

# CREATING A FACILITIES MASTER PLAN PART I

## *Comprehensive Demographic Studies and Enrollment Projections*

### INTRODUCTION AND BACKGROUND

Creating a facilities master plan is essential for a district to be prepared for the future and to continue to serve the needs of its changing student population. This fact sheet is the first in a series that will provide essential information for board members about the main components of facilities master plans, and important considerations for governance teams as they review and approve such plans. While district and county office staff develop these components, board members have the critical role of reviewing the plans to ensure that they contain the information needed for making critical decisions about facilities.

The preparation of a Facilities Master Plan includes two key components: 1) comprehensive demographic studies and enrollment projections and 2) a facilities needs assessment. This brief addresses comprehensive demographic studies and enrollment projections. These are studies and projections that inform the district of who and how many students are coming — and what sort of new and additional facilities, buildings, classrooms, core and support facilities will be needed to adequately house and educate those students five to ten years into the future.

### DEMOGRAPHIC STUDIES AND ENROLLMENT PROJECTIONS

Planning for a school district's future — anticipating how many students you will serve five or ten years hence, and where you will need facilities to house them — is never easy. An essential building block of any school district's comprehensive facilities master plan is a demographic study that produces accurate enrollment projections.

A demographic study should consider all of the pertinent factors that influence a school district's future enrollments. Factors to consider (at a minimum) include:

- » Historical enrollment trends

- » The district's historical and planned residential development (including local birth trends)
- » Local charter schools, private schools, and the number of transfer students coming into (or leaving) the school district

There are three timeframes for these enrollment projections — short-range, mid-range and long-range. Each timeframe has its own particular purpose and boards should designate staff to consider and create projections for all three.

#### **Short-Range Enrollment Projections (1-3 Years).**

Typically, short-range enrollment projections are the most accurate — and these short-range projections are essential when a district is making critical decisions about housing students in the short term. A 1-to-3-year timeline is generally too short to allow for the planning and building of permanent facilities, so these short-range facilities planning decisions may include adding portables, making school attendance area changes, or assigning student overloads from a crowded school to other schools (not always nearby) that have available capacity. It is important to keep in mind community views about some of these choices for short-term housing of students.

#### **Mid-Range Enrollment Projections (5-10 Years).**

Mid-range, grade-by-grade projections — for all schools in a school district — form the central building block of any comprehensive facilities master plan. Based on these mid-range projections, many decisions can be made regarding the housing of students over a longer period. Mid-range projections are not easy — a 5-to-10-year timeline is generally considered the limit within which reasonably accurate enrollment projections can be made. But with a 5-to-10-year perspective, the need for additional classroom space at existing schools, as well as the need for new schools (where, when and for what grades?) can be determined with a reasonable degree of certainty. With the help of accurate projections, as the school district's future unfolds

over several years, and new-and-updated enrollment projections are prepared, adjustments to the district's facilities plans can generally be made well in advance of the need for these new facilities.

**Long-Range Enrollment Projections (10 Years to Residential Build-out).** While detailed long-range district projections cannot be made with an assured high degree of reliability, a long-range perspective on future enrollment can provide information regarding the potential need to acquire new school sites and build new schools. The need for a longer-range perspective differs from one school district to another — for instance, a district that includes a lot of undeveloped land already designated for future residential projects has a greater need for a possible residential build-out projection (sometimes known as the “saturation” projection).

Following these short-term, mid-term and long-term strategies will put your school district in a better position to respond to communities in a world where enrollment can go up (or down), depending on birth rates and economic trends (as many school districts discovered to their chagrin during the Great Recession). However, in each case, an accurate assessment of enrollment projections for coming years is a critical factor in preparing a school district's facilities master plan — a critical document that helps the school district prepare for years to come.

### QUESTIONS FOR BOARD MEMBERS TO ASK

- » Do we have a facilities master plan? Is it up to date?
- » Who knows about the facilities master plan? Do the right district staff know?
- » How has the facilities master plan affected district investments?

### RESOURCES FOR BOARD MEMBERS

- » Link to more detailed information on demographic studies and enrollment projections, [www.totalschoolsolutions.net/fac\\_demoEPs](http://www.totalschoolsolutions.net/fac_demoEPs)
- » Link to more detailed information on needs assessment, [www.totalschoolsolutions.net/fac\\_needsAssessment.php](http://www.totalschoolsolutions.net/fac_needsAssessment.php)
- » Link to CSBA GAMUT Policies, [gamutonline.net](http://gamutonline.net)

### CONCLUSION

Planning for a school district's future — whether short-term needs or in anticipating how many students you will serve five or ten years hence, and where you will need facilities to house them — is never easy. Boards can play an important role in ensuring that the most up to date and accurate information is used in making these important long-term decisions for their district.

