



**OFFICE OF THE SUPERINTENDENT**

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**TO:** Board of Education

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By: er

**TITLE:** Administrative Regulation 3650 Enrollment Impact Analysis

**DATE:** February 28, 2018

**PURPOSE:** Review Administrative Regulations for Board Policy 3650 Enrollment Impact Analysis.

**BACKGROUND:** The district is focused on maintaining financial vitality and organizational resilience; in addition, the Board of Education is charged with the financial sustainability of OUSD. Student enrollment is the main driver of revenue and numerous decisions are made by the Board annually that have a significant impact on district student enrollment. The enrollment impact analysis allows the Board to have more complete information regarding the potential impact of its decision-making on enrollment and financial stability

Board Policy 3650 Enrollment Impact Analysis was introduced as a new matter on January 25, 2017 and adopted on April 12, 2017.

Due to a change in the Board Agenda for the December 13, 2017 meeting, AR 3650 Enrollment Impact Analysis was postponed to February 28, 2018.

**CURRENT STATUS:** The first enrollment impact analysis was presented to the Board on November 8, 2017. The analysis focused on Latitude 37.8 High School and Oakland Charter High School. Future Enrollment Impact reports will be provided to the Board quarterly.

**NEXT STEPS:** Board of Directors to approve AR 3650. The next Enrollment Impact Analysis will be provided in March 2018 in memo format, and it will focus on Proposition 39 preliminary offers for the 2018-19 school year.

**ASSISTANCE:** None – information only.

**ATTACHMENTS:** AR 3650 Enrollment Impact Analysis, Board Policy 3650 Enrollment Impact Analysis

**OAKLAND UNIFIED SCHOOL DISTRICT**  
**Administrative Regulation**  
**Business and Non-instructional Operations**

**AR 3650**

**Enrollment Impact Analysis**

The Board of Education is charged with the financial sustainability of Oakland Unified School District.

Student enrollment is the main driver of revenue for the school district.

Numerous decisions made by the Board annually have significant impact on district student enrollment.

The Board of Education desires to have more complete information regarding the potential impact of its decision-making on student enrollment and therefore the financial stability of the District.

The Board of Education shall require the Superintendent or designee to produce an Enrollment Impact Analysis, as described below, to accompany any documents furnished to the Board regarding changes in school programs in the District to assist the Board in informed decision-making.

An Enrollment Impact Analysis can accompany Board consideration of any of the following: Proposition 39 offers that may require relocation of District students, new district and charter schools, closure of district and charter schools, grade expansions of district or charter schools, program changes for magnet schools, changes in the transportation services offered by District, relocation of programs from one location to another (including Special Education programs), coordination with the charter sector around enrollment, and any other change in policy or practice that is likely to affect student enrollment in District.

The Enrollment Impact Analysis can include information regarding the rationale for the proposed change, demographic trends in the attendance area, history of the relevant site (enrollment, where the students live/come from and go to), trend analysis (how many neighborhood kids attend, particularly in the entering grades), anticipated housing projects in the area, funding sources and analysis of funding sustainability, whether the program change under consideration was budgeted for in preparation for the change, and what the financial outcome is anticipated to be, if enrollment changes are expected as a result of the change.

Enrollment Impact Analyses will use data to inform decisions. The types of data include, but are not limited to:

- Attendance boundaries
- Historical enrollment on CBEDS day
- School feeder patterns
- Demand
- Location
- Proximity to other schools
- 5 year average enrollment growth or decline
- School performance data
- Funding/financial and budget data

The process for each enrollment impact analysis will vary depending on the subject matter before the Board. The enrollment department will create a set of metrics to share on a regular basis to provide better information on seasonal enrollment trends. The reports will be published quarterly, and 2018-19 topics will include the following topics:

- March 2018: Proposition 39 offers
- June 2018: Postmortem on enrollment options process and Blueprint for Quality Schools
- September 2018: 20 day counts and projections reconciliation

- December 2018: Concurrence of application between charter and district systems

Requests for other ad-hoc analysis need to be received 8 weeks prior to the due date, and these will be conducted taking into account capacity constraints at the time. After we build in capacity to automate sections of the report in year 1, we will look to produce more thorough analysis in future years. Given changes to the context, revisions to topics above may be made to provide more relevant or timely data to the board and community.

Typically, the analysis process will include:

- 1) Investigation of the context surrounding the subject matter with internal and external data;
- 2) Data collection and review;
- 3) Data Analysis: Compile data and run analyses and scenarios to formulate hypotheses; data analysis will include financial data, mapping analytics, feeder pattern analysis, demand rates, historical enrollment data, along with program design and performance; we will incorporate long-term (5 year) enrollment and fiscal implications, knowing that a series of assumptions must be made based on the best evidence available at the time but that these assumptions are subject to change with new evidence;
- 4) Consultations with internal and external stakeholders related to the subject matter, analyses, and hypotheses;
- 5) Design and create the enrollment impact analysis report;
- 6) Quality and accuracy review of all data, scenarios, and hypotheses;
- 7) Internal discussions of draft report; and
- 8) Finalize memo to the board

The Executive Director, Enrollment & Registration Management and School Portfolio Management will oversee the cross-functional development and execution of the enrollment impact analysis process. A cross-functional team including, but not limited to, Enrollment, Finance, Research Assessment & Data, Special Education, Operations, Legal, Transportation, and Office of Charter Schools will collaborate to provide data, review data and analyses, and create the enrollment impact analyses for the Board. The Enrollment Department will initiate the aforementioned process and be responsible for submitting the final memo to the Board. At the discretion of the board president, a board presentation will accompany the memo, and the board may determine other forums for staff to present their report (e.g. District Budget Advisory Committee, Community Advisory committee meetings, etc).

# **OAKLAND UNIFIED SCHOOL DISTRICT**

## **Board Policy**

### **Business and Noninstructional Operations**

#### **BP 3650**

#### **Enrollment Impact Analysis**

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The Enrollment Impact Analysis requirement shall be effective July 1, 2017, and is intended to inform Board decision making as it relates to school portfolio decisions, among others, in fall of 2017.

The Superintendent or designee shall produce Administrative Regulations that detail how this Policy will be implemented, for approval by the Board of Education, within 180 days of the adoption of this Policy.

4/12/17