



OFFICE OF THE SUPERINTENDENT

TO: Board of Education

FROM: Kyla Johnson Trammell, Superintendent
Charles Wilson, Executive Director, Enrollment Services
Nana Xu, Director of Strategic Policy and Planning, Enrollment

Subject: Enrollment Impact Analysis of Charter Enrollment as Informed by Proposition 39
Preliminary Offers for the 2018-2019 School Year

DATE: March 28, 2018

PURPOSE: To determine the impact of potential charter enrollment changes as informed by Prop. 39 preliminary offers on OUSD enrollment; to update the Board with seasonal enrollment related metrics.

BACKGROUND: According to BP 3650, The Board of Education shall require the Superintendent or designee to produce an Enrollment Impact Analysis to accompany any documents furnished to the Board regarding changes in school programs in the District to assist the Board in informed decision-making. Prop. 39 offers are on the consideration list of changes that the Board would like more complete information regarding the potential impact on student enrollment. In the memo below, we provide the board an analysis of the potential impact to the district of charter enrollment changes based on Prop. 39 preliminary offers.

CURRENT STATUS: The Office of Charter Schools will present final offers to the Board on March 28, 2018

NEXT STEPS: The subsequent enrollment impact analysis will be provided to the board in June 2018.

ASSISTANCE: None – information only.

ATTACHMENTS: Seasonal Enrollment Metrics [separate document]

Proposition 39 Offers for the 2018-2019 School Year

Context around Proposition 39:

In 2003, California Proposition 39 law established that charter students who live in Oakland are entitled to space for their charter schools at OUSD district-run schools. In addition, all Oakland residents, including parents of charter school students, pay rent/property taxes that go towards OUSD facilities (including bonds). Therefore, charter schools are legally entitled to space in OUSD facilities.

Charter-run schools must pay their fair share (pro-rata) for the space that they have exclusive use of (e.g., classrooms) and the space that they have partial use of (e.g., cafeteria at lunch). Additionally, the charter-run schools must pay their fair share of the salary and benefits of custodial staff, if they are sharing a campus with a district-run school.

Timeline of 2017-18 Proposition 39 Offers for the 2018-2019 school year:

- November 1, 2017: Proposition 39 Facilities Request Form deadline.



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- December 1, 2017: Preliminary Facility Offers developed; District submits objections to charter projections.
- January 2, 2018: Preliminary Facility Offers vetted and revised; charter responds to objections to projections by January 2.
- February 1, 2018: Deadline to provide charter with Preliminary Facility Offer.
- March 1, 2018: Deadline for charter to respond with feedback on Preliminary Facility Offer.
- April 1, 2018: Deadline for Board-approved Final Facility Offer to be provided to charter.
- May 1, 2018: Deadline for charter to accept/decline Final Facility Offer.
- June 2018: Non-statutory deadline by which District seeks Facilities Use Agreement.

The deadlines noted above may be modified by mutual agreement.

Proposition 39 Preliminary Offers for the 2018-2019 school year:

Charter School	Gradespan in 2018-19 (* = growing a grade level)	Projected In-District ADA	Total Projected ADA	Current Location	Preliminary Offer Site(s) and # of classrooms
Achieve Academy (EFC)	TK-5	629.11	646.61	District Facility: Hawthorne Campus, 1700 28th Avenue, Oakland, CA 96201	Hawthorne (31)
American Indian Public Charter High School	9-12	368.50	430.22	District Facility: Lakeview Campus, 746 Grand Avenue, Oakland, CA 94610	TOTAL (18): Lakeview (15), Westlake (3)
American Indian Public Charter School	6-8	127.40	137.20	Own Private Facility: 171 12th Street, Oakland, CA 94607	Brookfield (6)
American Indian Public Charter School II	TK-8	478.08	622.16	Own Private Facility: 171 12th Street, Oakland, CA 94607	TOTAL (21): Allendale (5), Lowell/WOMS (5), MLK (4), Place @ Prescott (4), Bunche (3)



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ARISE High School	9-12	287.96	310.96	Lease Private Facility: 3301 12th Street, Suite 205, Oakland CA, 94601	TOTAL (14): Franklin (5), Roosevelt (9)
Aspire College Academy	K-5	248.93	278.24	Lease Private Facility: 8030 Atherton Street, Oakland, CA 94605	TOTAL (13): Howard (3), Grass Valley (4), New Highland/RISE (6)
Aurum Preparatory Academy (ACOE authorized)	6	76.00	83.60	N/A (new school opening in 18-19)	Hawthorne (4)
East Bay Innovation Academy	6-11*	495.74	579.82	District Facility (6-8): Marshall Campus, 3400 Malcolm Ave, Oakland, CA 94605 & Lease Private Facility (9-10): Golden Gate Academy, 3800 Mountain Blvd, Oakland, CA 94619	TOTAL (24): Marshall (12) + Frick (6), EOP/Webster (6)
Envision Academy (ACOE authorized)	9-12	350.29	398.05	Lease Private Facility: 1515 Webster St, Oakland, CA 94612	TOTAL (16): McClymonds (13), Westlake (3)
Francophone Charter School	K-6*	150.10	218.50	District Facility: Barack Obama Academy, 9736 Lawlor St., Oakland 94605	TOTAL (8): Toler Heights/Barack Obama (6), Howard (2)
Urban Montessori (ACOE authorized)	K-8*	405.30	454.02	District Facility (K-3): Sherman Campus & Lease Private Facility (4-7): Golden Gate, 3800	TOTAL (20): Sherman (12), Markham (8)



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				Mountain Blvd	
Yu Ming Charter School (ACOE authorized)	K-8*	168.04	454.02	Lease Private Facility: 1086 Alcatraz Ave, Oakland, CA 94608; previously at 6232 Herzog St. (Golden Gate CDC) where they have a pending Prop 51 application	TOTAL (8): CDC (6), Sankofa (2); (Potential Withdrawal in exchange for guaranteeing CDC in the event Yu Ming's Prop 51 is approved.)
Aspire ERES Academy	K-8	201.52	215.33	Lease Private Facility: 1936 Courtland Avenue, Oakland, CA 94601	TOTAL (11): Horace Mann (2), Roots (2), Fruitvale (4), Garfield (3) (Potential Withdrawal in exchange for Fremont field usage in 18-19)
Cox Academy (EFC; ACOE authorized)	TK-5	535.74	551.00	District Facility: co-located w/Reach at E. Morris Cox Elementary, 9860 Sunnyside St, Oakland, CA 94603 (Bldg A, C, D and portables)	COX (pending in lieu/withdrawal)
LPS Oakland R & D	9-12	438.84	446.20	District Facility: Castlemont High Campus, 8601 MacArthur Boulevard, Oakland, CA 94605 (Bldg 100 and portables 2, 3A, 3B)	Castlemont (21) (Pending In Lieu/Withdrawal) Louise and Will agreed to the addition of Portable 1 for LPS



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Assumptions and Limitations of the Enrollment Impact Analysis of Charter Enrollment as Informed by Prop. 39 Preliminary Offers

The accuracy of the enrollment impact analysis is impacted by a number of factors, including, but not limited to:

Assumptions	
1	Assume that enrollment gains in charters are enrollment losses in the District and enrollment losses in charters would be enrollment gains in the District.
2	<p>Preliminary offers may include multiple school sites and the charter can indicate which facilities within their offer to accept. The district has discretion to accept the charter's acceptance of some of the facilities within the offer.</p> <p>For the purposes of this analysis, the multiple school sites listed in the offer are part of the whole preliminary offer.</p>
3	<p>Unrestricted revenue (includes LCFF, concentration, supplemental, Measure G, and lottery resources from the 2017-18 school year) is calculated on a per student basis. The revenue is further differentiated by grade spans (elementary, middle, and high school).</p> <p>Elementary: \$9,469 per student Middle: \$9,522 per student High: \$10,839 per student</p>
Limitations	
1	We cannot reliably predict to what extent granting or denying a Prop. 39 offer will lead to a gain or loss in District enrollment.
2	<p>Accuracy of this report is dependent on many factors and our analysis may be subject to change, depending on:</p> <ul style="list-style-type: none">• The accuracy of the information provided by the charter• A charter's strategic marketing and community engagement plan• A charter's acceptance of an offer, which will be unknown until May 1, 2018• A charter's growth plan• The quality and appeal of school facilities offers• Changes in OUSD programs• Intangible measures like school reputation, CMO appeal, the public's perception of a school's quality
3	The analysis is based on Preliminary Offers. The Office of Charter Schools is working on Final Facilities Offers. These will be presented to the Board on March 28, 2018 and will likely differ from the Preliminary Offers.



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4	<p>We did not include multi-year projections because:</p> <ul style="list-style-type: none">• Prop 39 offers do not have information on long term enrollment projections for charters• In a charter's petition, three years of enrollment projections, cash flow statements, and budget information are required. In some cases, the most recent petitions/renewals were submitted years ago so no recent enrollment projections data exists for charters in the petition• No clear methodology exists to project charter growth without deeper knowledge about a charter's growth plan.
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Potential Impact of Projected Charter Enrollment Changes as Informed by Prop. 39 Preliminary Offers for the 2018-2019 school year

The Prop. 39 offer process provided the opportunity to see the projected changes in charter enrollment as presented by each CMO, and analyze the potential impact to the district's enrollment. At this time, 5 year enrollment projections for charters are unavailable given the aforementioned reasons. Therefore, this analysis does not include a review of 5 year enrollment projections.

If *all* Prop. 39 Preliminary Offers are accepted, the anticipated impact on enrollment is a net decrease of 522 students. This potential loss in enrollment would amount to a loss of \$5,350,104 in revenue.

ENROLLMENT IMPACT TO DISTRICT			
	Students	Unrestricted Revenue/student	Total Revenue
Elementary	-111	\$9,469	-\$1,050,233
Middle	-120	\$9,522	-\$1,144,004
High	-291	\$10,839	-\$3,155,867



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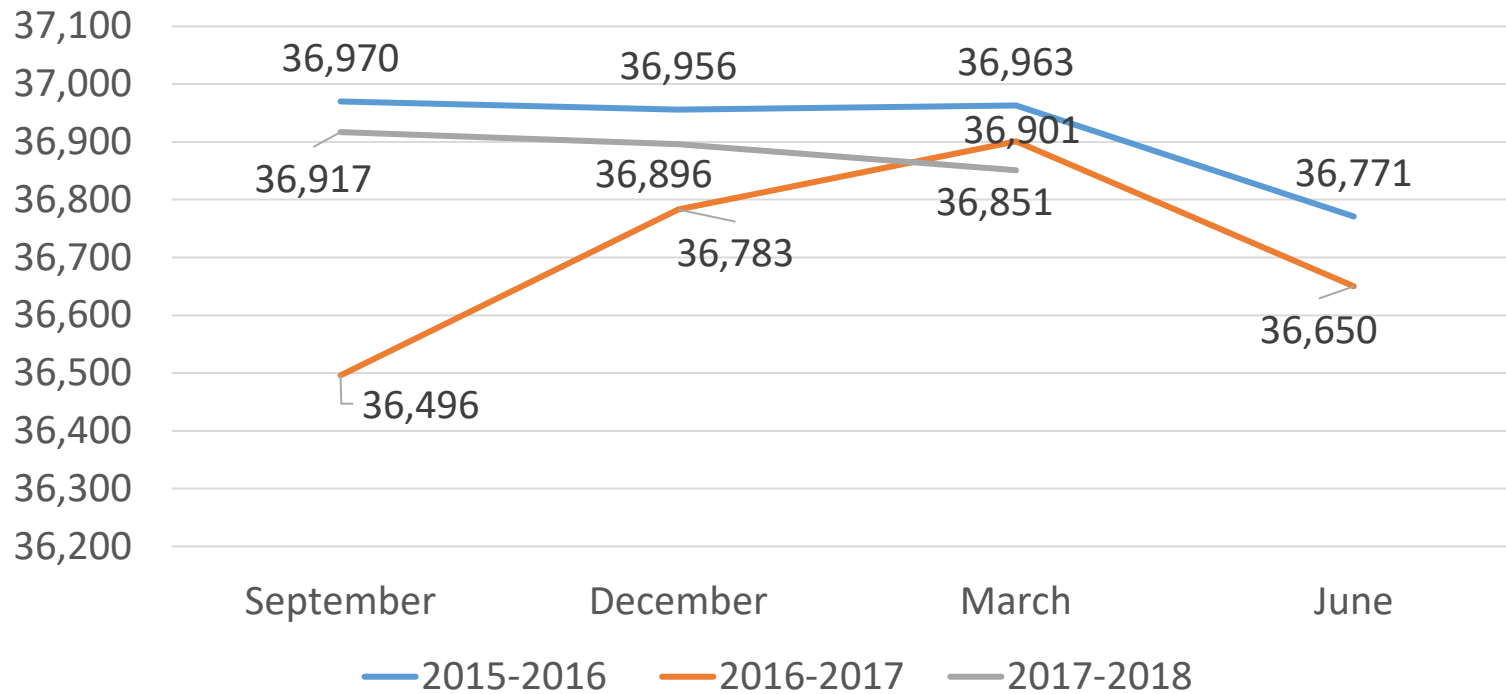
Total Potential Enrollment Impact to District	-522		-\$5,350,104
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However, if *all* Prop. 39 Preliminary Offers are accepted, the anticipated revenue from facilities use fees is \$1,708,170. Based on the potential loss of revenue from a loss in enrollment and the facilities use fees, the potential net revenue impact to the district would be a loss of \$3,641,934.

It is important to note that there is no known correlation between Prop. 39 and charter growth, and that it is difficult to project with certainty any enrollment gain or loss to the District. We cannot reliably predict to what extent granting or denying a Prop. 39 offer will lead to a gain or loss in District enrollment.

Seasonal Enrollment Metrics

Enrollment, Engagement Reports 2015 - March 2018



SchoolMint	2017-18 School Year
Total # of on-time applications	8,837 as of 2/12/18 3:32 PM

Source: SchoolMint

In 2016-17, OUSD launched SchoolMint, an online application platform, to facilitate the options process for families. As of February 12, 2018 at 3:32pm, the district received 8,837 on-time online applications for the 2018-19 school year.

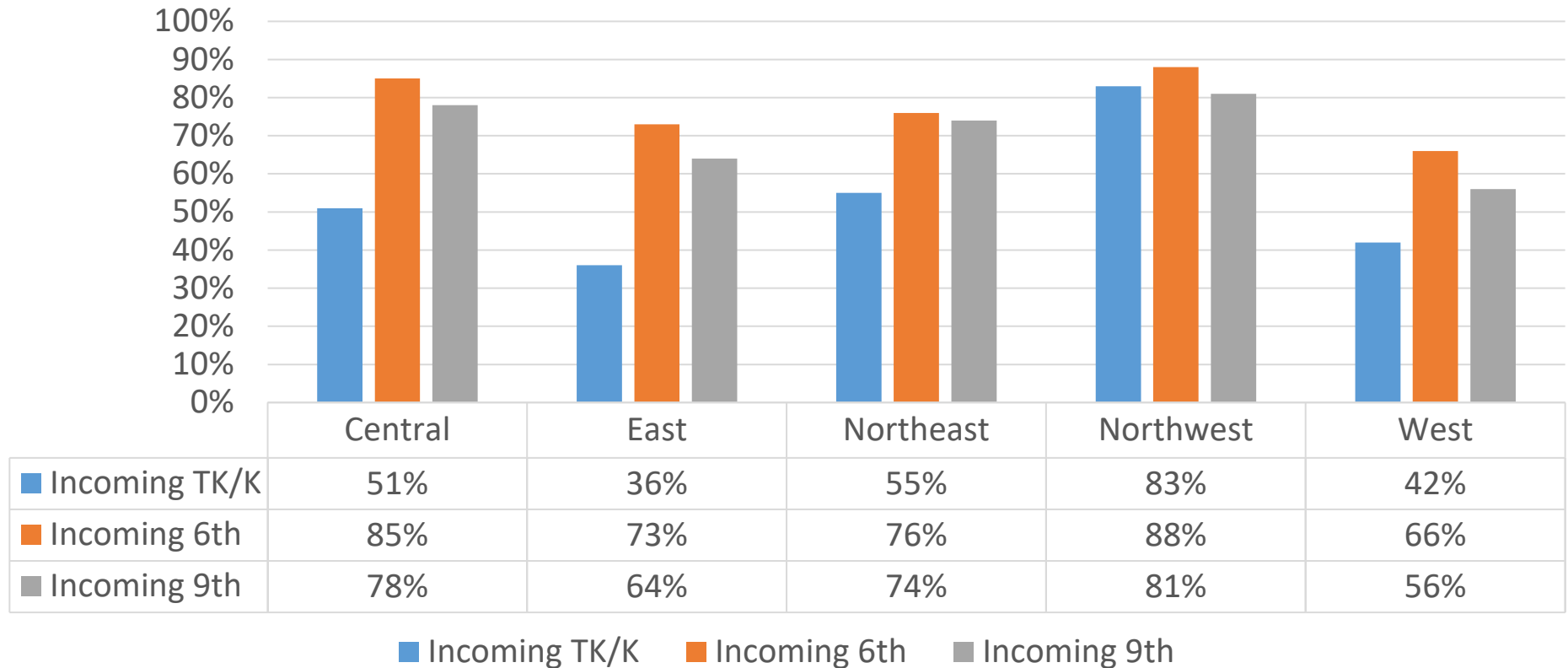
Source: Weekly Engagement Reports from 2015 – March 2018

The Enrollment presented here is based on Weekly Engagement Reports and shows the quarterly enrollment for each school year. Each year begins with the September Weekly Engagement Report closest to that year's Day 20 and then for every quarter (3 months) thereafter.

The data for 2017-2018 so far shows the district trending to:

- Higher enrollment in September 2017 and December 2017 compared to the 2016-17 school year.
- Lower enrollment in March 2018 compared to the previous two years.

On-Time as % of Region Applications for Oakland Residents who Enrolled in OUSD 2017-18

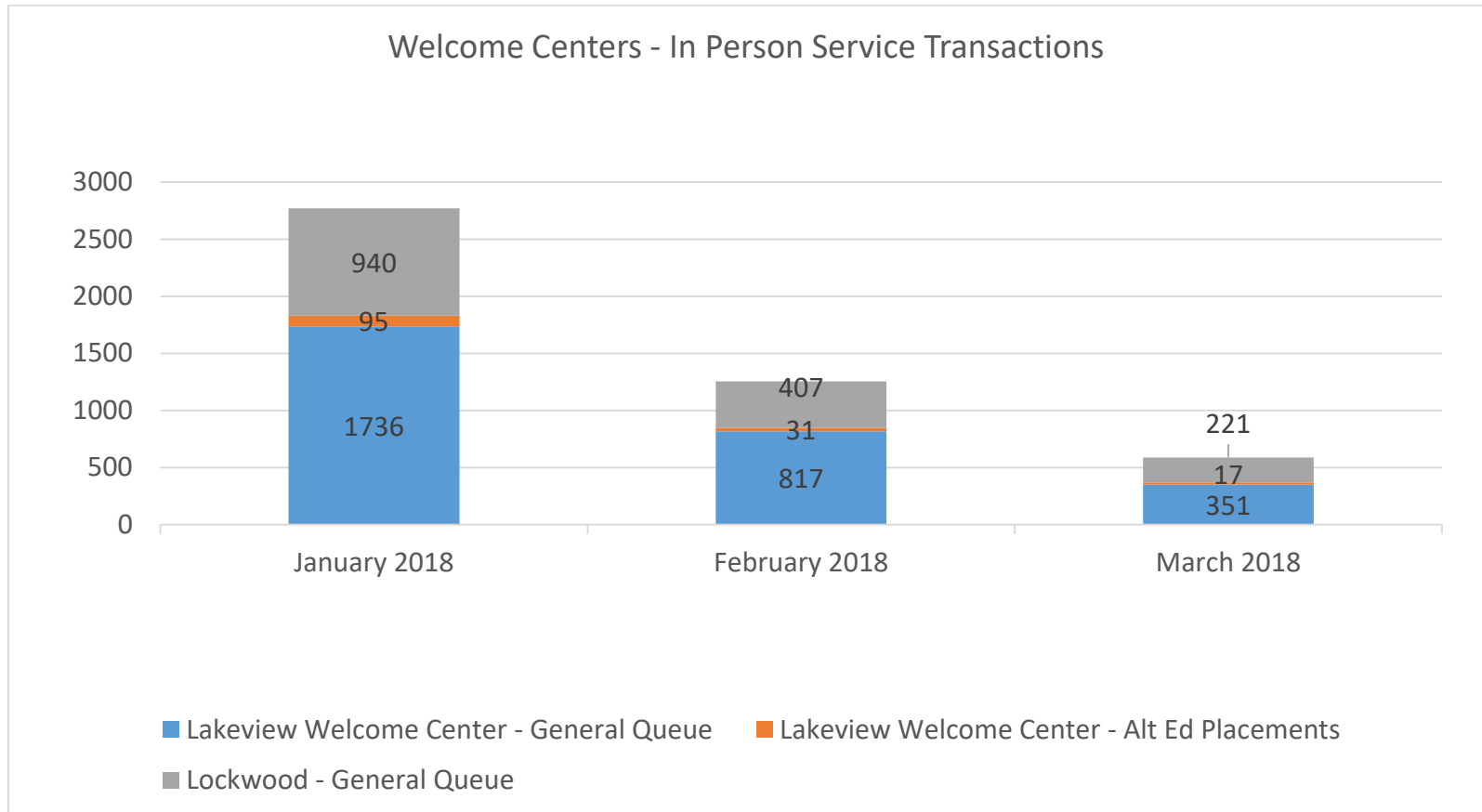


Source: OUSD Strategic Regional Analysis, 2017-18. Includes only students who were enrolled in an OUSD district-run school on the first Wednesday of October 2017. Student addresses are derived from the enrollment record on that date. Excludes Special Education students except those receiving Resource services.

Overall, the data show that applicants in the East and West regions had the lowest percentages of on-time applications.

- For incoming TK/K the lowest percentage of on-time applications were from the East.
- For incoming 6th and 9th the lowest percentage of on-time applications were from the West.
- For incoming TK/K, 6th, and 9th the highest percentage of on-time applications were from the Northwest.

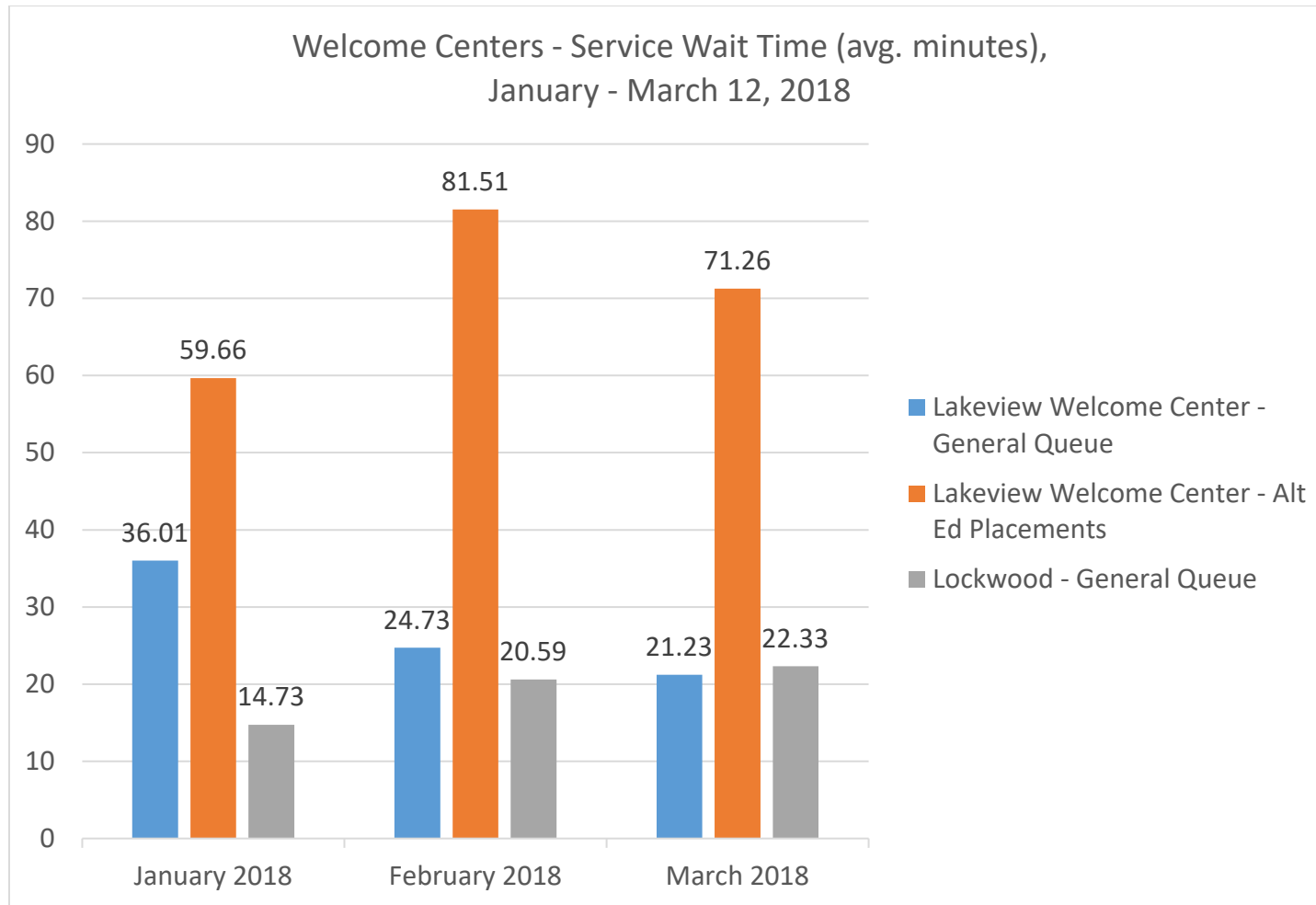
Seasonal Welcome Center Customer Service Metrics: January 1, 2018 to March 12, 2018



Source: Qless, data downloaded on March 12, 2018 for the January 1 – March 12 reporting period.

The Enrollment Welcome Centers use Qless to manage and track the in person queues at each center. There are two Welcome Centers, Lakeview and Lockwood. The Lakeview Welcome Center also has an Alternative Education placement center. The Service Transactions Report shows the total number of transactions at each center for the specified reporting period.

In January 2018, the welcome centers had the most transactions, partly due to the Open Enrollment window. The deadline for on-time Open Enrollment applications was January 26, 2018.



Source: Qless, data downloaded on March 12, 2018 for the January 1 – March 12 reporting period.

The Enrollment Welcome Centers use Qless to manage and track the queues at each center. There are two Welcome Centers, Lakeview and Lockwood. The Lakeview Welcome Center also has an Alternative Education placement center. The Service Wait Time Report shows the average amount of time spent in queues by customer each center for the specified reporting period.

Generally, the wait times were less than 25 minutes on average at Lockwood and Lakeview. Alternative Education at Lakeview has longer wait times because there is only one person on staff dedicated to these placements whereas Lakeview has up to eight staff and Lockwood has up to two staff at any given time.

Welcome Centers – Virtual Transactions (as measured by Zendesk)

New Tickets	3,204
Solved Tickets	2,972
Agent Touches	6,529
Satisfaction Rating	92%
1st Reply Time	14.14 hours

Source: Zendesk, data downloaded on March 12, 2018 for the January 1 – March 12 reporting period.

The OUSD Welcome Centers use Zendesk to manage and track requests and questions from families. Families contact the Welcome Centers via phone call, voicemail, or mail.

- **New Tickets** is the number of new tickets created during the reporting period.
- **Solved Tickets** is the number of solved tickets during the reporting period.
- **Agent Touches** is number of agent updates to tickets during the reporting period.
- **Satisfaction Rating** is the average customer satisfaction rating given during the reporting period.
- **First Reply Time** is the average amount of time it took an agent to make the first public comment in a ticket (in calendar hours).