 | 328 | 342 | 322 | 288 | 365 | 387 | 327 | 384 | 4,237 |
| 2016-17 | 189 | 222 | 249 | 299 | 346 | 335 | 333 | 336 | 357 | 327 | 303 | 370 | 390 | 332 | 4,200 |
| 2017-18 | 168 | 198 | 243 | 256 | 307 | 359 | 342 | 340 | 350 | 359 | 340 | 305 | 371 | 393 | 4,163 |
| 2018-19 | 189 | 221 | 216 | 249 | 262 | 318 | 367 | 348 | 352 | 352 | 374 | 343 | 305 | 373 | 4,080 |
| 2019-20 | 193 | 226 | 241 | 220 | 254 | 271 | 324 | 373 | 361 | 355 | 367 | 377 | 343 | 307 | 4,020 |
| 2020-21 | 197 | 231 | 246 | 246 | 226 | 263 | 277 | 330 | 387 | 364 | 369 | 369 | 377 | 345 | 4,030 |
| 2021-22 | 202 | 238 | 252 | 254 | 253 | 236 | 270 | 284 | 343 | 390 | 380 | 373 | 370 | 380 | 4,023 |
| 2022-23 | 207 | 243 | 260 | 258 | 259 | 262 | 241 | 274 | 294 | 345 | 407 | 382 | 373 | 373 | 3,971 |
| 2023-24 | 211 | 248 | 265 | 265 | 264 | 269 | 268 | 245 | 285 | 296 | 360 | 409 | 382 | 375 | 3,930 |

* 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.

District Enrollment Projections

Cohort Progression Model

Projected Enrollment Summaries

Indicators of Projection Change

Projected Enrollment Summaries

The summarized enrollment projections for the district and at each school level are presented on the following pages. The four options based on future birth estimates and housing adjustments are also differentiated. However, the variation in birth estimates make no difference at the middle school and high school levels since children born over the next five years will not be old enough to influence those projections within the ten year timeframe.

Option Four is recommended as the most realistic or likely result at this time, although Option One can be considered the default or baseline standard for enrollment projections. If an assumption regarding housing development needs to be altered or actual birth data veers from the projected patterns, the district may adjust to a different option number. The presentation and explanation of each option is

intended to allow the district to better plan for multiple scenarios.

The general trend for the district under all scenarios is that enrollment will continue to decline, especially from the 2015 to 2019 school years. If there is little change in recent birth totals and residential construction, enrollment will decline over the entire ten years. However, a rebound in birth rates and an improving housing market that prompts new construction and more sales transactions will begin to counteract the baseline declines during the secondary period.

Figures 28, 29, 30, and 31 isolate the projections according to the grade levels of buildings in the district. Changes have also been evaluated over the five-year intervals of the primary and secondary periods. Some of the levels will experience very different trends from one five-year period to the next.

FIGURE 28: Total District Enrollment Projections

| Year | Option 1—Base Future Births | | Option 2—Expanded Future Births | | Option 3—Higher Future Births | | Option 4—Housing Adjustment with Expanded Future Births | |
|------------------------|-----------------------------|---------------|---------------------------------|---------------|-------------------------------|---------------|---|---------------|
| | Total Students | Annual Change | Total Students | Annual Change | Total Students | Annual Change | Total Students | Annual Change |
| 2013-14 (Current) | 4,268 | | 4,268 | | 4,268 | | 4,268 | |
| 2014-15 | 4,261 | -7 | 4,261 | -7 | 4,261 | -7 | 4,261 | -7 |
| 2015-16 | 4,233 | -28 | 4,233 | -28 | 4,233 | -28 | 4,237 | -24 |
| 2016-17 | 4,157 | -76 | 4,157 | -76 | 4,157 | -76 | 4,200 | -37 |
| 2017-18 | 4,111 | -46 | 4,111 | -46 | 4,111 | -46 | 4,163 | -37 |
| 2018-19 | 4,026 | -85 | 4,026 | -85 | 4,026 | -85 | 4,080 | -83 |
| 2019-20 | 3,952 | -74 | 3,965 | -61 | 3,972 | -54 | 4,020 | -60 |
| 2020-21 | 3,942 | -10 | 3,973 | 8 | 3,995 | 23 | 4,030 | 10 |
| 2021-22 | 3,893 | -49 | 3,949 | -24 | 3,992 | -3 | 4,023 | -7 |
| 2022-23 | 3,807 | -86 | 3,895 | -54 | 3,969 | -23 | 3,971 | -52 |
| 2023-24 | 3,728 | -79 | 3,854 | -41 | 3,967 | -2 | 3,930 | -41 |
| Total Change 2013-2023 | -540 | | -414 | | -301 | | -338 | |

FIGURE 29: Grades K-5 Enrollment Projections

| Year | Option 1—Base Future Births | | Option 2—Expanded Future Births | | Option 3—Higher Future Births | | Option 4—Housing Adjustment with Expanded Future Births | |
|---|-----------------------------|---------------|---------------------------------|---------------|-------------------------------|---------------|---|---------------|
| | Total Students | Annual Change | Total Students | Annual Change | Total Students | Annual Change | Total Students | Annual Change |
| 2013-14 (Current) | 1,854 | | 1,854 | | 1,854 | | 1,854 | |
| 2014-15 | 1,873 | 19 | 1,873 | 19 | 1,873 | 19 | 1,873 | 19 |
| 2015-16 | 1,819 | -54 | 1,819 | -54 | 1,819 | -54 | 1,822 | -51 |
| 2016-17 | 1,762 | -57 | 1,762 | -57 | 1,762 | -57 | 1,784 | -38 |
| 2017-18 | 1,678 | -84 | 1,678 | -84 | 1,678 | -84 | 1,706 | -78 |
| 2018-19 | 1,604 | -74 | 1,604 | -74 | 1,604 | -74 | 1,632 | -74 |
| 5 Yr. Change from 2013-14 to 2018-19 | -250 | | -250 | | -250 | | -222 | |
| 2019-20 | 1,499 | -105 | 1,511 | -93 | 1,518 | -86 | 1,537 | -95 |
| 2020-21 | 1,432 | -67 | 1,463 | -48 | 1,485 | -33 | 1,489 | -48 |
| 2021-22 | 1,414 | -18 | 1,470 | 7 | 1,514 | 29 | 1,503 | 14 |
| 2022-23 | 1,404 | -10 | 1,492 | 22 | 1,566 | 52 | 1,523 | 20 |
| 2023-24 | 1,424 | 20 | 1,549 | 57 | 1,662 | 96 | 1,578 | 55 |
| 5 Yr. Change from 2018-19 to 2023-24 | -180 | | -55 | | 58 | | -54 | |
| 10 Yr. Change Since 2013-14 | -430 | | -305 | | -192 | | -276 | |

Elementary Schools

Much of the district’s overall decrease in enrollment over the next five years will be seen at the elementary school level. Birth activity has been significantly lower in the township the last four years and the impacts resulting in fewer kindergarten students will begin to take effect in 2015. As smaller kindergarten classes become a reality, those classes will move through the system and bring smaller enrollments throughout the elementary school grades. An increase in housing construction will reduce the impacts, but only by 28 students during the primary period according to Option 4.

As stated previously, we do not expect the low birth totals to continue and an increase in births will start to boost elementary school enrollments during the secondary period.

SCHOOL DISTRICT OF UPPER DUBLIN

FIGURE 30: Grades 6-8 Enrollment Projections (Sandy Run MS)

| Year | Options 1,2 and 3 | | Option 4—Housing Adjustment | |
|--------------------------------------|-------------------|---------------|-----------------------------|---------------|
| | Total Students | Annual Change | Total Students | Annual Change |
| 2013-14 (Current) | 993 | | 993 | |
| 2014-15 | 947 | -46 | 947 | -46 |
| 2015-16 | 951 | 4 | 952 | 5 |
| 2016-17 | 1,011 | 60 | 1,020 | 68 |
| 2017-18 | 1,037 | 26 | 1,049 | 29 |
| 2018-19 | 1,039 | 2 | 1,052 | 3 |
| 5 Yr. Change from 2013-14 to 2018-19 | 46 | | 59 | |
| 2019-20 | 1,074 | 35 | 1,088 | 36 |
| 2020-21 | 1,066 | -8 | 1,080 | -8 |
| 2021-22 | 997 | -69 | 1,017 | -63 |
| 2022-23 | 893 | -104 | 914 | -103 |
| 2023-24 | 803 | -90 | 825 | -89 |
| 5 Yr. Change from 2018-19 to 2023-24 | -236 | | -227 | |
| 10 Yr. Change Since 2013-14 | -190 | | -168 | |

Sandy Run Middle School

Adjustments to the estimates of future births will not affect enrollment at the Middle School since those children will not have reached the sixth grade prior to 2024. However, housing construction could bring a few more students than would otherwise be expected, as shown in Option 4. With or without the housing adjustment, enrollment is expected to see a modest increase over the primary period. The smaller classes now headed towards the elementary schools will reach the middle school by 2020 causing an overall decline in enrollment during the secondary period.

FIGURE 31: Grades 9-12 Enrollment Projections (Upper Dublin HS)

| Year | Options 1,2 and 3 | | Option 4—Housing Adjustment | |
|--------------------------------------|-------------------|---------------|-----------------------------|---------------|
| | Total Students | Annual Change | Total Students | Annual Change |
| 2013-14 (Current) | 1,421 | | 1,421 | |
| 2014-15 | 1,441 | 20 | 1,441 | 20 |
| 2015-16 | 1,463 | 22 | 1,463 | 22 |
| 2016-17 | 1,384 | -79 | 1,396 | -67 |
| 2017-18 | 1,396 | 12 | 1,409 | 13 |
| 2018-19 | 1,383 | -13 | 1,395 | -14 |
| 5 Yr. Change from 2013-14 to 2018-19 | -38 | | -26 | |
| 2019-20 | 1,380 | -3 | 1,394 | -1 |
| 2020-21 | 1,444 | 64 | 1,461 | 67 |
| 2021-22 | 1,482 | 38 | 1,503 | 42 |
| 2022-23 | 1,510 | 28 | 1,534 | 31 |
| 2023-24 | 1,502 | -8 | 1,526 | -8 |
| 5 Yr. Change from 2018-19 to 2023-24 | 119 | | 131 | |
| 10 Yr. Change Since 2013-14 | 81 | | 105 | |

Upper Dublin High School

Adjustments to the estimates of future births will also not affect enrollment at the High School over the next ten years. With or without the housing adjustment, enrollment is expected to remain fairly stable over the primary period with only a slight decline overall. Growth will continue during the secondary period. Impacts from the recent decline in births will not reach the high school level until after the ten year study period.

District Enrollment Projections

Cohort Progression Model

Projected Enrollment Summaries

Indicators of Projection Change

Indicators of Projection Change

No further adjustments to the projections on the preceding pages are necessary at this time. The background data and analysis throughout this report forms a basis and understanding of how the numbers should be interpreted. However, markets and trends can always change in unexpected manners. This section provides a further understanding of the assumptions inherent with the progression model and potential warning signs that would prompt a future reconsideration of the projected enrollment figures. These indicators are not likely to prompt an immediate change in future enrollments, but over time they could still influence the outlook.

Housing Construction

New housing and births are the two most significant factors that could suggest a revision in the expected enrollments, but housing will have the more immediate effect. Housing construction has been relatively low over the last ten years, so further declines in enrollment due to further reductions in housing activity would be unlikely. A housing adjustment for additional students, as incorporated into Option 4 of the projection scenarios, would be necessary if current proposed projects do get built as expected. Should any of these alter or be unexpectedly discontinued, the effects can be roughly gauged through the scenarios. If more development is brought forward, a further adjustment might be warranted.

FIGURE 32: Factors Used for Housing Adjustment Model Calculations

| | Units | Type | School Age Children in Public School* | Years Added to Public School across Grades |
|--------------------|-------|------------------|---------------------------------------|--|
| Dublin Court | 17 | Townhomes | 3 | 2014-15 |
| Maple Glen Court | 10 | Detached Singles | 8 | 2015-16 |
| Dresher Commons | 25 | Townhomes | 4 | 2015-16 |
| Piszek Tract | 43 | Detached Singles | 33 | 2016-17 |
| Tai Subdivision | 20 | Townhomes | 3 | 2016-17 |
| St. Mary's Villa** | 88 | Twins/Townhomes | 15 | 2016-17 2017-18 |
| St. Mary's Villa | 40 | Multifamily | 2 | 2016-17 2017-18 |

* The historical trend allows us to expect 13 units built by default each year. These units were subtracted once each year from the total proposed units since a portion of the proposed housing would be fulfilling the historical trend and the base models already account for some construction.

** St. Mary's Villa also includes 250 Age Restricted Rental Apartments. These are assumed not to have an impact on school age enrollment.

Figure 32 provides the data that was used to make the housing adjustment in Option 4 of the cohort progression model. Countywide factors for the number of children based on unit type (p. 15) were calculated and then modified to reflect a proportion that would attend public over private school (83 percent). These expected students were added to the model in the years indicated, but they were distributed across all grade levels. Finally, as these additional students go through the system and graduate, the model gets repopulated each year to balance out the departures. This keeps the average factor of school age children per unit intact through the life of the model.

Birth Patterns

Birth numbers are directly integrated into the cohort progression model and form the basis for the difference between Options 1, 2, and 3 presented on the preceding pages. The number of births can significantly affect future projections, but any changes today will not be felt for at least six years in terms of the projections.

Annual birth data should be tracked to anticipate if one option may become more likely during the secondary period. Live birth data is available from the Pennsylvania Department of Health, but the numbers must be correlated to the school year rather than the calendar year.

Alternative School Enrollment

Private schools, charter schools, cyber schools, and homeschooling could also impact the district's public school enrollment if students opt for these alternatives at a greater or lesser rate than in the past. The American Community Survey provides delayed data on private schools averaged out over multiple years, so the district's record of private school students using district buses is going to provide more immediate information on any change in enrollment trends, although it is incomplete since it is only based on those using bus transportation.

Upper Dublin's bus records show a fairly dramatic drop in private school residents living in the township. Nationally, private school enrollment has also declined in recent years. The economy could be having an effect, but at least one study from the Census Bureau claims that mainstream public schools are not the primary competition to private schools, but rather new charter schools and homeschooling formats are causing lower enrollments. Still, if the economy improves and private school residents increase, there could be an additional decline on public school attendees.

Charter schools, cyber schools, and homeschooling make up a relatively small portion of students within Upper Dublin Township, but many of these opportunities were not around ten to fifteen years ago. Approximately 58 students were using these combined alternatives during the 2013-14 school year. UDSD tracks homeschooled students along with annual enrollment in charter and cyber schools since they are still considered public schooling.

Housing Sales Activity

The amount of housing sales transactions in Upper Dublin has already started increasing at a fairly quick rate from its historical low in 2011 (page 21). The market overall is improving, but still going through fits and starts. Thus far, countywide sales levels in 2014 are actually lower than they were in 2013. When sales do increase in Upper Dublin, as they have the last two years, the effect on school age children in the district is expected to be a delayed reaction. New households moving into an area are less likely to have school age children, but they are more likely to have members of child-bearing age. Therefore, an increase in school age children probably will not be felt in the near term but might in the longer term if housing sales continue to increase.

School Profiles

Part 4

School Profiles

Introduction

Fort Washington Elementary

Jarrettown Elementary

Maple Glen Elementary

Thomas Fitzwater Elementary

Introduction

Application of the Cohort Progression Model to individual school buildings can be done, but it loses some accuracy when enrollments are at a smaller scale, especially when under one thousand. It becomes even more difficult when school boundary areas do not correspond with municipal boundaries, making it impossible to use actual birth data related to the precise area. Both situations are existing conditions in the UDSD, so the following school profiles do not present detailed projection numbers for the future.

However, there is still useful data that can inform more general forecasts for the future. The county's geographic data on housing construction and sales have been customized to recognize each school boundary. Plus, the overall projections for each school level provide the context for how much growth or decline might occur in each school.

The following profiles offer an assessment of what is happening in each area and how it might affect future enrollments. Of course, the middle school and high school profiles have been left out since those projections were presented in Part Three.



Fort Washington Elementary School



Jarrettown Elementary School



Maple Glen Elementary School



Thomas Fitzwater Elementary School

Fort Washington Elementary School

Past Enrollment

Enrollment at Fort Washington has vacillated over the last seven years, but it kept within the 451-481 range until breaking through to over 500 in 2013-14. This past year featured a larger than usual kindergarten class, but most grades throughout the school were also above average compared to other years.

Housing

The recent growth did not stem from new residential construction as an average of only two units per year have been built within the school’s boundary. However, it has been one of the most active areas in the township for existing home sales, especially for single family detached homes which drove an increase in sales the last two years. This area is home to the proposed St. Mary’s Villa redevelopment, which could add a substantial number of new units, although they will all be single family attached and multifamily housing types.

Forecast

Enrollments at Fort Washington are expected to remain fairly stable for 2014-15 and 2015-16, with possibly a slight drop to go back under 500. The even distribution of the grade sizes being above average will help to keep this consistency. The heightened sales activity could also provide for some turnover and bring new students into the area.

The overall decline in births in the township will begin to have an impact by the 2016-17 school year and beyond as the large grade classes of today move through the school and are replaced by smaller kindergarten classes. While the St. Mary’s development will provide some new students, overall enrollment for Fort Washington is expected to drop down to around 455-465 students by the 2018-19 school year.

FIGURE 33: Fort Washington Elementary School Enrollment by Grade, 2007-2013

| Year | K | 1 | 2 | 3 | 4 | 5 | Total | Annual Change |
|---------|----|----|----|----|-----|-----|-------|---------------|
| 2007-08 | 64 | 77 | 94 | 61 | 88 | 88 | 472 | |
| 2008-09 | 66 | 65 | 78 | 96 | 65 | 89 | 459 | -13 |
| 2009-10 | 71 | 70 | 62 | 81 | 101 | 66 | 451 | -8 |
| 2010-11 | 72 | 81 | 72 | 69 | 87 | 100 | 481 | 30 |
| 2011-12 | 68 | 80 | 81 | 74 | 74 | 88 | 465 | -16 |
| 2012-13 | 78 | 74 | 83 | 86 | 79 | 75 | 475 | 10 |
| 2013-14 | 92 | 80 | 80 | 83 | 85 | 84 | 504 | 29 |

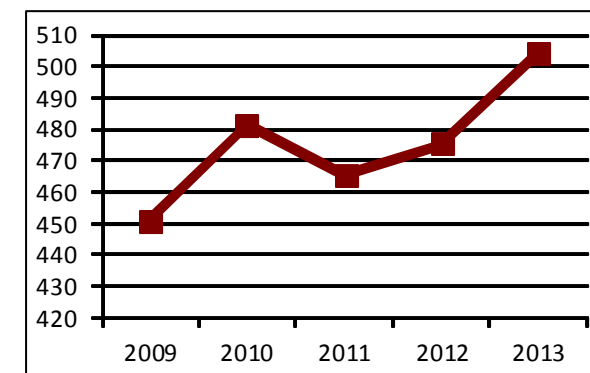
Source: School District of Upper Dublin (enrollment as of October 1 each year)

FIGURE 34: Housing Activity Within Fort Washington ES Boundary Area

| Year | New Units Built | Existing Units Sold | | | |
|-------|-----------------|---------------------|-----|----|-------|
| | Total | SFD | SFA | MF | Total |
| 2009 | 5 | 49 | 20 | 16 | 85 |
| 2010 | 2 | 49 | 12 | 9 | 70 |
| 2011 | 1 | 43 | 13 | 5 | 61 |
| 2012 | 0 | 61 | 13 | 4 | 78 |
| 2013 | 2 | 61 | 13 | 8 | 82 |
| Total | 10 | 263 | 71 | 42 | 376 |

Source: Montgomery County Planning Commission

FIGURE 35: Fort Washington ES Enrollment



SCHOOL DISTRICT OF UPPER DUBLIN

Jarrettown Elementary School

Past Enrollment

Enrollment at Jarrettown remained very consistent from 2007-08 to 2012-13, falling between 450 and 457 students. A slight bump in 2013-14 followed with enrollment going up to 468. Grade sizes in 2013-14 were distributed fairly evenly with the third grade class standing out above the others. The fourth and fifth grade classes were the only ones to fall below the average for their class while the younger grades were all above average when compared to other years.

FIGURE 36: Jarrettown Elementary School Enrollment by Grade, 2007-2013

| Year | K | 1 | 2 | 3 | 4 | 5 | Total | Annual Change |
|---------|----|----|----|----|----|----|-------|---------------|
| 2007-08 | 57 | 85 | 81 | 79 | 84 | 65 | 451 | |
| 2008-09 | 67 | 61 | 85 | 79 | 77 | 88 | 457 | 6 |
| 2009-10 | 64 | 73 | 64 | 88 | 81 | 80 | 450 | -7 |
| 2010-11 | 75 | 74 | 72 | 63 | 89 | 82 | 455 | 5 |
| 2011-12 | 71 | 77 | 72 | 76 | 66 | 92 | 454 | -1 |
| 2012-13 | 77 | 72 | 86 | 71 | 80 | 67 | 453 | -1 |
| 2013-14 | 74 | 78 | 79 | 86 | 74 | 77 | 468 | 15 |

Source: School District of Upper Dublin (enrollment as of October 1 each year)

FIGURE 37: Housing Activity Within Jarrettown ES Boundary Area

| Year | New Units Built | Existing Units Sold | | | |
|-------|-----------------|---------------------|-----|----|-------|
| | Total | SFD | SFA | MF | Total |
| 2009 | 1 | 48 | 5 | 0 | 53 |
| 2010 | 0 | 31 | 5 | 0 | 36 |
| 2011 | 193* | 31 | 4 | 0 | 35 |
| 2012 | 1 | 53 | 5 | 0 | 58 |
| 2013 | 0 | 58 | 6 | 0 | 64 |
| Total | 195 | 221 | 25 | 0 | 246 |

* Includes 192 age restricted units of Dublin Terrace
Source: Montgomery County Planning Commission

Housing

With the exception of age restricted housing, only three new units were built in the Jarrettown area over the last five years. The number of sales in the area were relatively low compared to the areas of other elementary schools in the district. However, 90 percent of the sales were for family-friendly detached housing, and there was an increase in the last two years.

This area could end up seeing the biggest impact from new construction in terms of school age children. Three proposals could bring up to 88 new

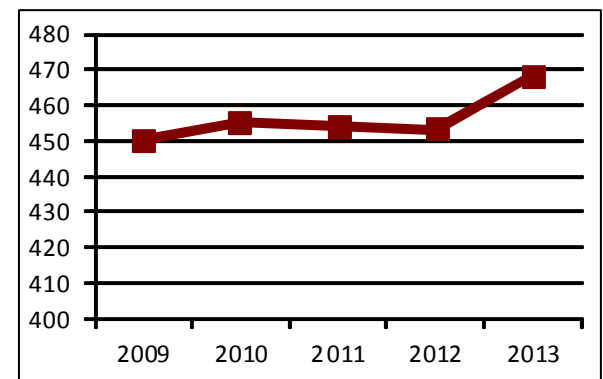
units, with about half being detached singles from the Piszek Tract. The other two proposals are for townhomes at Dresher Commons and as part of the Tai Subdivision. Combined, these developments could bring 40 additional students by 2016 or 2017.

Forecast

Enrollments at Jarrettown are expected to remain fairly stable at around 460 students for 2014-15 and 2015-16. While the kindergarten level will begin to get smaller by 2015-16 it will be offset by the departure of the current 4th and 5th grade classes which are below average in size. No major impacts from sales activity are seen affecting enrollment at this time.

After the 2015-16 school year, Jarrettown would seem poised for more considerable declines in enrollment. The lower birth totals in the township coupled with some lean years in terms of housing sales and little construction, may show an impact. Additionally, the third grade class in 2013-14, the year's largest, will be leaving the school after 2015-16. Without any new development, enrollment may drop below 400 by the 2018-19 school year. However, if the Piszek Tract gets developed as proposed, enrollment may still stand at around 430 students by that time.

FIGURE 38: Jarrettown ES Enrollment



Maple Glen Elementary School

Past Enrollment

Enrollment at Maple Glen has ranged between 413 and 436 students over the last seven years, but those figures also summarize enrollment for the last two years alone. The number of students jumped up by 23 from 2012-13 to 2013-14. The largest kindergarten class of the last seven years and similar growth in the first grade class helped drive the increase in 2013-14, although the largest class this past year was the 4th grade.

Housing

The Maple Glen area received nine new housing units over the last five years, but five of them were in 2009. Overall sales activity has been quite high, especially this past year, although this area has a higher proportion of attached housing (townhomes) than some of the others. There is one proposal expected to be developed, the ten unit Maple Glen Court. It could bring another eight students to the school by 2015-16.

Forecast

Enrollment at Maple Glen will go up in 2014-15 based on the departure of a smaller than average 5th grade class from the year before. However, it will come back down the following year as the largest class (the 4th grade in 2013-14) leaves the school and kindergarten classes become smaller from the decline in township births. Without any other construction projects of note, the enrollments will continue to decline and may fall to under 400 by 2018-19. However, sales in the area should be observed to see if they continue at a high pace and potentially offset some of the decline with new students in younger households.

FIGURE 39: *Maple Glen Elementary School Enrollment by Grade, 2007-2013*

| Year | K | 1 | 2 | 3 | 4 | 5 | Total | Annual Change |
|---------|----|----|----|----|----|----|-------|---------------|
| 2007-08 | 54 | 52 | 81 | 72 | 84 | 72 | 415 | |
| 2008-09 | 50 | 62 | 58 | 84 | 75 | 88 | 417 | 2 |
| 2009-10 | 68 | 62 | 63 | 59 | 87 | 78 | 417 | 0 |
| 2010-11 | 64 | 81 | 69 | 67 | 61 | 89 | 431 | 14 |
| 2011-12 | 67 | 69 | 80 | 68 | 68 | 64 | 416 | -15 |
| 2012-13 | 66 | 64 | 69 | 82 | 65 | 67 | 413 | -3 |
| 2013-14 | 76 | 75 | 65 | 72 | 83 | 65 | 436 | 23 |

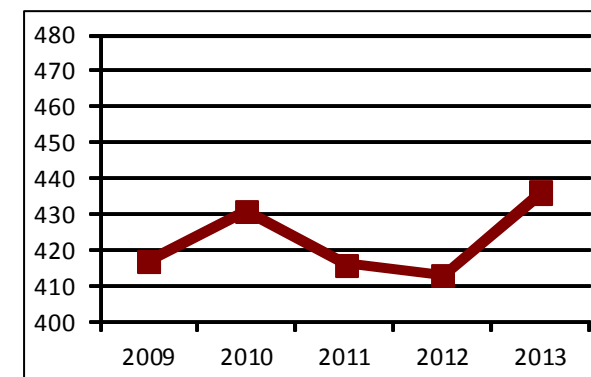
Source: School District of Upper Dublin (enrollment as of October 1 each year)

FIGURE 40: *Housing Activity Within Maple Glen ES Boundary Area*

| Year | New Units Built | Existing Units Sold | | | |
|-------|-----------------|---------------------|-----|----|-------|
| | Total | SFD | SFA | MF | Total |
| 2009 | 5 | 41 | 25 | 0 | 66 |
| 2010 | 2 | 32 | 31 | 0 | 63 |
| 2011 | 1 | 41 | 25 | 0 | 66 |
| 2012 | 1 | 45 | 28 | 0 | 73 |
| 2013 | 0 | 68 | 37 | 0 | 105 |
| Total | 9 | 227 | 146 | 0 | 373 |

Source: Montgomery County Planning Commission

FIGURE 41: *Maple Glen ES Enrollment*



SCHOOL DISTRICT OF UPPER DUBLIN

Thomas Fitzwater Elementary School

Past Enrollment

Enrollment at Thomas Fitzwater has been moderately increasing for the last three years reaching its high point in 2013-14 at 446 students. The 2013-14 group is most notable for its larger than average 4th grade class and a surprisingly small kindergarten class. The 2nd grade class is also larger than average and is the result of the 2011-12 kindergarten class, the school's biggest incoming class of the last seven years.

Housing

The Thomas Fitzwater area has had more new construction than other areas with 17 units built in the last five years. Sales activity has not stood out, but like the other areas, there was a bump in units sold during 2013. This area has a bit more diverse housing stock, although detached units are still dominant. There are no major development projects that will add housing to the area on the horizon, but the Dublin Court development of 17 townhomes has been under construction from 2013 to 2014. These units should start to add a handful of new students to the school in the 2014-15 school year.

Forecast

Enrollment at Thomas Fitzwater may decrease slightly in 2014-15 based on the departure of a large 5th grade class and its replacement with a smaller kindergarten class. Enrollment will continue to decline at a higher rate beyond next year as the 4th grade class exits in 2015-16 and kindergarten classes continue to decline from the drop in township births. Without any new detached housing on the horizon, enrollment may be around 375 students by the 2018-19 school year.

FIGURE 42: Thomas Fitzwater Elementary School Enrollment by Grade, 2007-2013

| Year | K | 1 | 2 | 3 | 4 | 5 | Total | Annual Change |
|---------|----|----|----|----|----|----|-------|---------------|
| 2007-08 | 56 | 70 | 70 | 72 | 80 | 83 | 431 | |
| 2008-09 | 63 | 61 | 72 | 71 | 75 | 83 | 425 | -6 |
| 2009-10 | 69 | 73 | 57 | 72 | 75 | 77 | 423 | -2 |
| 2010-11 | 62 | 74 | 73 | 54 | 76 | 81 | 420 | -3 |
| 2011-12 | 80 | 73 | 74 | 76 | 60 | 73 | 436 | 16 |
| 2012-13 | 69 | 80 | 72 | 80 | 78 | 63 | 442 | 6 |
| 2013-14 | 58 | 73 | 80 | 69 | 87 | 79 | 446 | 4 |

Source: School District of Upper Dublin (enrollment as of October 1 each year)

FIGURE 43: Housing Activity Within Thomas Fitzwater ES Boundary Area

| Year | New Units Built | Existing Units Sold | | | |
|-------|-----------------|---------------------|-----|----|-------|
| | Total | SFD | SFA | MF | Total |
| 2009 | 5 | 47 | 4 | 2 | 53 |
| 2010 | 2 | 41 | 8 | 3 | 60 |
| 2011 | 0 | 42 | 10 | 1 | 53 |
| 2012 | 1 | 45 | 6 | 6 | 57 |
| 2013 | 9 | 54 | 13 | 6 | 73 |
| Total | 17 | 229 | 41 | 18 | 288 |

Source: Montgomery County Planning Commission

FIGURE 44: Thomas Fitzwater ES Enrollment

