Board Study Session
Discussion Items
June 17, 2004
10:00 a.m.

- Facilities Assessment — 60 minutes
- Westlake High School Construction Update — 30 minutes
- Public Comments — 15 minutes

Following the meeting, the Board members will tour the Westlake High School construction site.

Next Meetings:

- June 23 – Study Session – Budget Workshop – 4-6 p.m.
- June 23 – Regular Board Meeting – 6:30 Closed & 7:30 Public

Kindergarten Through Grade 5
Demographic and Capacity Study

Eanes Independent School District
Austin, Texas

William P. Reimer
June, 2004

Introduction

It was a pleasure for me to visit the Eanes Independent School District. I was extremely impressed with the support that exists within the community for its schools. The buildings were well cared for and in good condition. The staff was very helpful in responding to questions and providing information. The District enjoys a fine and deserved reputation for outstanding performance and service to students.

At the request of Dr. Nola Wellman, the Superintendent, I came to the District to examine the recent enrollment decline being experienced at the elementary level. Dr. Wellman asked for recommendations for a "process" by which the Board of Education would assess the problem, determine its likely continuation into future years and list possible alternatives for consideration.

The format for this report will be to review demographic data, analyze facility capacity, summarize major findings, and provide recommendations as to next steps and opportunities for improvement. Too, I will attach a resume of my experience as an appendix, rather that taking time here to speak to my qualifications. It is my hope that this report will clarify next steps and provide a vehicle for dialogue between the Board, staff and community.

Demographic Review

The primary resources utilized were:

- Progress Report: Demographic Analysis and Enrollment Projections, prepared by Harner and Associates, in January of 2000; and
- Demographic Analysis and Enrollment Projections, also prepared by Harner and Associates in January of 2004.

We also reviewed Census Data and birth rate data for Travis County. A summary of key findings includes:

- Since the fall of 1999, the smallest grade in the district has been kindergarten
- Since the fall of 1999, the second smallest grade has been first grade, except in 2002, when grade two was the second smallest.
- Since its high point in 1999 (3301), K through 5 enrollment has declined to 2979 in the fall of 2003. As Table 1 indicates, the decline has been moderated somewhat by new students, either as a result of new homes being built and/or choice options for out of district students.

TABLE 1

YEAR	NATURAL DECREASE 5-K	NET DECREASE K-5	DIFFERENCE
1999	-	-	
2000	(102)	(44)	58
2001	(191)	(172)	19
2002	(105)	(83)	22
2003	(130)	(23)	107

- Kindergarten enrollment over the next few years will at best remain consistent with current levels. TABLE 2 compares birth data for Travis County with kindergarten enrollment five years later for the District. Although births in Travis County have increased, the percentage attributable to Eanes ISD residents is decreasing each year. Based on a continuation of this trend, the Table forecasts kindergarten enrollment until 2007.

TABLE 2

YEAR	BIRTHS	YEAR	KINDERGARTEN	PERCENT EISD
1994	10835	1999	466	4.3%
1995	11278	2000	462	4.1%
1996	11571	2001	448	3.9%
1997	11934	2002	425	3.6%
1998	12614	2003	434	3.4%
1999	13270	2004	*425**	*3.2%**
2000	14473	2005	*434**	*3.0%**
2001	14599	2006	*423**	*2.9%**
2002	14434	2007	*404**	*2.8%**

*Forecast numbers and assumed percentages shown in italics.

- Using these kindergarten numbers and a cohort projection model similar to Dr. Harners', slightly higher enrollments are forecast for grades K through 5. TABLE 3 provides the comparable data.

TABLE 3

YEAR	2004 Study*	This Study	DIFFERENCE
2004	2757	2842	+85
2005	2698	2785	+87
2006	2675	2743	+68
2007	2627	2655	+28

*Mid-Range Projections

Although using similar models, but with different assumptions and inputs, it would appear that we both agree that declining enrollment will continue at the elementary level for the next few years.

Capacity Considerations

Once enrollments are forecast, the next step is to compare these figures with available space at the elementary level. This task proved to be more difficult, in that a universally accepted method of computing capacity and agreed upon "required" programming do not seem to be available. In fact, I was able to find two different capacity calculations for each building, and upon walking through most of the schools, I was able to come up with a third capacity estimate. (Table 4, including the District Business Office calculation and the facility study done by SHW in 2003.) Without consistency, equity and consensus on how many students each building can hold, uncertainty is sure to develop in the community and at the schools regarding building efficiency. While I was in the District, this issue came up in discussions with community representatives who stated that School X or School Y had had more kids than they do now, and didn't understand why "capacity" seemed different now. The reality is that when schools have excess space, they will expand into it with programs or services that are of benefit to students, staff or the community. Once that expansion has occurred, it becomes difficult to evaluate *optimal* capacity when compared with site based *desirable* capacity.

TABLE 4

SCHOOL	District B.O.	SHW 2003	May 2004
Barton Creek	478	423	513
Bridge Point	794	813	770
Cedar Creek	430	576	513
Eanes	522	651	599
Forest Trail	636	633	513
Valley View	456	584	429
TOTAL	**3316**	**3824**	**3337**

There are a number of reasons for the differences, and I will point out just a few.

- There are not efficiency adjustments in either the District or SHW calculations. Each assumes that a classroom has 22 or 25 children in it, when in reality, all slots are not filled. The May of 2004 study assumed 95% efficiency in scheduling student slots, which is supported by actual enrollment data.
- Required programs are not specified. For example, is CDC (Child Development Center) required? Some schools have a program, some do not. Those that do, utilize spaces that it would appear were designed for classrooms. This explains the gap at Bridge Point, where the District Business Office and May 2004 studies took out 3 rooms from the capacity calculation, while the SHW study of 2003 did not. See Table 5 for a listing of the various programs by school.
- Class sizes varied in each of the studies. While the State of Texas mandates class sizes of 22 at grades K through 4, different numbers were used for grade five. Agreement on the desired staffing levels in grade five are necessary.
- There does not appear to be a standard educational program or "educational specification" for the elementary schools. Since the buildings were brought on line over an extended period of time, each one is a unique design and programmed to reflect the priorities of the community at the time of design. The educational specification document would bring uniformity to the process in terms of required spaces, and the number and size expected for each space
- The SHW study appears to be a *design* capacity, disregarding any special program considerations as listed in Table 5. As such, it is likely a high number that will not e acceptable to the community. Too, the SHW study does not include an efficiency adjustment.
- The District Business Office capacity figure represents more of an *operational* capacity, recognizing some the special programs listed in Table 5. It too does not include an efficiency adjustment. In all likelihood, this number is low.
- The capacity number that I was able to compute adjusts for efficiency and is based on a "design" capacity of 3513 students. Although a more detailed analysis would be of assistance, including the discussion of what "required programming" consists of; I believe these numbers better reflect design and operational capacity for the District.

TABLE 5

	Barton Creek	Bridge Point	Cedar Creek	Eanes	Forest Trail	Valley View
Spec. Ed						
PPCD				2		2
Behavior			1	1		1
ASK	3	1	2		2	
Resource	5	2	2	3	3	4
Speech	1	1	1	1		1
OT/PT	1	1	1	1	1	1
Content Mastery	1	1	1	1		1
Title 1	1		1			1
Pals	1					
Sp. Ed			1			
Spec Prgms						
Music	2	2	1	2	2	1
Art	1	2	1	2	2	1
Computer	1	2	1	2	2	2
G&T	2	1	1	1	1	1
KMBC/CTC office				1		
CDC	3	3				5
Multi Purpose	1		1			1
Science	1					1
Counseling group	1			1		1
ESL			.5		1	1
District training					1	
Psych.	1		1			1
Workroom	1		1			
Class reduction		1	.5	1	1	
Vacant		1		1	1	
Reading lab	1					
Portables			2	4	4	

In order to define the scope of any potential problem, we must compare enrollments to

capacities over time. Table 6 and Table 7 do that, using the districts' two capacity calculations and enrollment forecasts from the Harner study of January, 2003. For consistency, Table 8 uses enrollment projections and capacity calculations done in May of 2004.

TABLE 6

Year	Enrollment	Capacity*	Efficiency
2004	2757	3316	83%
2005	2698	3316	81%
2006	2675	3316	81%
2007	2627	3316	79%

* District Business Office Calculation

TABLE 7

Year	Enrollment	Capacity*	Efficiency
2004	2757	3824	72%
2005	2698	3824	71%
2006	2675	3824	70%
2007	2627	3824	69%

*SHW, 2003

TABLE 8

Year	Enrollment	Capacity*	Efficiency
2004	2757	3337	83%
2005	2698	3337	81%
2006	2675	3337	80%
2007	2627	3337	79%

*May, 2004

As can be seen, the efficiency of building utilization is dramatically different depending upon which capacity calculation is used. The District must agree on the appropriate capacity number, and the assumptions built into it for programming equity. Without that, any discussion of over or under utilized buildings will be subjective, based more on what is, rather than what ought to be for everyone.

Suppose we were to get a bit more specific, by breaking the enrollments down to the

school level. If we estimate each schools' enrollment over the next three years, and compare it with the District Business Office capacity number, we can arrive at an estimated efficiency percentage to give an initial indication of where the decline may be most prevalent.

TABLE 9

School	2004	2005	2006
Barton Creek	81%	*78%*	*75%*
Bridge Point	96%	100%	107%
Cedar Creek	86%	*77%*	*73%*
Eanes	83%	*75%*	*70%*
Forest Point	85%	84%	82%
Valley View	87%	90%	88%

Numbers in italics show efficiencies less than 80%. The 80% figure is illustrative of a school facility that would have slightly less than one unused classroom for each grade or if a required class size is 22 students, classes would be averaging 17 each.

As examples of how critical the understanding of capacity is, let us develop Tables 10 and 11, assuming one school is taken off line in 2004. For the purposes of this example, we will go alphabetically, removing Barton Creek from our capacity calculation. For this result, we cannot allocate the children to other schools, so we will use the total percentage of capacity only.

TABLE 10

Total Efficiency	2004	2005	2006
*Current Capacity	83%	81%	81%
*Capacity w/o BC	97%	95%	94%

*District Business Office Calculation

TABLE 11

Total Efficiency	2004	2005	2006
**Current Capacity	76%	74%	74%
**Cap. w/o BC	89%	87%	86%

** SHW Capacity Calculation @ 95% Efficiency

As can be seen in Table 10, if a school is closed in 2004, the District would retain little flexibility to deal with changing enrollment patterns, since very few seats would be vacant in the remaining schools. Even in Table 11 using the most optimistic capacity figures, efficiencies are slightly less than what exist today with all six schools, even though many students would be relocated and a resource important to many community members would be changed. Tables 9, 10 and 11 again stress the importance of agreeing on the standards and methodology for capacity calculation. With differing numbers available in the District, it becomes possible to present any point of view in support of one person's

particular position with regard to enrollment changes.

Findings

Based on the information presented previously regarding enrollment and capacity, a listing of key findings is important in order to focus future efforts and discussion.

- Elementary enrollment will continue its decline, attributable to a maturing population in the older portions of the district, reduced potential for new housing and a lower number of families in child bearing age cohorts
- Kindergarten will be the smallest grade in the district for the next four or five years
- There are no universally accepted standards and methodology for computing capacity at the elementary level
- Inconsistency is apparent in programming opportunities in all schools
- Given District generated capacity numbers only, efficiency for the 2004/05 school year is likely greater than 72% and less than 83%.
- It is apparent that the current Eanes, Cedar Creek and Barton Creek boundary areas are experiencing declining enrollment first..
- The change becomes more significant, beginning in the 2005/2006 school year.

Recommendations

Change is difficult. It is especially difficult when dealing with children, families and staff members. In order to institute changes in any system, it is important to have a sound improvement process, to take enough time to be thorough and thoughtful, and to communicate with all who may have a vested interest in that change. The process suggested in the following pages will hopefully meet those requirements.

Process Proposal and Timeline

July, 2004

1. Engage Harner and Associates (or an alternative firm, if an RFP is desired) to update the 2000 enrollment study to include:

a. Revised 5 year projections by school and by planning area for K through 12th grade.

b. Assess development potential for remaining vacant property within the district

c. Development of a technology system whereby District staff can manage the data and update the projections annually. A spreadsheet format is contemplated, at minimal cost.

d. Implement a geographic software system (ArcGIS, as an example) to visually display student residency over the course of the 5 year plan to illustrate enrollment shifts and impact on schools. Cost estimates vary, depending on the program selected and the training required.

2. Engage a property appraisal firm to inventory all vacant EISD properties and provide for a confidential and comprehensive real estate inventory including, as a minimum:

a. Title search and policy
b. Location and legal description
c. Zoning and current land usage, if any
d. Utility availability and/or cost to bring utilities to the site
e. Access or accessibility potential
f. Estimate of highest and best use
g. Estimated of current market value

August, 2004

1. Form a District Long Range Facility Planning Committee to study enrollment trends and make appropriate and timely recommendations to the Board of Education. The composition of the LRFPC should include parents, community members, real estate professionals, finance experts and school staff. The Committee should have balanced representation and be facilitated by the Central Office, with advice as necessary from consultants or issue specialists. The work of the group should include:

a. Review data from the Harner studies
b. Review data provided by this report
c. Agree on design and program capacities for all schools
d. Discuss and develop a full range of alternatives to accommodate student enrollment *efficiently* and *effectively* until the fall of 2009. Alternatives might include as a minimum:

d.1. Boundary changes to balance enrollments
d.2 Alternative programs including magnet concepts, International Baccalaureate, charter schools, sharing of services or staff to improve efficiency etc
d.3 Shared use of facilities or sites with other governments or service providers
d.4 Close a building and reassign students
d.5 Property sale or lease
d.6 New buildings, remodeling or reuse of District assets
d.7 Optimizing out of district enrollment in EISD schools
d.8 Grade configuration changes (Ex.: K-4, 5-8 or K-8) and the impact on enrollment and program.
d.9 Temporary busing from one area to another

e. Evaluate the advantages and disadvantages of each option or scenario including costs, benefits and impacts on families and children. Combinations of options are likely to develop, in that different solutions will apply because of differing circumstances.
f. Prepare a draft report as a basis for a future presentation to the Board of Education
g. Use the report as a vehicle for community input via community forums, meetings and presentations
h. Prepare a final report for the Board, based upon the analysis of data, consideration of options, and feedback from the community.

February, 2005

1. Presentation of findings to the Board of Education

March, 2005

1. Board action on any initial proposals, except school closure, which would have greater impact on operations and logistics.

August, 2005

1. LRFPC continues to meet monthly, bi-monthly or quarterly to update the 5 year facility plan

November, 2005

1. Earliest Board action if school closure is recommended option for 2006/2007 school yea

Supporting documentation

Document I

A five year enrollment history in grades kindergarten through 12 is provided. It illustrates the reduced enrollment levels in the elementary grades.

Document II

A bar graph shows the enrollments in grades K through 5 only from 1999 to 2003. The lower kindergarten and first grade are evident, but if you look closely, you are seeing increases from one year to the next in most grades. For example, the kindergarten class in 1999 was smaller than the first grade class of 2000, indicative of some growth or choice options to enroll in the District.

Document III

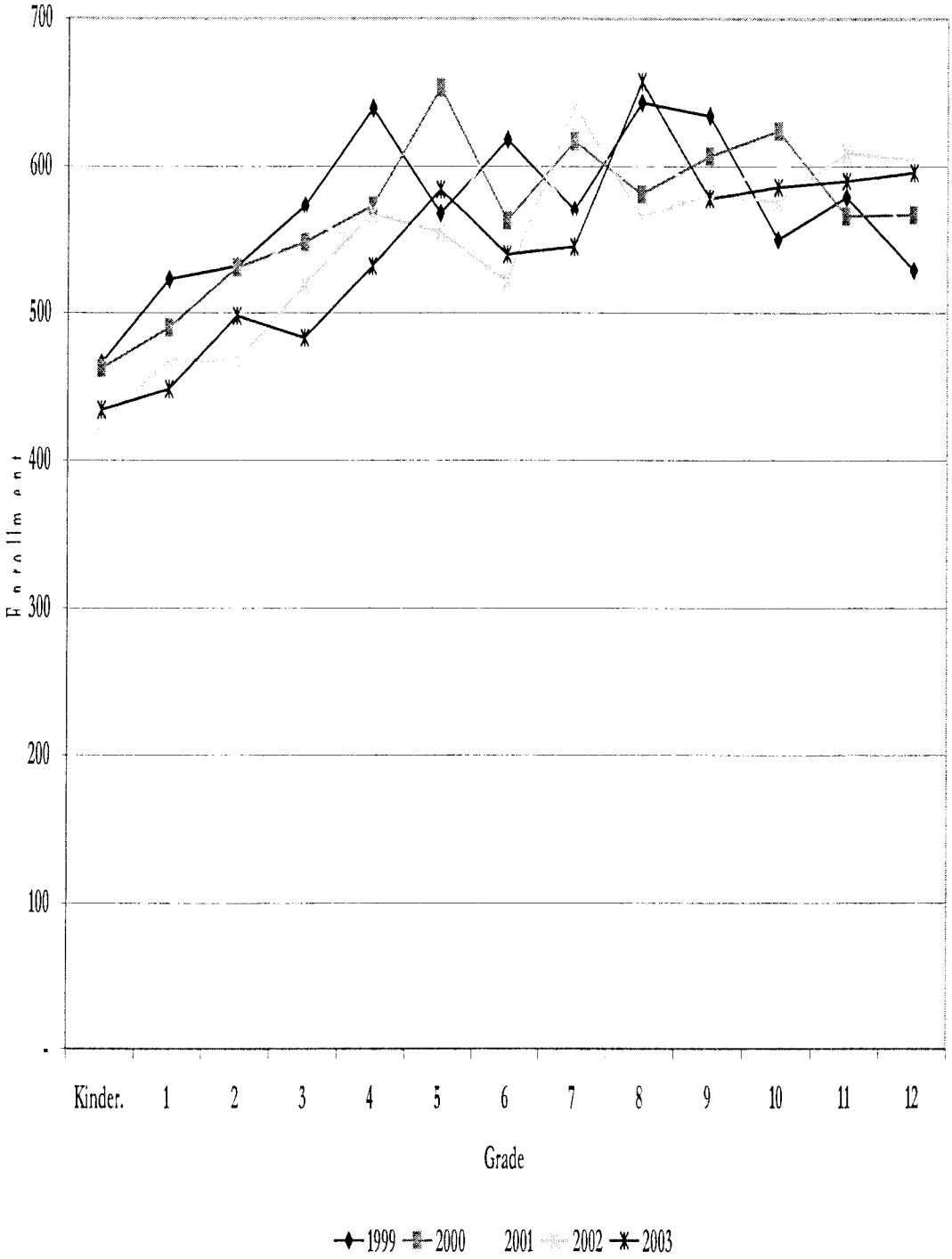
The suggested criteria for consideration in declining enrollment circumstances are meant to guide the Board and community in any deliberations or discussions. They attempt to identify those factors that must be analyzed in advance of any final decision.

Document IV

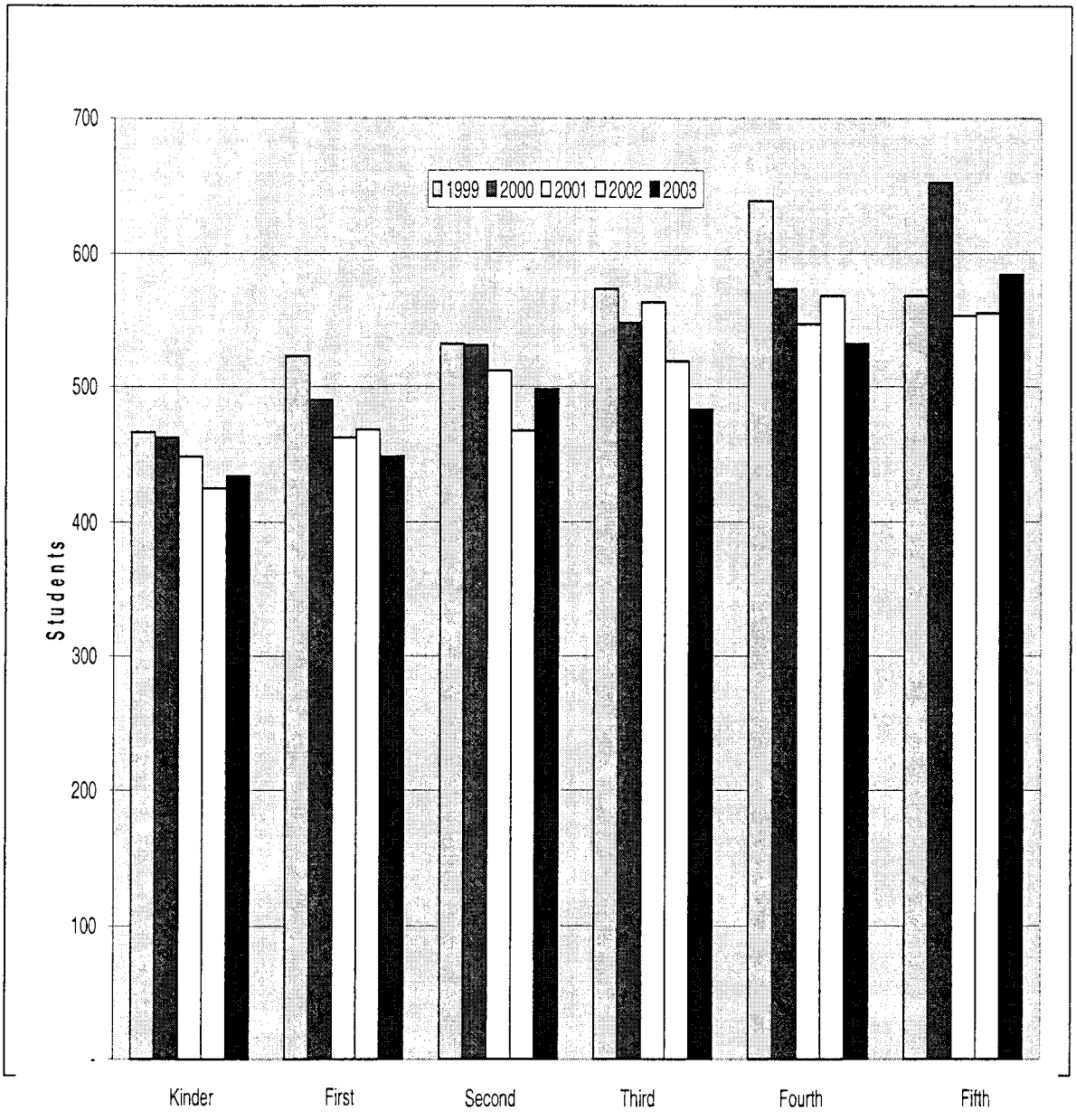
The resume outlining the background and experience of Mr. Reimer is included.

Document I
Five Year Enrollment History, K-12

Eanes Independent School District Enrollment: 1999 to 2003



Document II
K through 5 Enrollments
1999 to 2003



Document III

Criteria for Consideration in Declining Enrollment Situations

1) Enrollment (Current and Projected) and Capacity
    i) Trends by school
    ii) Percentage of capacity
    iii) Special program impacts
    iv) Choice enrollment impacts
    v) Program issues

2) Boundary Changes
    i) Number of students moved
    ii) Length of time for solution

3) Building Condition
    i) Compliance with ADA
    ii) Condition of building systems
    iii) Special features that enhance community services; i.e., library, pool,

4) Financial Considerations
    i) Taxpayer burden or savings
    ii) Operational efficiency
    iii) Cost per student
    iv) Capital costs

5) Impact on Families and Neighborhood
    i) Social impact on students
    ii) Number of students impacted
    iii) Diversity
    iv) Potential for future growth
    v) Impact on Middle School feeder system

6) Transportation
    i) Cost
    ii) Time on bus
    iii) Need for additional buses

7) Future use, sale or reuse
    i) Potential community use
    ii) Development potential
    iii) Impact on surrounding property values
    iv) Other school district uses

Document IV

RESUME

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EXPERIENCE:

2003-present **Consultant**
Independent consultant; contract consultant with Strategic Resources West, Inc.

1998-2003 **Chief Operating Officer -** Douglas County School District, Castle Rock, CO
Responsible for administration, management and supervision of all financial and operations departments in the District. Douglas County has over 41,000 students, 60 buildings and annual budgets for all funds in excess of $400 million.

1986-1998 **Assist. Superintendent –** Ed. Support Services, Douglas County S.D.
Responsible for all support departments including: Transportation, Maintenance, Construction, Energy Management, Food Service, Information and Technology, Planning, Business and Financial Services, and Risk Management. Developed the Districts' Strategic Plan and initiated our Quality Improvement Initiative.

1983-1986 **Executive Director -** Auxiliary Services, Douglas County School District.
Supervisory responsibilities for Planning, Construction, Maintenance and Food Services

1977-1983 **Director of Planning -** Cherry Creek School District
Responsible for Planning, Construction and Boundary Studies for rapidly expanding district.

1975-1977 **Senior Planner** - Pandullo, Quick and Associates, Wayne N.J.
Urban planning and environmental studies.

EDUCATION:

The University of Colorado at Denver.	Educational Administration, Ph.D program.
Rutgers University, New Brunswick, NJ	M.C.R.P., City & Regional Planning
Kean University, Union, NJ	B.A., Industrial Technology

Certifications	Colorado Superintendent License Malcolm Baldrige National Quality Award Trainer, JSA, 1999 Strategic Planning Facilitator, AMA 1997;

OTHER:

Extensive training in the Baldrige Quality Model for both instructional and non-instructional staff. Supervised the work of numerous cross-functional teams, school principals, and various employees. Analysis, development of projection formulas, planning for enrollment and boundaries. Facilitated district-wide study of year-round schools; developed both the district Facilities, and Strategic Plans. Led district-wide management and leadership teams in response to extremely fast-growth (fastest in the nation for more than ten years).