DRAFT Demographic Analysis & Enrollment Projections Study

San Bruno Park School District

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EXECUTIVE SUMMARY

This Demographic Analysis and Enrollment Projections Report for the San Bruno Park School District (SBPSD) was prepared by King Consulting to supply the District with relevant and accurate information on its demographics and enrollment trends. The report contains a vast array of information that District staff in many areas will find useful and informative. This Executive Summary provides the most pertinent findings as they relate to the District's enrollment trends.

King Consulting accounts for a range of plausible demographic trends with Low, Moderate, and High projections of SBPSD enrollment. While the Low and High projections are useful to see how enrollment could trend if the most extreme recent variables become normalized in the coming years, the Moderate projection is recommended for planning purposes and will be shown here.

Since the 2014-15 school year, SBPSD enrollment decreased by 28%. While the COVID-19 pandemic played some part in reduced enrollment in 2020 and 2021, underlying demographic factors indicate the District's decreasing enrollment over the last decade would have continued even without the pandemic's additional effects.

SBPSD's future enrollment trends will be affected by three main factors in the coming years:

- Residential Development – For the seven-year projection period, the District will see the development of hundreds of new homes within its boundaries. These new homes will bring in additional students who would not otherwise be enrolled with San Bruno Park SD, boosting the baseline total enrollment that would be projected absent this development.
- Universal Transitional Kindergarten – Beginning this year, Transitional Kindergarten began expanding, adding increasingly younger students each year until 2025, when every four year old in the District will be eligible to enroll in what will become an effective new grade level. This will lead to more enrolled TK students each year of the rollout, thereby boosting the District's total enrollment.
- District Demographics – As the above factors add new students to the District, its demographic profile presents the likelihood of a more than offsetting enrollment decrease. As is occurring throughout many other districts in California, births within SBPSD declined by more than 30% between 2014 and 2021. According to United States decennial Census data, there are fewer people under 18 living in San Bruno Park School District than there were in 2010 even as total population has increased. With fewer children in the District, incoming cohorts are smaller than the older cohorts who are leaving the District, who came to the District after years with more births than what has occurred recently. Each year that the number of students matriculating from the District is larger than the number entering, total enrollment will decrease.

The net result of these offsetting factors is generally stable elementary school enrollment for the next few years while the District is enrolling additional TK students each year. Beginning in 2026-27, however, when there is no longer an increase of newly eligible TK students, the demographic decreases brought on by smaller incoming cohorts (based on recent record low birth rates) replacing previous larger cohorts will lead to lower

elementary enrollment each year, even with continuing new home construction. Middle school grade enrollment is projected to decrease steadily throughout the projection period as current cohorts are replaced by the smaller cohorts already enrolled in elementary school. It is important to note, however, that in the furthest years of the enrollment projection, changes to demographic trends or development levels could lead to different outcomes, so the District should update these projections regularly.

Figure 1 visualizes SBPSD's Moderate enrollment projection through the 2029-30 school year, along with several years of recent historical enrollment. Projected enrollment is shown in a lighter color. The chart shows relatively stable total enrollment through 2026-27 with full Universal TK implementation and the continuing construction of new homes keeping elementary enrollment elevated while middle school enrollment continues to decrease with the advancement of smaller cohorts into those grades. Total enrollment is projected to continue to steadily decrease once additional TK students are no longer entering the District, even with assumed residential development occurring throughout this period.

Figure 1. SBPSD Moderate Enrollment Projection
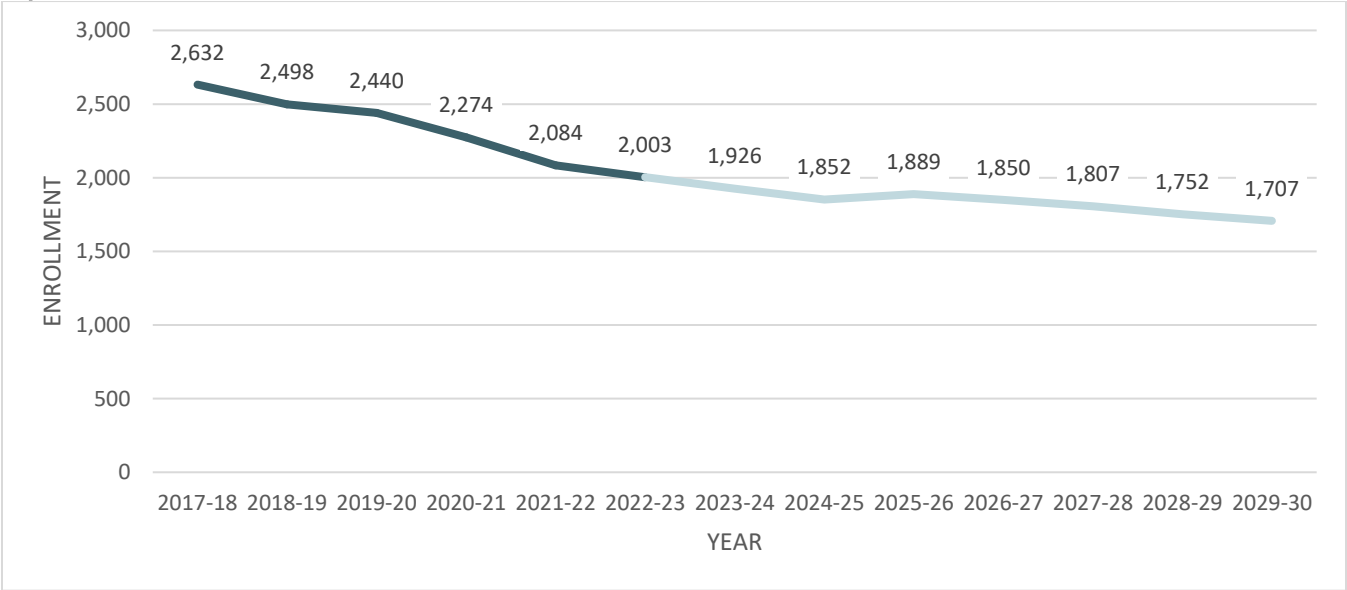
- Total SBPSD enrollment is projected to decrease from 2,003 in the current year to 1,707 by 2029-30 (minus 296 or 14.8%).
- TK-5th grade enrollment will decrease from 1,388 to 1,241, due to the increase of TK enrollment into a new full grade level over the next four years and new students from development (minus 147 or 10.6%).
- 6th-8th grade enrollment will decrease from 615 to 466 as current larger cohorts who originated from years of higher birth totals are replaced by increasingly smaller cohorts who have already entered and are expected to continue entering the District (minus 149 or 24.2%).

Conclusion and Recommendations

SBPSD continues to shift demographically, with increasingly fewer births, and therefore, increasingly smaller cohorts of students entering the District each year. Since the cohorts currently set to matriculate from the

District into high school originated as larger kindergarten cohorts almost a decade ago, the difference in size between new incoming kindergarten cohorts and those outgoing cohorts is substantial right now, and every year this disparity, absent other considerations, would cause a drop in total enrollment for the District. However, new residential development and the rollout of universal transitional kindergarten are projected to offset these demographic factors to some extent, leading to more stable elementary school enrollment for SBPSD in the coming years even as middle school enrollment continues to steadily decrease.

Although elementary enrollment will remain near current levels, the District should carefully consider the proportionally increased need for more classrooms for its youngest students. Other specific capacity considerations must wait to be addressed until the District completes its process for establishing updated elementary school boundaries with the upcoming closure of Rollingwood Elementary at the conclusion of the 2022-23 school year. Based on the analysis contained in this report, the following steps are recommended for the District to consider as it works to meet its future facility needs, keeping in mind that some recommendations may be constrained by broader fiscal and policy issues:

1. The District should plan for how it will house the additional Transitional Kindergarten students it will enroll.

2. Continue to closely monitor residential development throughout the District, as increased enrollments in these areas can impact existing school facilities even as total enrollment decreases.

3. Update this study regularly to capture emerging demographic trends and updates to residential development expectations.

4. Additional recommendations may be developed for the final version of this document after coordination with District staff and/or the Board of Education.

San Bruno Park School District Demographic Analysis & Enrollment Projections Study

This report is divided into eight major components:

A. Introduction

B. District and Community Demographics

C. Student Generation Rates

D. Residential Development

E. Spatial Analysis

F. Enrollment Projections

G. Resident Projections

H. Conclusion and Recommendations

SECTION A: INTRODUCTION

The San Bruno Park School District (SBPSD) is in San Mateo County, California. The District serves most of the City of San Bruno as well as a largely uninhabited portion of unincorporated San Mateo County around San Francisco International Airport. SBPSD serves grades TK-8 and has a total enrollment of 2,003 students as of October 2022. SBPSD currently operates five elementary schools and one middle school. However, following the 2022-23 school year, Rollingwood Elementary will be closed, resulting in four elementary schools for future years.

Table 1 shows current year enrollment totals for all SBPSD schools. It is important to note that Non-Public School (NPS) students are not included in these enrollment values. Figure 2 shows area served by SBPSD where official population is recorded.

Table 1. School Sites and 2022-23 Enrollments

Elementary Schools	Grade Levels	2022-23 Enrollment
Allen	K-5	306
Belle Air	TK-5	237
John Muir	TK-5	401
Portola	K-5	256
Rollingwood	TK-5	188
Middle School	**Grade Levels**	**2022-23 Enrollment**
Parkside	6-8	615
Grand Total		**2,003**

Figure 2. San Bruno Park School District
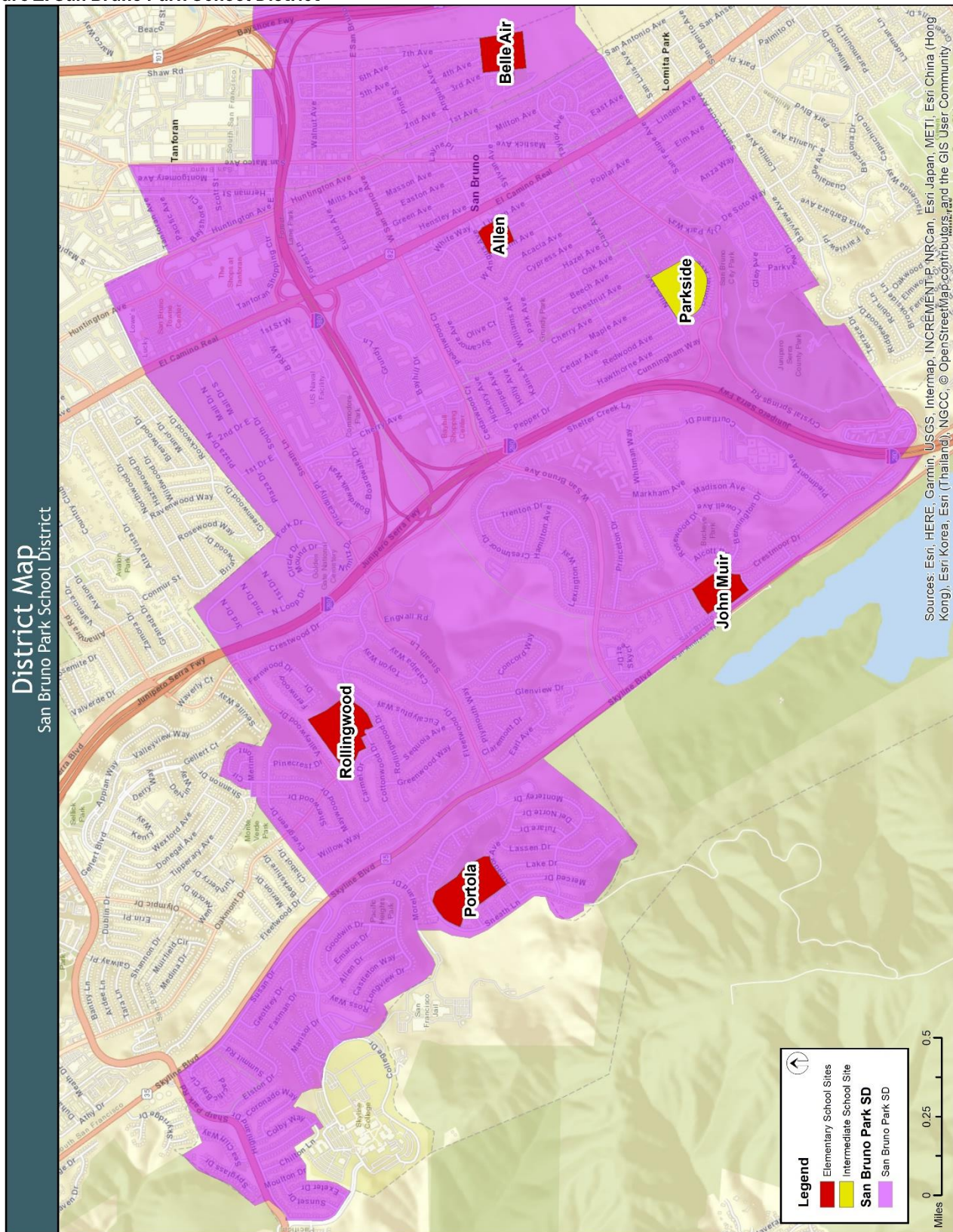
Figure 2. San Bruno Park School District

SECTION B: DISTRICT AND COMMUNITY DEMOGRAPHICS

## District Enrollment Trends

Historical Enrollments

Historical enrollment trends are based on certified State enrollment totals as reported by the California Department of Education (CDE). Enrollments do not include NPS students. Since 2014-15, total District enrollment decreased by 28%. While the COVID-19 pandemic played some part in reduced enrollment in 2020 and 2021, other demographic factors (which will be explored throughout this report) indicate the District's decreasing enrollment over the last decade would have continued even without the pandemic's additional effects.

Figure 3 illustrates the District's enrollment pattern since 2013-14. Figure 4 provides current year enrollments by school, while Table 2 analyzes the District's enrollment balance across its elementary schools. As shown, the District's elementary enrollment is imbalanced, with the largest school accommodating 45% more students than the average school population.

Figure 5 illustrates annual growth/decline in student enrollment and highlights consistency of decreasing enrollment over the previous decade, as well as the additional enrollment decrease that occurred during the COVID-19 pandemic in 2020 and 2021. A closer examination of historical enrollments by grade level demonstrates that enrollment has decreased at similar rates among both elementary school and middle school student populations (Figure 6).
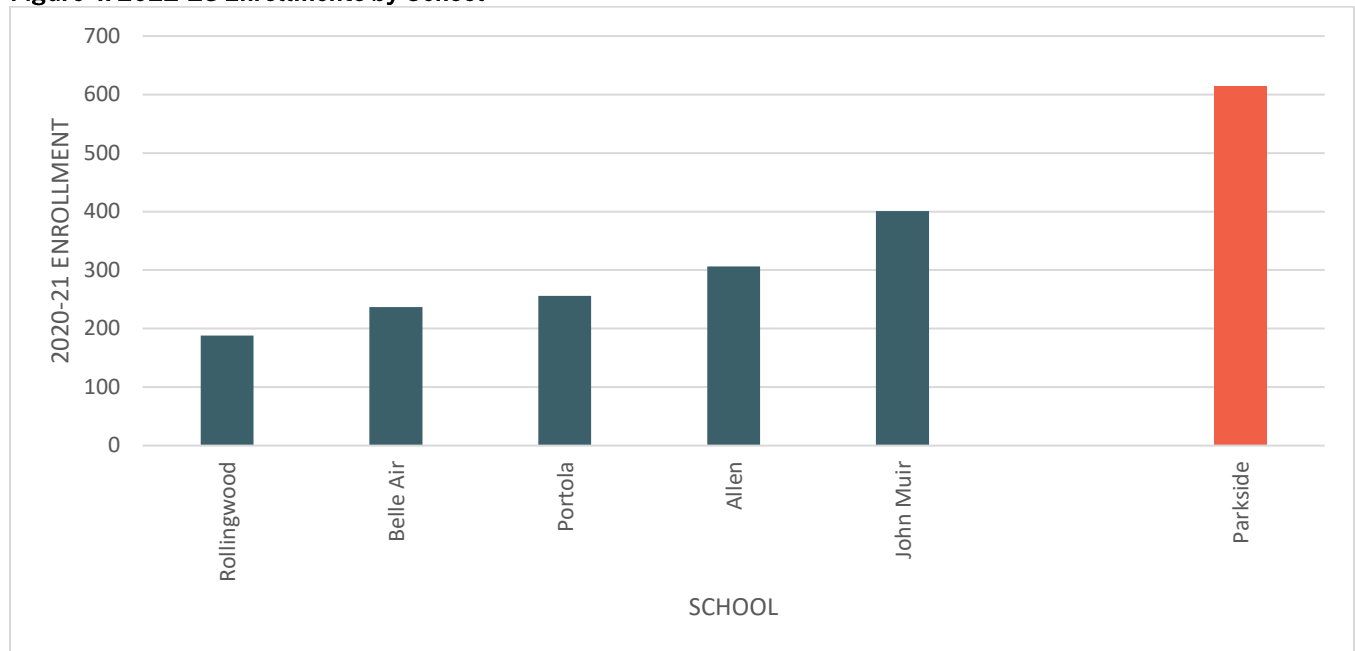
Table 3 provides historical enrollments by school since 2012-13.

Figure 3. Historical Enrollments
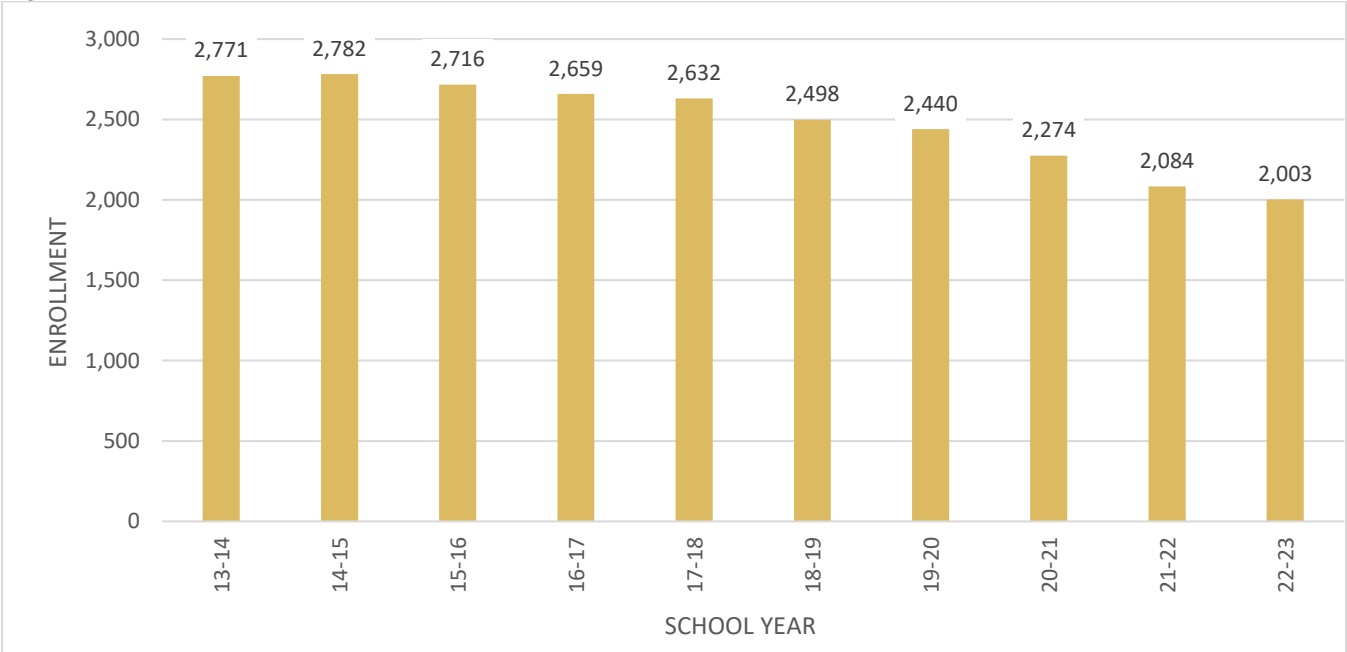
Source: California Department of Education and SBPSD.
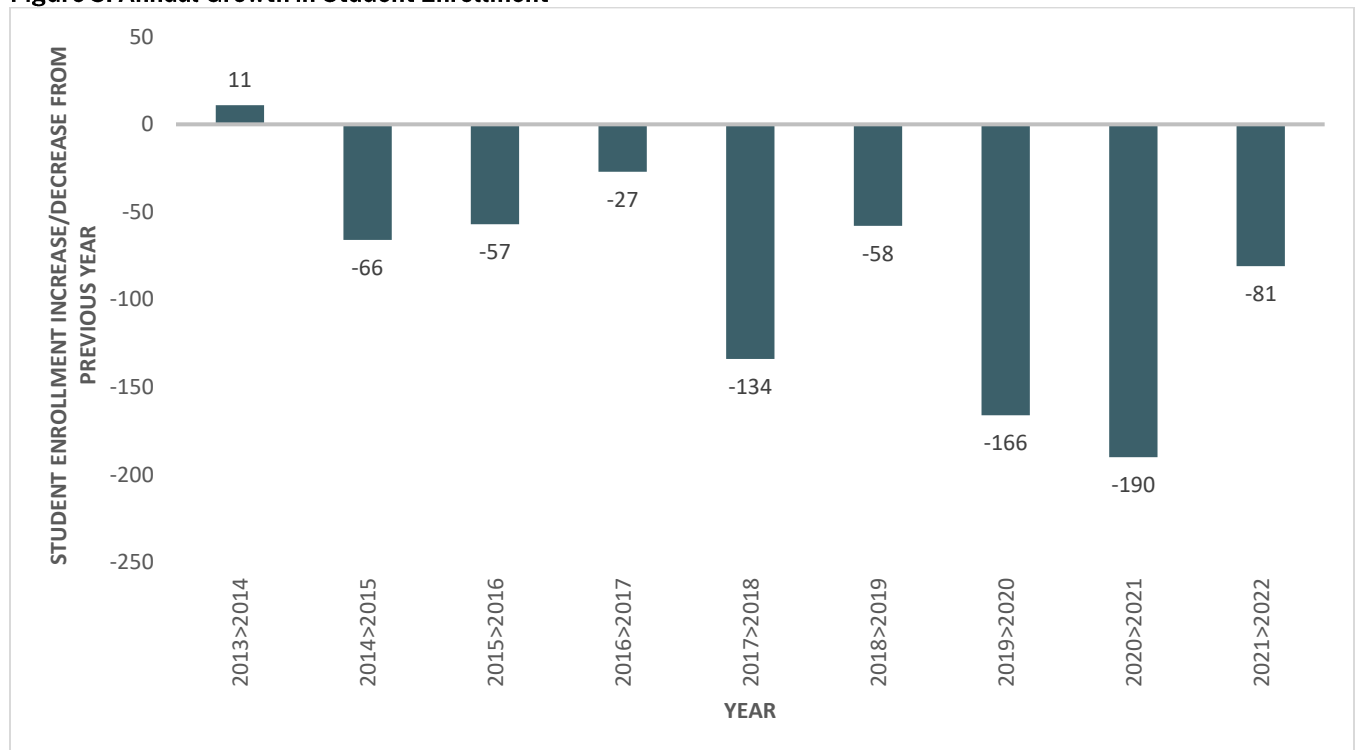
Figure 4. 2022-23 Enrollments by School

Source: California Department of Education.
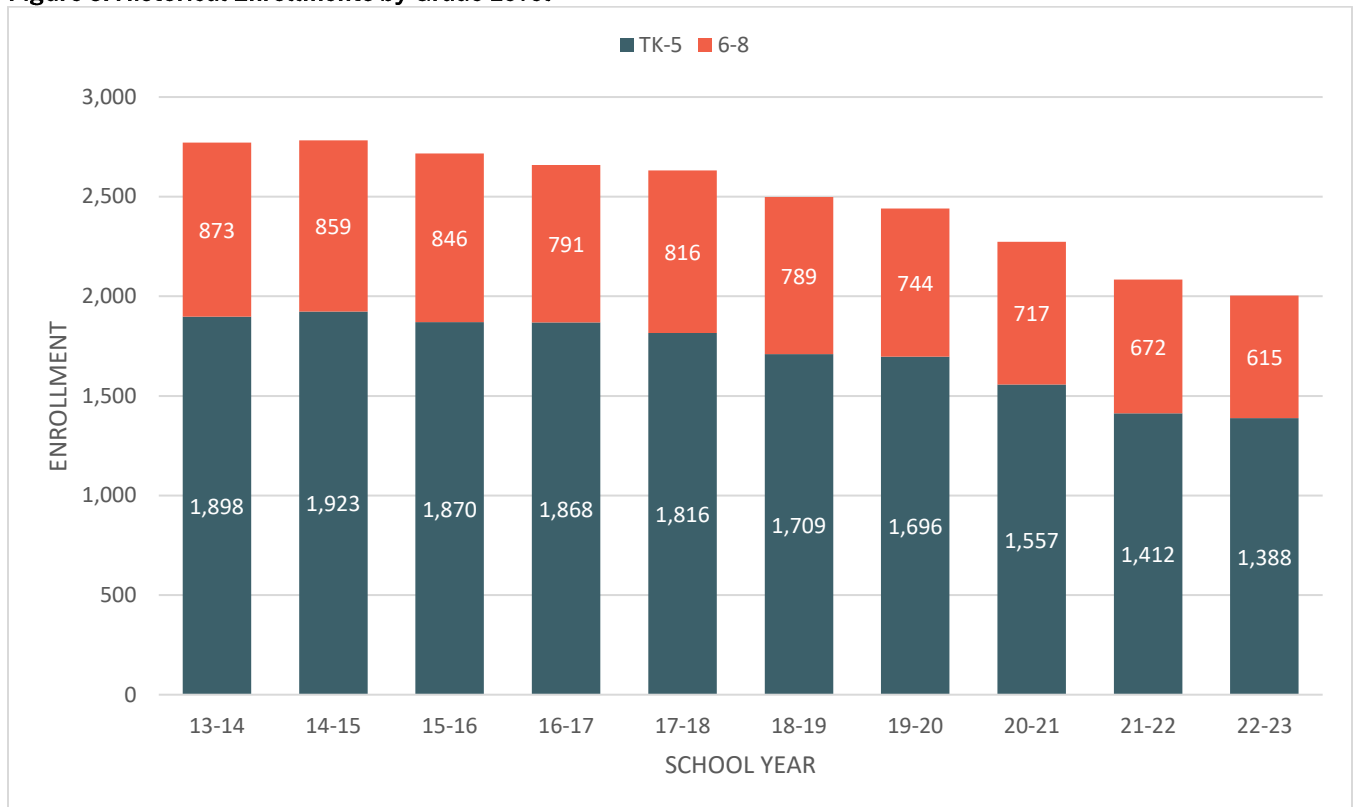
Table 2. SBPSD Average Elementary School Enrollments

Average Enrollment	Smallest Enrollment (Deviation)	Largest Enrollment (Deviation)
278	188 (-32%)	401 (+45%)

Figure 5. Annual Growth in Student Enrollment

Source: California Department of Education.

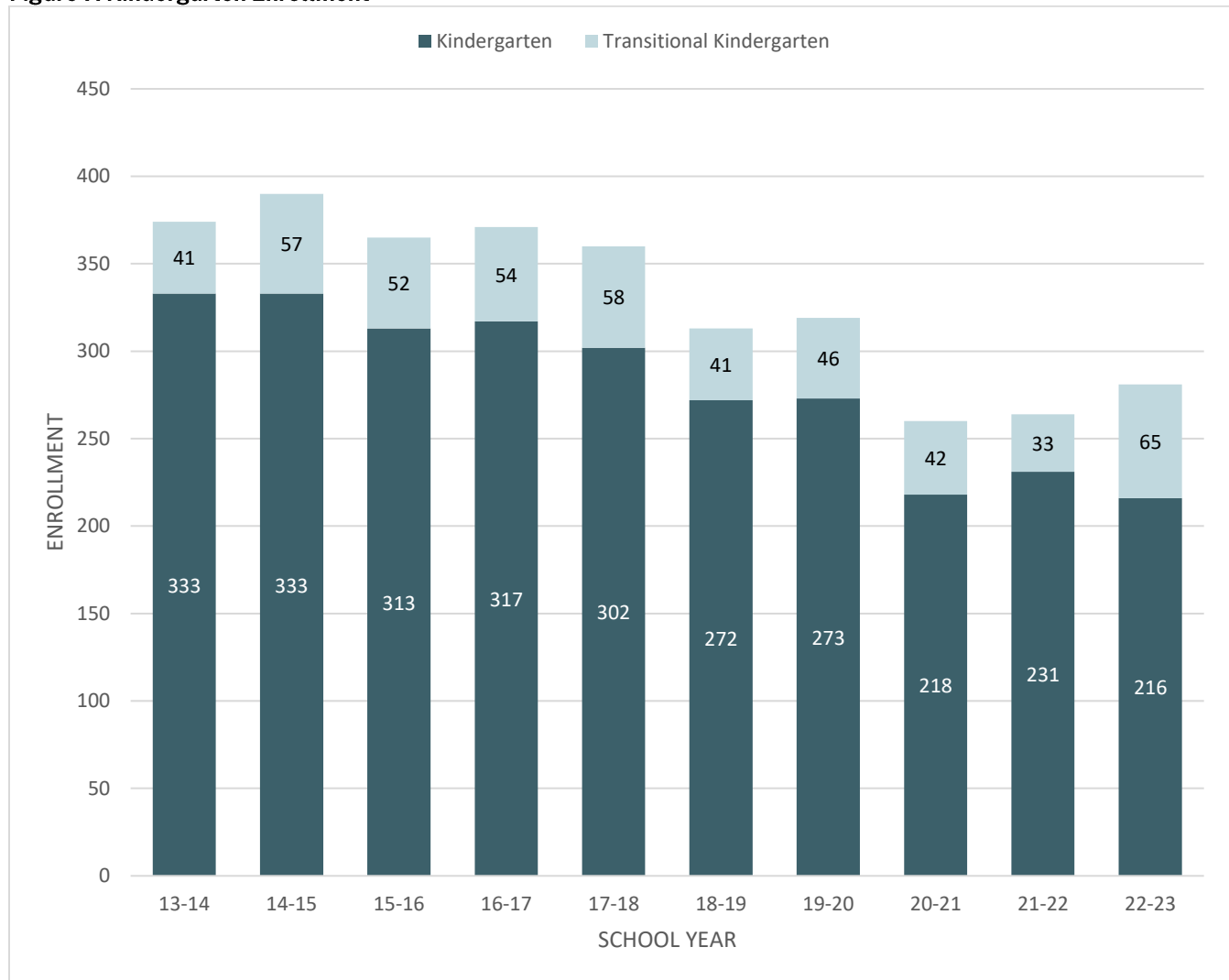**Figure 6. Historical Enrollments by Grade Level**

Source: California Department of Education.

Total kindergarten and transitional kindergarten enrollment peaked in 2014-15 and began showing noticeable decline by 2018-19 (Figure 7). Recent cohorts of kindergarten students (not including transitional kindergarten students, since they do not advance to 1st grade) are smaller than the cohorts that arrived prior to 2018, with the 2020 through 2022 kindergarten cohorts being even smaller. This is a major reason for the declining elementary enrollments seen in Figure 6. The smaller kindergarten cohorts are due primarily to the decreasing number of local births, which will be discussed further in Section H, though the COVID-19 pandemic had an outsize impact on kindergarten enrollment compared to other grade levels (since kindergarten enrollment is not compulsory) in 2020-21 and 2021-22. Kindergarten enrollment has an enormous impact on total enrollment levels because each smaller incoming kindergarten cohort directly replaces a larger cohort matriculating out from SBPSD.

Transitional kindergarten (TK) enrollment decreased during the pandemic as well. However, with the State's mandate to expand TK into a new grade level to serve all four year old students by 2025-26, these enrollments will grow considerably over the next four years, as already evidenced by the record high level of TK enrollment in 2022-23, the first year of expanded eligibility.

Figure 7. Kindergarten Enrollment

Source: California Department of Education and SBPSD.

Table 3. Historical Enrollments by School

| Elementary Schools	Grade Levels	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Allen	K-5	375	361	360	346	336	409	389	378	339	306
Belle Air	TK-5	323	323	315	296	280	264	265	244	212	237
John Muir	TK-5	348	352	344	330	329	437	457	398	365	401
Portola	K-5	346	352	344	366	347	337	326	303	264	256
Rollingwood	TK-5	253	290	279	273	262	262	259	234	232	188
Middle School	**Grade Levels**	**2013-14**	**2014-15**	**2015-16**	**2016-17**	**2017-18**	**2018-19**	**2019-20**	**2020-21**	**2021-22**	**2022-23**
Parkside	6-8	873	859	846	791	816	789	744	717	672	615
Closed Schools	**Grade Levels**	**2013-14**	**2014-15**	**2015-16**	**2016-17**	**2017-18**	**2018-19**	**2019-20**	**2020-21**	**2021-22**	**2022-23**
El Crystal ES	K-5	253	245	228	257	262					
Total Enrollment		**2,771**	**2,782**	**2,716**	**2,659**	**2,632**	**2,498**	**2,440**	**2,274**	**2,084**	**2,003**

Historical Enrollment by Socioeconomic Status

To analyze the District's socioeconomic profile, the consultant utilized participation in the Free or Reduced Price Meals (FRPM) program as a socioeconomic indicator. Table 4 provides the number of SBPSD students participating in the FRPM program from 2012-13 to 2021-22. The percent of students in FRPM has decreased steadily since 2017-18 and is now less than half of the State-wide rate of 57.8%. Figure 8 graphically demonstrates the change by year.

Table 4. Historical Students Enrolled in Free or Reduced Price Meals

| School Year	Students Enrolled in Free or Reduced Price Meals	Percent FRPM
2012-13	1,031	38.4%
2013-14	1,092	39.2%
2014-15	1,052	37.6%
2015-16	1,043	38.2%
2016-17	921	34.5%
2017-18	1,014	38.4%
2018-19	930	37.1%
2019-20	878	35.8%
2020-21	709	31.2%
2021-22	576	27.6%

Figure 8. Historical Students Enrolled in Free or Reduced-Price Meals
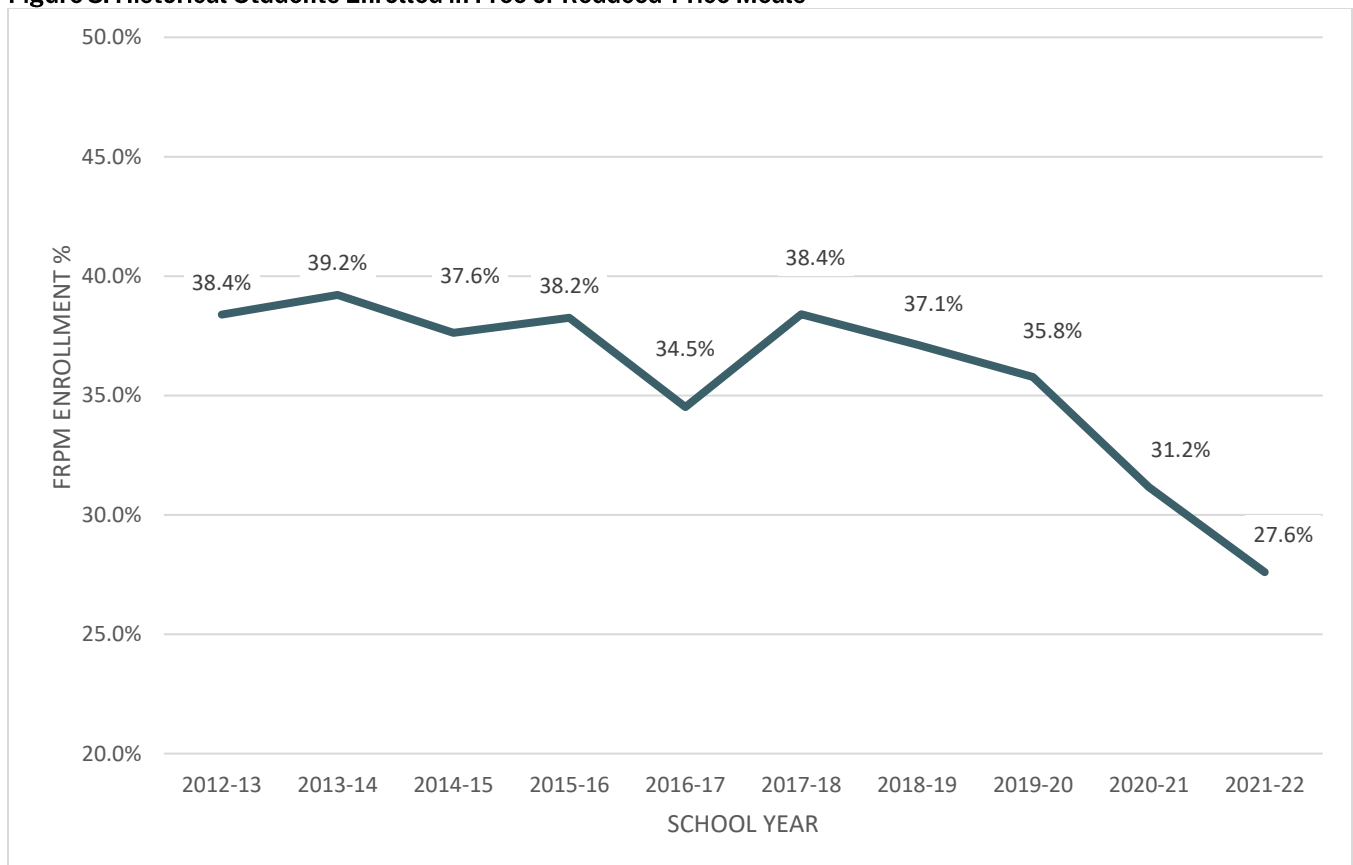
Historical Enrollment by Ethnicity

To analyze the District's race/ethnicity profile, the 2012-2021 CalPADS enrollments by race/ethnicity were used. Historically, SBPSD enrollments have demonstrated strong diversity, with no category of race/ethnicity used by the State comprising a majority of District enrollment during the previous decade. The most represented group is Hispanic/Latino students (44%), with Asian students (18%) and white students (16.7%) making up the next largest populations. Figure 9 demonstrates the District's race/ethnicity trends from 2012-13 to 2021-22.

**Figure 9. Historical Enrollment by Race/Ethnicity**
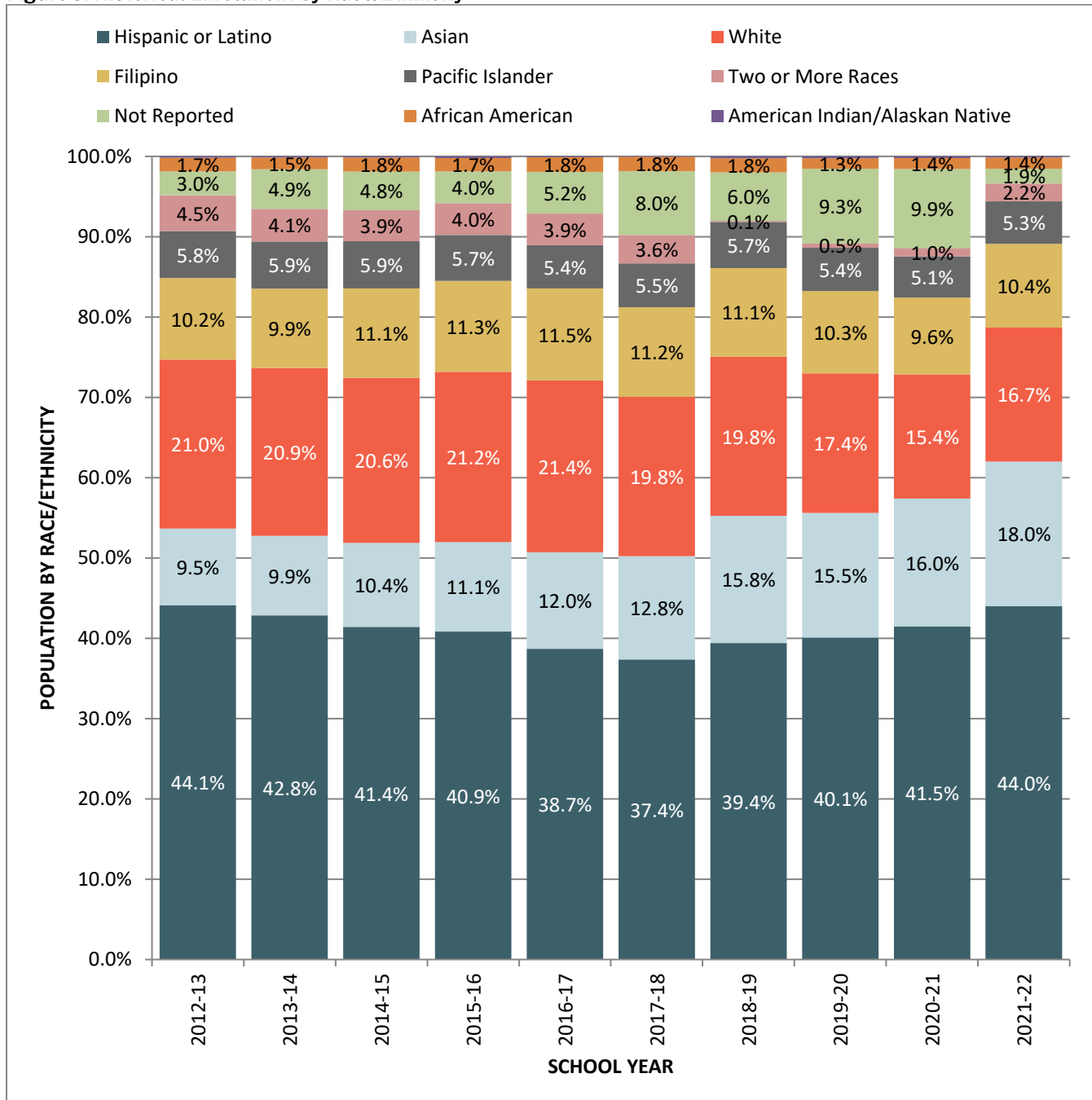
Historical Enrollment of English Language Learners

CalPADS enrollments of English Language Learners (ELL) were also compiled and analyzed. Table 5 contains the number of SBPSD students enrolled as ELL students from 2012-13 to 2021-22, as well as a breakdown by primary language spoken. Total ELL enrollment decreased over the previous decade in both count and as a percentage of total enrollment. The composition of the ELL student population has consisted mostly Spanish speaking students, but many other languages are represented. The second most widely spoken language among English learners over the last decade has included Arabic, Filipino, and Portuguese. Figure 10 graphically depicts this trend over time.

Table 5. Historical Students Enrolled as English Language Learners

School Year	Total Students Enrolled as ELL	Spanish Speaking	All Other Languages	Percent ELL of Total Enrollment
2012-13	1,030	684	346	38.3%
2013-14	1,088	726	362	39.1%
2014-15	1,070	691	379	38.3%
2015-16	1,093	698	395	40.1%
2016-17	856	530	326	32.1%
2017-18	723	460	263	27.4%
2018-19	794	525	269	31.7%
2019-20	763	504	259	31.1%
2020-21	643	449	194	28.3%
2021-22	560	418	142	26.8%

Figure 10. Historical Students Enrolled as English Language Learners
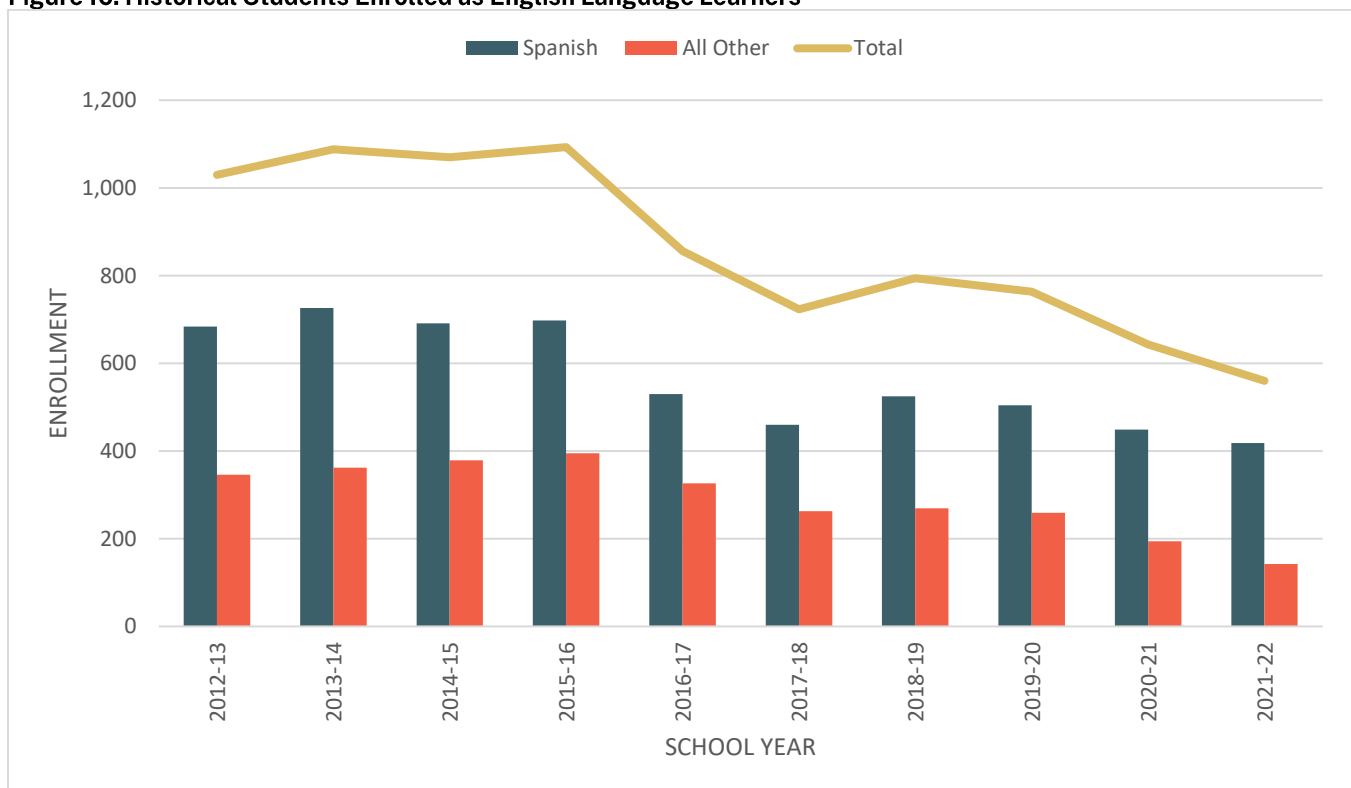
Historical Enrollment of Special Education Students

Data on students classified by the State as being enrolled in Special Education classes were also collected from CalPADS. Table 6 provides the number of SBPSD students enrolled in Special Education classes from 2012-13 to 2018-19, broken down by the most common SBPSD grade configuration. Special Education enrollment increased from 2012 through 2016, then generally increased each year thereafter. Figure 11 depicts these trends in a visual format.

Table 6. Historical Students Enrolled in Special Education Classes

School Year	Total Special Education Students	Percent Special Education
2012-13	306	11.4%
2013-14	306	11.0%
2014-15	295	10.6%
2015-16	286	10.5%
2016-17	292	10.9%
2017-18	319	12.1%
2018-19	312	12.5%

**Figure 11. Historical Students Enrolled in Special Education Classes**
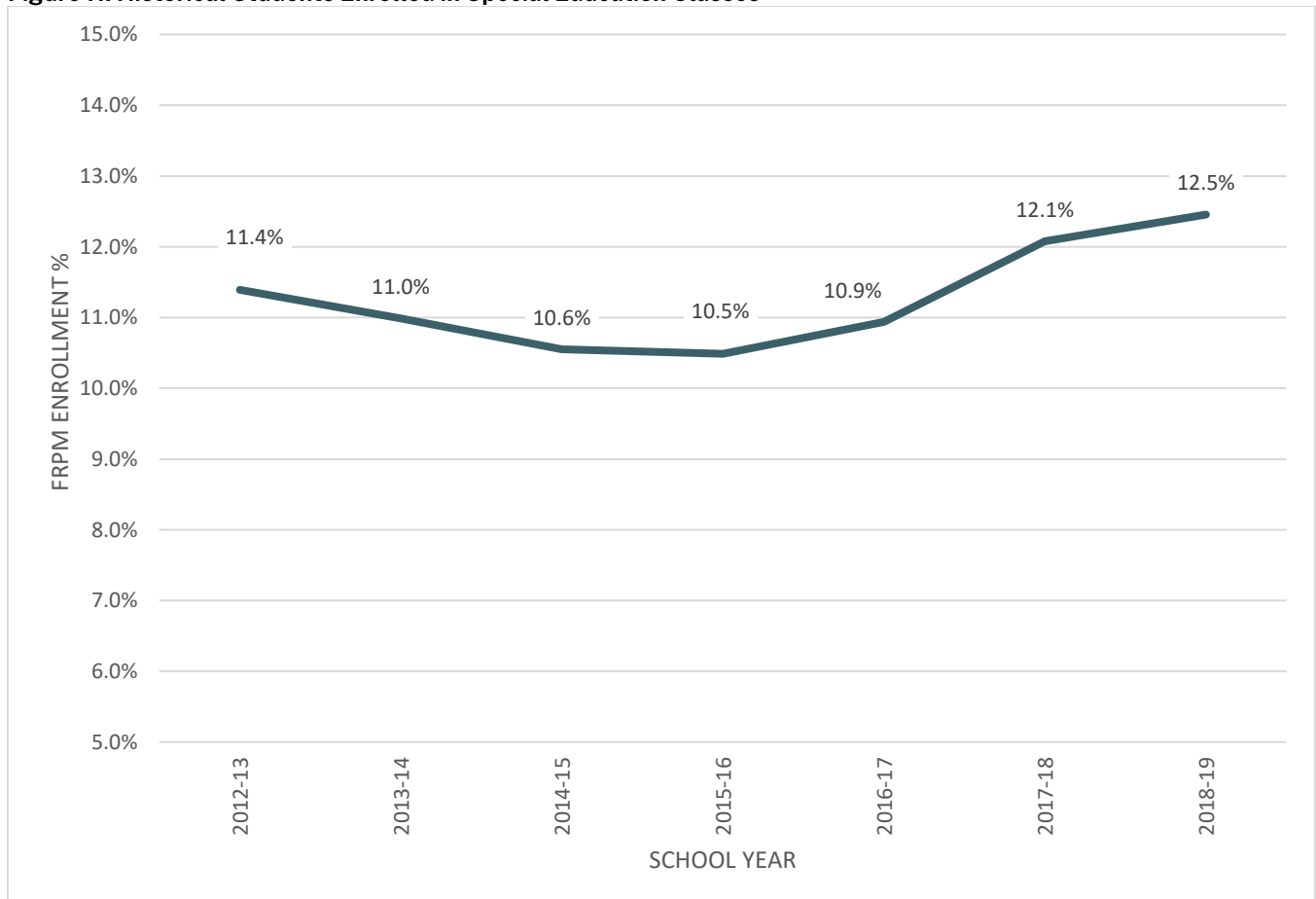
Private School Trends

While direct public-to-private and private-to-public student transfer data is not readily available, it is possible to compare historical enrollments to determine if there is a significant correlation between public school enrollments as compared to private school enrollments.

Private school enrollments for private schools located within the District were collected from the California Department of Education for years 2012 to 2021. Private school enrollments increased 19% from 2012 through 2021, during which time SBPSD enrollment decreased (Figure 12). However, private enrollment at grades 6-8 decreased during this time by 20%, and elementary K-5 private enrollment increased by 40%. K-5 private school enrollment increased the most between 2017 and 2018, corresponding to the closure of El Crystal elementary school.

Figure 12. Private School Enrollments for Private Schools Located within SBPSD
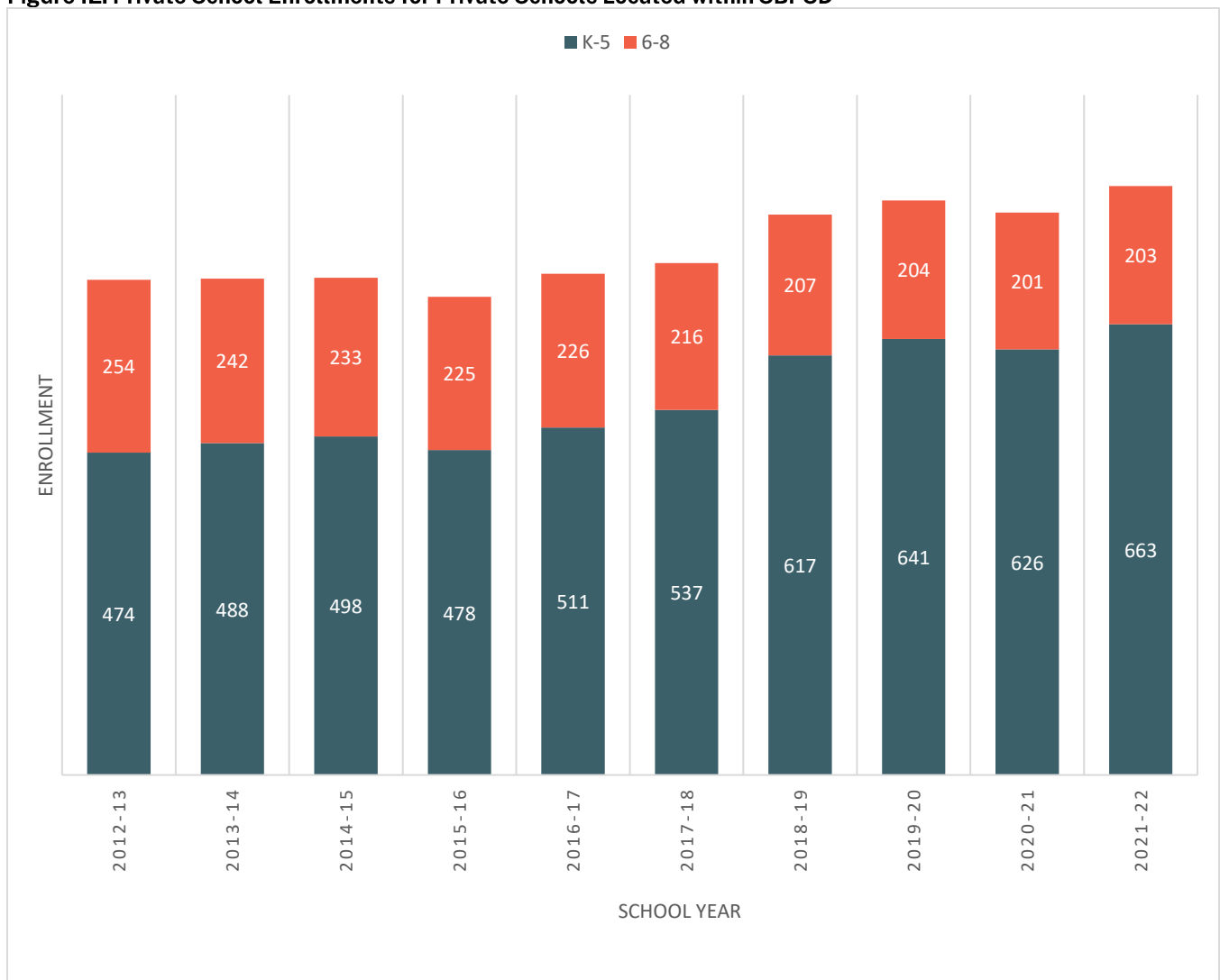
Source: California Department of Education.

Community Demographics

The San Bruno Park School District serves most of the City of San Bruno, as well as an uninhabited area of unincorporated San Mateo County around San Francisco International Airport. This community demographic analysis will focus on the general population residing within the SBPSD boundary as shown in Figure 2 in Section A of this document.

Population Trends (2020 Decennial Census)

The SBPSD boundary has a total population of 39,253 according to the 2020 Decennial United States Census. This represents growth of 7.8% since 2010 (Figure 13).

While detailed age data for 2020 is not yet available and previous estimates are less consistent with the confirmed 2020 total, an analysis of the population split between people aged 18 and over and those under 18 years reveals that the total population increase from 2010 to 2020 consisted entirely of people aged 18 and over, with 11.4% growth for that population compared to a decrease of 6% for the population under 18 (Figure 14). The SBPSD community demonstrates the same diversity as the SBPSD student population, with Asian (31.5%), White (30.6%), and Hispanic or Latino (27.3%) people making up the largest groups (Figure 15).

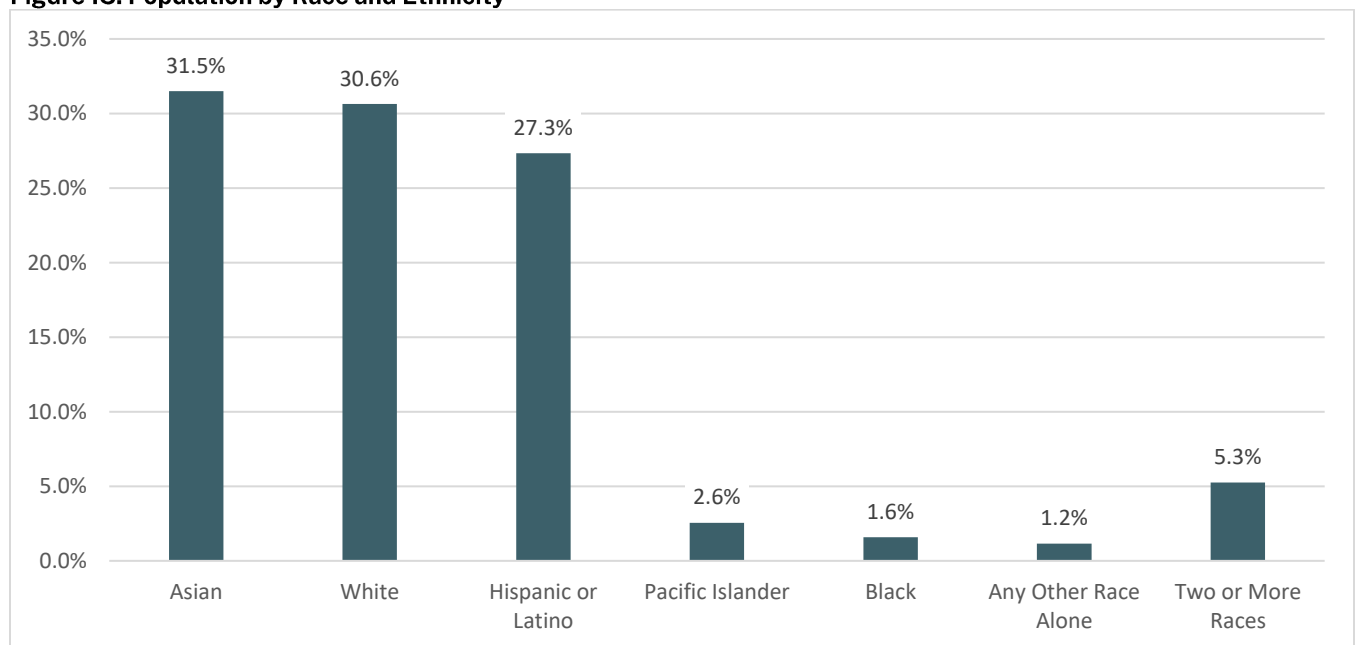**Figure 13. Population Growth 2000-2020**
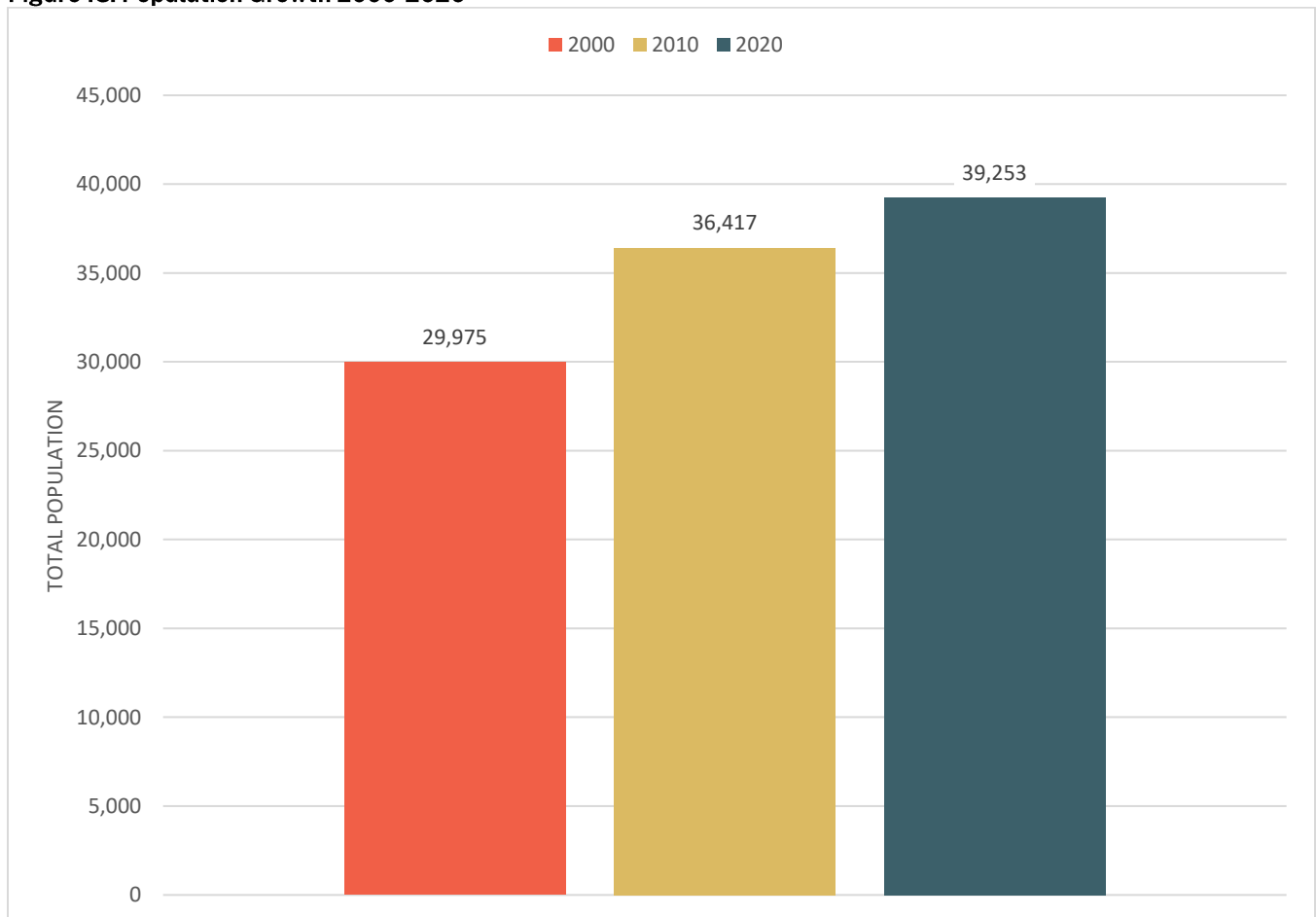
Source: U.S. Census Bureau Decennial Census (2000, 2010, 2020).

Figure 14. Population Growth by Age Range, 2000-2020
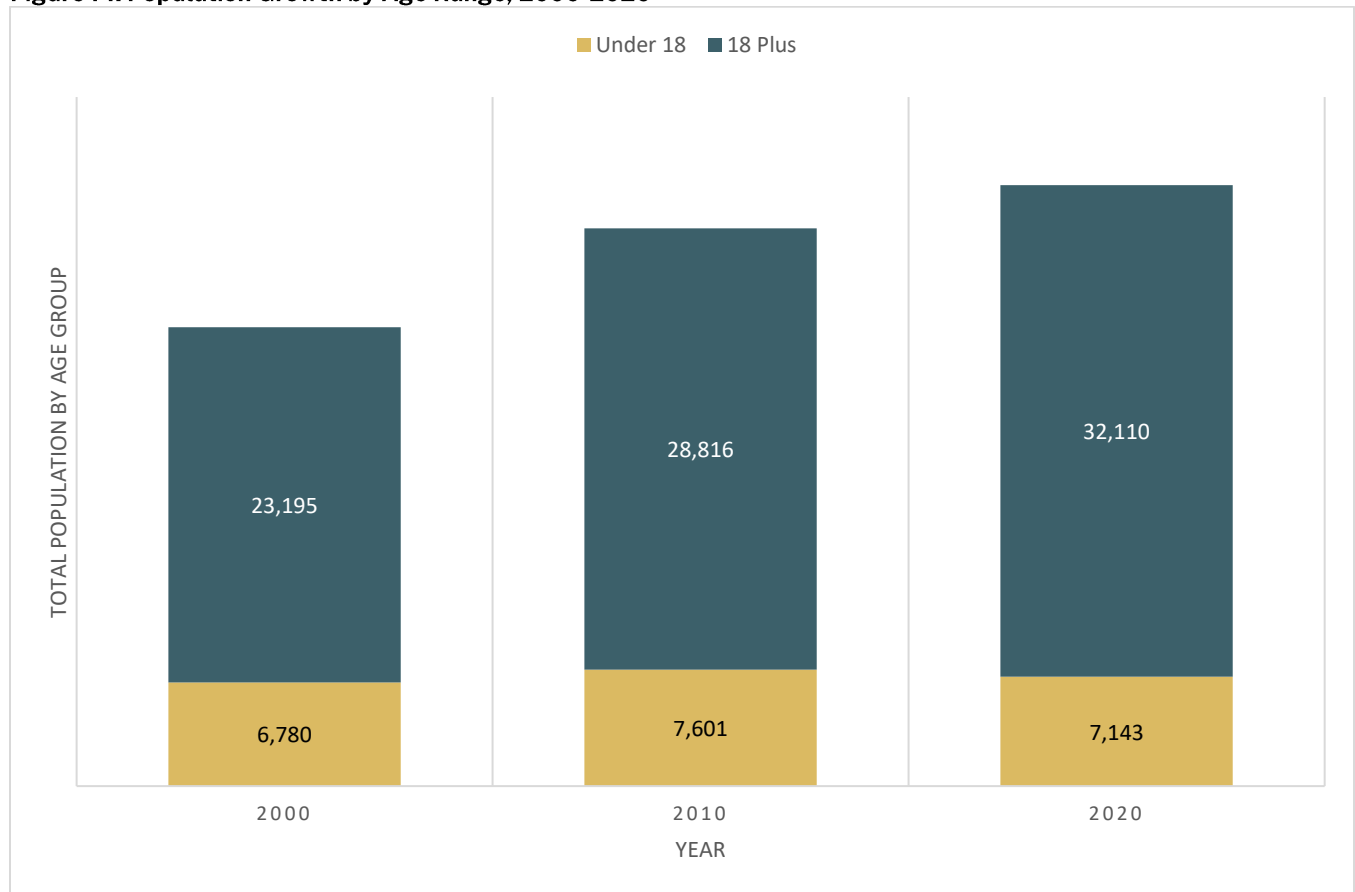
Source: U.S. Census Bureau Decennial Census (2000, 2010, 2020).

**Figure 15. Population by Race and Ethnicity**

Source: U.S. Census Bureau, 2020 Decennial Census.

Household Characteristics (2020 American Community Survey)

Median household income, based on American Community Survey (ACS) estimates from the United States Census, is higher in SBPSD compared to the State as a whole, and increasing faster over time (Figure 16).

Figure 16. Median Household Income
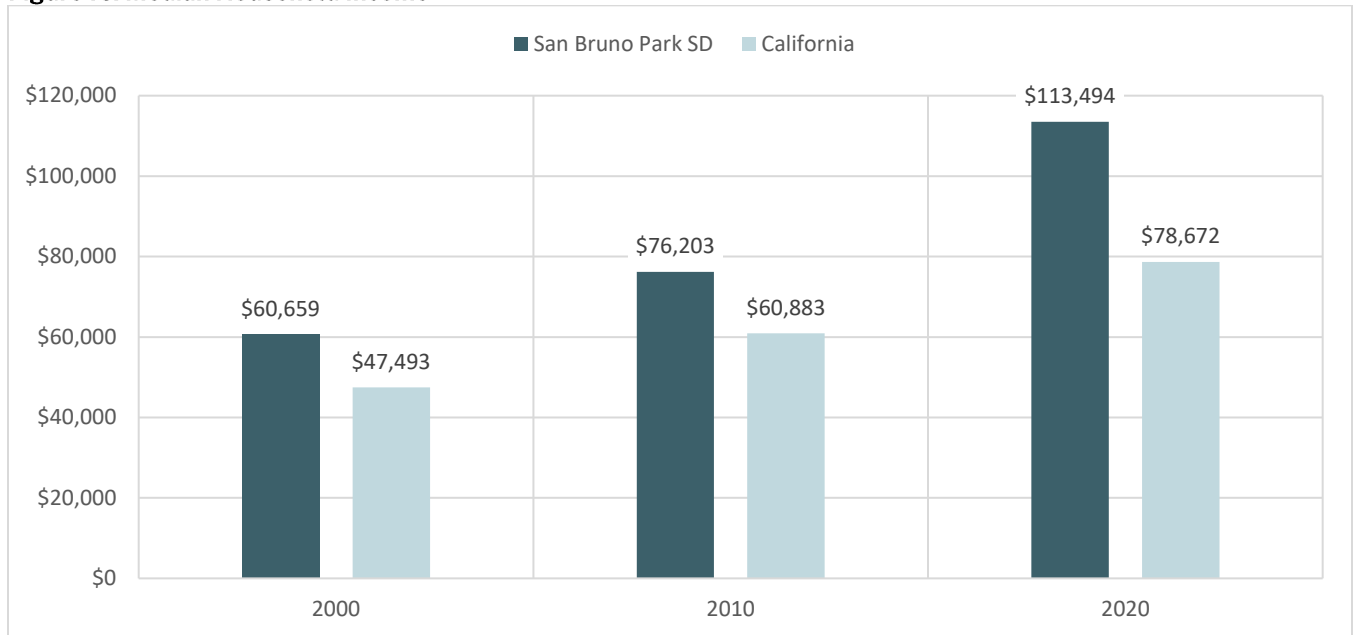
Source: U.S. Census Bureau Decennial Census (2000, 2010), U.S. Census Bureau, ACS, 2020.

The percent of households with children under 18 decreased from 2010 to 2020, consistent with the imbalanced population growth between the age ranges as previously observed. Meanwhile, the number of persons per household increased over the last 20 years in owner-occupied housing while remaining stable in renter-occupied housing. (Figures 17-18).

Figure 17. Percent of Households with Individuals Under 18
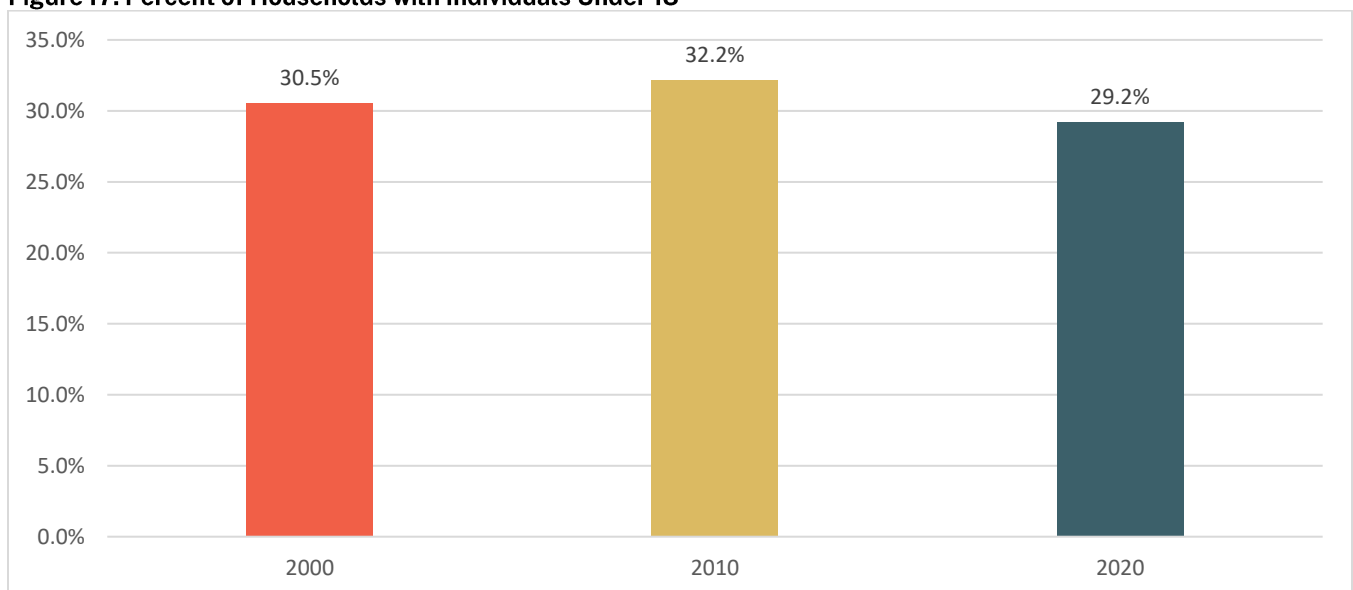
Source: U.S. Census Bureau Decennial Census (2000, 2010), U.S. Census Bureau, ACS, 2020.

**Figure 18. Number of Persons per Household**
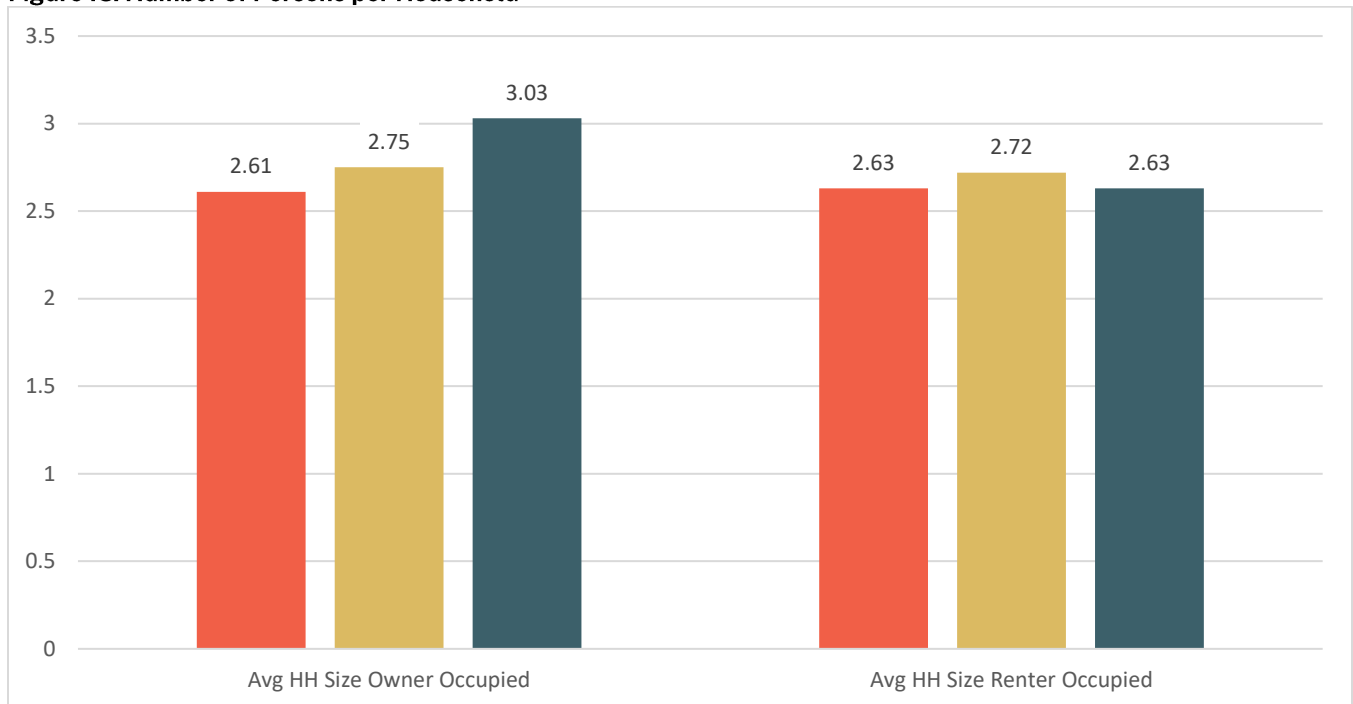
Source: U.S. Census Bureau Decennial Census (2000, 2010), U.S. Census Bureau, ACS, 2020.

*Home Ownership and Median Home Values (2020 American Community Survey)*

Home-ownership in the District (the percent of non-vacant housing units occupied by the owner) has gradually decreased since 2000 (Figure 19). The median home value in the District of owner-occupied housing units, according to Census estimates, is currently $945,800, almost triple the median value in 2000 (Figure 20).

Figure 19. Home Ownership Rate
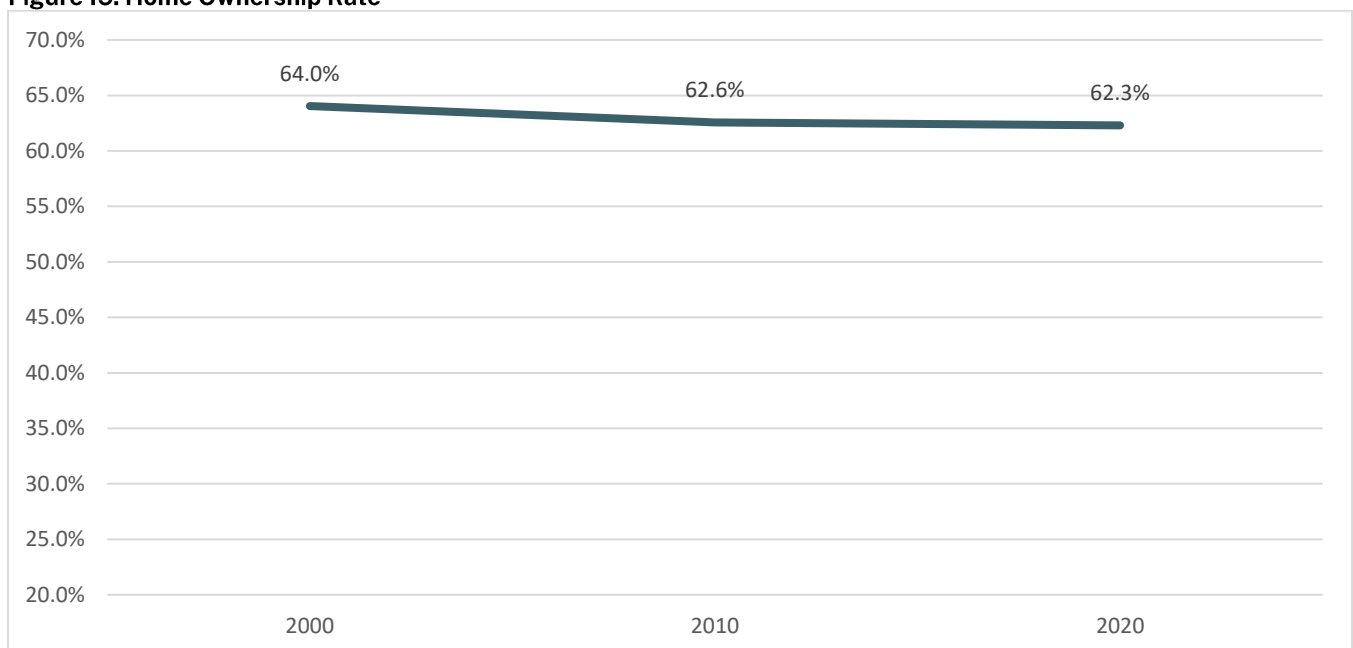
Source: U.S. Census Bureau Decennial Census (2000, 2010), U.S. Census Bureau, ACS, 2020.

Figure 20. Median Value of Owner-Occupied Units
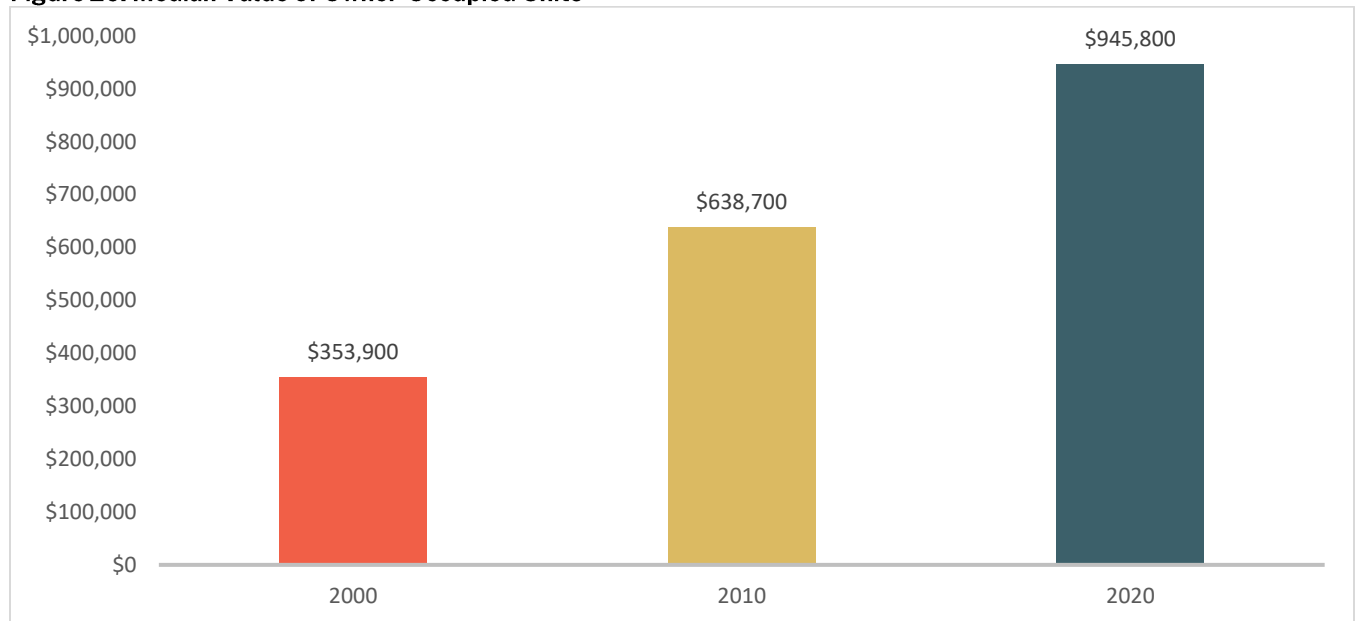
Source: U.S. Census Bureau Decennial Census (2000, 2010), U.S. Census Bureau, ACS, 2020.

The percent of owner-occupied units decreased from 2000 to 2020, while the percent of renter-occupied housing units increased. The vacancy rate also increased, with most vacant units being units for rent or rented but not yet occupied.

Figure 21. Housing Units by Occupancy
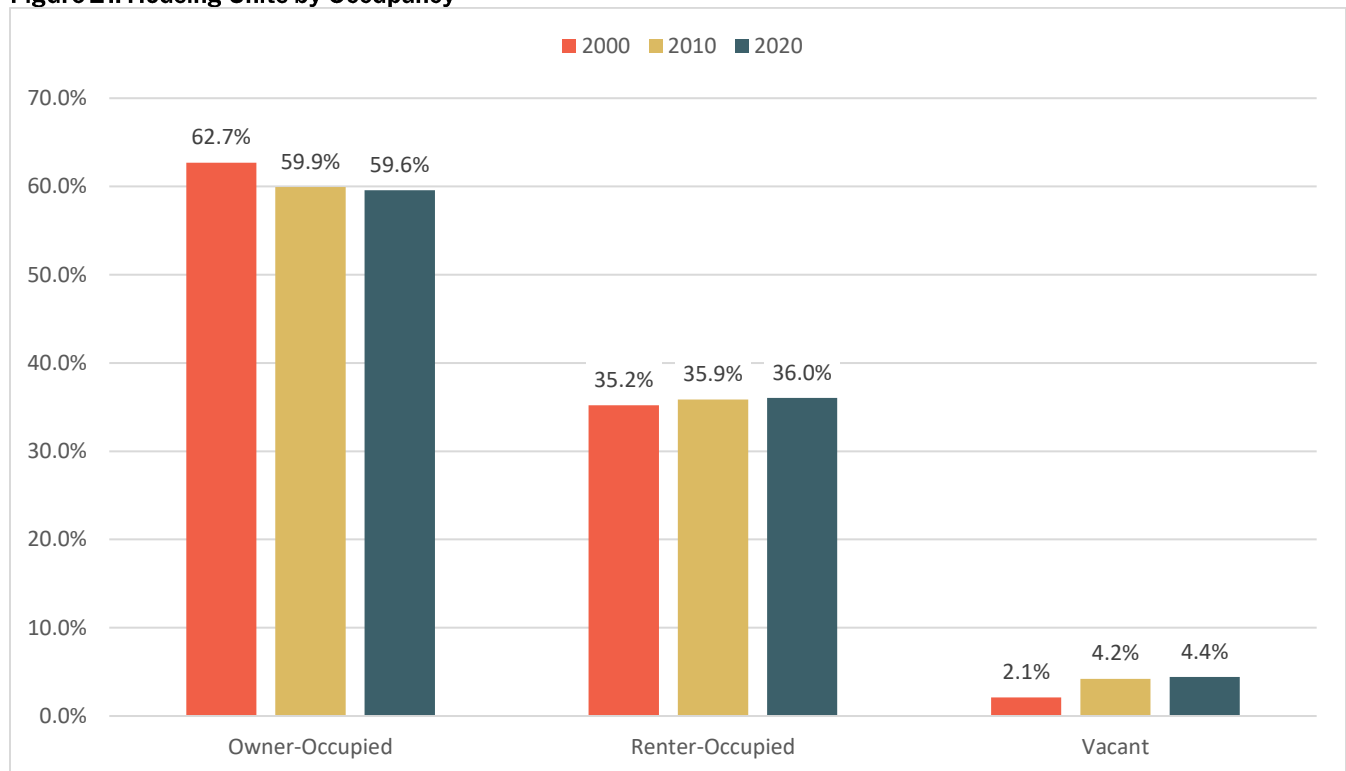
Source: U.S. Census Bureau Decennial Census (2000, 2010), U.S. Census Bureau, ACS, 2020.

SECTION C: STUDENT GENERATION RATES

Student generation rates are a critical component of facility planning. When analyzing the impacts of future residential development, student generation rates are used to project the number of students the District can expect from planned developments. The data is used to determine if and when new school facilities will be needed and to make critical facility decisions, such as potential boundary adjustments or the addition of new classrooms to existing sites. The housing mix of the planned development, including detached units, attached units, apartments, and affordable units, is compared to similar recently constructed housing in and near the District to project how many students will reside in the new development. Then, the number of years a new development will take to be completed is calculated with the projected number of students from the various housing types. This determines how many students from each grade level will be generated over the build-out of the new community.

King Consulting utilized a real estate database to survey 186 single-family detached and 246 multi-family housing units recently constructed within the District. These recently constructed properties were cross-referenced with the 2022-23 SBPSD student list to determine the number of students generated per housing unit by grade level and by housing type. Single-family-attached and affordable student generation rates were determined using rates from other nearby districts in eastern San Mateo County.

Based on this analysis, the TK-8th grade District-wide student generation rates by typology are outlined in Table 7. Student generation rates in SBPSD are lower than in many other areas of the State, again consistent with demographic analysis showing fewer school age children residing in the District. Affordable housing units typically generate the highest number of students, with approximately 22 students expected to be generated for every 100 affordable homes built. Single-family detached housing is the next highest, while single-family attached and multi-family housing units generate fewer students.

Table 7. Student Generation Rates: New Construction

Grade	Single-Family Detached SGR	Single-Family Attached SGR	Multi-Family SGR	Affordable SGR
TK-5	0.086	0.045	0.045	0.135
6-8	0.027	0.028	0.028	0.084
Total TK-8	**0.113**	**0.073**	**0.073**	**0.219**

SECTION D: RESIDENTIAL DEVELOPMENT

It is imperative to monitor residential development, as new development will generate additional students for the school district to house and will affect where and how schools will be constructed as well as the fate of older schools within the District. The San Bruno Park School District serves most of the City of San Bruno and an uninhabited area of San Mateo County. Planning staff at the City of San Bruno were contacted to provide information and documents regarding current and planned residential development.

The City of San Bruno has identified all the active residential development projects in SBPSD that City planning staff believe will be constructed during the planning period through the 2029-30 school year. Table 8 details these projects. It is important to note that additional projects may be approved above and beyond what is shown in Table 8, so the District should continue to work with the City to monitor ongoing development trends. Figure 22 shows the location of these projects.

Table 8. SBPSD Residential Development Projects

Name	Unit Type	Units	Total Students Generated by 2029-30
Mills Park	Multi-Family/Affordable	427	41
Glenview Terrace	Single-Family Detached	29	3
732-740 El Camino Real	Multi-Family/Affordable	136	21
Butler Apartments	Multi-Family	23	2
170 San Bruno Ave	Multi-Family/Affordable	42	4
111 San Bruno Ave	Multi-Family	46	3
Former Engvall Middle School	Single-Family Attached	118	9
Former Crestmoor High School	Single-Family Detached	194	22
Former AT&T Offices	Affordable	320	70
Tanforan	Multi-Family	1,000	73
Total		*2,335*	*248*

Figure 22. SBPSD Residential Development Projects

SECTION E: SPATIAL ANALYSIS

The consultant utilized a computer mapping software, a Geographic Information System (GIS), to map and analyze the San Bruno Park School District. A GIS is a collection of computer hardware, software, and geographic data that allows for the capture, storage, editing, analysis, and display of all forms of geographic information. Unlike a one-dimensional paper map, a GIS is dynamic in that it links location to information in various layers to spatially analyze complex relationships. For example, within a GIS you can analyze and visualize where students live vs. where students attend school.

Combining District-specific GIS data (students, attendance areas, land use data, etc.) with basemap data (roads, rivers, school sites, etc.) enables the District to understand data in news ways and enhance its decision-making processes. Maps showing District current school sites and elementary attendance boundaries are provided in Figure 23 (the District has only one middle school, so there is no attendance boundary for grades 6-8). It is important to note that the District will adopt new elementary school attendance boundaries during the 2022-23 school year to take effect in 2023-24, following the closure of Rollingwood Elementary School.

Figure 23. 2022-23 Elementary School Boundaries
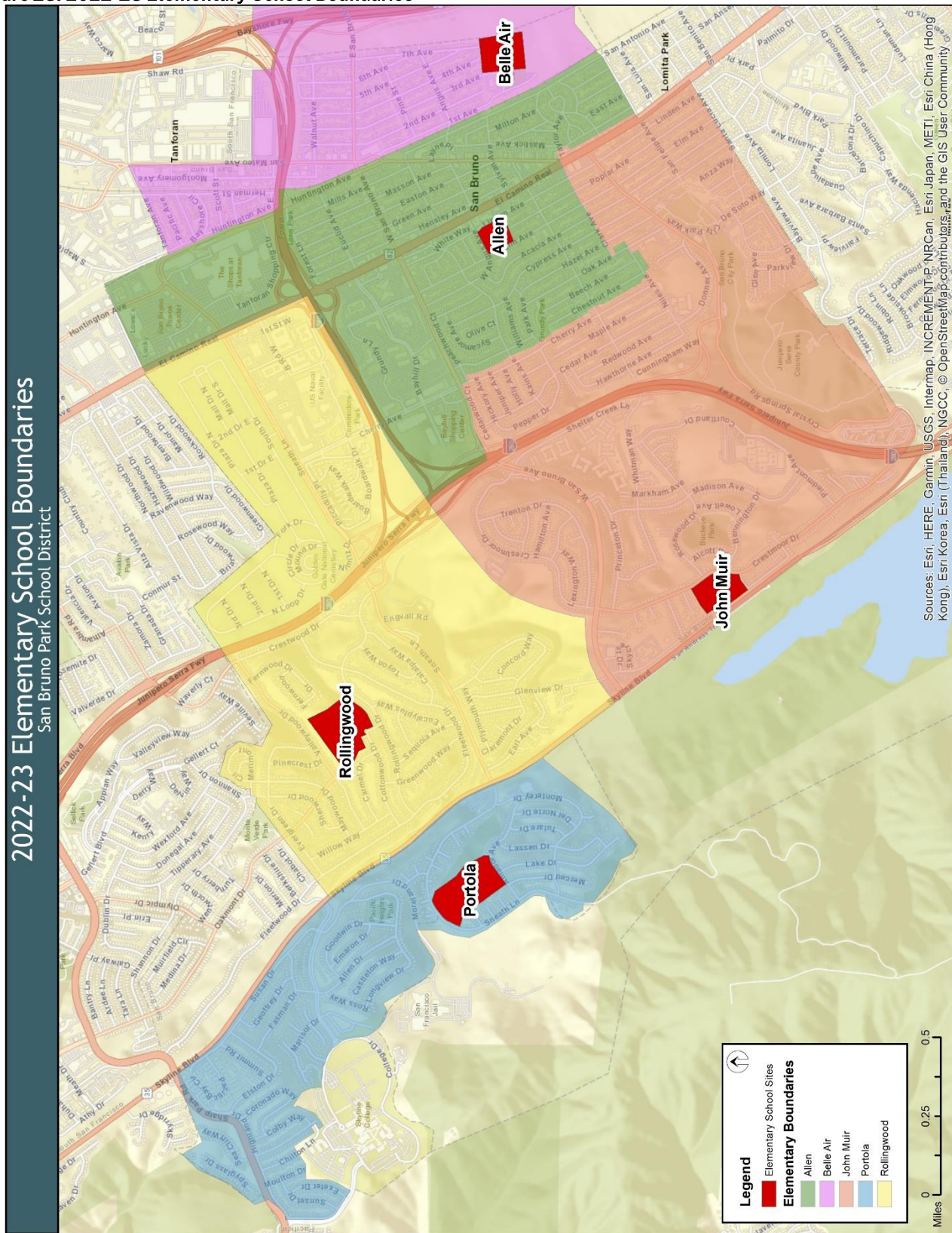
Student Data

King Consulting mapped the 2022-23 student information database by a process called geocoding. The address of each individual SBPSD student was matched in the SBPSD GIS. This resulted in a point on the map for each student (Figure 24). This map demonstrates the distribution of 2022-23 students (or lack thereof) in the various areas of the District, as well as students who reside outside the District.

Figure 24. 2022-23 Student Distribution
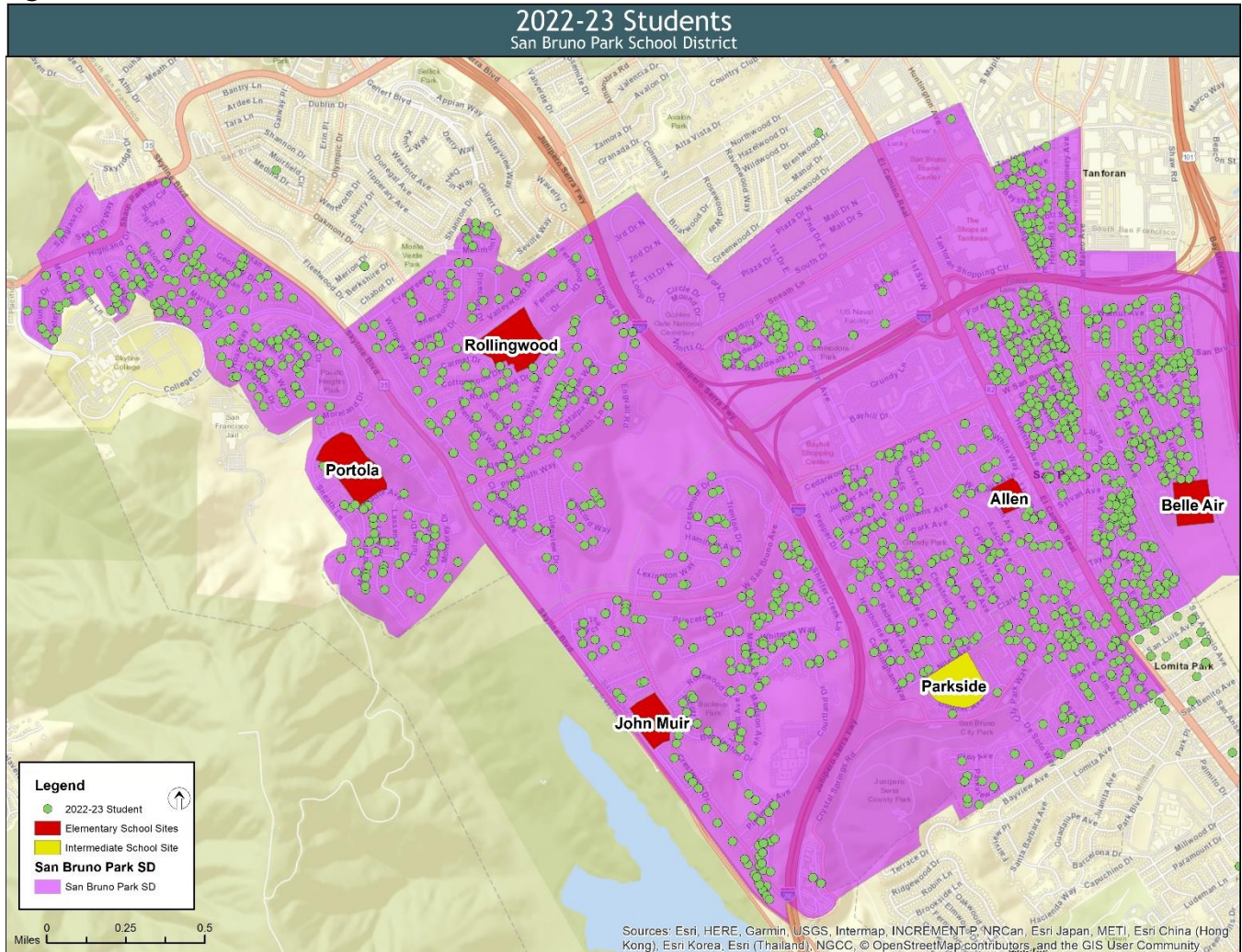
Student Densities

Once the 2022-23 students were mapped, they were analyzed and displayed by grade level. These layers of information provide tools for analyzing enrollments, determining future enrollments, and promoting diversity District-wide.

At the elementary school levels (TK-5th grades) (Figure 25):

1. The highest number of students reside in the John Muir and Allen school boundaries.

2. The fewest number of students reside in the Belle Air and Portola school boundaries.

Figure 25. 2022-23 Elementary School Student Resident Totals

Elementary School Student Resident Totals
San Bruno Park School District

Belle Air
193

Allen
368

John Muir
371

Rollingwood
234

Portola
198

Miles
0   0.25   0.5

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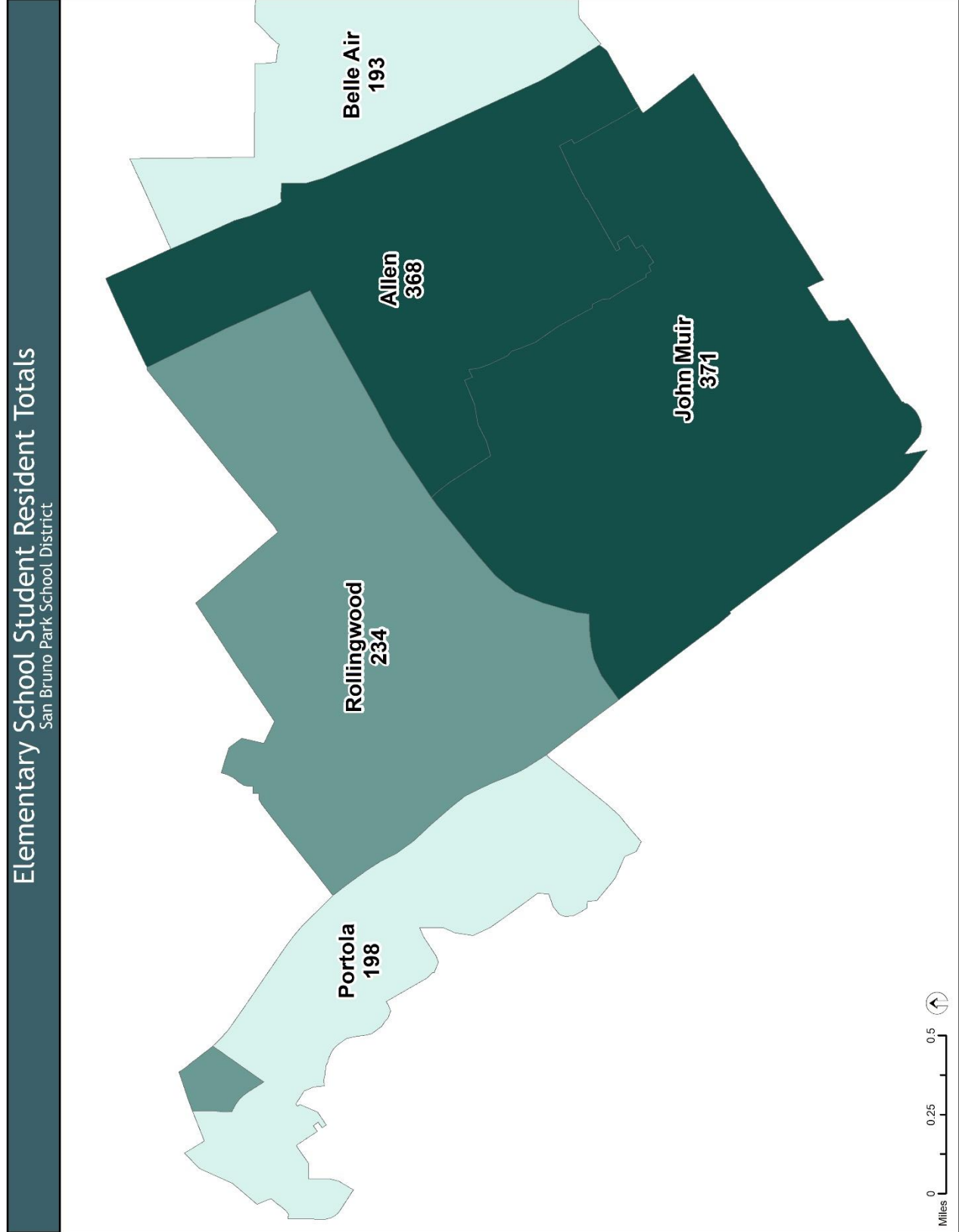
Attendance Matrices

An important factor in analyzing the SBPSD student population is determining how each school is serving its neighborhood population. Attendance matrices are included to provide better understanding of where students reside versus where they attend school. The tables on the following pages compare the 2022-23 SBPSD students by their school of residence versus their school of attendance[1].

In-migration refers to students attending a school but not residing in its zone. Out-migration refers to students leaving their school zone to attend a different SBPSD school. Students who live outside of SBPSD are included in the analysis of in-migration. This detailed analysis demonstrates the District is experiencing high rates of in-migration and out-migration across many of its school sites.

Elementary School Matrix

Table 9 demonstrates the rates of elementary in-migration; from 10.3% at Allen to 31.3% at Belle Air elementary school (in other words, 31.3% of Belle Air enrollment is comprised of students not residing within the Belle Air boundary).

Likewise, the matrix also demonstrates the rates of elementary out-migration; from 6.5% at John Muir to 32.5% at Rollingwood elementary school (in other words, 32.5% of the elementary students residing in the Rollingwood elementary school boundary attend a school other than Rollingwood).

Figures 26 and 27 demonstrate the rates of in and out-migration for all elementary schools. Figure 28 demonstrates the elementary school student net migration. Net migration is the difference between the number of students migrating into the school and the number of students migrating out of the school boundary. Net migration only counts students migrating into or out of one of the SBPSD elementary schools and is meant to compare these schools to each other in terms of where SBPSD students are choosing to attend. Inter-district students are not included in this analysis.

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[1] These student totals were derived from the geocoded 2022-23 student list and therefore may not precisely match the 2022-23 SBPSD enrollment data totals as reported to CDE.

Table 9. Elementary Attendance Matrix

		School of Residence						
		Allen	Belle Air	John Muir	Portola	Rollingwood	Other Districts	Total Attending
School of Attendance	Allen	**270**	7	7	1	7	9	**301**
	Belle Air	46	**165**	5	1	8	15	**240**
	John Muir	28	9	**347**	2	14	4	**404**
	Portola	11	6	5	**184**	46	4	**256**
	Rollingwood	10	5	5	8	**158**	4	**190**
	Other	3	1	2	2	1	1	**10**
	Total Residing	**368**	**193**	**371**	**198**	**234**	**37**	**1,401**

	Allen	Belle Air	John Muir	Portola	Rollingwood
% In-Migration	10.3%	31.3%	14.1%	28.1%	16.8%
% Out-Migration	26.6%	14.5%	6.5%	7.1%	32.5%

	Allen	Belle Air	John Muir	Portola	Rollingwood
Net Migration between Attendance Areas	-73	33	31	56	-47

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Figure 26. Elementary School Student In-Migration

Elementary School In-Migration Rates
San Bruno Park School District

Belle Air
31.3%

Allen
10.3%

John Muir
14.1%

Rollingwood
16.8%

Portola
28.1%
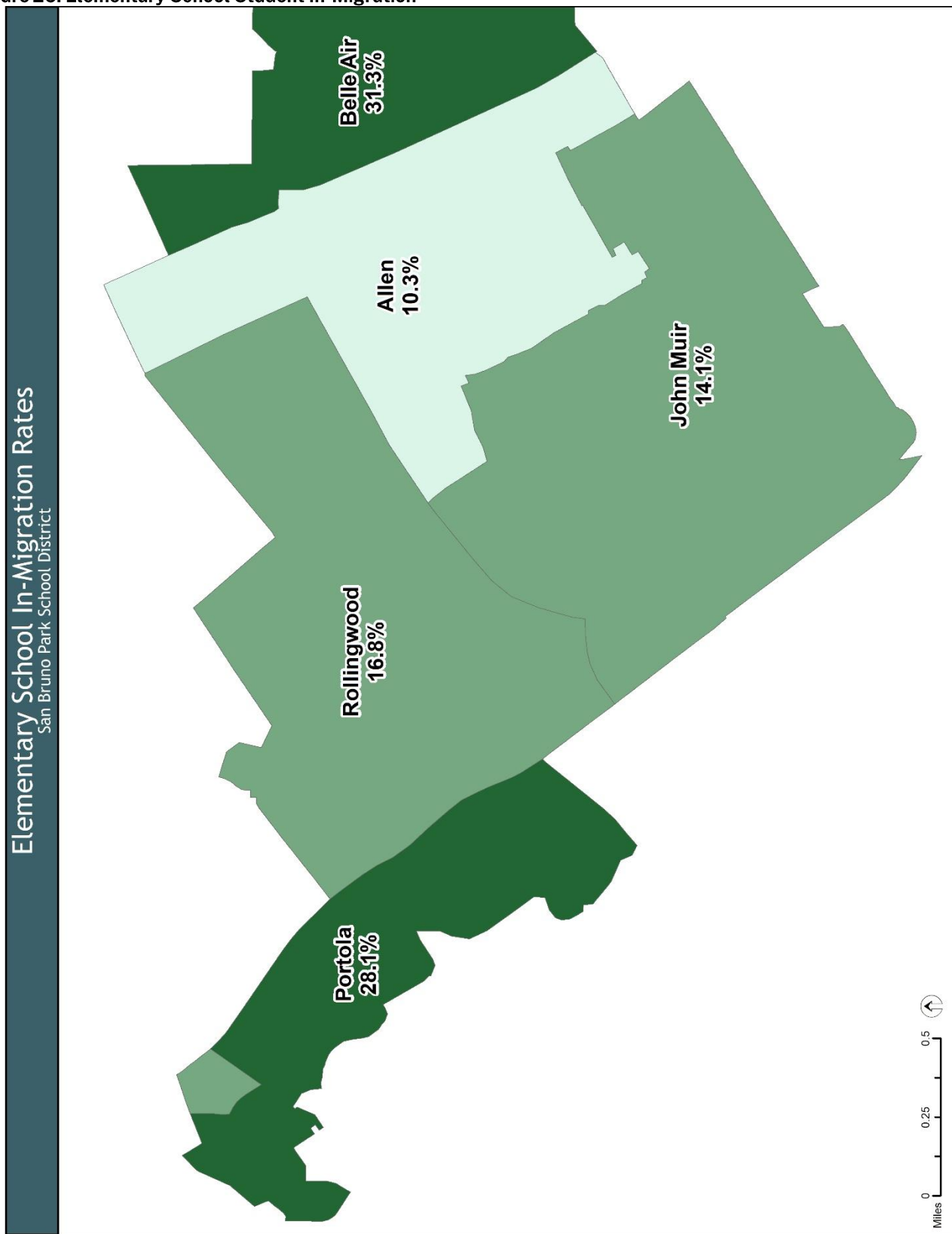
Figure 27. Elementary School Student Out-Migration

Elementary School Out-Migration Rates
San Bruno Park School District

Belle Air
14.5%

Allen
26.6%

John Muir
6.5%

Rollingwood
32.5%

Portola
7.1%

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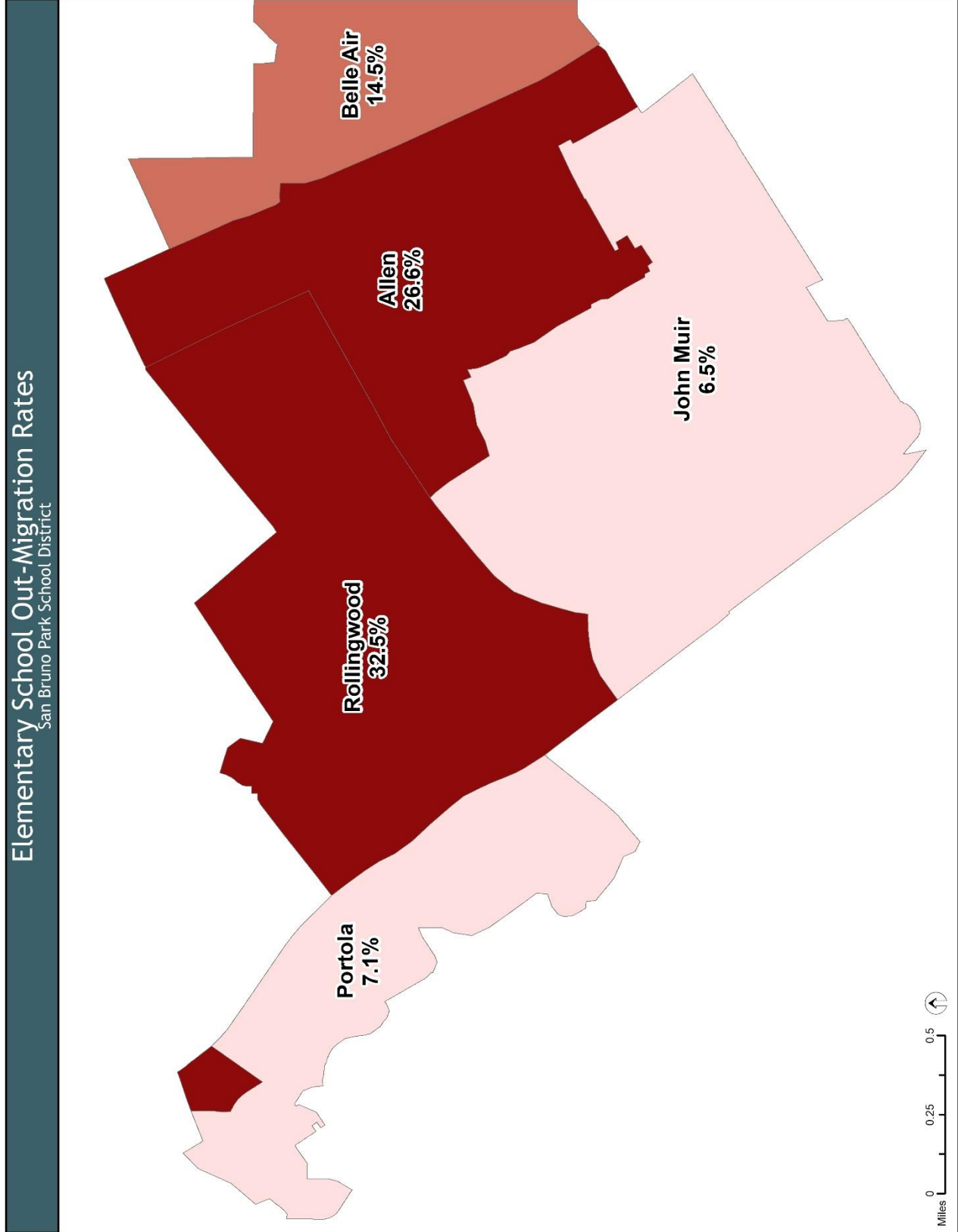
Figure 28. Elementary School Student Net Migration
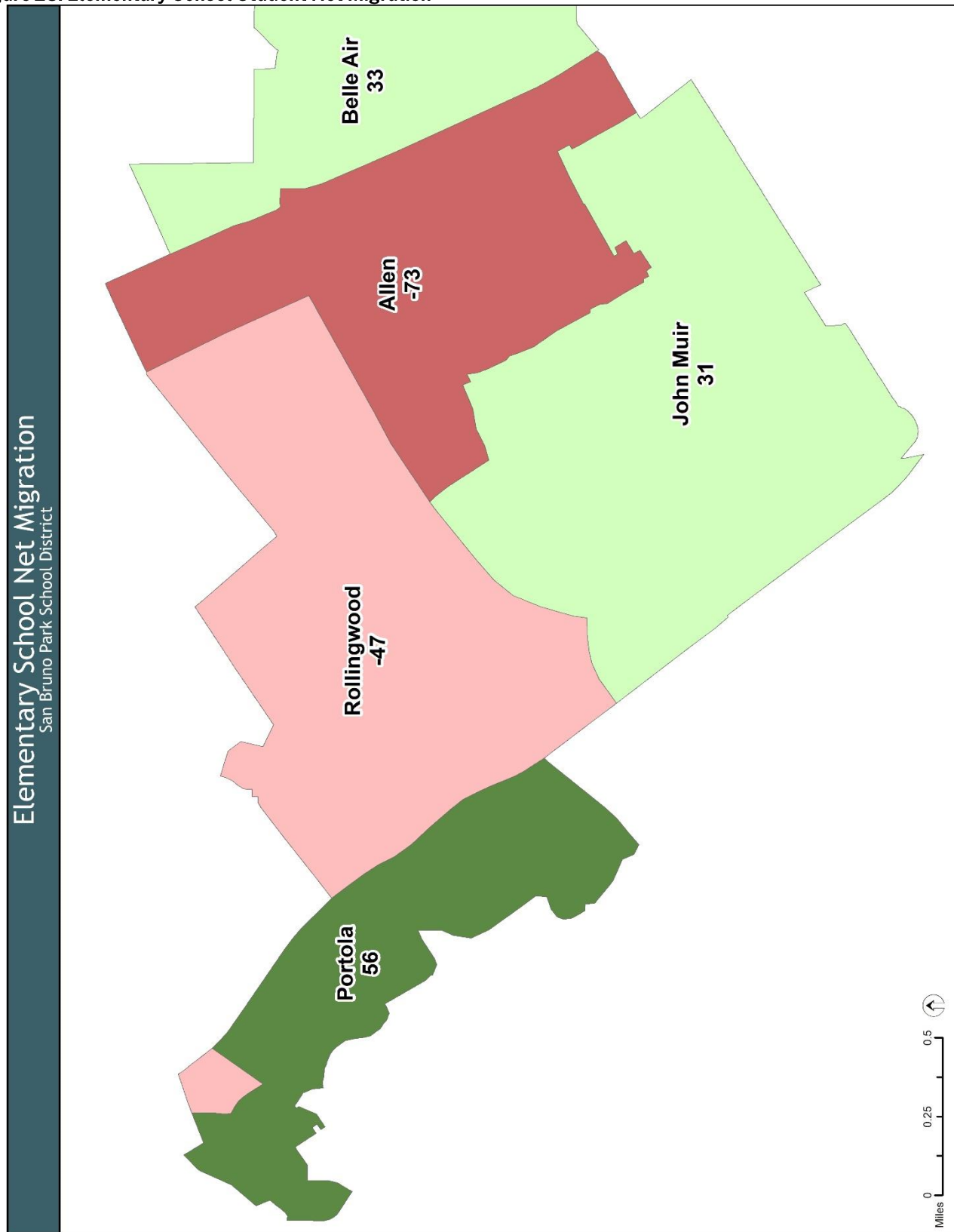
Non-Resident Student Trends

Non-Resident Students Enrolled at SBPSD

SBPSD students residing outside of the District were isolated and measured for purposes of evaluating the impact to District enrollments and District facilities. Currently, there are 90 non-resident students enrolled in SBPSD representing 4.5% of the District's 2022-23 TK-8th grade enrollment. Figure 29 depicts the current year non-resident students by their city of residence according to official residence address. The portions of the City of San Bruno not assigned to SBPSD represent the largest number of non-resident students, with South San Francisco next.

Figure 29. 2022-23 Non-Resident Students Enrolled in SBPSD by City of Residence
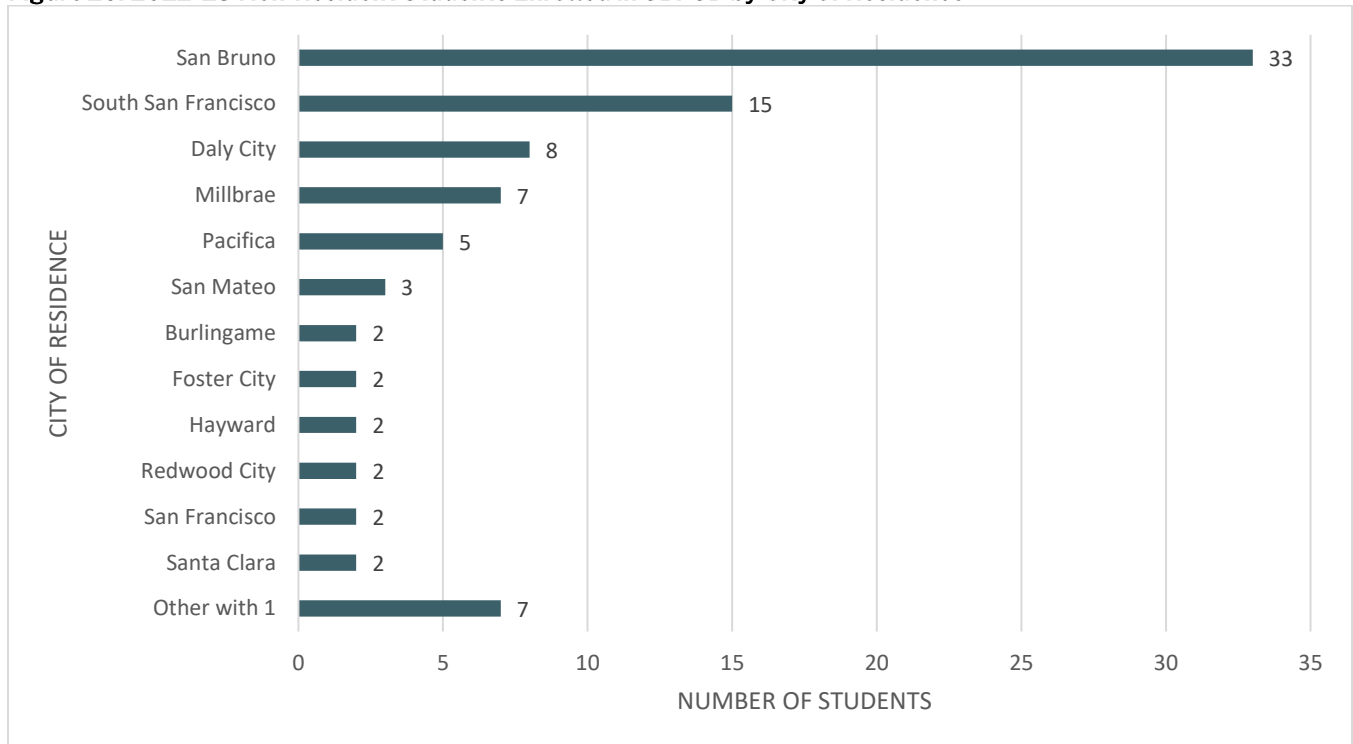
SECTION F: ENROLLMENT PROJECTIONS

To effectively plan for facilities, boundary changes, or policy changes for student enrollments, school district administrators need an enrollment projection. King Consulting prepared 7-year enrollment projections for SBPSD utilizing the industry standard cohort "survival" methodology. While based on historical enrollments, the consultant adjusts the calculation for:

1. Historical and projected birth data (used to project future TK and kindergarten students);

2. The addition of students generated by residential development;

3. Weighting or de-weighting anomalous years of student migration.

Historical and Projected Birth Data

Close tracking of local births is crucial for projecting future kindergarten students. Births are the single best predictor of the number of future kindergarten students to be housed by the District. Birth data is collected for the San Bruno Park School District by the California Department of Health Services using ZIP Codes[2] and is used to project future kindergarten and transitional kindergarten class sizes.

Since 2007, births in California have declined significantly (Figure 30). In 2021, Californians gave birth to 418,533 children, setting a record low since 1990 for the seventh straight year. The one-year decrease in births recorded in 2020 was the largest since 1995. Women in California continue to put off having children until later in life. Recent birth rates in California fell for mothers under 30 but rose for mothers 30 and older.

In San Mateo County, births followed a similar pattern with a recent peak in 2007 followed by decreasing births. From 2007 to 2021, births decreased by 24.7% (Figure 31). 2021 births in San Mateo County totaled 7,463, the lowest total since 1978.

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[2] The consultant utilized ZIP Code 94066.

Figure 30. California Births: 1991-2021
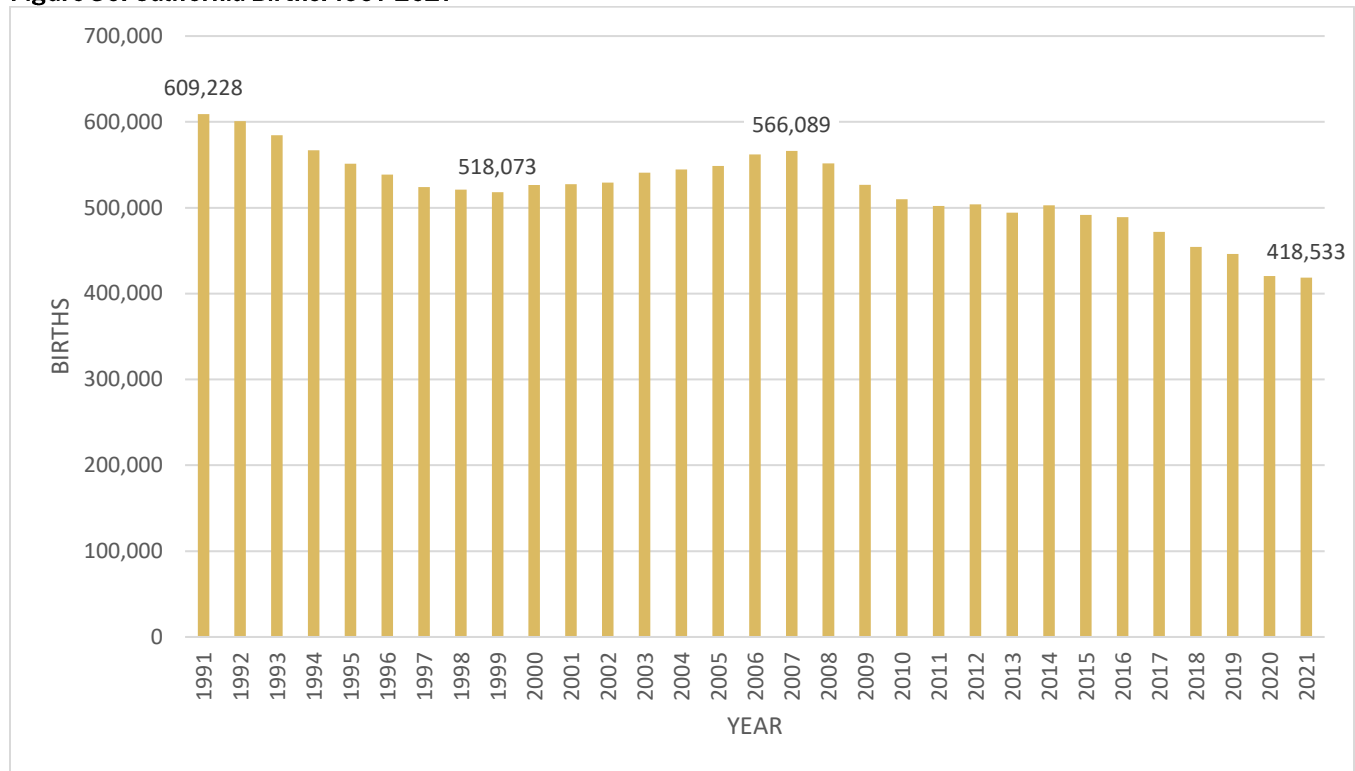
Source: California Department of Public Health.

Figure 31. San Mateo County Births: 1991-2021
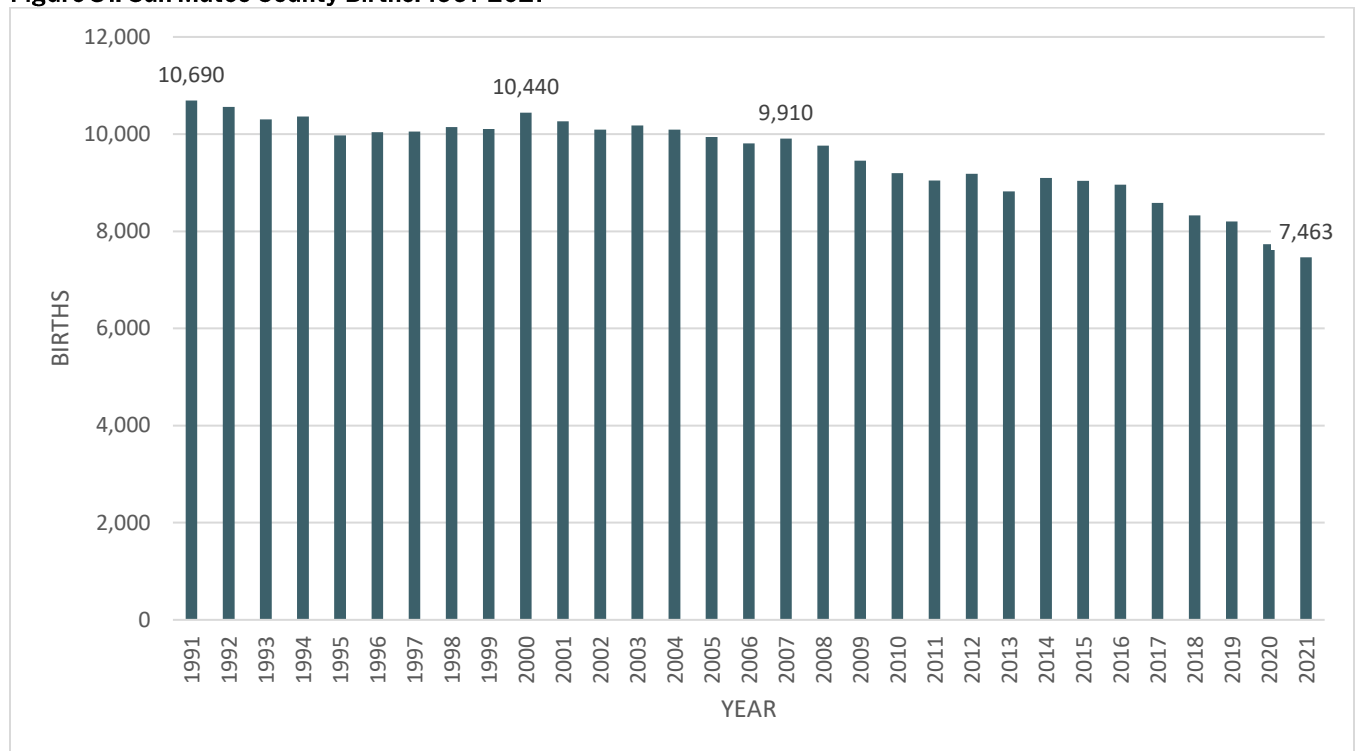
Source: California Department of Public Health.

Births in the San Bruno Park School District have differed slightly from State and County trends while still decreasing in recent years. Local births did not decrease in the early part of the last decade, with peak births having been recorded in 2014. Since then, however, births **declined by 30.9%** to 400 in 2021. The last three years of births represent the four lowest birth years on record in SBPSD since at least 1982. Figure 32 demonstrates the total number of recorded births between 2000 and 2021 in the San Bruno Park School District.

Figure 32. SBPSD Births: 2000-2021
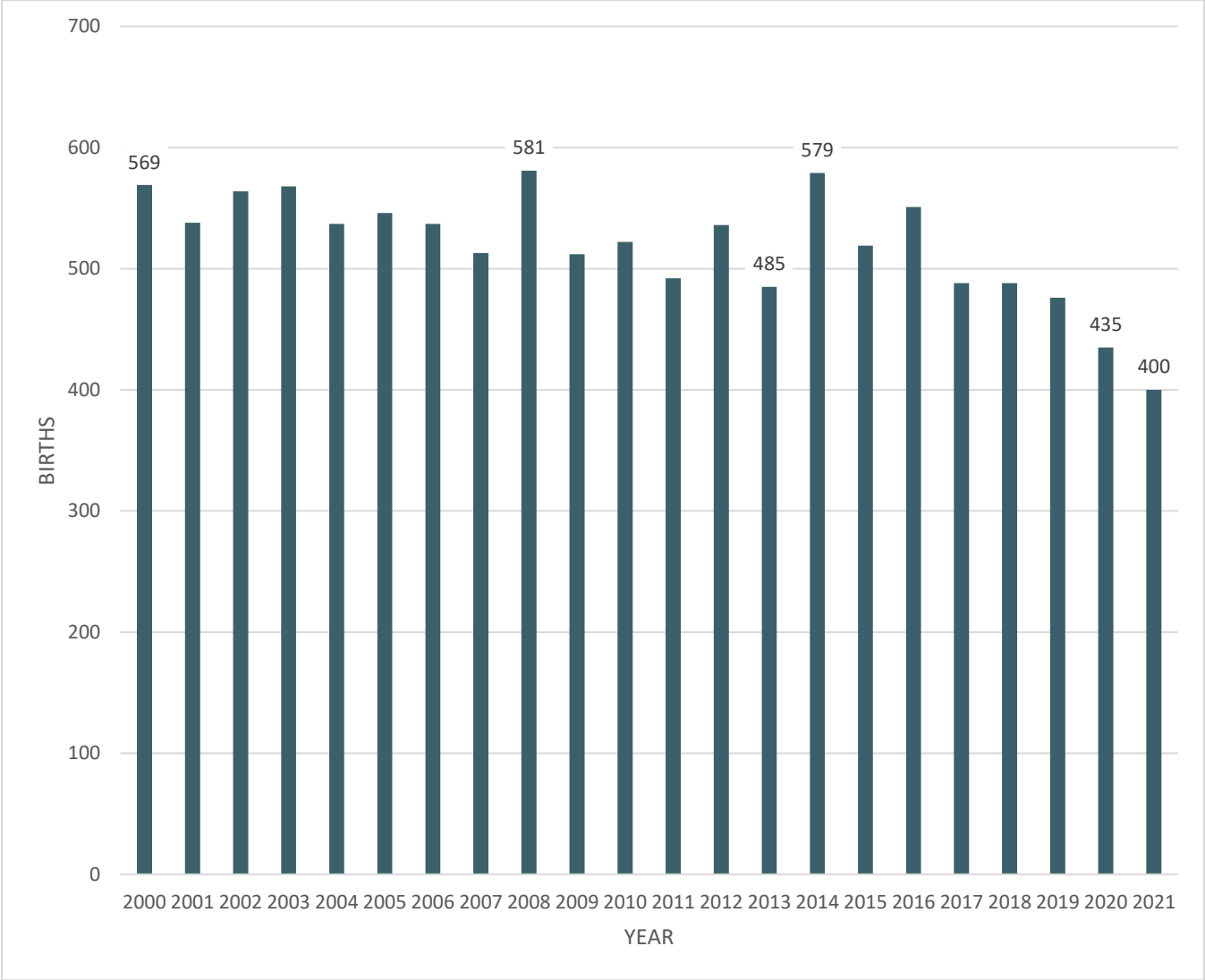
Source: California Department of Public Health.

The number of children born to parents who live in SBPSD is correlated with the size of the incoming kindergarten cohort five years later. Therefore, King Consulting uses recent birth data as the most important factor when projecting future kindergarten students for SBPSD to house. Figure 33 demonstrates this relationship.

Figure 33. Births Compared to Kindergarten Enrollments (Lagged 5 Years)
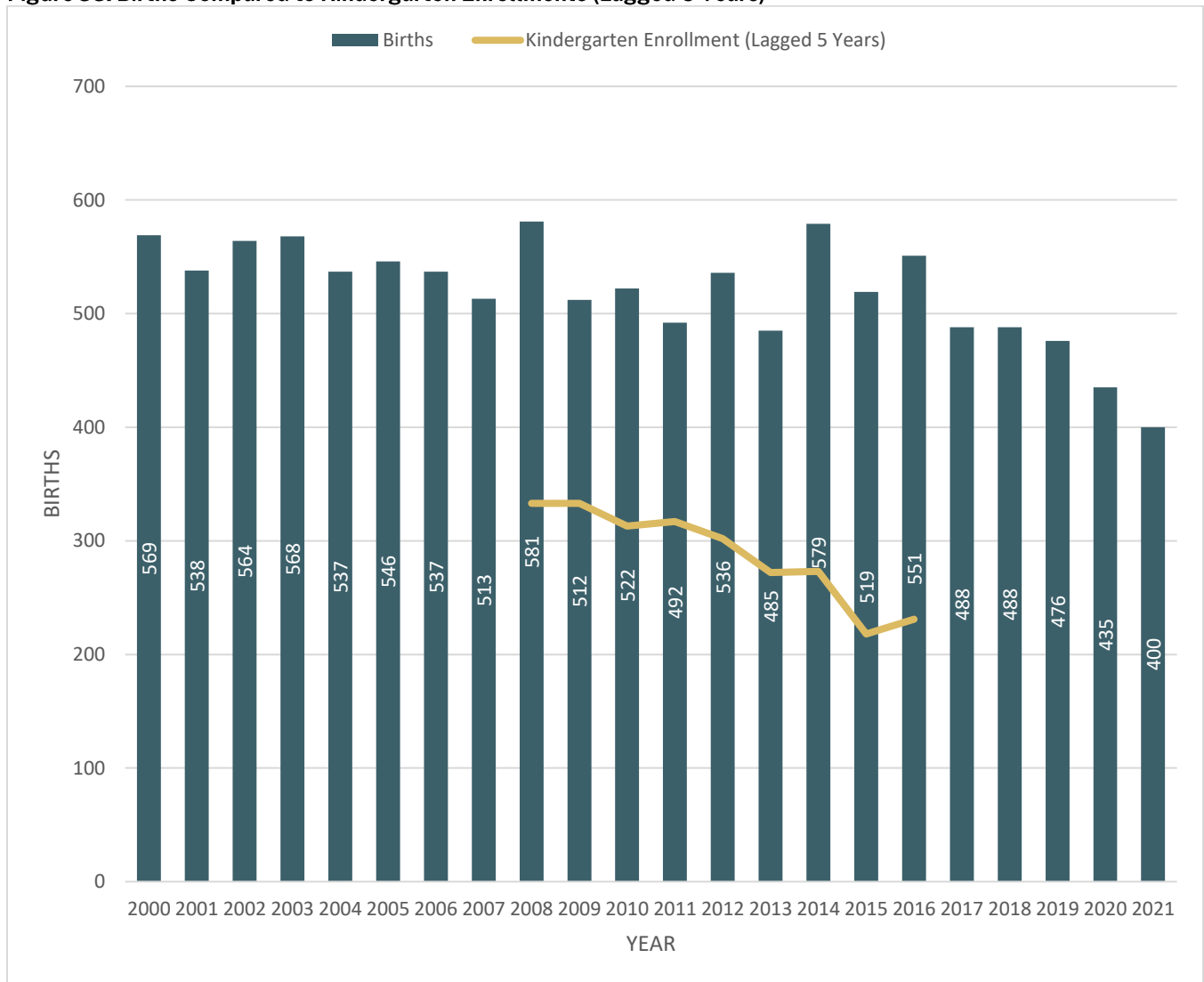
Source: California Department of Public Health and CDE.

There is rarely a one-to-one correspondence between births and subsequent kindergarten enrollments. Table 10 and Figure 34 demonstrate the birth-kindergarten, as well as the birth-transitional kindergarten ratios. The ratios provide the percentage of births that result in kindergarten enrollments in the District five years later or transitional kindergarten enrollments four years later. It is a net rate because children move both into and out of the District. The ratio of SBPSD births to SBPSD kindergarten enrollments decreased in recent years, with the years most affected by the COVID-19 pandemic (2020 and 2021) showing the lowest ratios. Currently, the birth-to-kindergarten ratio is 0.44, meaning that for every 100 births in 2017, approximately 44 children enrolled in SBPSD kindergarten classes five years later (in 2022). The transitional kindergarten ratio is currently 0.14, which compares TK enrollments to births from four years ago (in 2018). The birth-to-kindergarten ratios are analyzed, and statistical calculations are applied to estimate future birth-to-kindergarten ratios.

Table 10. Birth-Kindergarten and Birth-Transitional Kindergarten Ratios

Birth Year	Births	Kindergarten Year	Kindergarten Enrollment	Ratio of Births to Kindergarten Enrollment	Transitional Kindergarten Enrollment	Ratio of Births to TK Enrollment
2008	581	2013-14	333	0.57	41	0.08
2009	512	2014-15	333	0.65	57	0.11
2010	522	2015-16	313	0.60	52	0.11
2011	492	2016-17	317	0.64	54	0.10
2012	536	2017-18	302	0.56	58	0.12
2013	485	2018-19	272	0.56	41	0.07
2014	579	2019-20	273	0.47	46	0.09
2015	519	2020-21	218	0.42	42	0.08
2016	551	2021-22	231	0.42	33	0.07
2017	488					
2018	488					
2019	476					
2020	435					
2021	400					

Figure 34. Birth-Kindergarten and Birth-Transitional Kindergarten Ratios
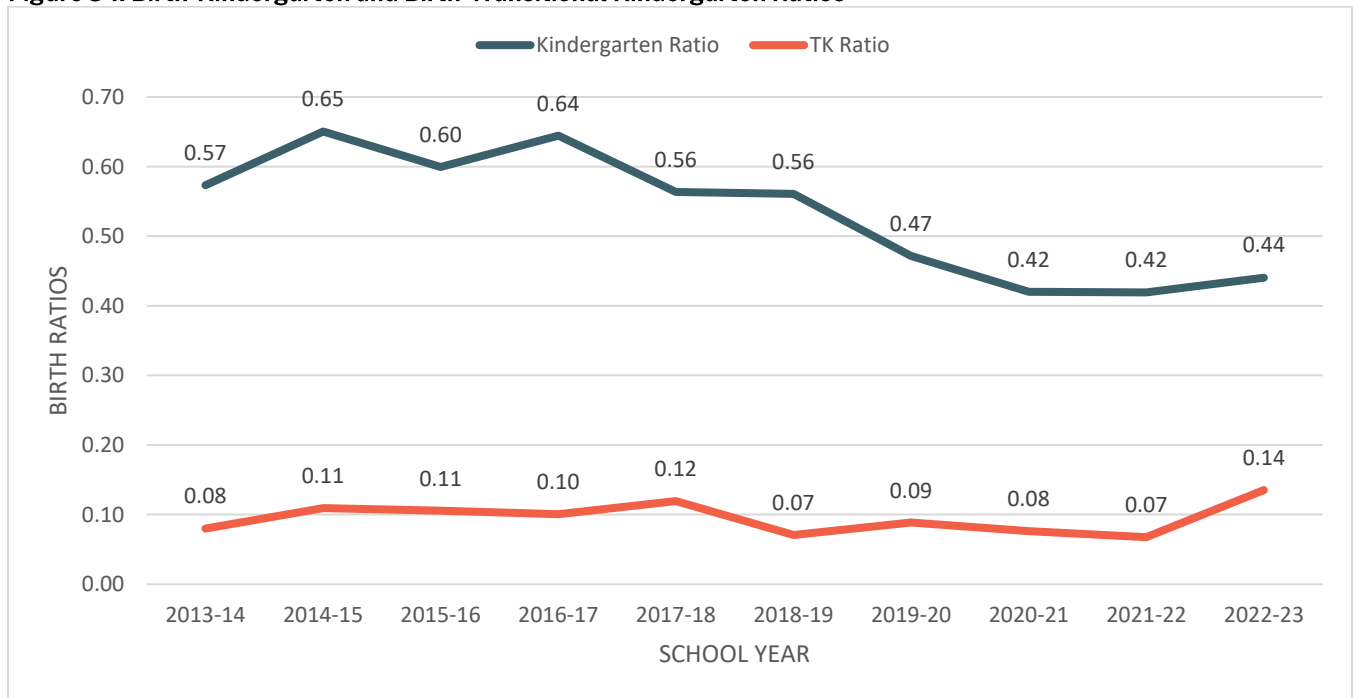
The projected birth-to-kindergarten ratios are multiplied by the number of births each year to project future kindergarten enrollments. King Consulting anticipates the birth to kindergarten ratio will remain around 2022 levels, slightly higher than the artificially reduced rates observed during the COVID-19 pandemic. To project kindergarten classes beyond 2026, births are projected based on mathematical trends and projection from the California Department of Finance.

Student Migration Rates

The methods of projecting student enrollment in grades 1st-8th involve the use of student migration rates. A migration rate is simply how a given cohort changes in size as it progresses to the next grade level.

1. Positive migration occurs when a District gains students from one grade into the next grade the following year. For example, a cohort of 100 1st grade students becomes a cohort of 125 2nd grade students the following year. In this case, 25 new students enrolled in the District who were not enrolled the prior year[3].

   a. Positive migration could be indicative of numerous influences, including the in-migration of families with young children to the District, private to public school transfers, new residential construction, District policy changes, school closures in adjacent Districts, etc.

2. Negative migration occurs when a District loses students from one grade into the next grade the following year. For example, a cohort of 100 1st grade students becomes a cohort of 75 2nd grade students the following year. In this case, 25 students who were present the prior year are not enrolled in the current year.

   a. These losses could be indicative of numerous influences including the closure of schools, District policy changes restricting inter-district transfer students, losses to private and charter schools or other Districts, out-migration of families due to economic decline, etc.

As an example, in 2021-22 the District's cohort of 7th graders numbered 234 students. A year later, this cohort became an 8th grade class of 229 students. Using this example, the rate of migration is calculated in the following way:

$$(229-234)/234 = -2.1\%$$

The 2.1% decrease is a measure of the likelihood that a 7th grade cohort will become larger or smaller as it advances into 8th grade the following year. Migration rates are calculated for all grade levels by year and then analyzed by the current grade level configuration to find an average rate of change. Exceptionally high or low migration numbers are usually given lower weight in the calculations, and more recent data is typically given a higher weight.

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[3] These are net measurements.

Overall, SBPSD experienced entirely negative cohort migration over the last decade, with particularly negative migration between 2020 and 2021 (Figure 35). Migration into 2022 of the previous year's grades K-7 into grades 1-8 was a net loss of 5.8%, which is consistent with trends recorded over the previous decade.

Figure 35. Migration Grades K-7 > Grades 1-8
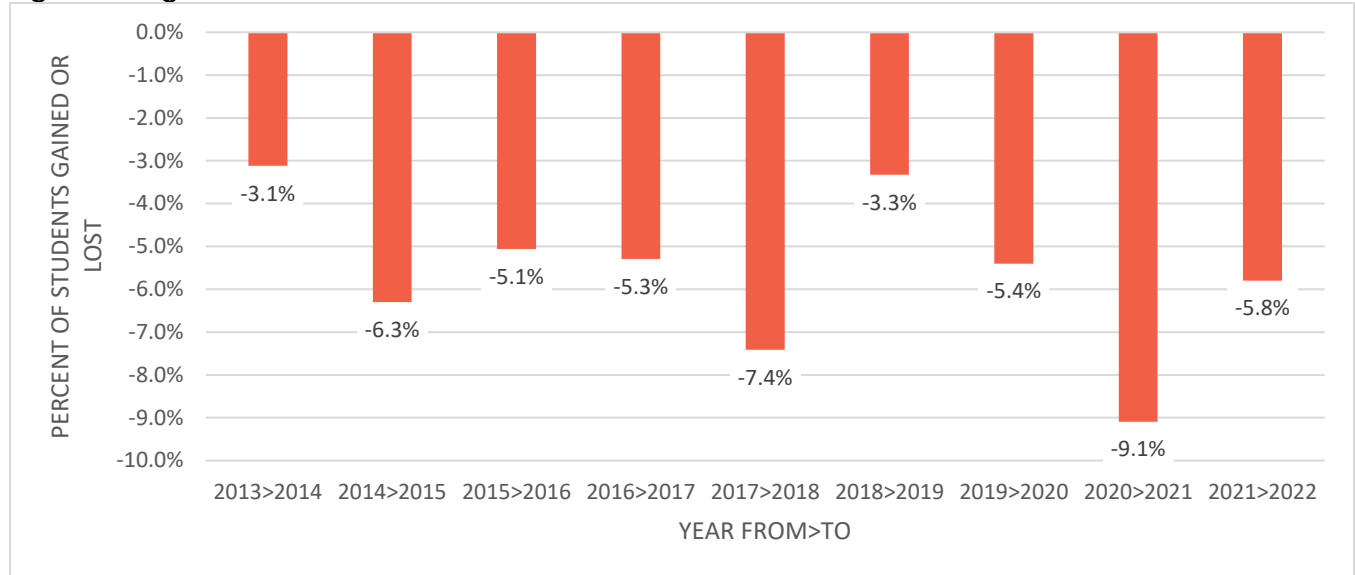
A closer examination of SBPSD migration by grade level shows additional trends at the elementary grades (Figure 36). Migration into grades 1-5 was most negative the year after El Crystal elementary school closed, and was less negative than other recent years in 2022.

Figure 36. Migration Grades K-4 > Grades 1-5
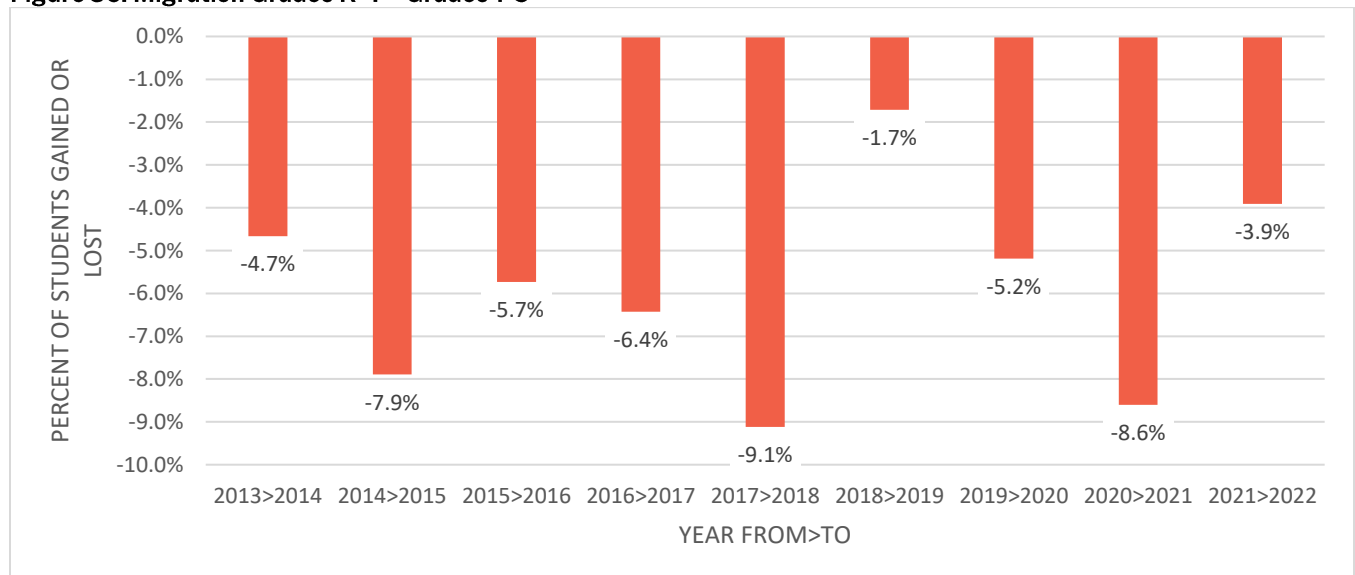
Meanwhile, middle school grade migration rates show an opposite trend (Figure 37). 2021 and 2022 demonstrated more net losses of students, especially between grades 5 and 6.

Figure 37. Migration Grades 5-7 > 6-8
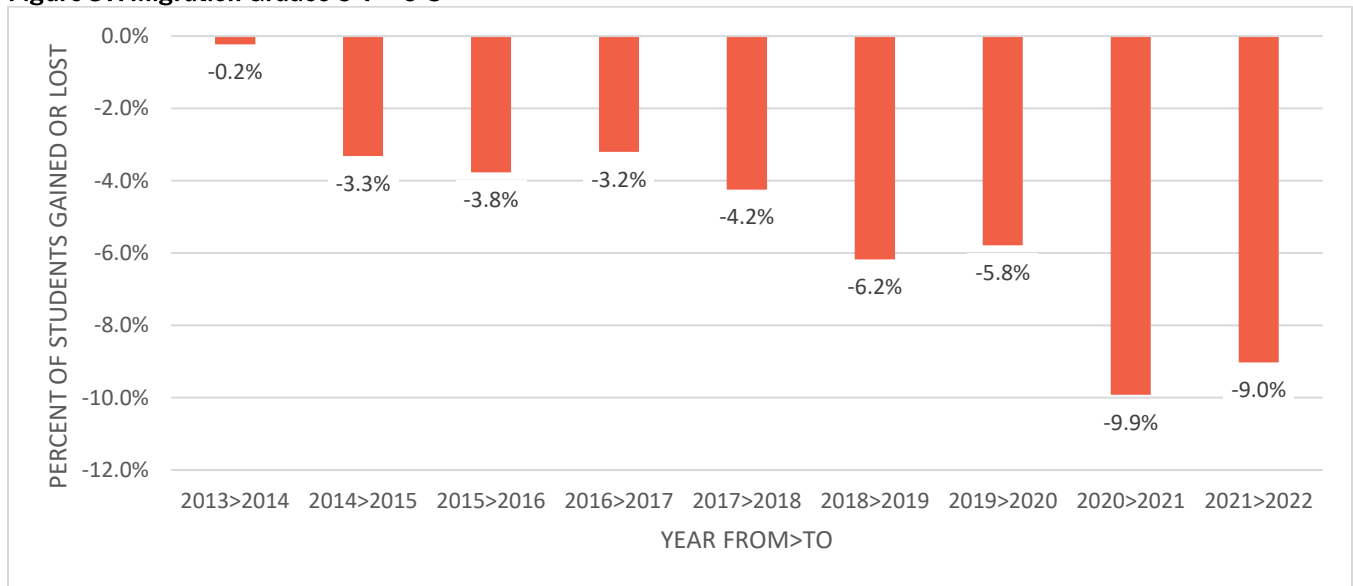
Enrollment Projections

The benefit of tracking district demographic trends is the ability to utilize the trend data to project future enrollment. Predicting future enrollment is an important factor affecting many school processes: long-range planning, budgeting, staffing, and anticipating future building and capital needs. King Consulting has utilized several tools to project future enrollment, including the most major factors of cohort growth, birth rates, and residential construction patterns.

The cohort survival method is the standard demographic technique for projecting enrollments. This method was utilized to project enrollments for SBPSD. Using this method, the current student body is advanced one grade for each year of the projection. For example, year 2022 first graders become year 2023 second graders, and the following year's third graders, and so on. As a cohort moves through the grades, its total population will, as demonstrated above, most likely change.

Enrollment projections were prepared by calculating births, birth-to-kindergarten and birth-to-TK ratios, grade-to-grade migration rates, student generation rates, and residential development, along with special consideration of how to factor in recent migration rates and the potential impact of COVID-19. King Consulting calculates three distinct enrollment projections: a Low projection, a Moderate projection, and a High projection. Since recent birth to kindergarten ratios and grade-to-grade migration rates have demonstrated significant variability, there is a range of plausible outcomes for the District's future enrollment, especially in the short term. By providing a range of enrollment projections that account for the record high and low input factors observed in the last few years, SBPSD can plan for a range of valid possibilities that will be defined by the High and Low projections.

The Moderate projection is recommended for planning purposes, and this projection carefully balances the various input factors for a long-term balanced approach that is most likely to hold up over time. Individual

school projections were not prepared at this time, due to the pending boundary changes that will greatly impact future enrollments at each school site after this year.

Moderate Enrollment Projection

Table 11. SBPSD Moderate 7-Year Enrollment Projection

Grade		20-21	21-22	22-23		23-24	24-25	25-26	26-27	27-28	28-29	29-30
TK		42	33	65		92	106	138	153	159	162	169
K		218	231	216		216	208	190	175	191	191	189
1		262	232	228		218	215	218	197	179	193	193
2		250	224	221		213	203	210	208	187	168	179
3		271	223	212		209	200	201	204	199	176	159
4		255	242	222		208	202	204	202	201	194	171
5		259	227	224		207	193	198	196	190	187	181
6		251	215	187		190	174	173	173	168	162	158
7		236	234	199		177	177	173	168	165	158	153
8		230	223	229		196	174	184	175	168	163	156
TK-5		1,557	1,412	1,388		1,363	1,328	1,360	1,335	1,305	1,270	1,241
6-8		717	672	615		563	525	529	516	501	482	466
Total		**2,274**	**2,084**	**2,003**		**1,926**	**1,852**	**1,889**	**1,850**	**1,807**	**1,752**	**1,707**

Based on the SBPSD District-wide Moderate enrollment projection, the District's enrollment will continue to decrease, even with additional eligible TK students being added each of the next three years as the program expands to a new grade level, as well as the addition of students who will move to the District from new residential development. These factors are projected to keep elementary enrollment close to current levels for a few years before the demographic factors of a continually shrinking population of school age children and low local births again lead to smaller cohorts replacing larger cohorts and driving enrollment down. Absent residential development, this projection would be even lower. It is important to note that in the furthest years of the enrollment projection, changes to demographic trends or development levels could lead to different outcomes, so the District should update these projections regularly.

- Total SBPSD enrollment is projected to decrease from 2,003 in the current year to 1,707 by 2029-30 (minus 296 or 14.8%).

- TK-5th grade enrollment will decrease from 1,388 to 1,241, due to the increase of TK enrollment into a new full grade level over the next four years and new students from development (minus 147 or 10.6%).

- 6th-8th grade enrollment will decrease from 615 to 466 as current larger cohorts who originated from years of higher birth totals are replaced by increasingly smaller cohorts who have already entered and are expected to continue entering the District (minus 149 or 24.2%).

Low Enrollment Projection

Table 12. SBPSD Low 7-Year Enrollment Projection

Grade	20-21	21-22	22-23		23-24	24-25	25-26	26-27	27-28	28-29	29-30
TK	42	33	65		83	95	125	138	143	146	153
K	218	231	216		207	200	193	174	187	185	183
1	262	232	228		216	204	207	198	175	187	185
2	250	224	221		211	199	198	195	185	163	172
3	271	223	212		207	196	196	191	186	173	153
4	255	242	222		205	198	198	194	186	179	166
5	259	227	224		206	190	193	189	182	172	166
6	251	215	187		187	170	168	166	160	152	143
7	236	234	199		175	172	168	161	157	148	142
8	230	223	229		195	171	178	169	160	154	146
TK-5	1,557	1,412	1,388		1,335	1,281	1,309	1,278	1,244	1,204	1,177
6-8	717	672	615		557	513	513	496	478	455	431
Total	**2,274**	**2,084**	**2,003**		**1,892**	**1,794**	**1,823**	**1,775**	**1,722**	**1,659**	**1,608**

High Enrollment Projection

Table 13. SBPSD High 7-Year Enrollment Projection

Grade	20-21	21-22	22-23		23-24	24-25	25-26	26-27	27-28	28-29	29-30
TK	42	33	65		101	116	151	168	174	178	186
K	218	231	216		232	224	216	195	210	208	205
1	262	232	228		221	234	237	225	201	214	212
2	250	224	221		216	209	231	229	216	191	202
3	271	223	212		212	205	209	227	221	206	183
4	255	242	222		210	207	212	211	225	218	202
5	259	227	224		209	197	204	205	202	212	206
6	251	215	187		192	178	178	180	178	173	180
7	236	234	199		178	180	178	174	173	168	164
8	230	223	229		198	177	188	181	176	172	167
TK-5	1,557	1,412	1,388		1,402	1,394	1,460	1,459	1,448	1,426	1,396
6-8	717	672	615		568	534	544	535	526	513	512
Total	**2,274**	**2,084**	**2,003**		**1,970**	**1,928**	**2,005**	**1,995**	**1,975**	**1,939**	**1,907**

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SECTION H: CONCLUSION AND RECOMMENDATIONS

SBPSD continues to shift demographically, with increasingly fewer births, and therefore, increasingly smaller cohorts of students entering the District each year. Since the cohorts currently set to matriculate from the District into high school originated as larger kindergarten cohorts almost a decade ago, the difference in size between new incoming kindergarten cohorts and those outgoing cohorts is substantial right now, and every year this disparity, absent other considerations, would cause a drop in total enrollment for the District. However, new residential development and the rollout of universal transitional kindergarten are projected to offset these demographic factors to some extent, leading to more stable elementary school enrollment for SBPSD in the coming years even as middle school enrollment continues to steadily decrease.

Although elementary enrollment will remain near current levels, the District should carefully consider the proportionally increased need for more classrooms for its youngest students. Other specific capacity considerations must wait to be addressed until the District completes its process for establishing updated elementary school boundaries with the upcoming closure of Rollingwood Elementary at the conclusion of the 2022-23 school year. Based on the analysis contained in this report, the following steps are recommended for the District to consider as it works to meet its future facility needs, keeping in mind that some recommendations may be constrained by broader fiscal and policy issues:

1. The District should plan for how it will house the additional Transitional Kindergarten students it will enroll.
2. Continue to closely monitor residential development throughout the District, as increased enrollments in these areas can impact existing school facilities even as total enrollment decreases.
3. Update this study regularly to capture emerging demographic trends and updates to residential development expectations.
4. Additional recommendations may be developed for the final version of this document after coordination with District staff and/or the Board of Education.

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