



Arlington
 INDEPENDENT SCHOOL DISTRICT
More Than a Remarkable Education

**Financial Futures Committee
 October 10, 2017
 6:00 pm, Mac Bernd Professional Development Center**

WELCOMEDavid Wilbanks
 FFC Chairperson

ENROLLMENT MANAGEMENT.....
 Cindy Powell, Chief Financial Officer
 Dr. Steven Wurtz, Chief Academic Officer
 Michael Hill, Assistant Superintendent of Administration
 Leslie Johnston, Communications Director

- Projection Methods
- Enrollment Trends
- Gibson Enrollment Study
- Gibson Student Survey
- Studer Parent Survey
- Program Development
- Branding & Marketing
- Group Discussions

CLOSING THOUGHTS.....David Wilbanks



Enrollment Management

October 10, 2017



FFC Purpose

- to provide findings and recommendations from community stakeholders to the Board of Trustees (“Board”) relating to ***budgets and long-range financial planning*** to support the District’s Strategic Plan.



FFC Charge

- Review external and internal data on issues relating to Texas public education, ***including the school finance*** and accountability systems and Texas bond election laws, to understand how those issues affect AISD's budget, tax rates and long-range financial planning.
- Review the District's ***strategic plan*** to understand the impact that the strategic plan may have on the budget, tax rates and long-range financial planning.
- Review the ***current general operating budget*** to gain an understanding of cost drivers and financial trends.



FFC Charge

- Review data including, but not limited to, the following topics in order to assess the impact on AISD budgets and provide input, as appropriate:
 - ***Enrollment trends and projections***
 - Property value trends and projections
 - ***Academic Services priorities*** and operational efficiency priorities presented to the Committee by the AISD administration
 - ***Current staffing methods*** in relation to state education law and current administration protocol
 - Compensation and benefits, including available salary market information, health insurance and wellness plan
 - Operating costs associated with bond projects



FFC Charge

- Formalize recommendations for the ***budget and long-range financial plans*** as appropriate to support the District's strategic plan, including possible additions, reductions or deletions to the budget. Recommendations should be aligned with the strategic plan, priorities and budget considerations presented by AISD administration and should consider operational efficiencies. The Committee may recommend that budget items/initiatives be: (1) deferred to a future year budget or possible future bond election, (2) eliminated, or (3) outsourced.



FFC Charge

- Present advisory, consensus reports and recommendations to the administration and Board ***annually or more frequently, if necessary***, regarding the AISD budget and long-range financial plans.



Example FFC Topics (from 3/28/17 FFC meeting)

- Enrollment trends
- Staffing
- Strategic plan activities
- Compensation
- Tax rates
- Facility capacities
- Fund balance
- Operational efficiencies



Big Picture

- Long-range planning must consider strategic plan, budget, legislative actions & inactions, program offerings & designs, facility needs





FFC Review

FFC Meeting	Topics Covered
3-28-17	Review of General Operating Budget
4-11-17	<ul style="list-style-type: none"> ▪ Texas School Finance System ▪ Property Values
5-15-17	<ul style="list-style-type: none"> ▪ Strategic Plan: Strategies & Activities for 2017-18 ▪ Financial Comparison Data
8-15-17	<ul style="list-style-type: none"> ▪ Overview of 2017-18 Budget & Tax Rate ▪ Legislative Update (<i>no additional state aid approved</i>)
10-10-17	Enrollment Trends & Enrollment Management



Enrollment Overview

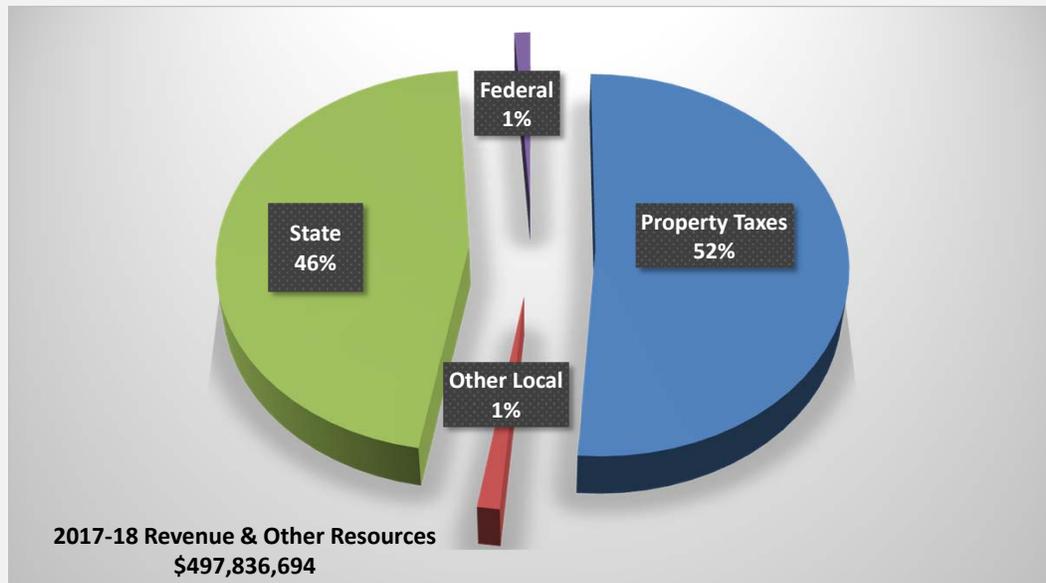


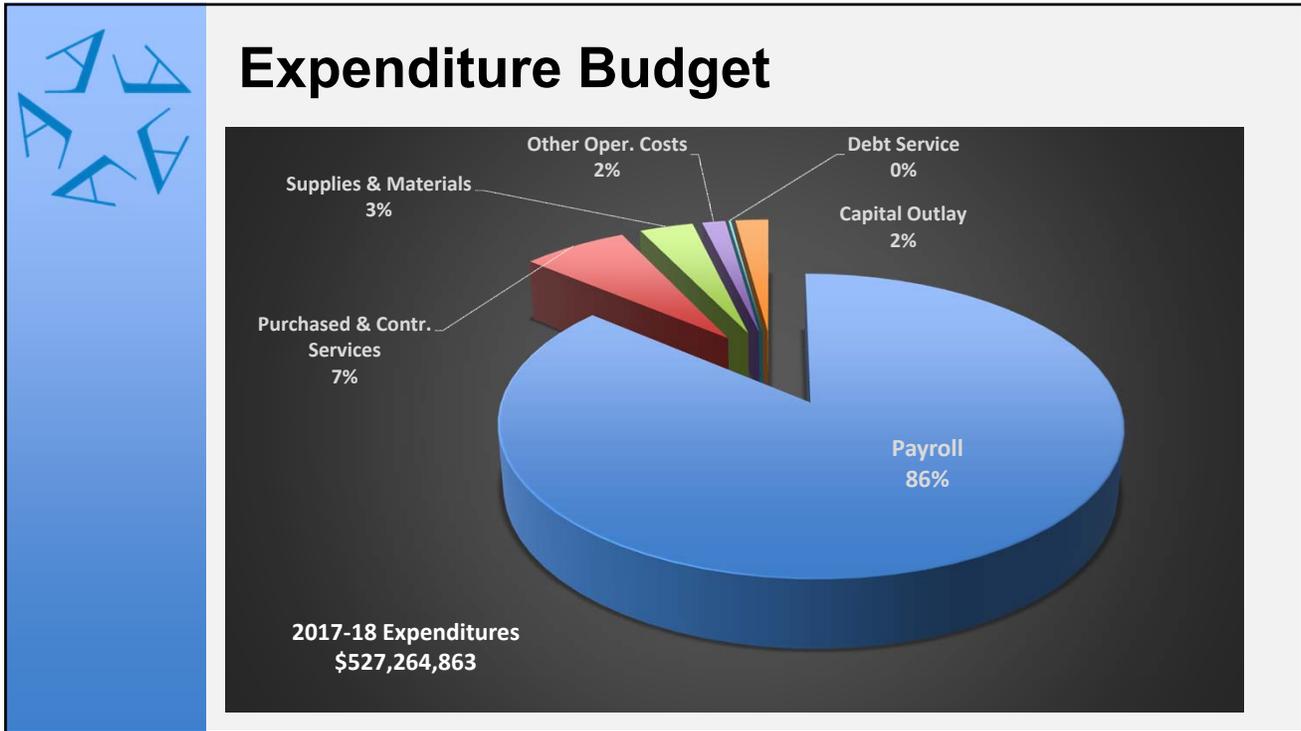
Impact of Enrollment Changes on Budget

- **Changes in enrollment impact both revenues & expenditures**
- **Revenues:**
 - State Aid (Foundation School Program):
 - Average Daily Attendance (ADA)
 - Special program participation (e.g., special education, career & technology, bilingual/ESL, gifted/talented, high school allotment, state compensatory education)
 - State Aid for one student in ADA = \$6,135
- **Expenditures:**
 - Staffing – based on projected enrollments
 - *Key control – staff tightly to enrollment projections (i.e., “right-size” staff to enrollment) to manage the budget*



Revenue & Other Resources Budget





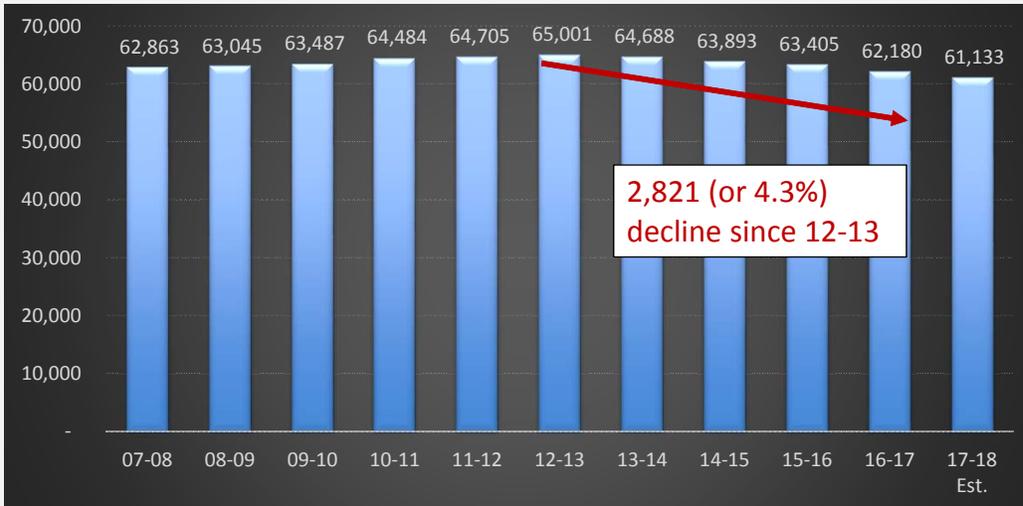
Enrollment Projection Methodology

- Finance Division projects enrollments for the upcoming school year
 - Cohort projection model
 - These projections are the basis for staffing decisions
- Outside consultant projects enrollments 10-years out
 - Cohort projection model adjusted for:
 - Housing/multi-family permits
 - Undeveloped land
 - Census data



Enrollment Trends

Student Enrollment History



Data Source: Fall PEIMS submissions



Enrollment Analysis



	Chg. 2014 to 2015	% Chg. 2014 to 2015	Chg. 2015 to 2016	% Chg. 2015 to 2016	Total Two Year Change	Total Two Year % Chg.
High School	213	1.2%	(56)	(0.3%)	157	0.9%
Jr. High	(81)	(0.9%)	82	0.9%	1	0.0%
Elementary	(653)	(1.8%)	(1,210)	(3.4%)	(1,863)	(5.1%)
Other	33	2.7%	(41)	(3.3%)	(8)	(0.7%)
Total	(488)	(0.8%)	(1,225)	(1.9%)	(1,713)	(2.7%)

High school & junior high school enrollments are flat. Elementary enrollments are declining.



TEA Transfer Report

TEA Transfer Report, 2013/14 - 2016/17



	2013/14	2014/15	2015/16	2016/17	3 YR Change
Total Transfers Into AISD	479	486	563	957	478
Total Transfers Out of AISD	5,425	5,918	6,771	8,257	2,832
Net Difference	-4,946	-5,432	-6,208	-7,300	-2,354

Note: TEA Transfer Report shows (1) students who reside within Arlington ISD but attend other public school districts & public charter schools, and (2) students who reside in other districts but attend Arlington ISD schools



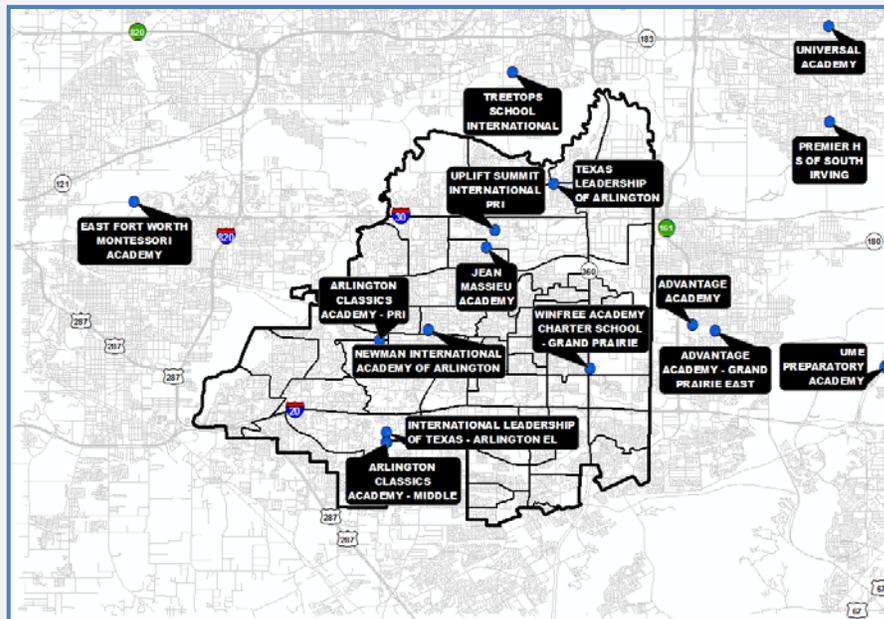
TEA Transfer Report - Charter Impact

Top 10 Charters for AISD Transfers in 2016/17	
Charter Name	Total AISD Transfer Students
International Leadership of Texas	1,784
Uplift Education	1,307
Newman International Academy of Arts	828
Arlington Classics Academy	802
Harmony Science Academy	427
Texas Leadership	366
Manara Academy	204
Jean Massieu Academy	183
Advantage Academy	135
East Fort Worth Montessori Academy	77

Note: TEA Transfer Report shows students who reside within Arlington ISD but attend other public school districts & public charter schools



Area Charter School Campuses





TEA Transfer Report – ISD Impact

Attend District	Reside in AISD / Transfer to Outside District 2016-17
Grand Prairie ISD	1,214
Mansfield ISD	115
HEB ISD	35
Irving ISD	27
Grapevine ISD	22
Kennedale ISD	19
Dallas ISD	19
Birdville ISD	14
Ft. Worth ISD	13

Source: TEA 2016-17 Transfer Report



TEA Transfer Report – Transfers In

Reside District	Reside in Outside District/ Transfer to AISD 2016-17
Mansfield ISD	223
Ft. Worth ISD	119
Kennedale ISD	87
Grand Prairie ISD	48
Hurst-Euless-Bedford ISD	17

Source: TEA 2016-17 Transfer Report



Change in Enrollment

Geographic Area	Enrollment Change Fall 2015 to 2016	% of Total District Change 2015 to 2016
North of I-30	(270)	22%
East of State Hwy 360	(541)	44%
South of South Green Oaks	(269)	22%
District Total	(1,225)	100%

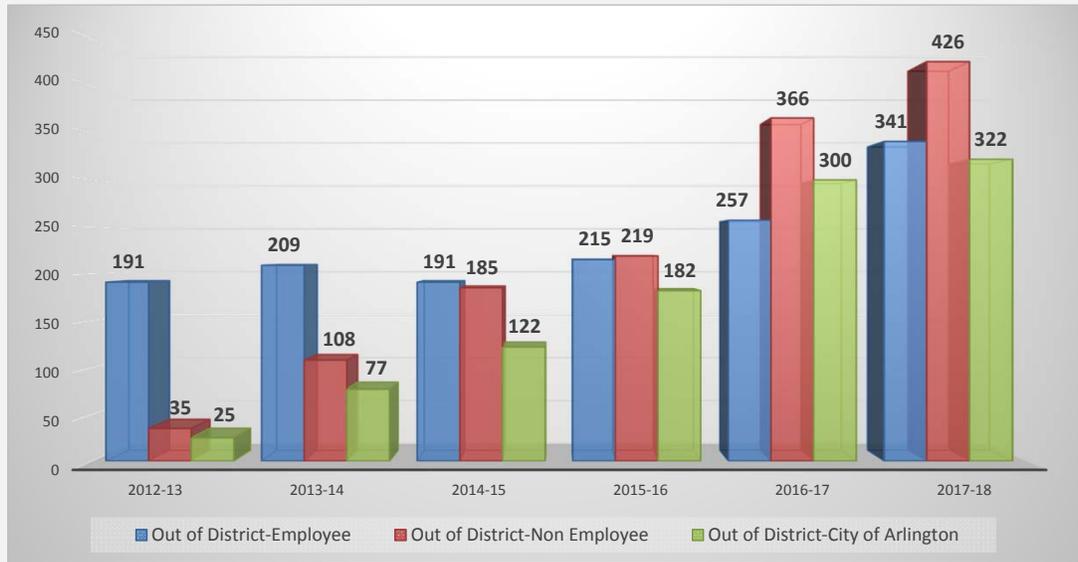


AISD Transfer Policy

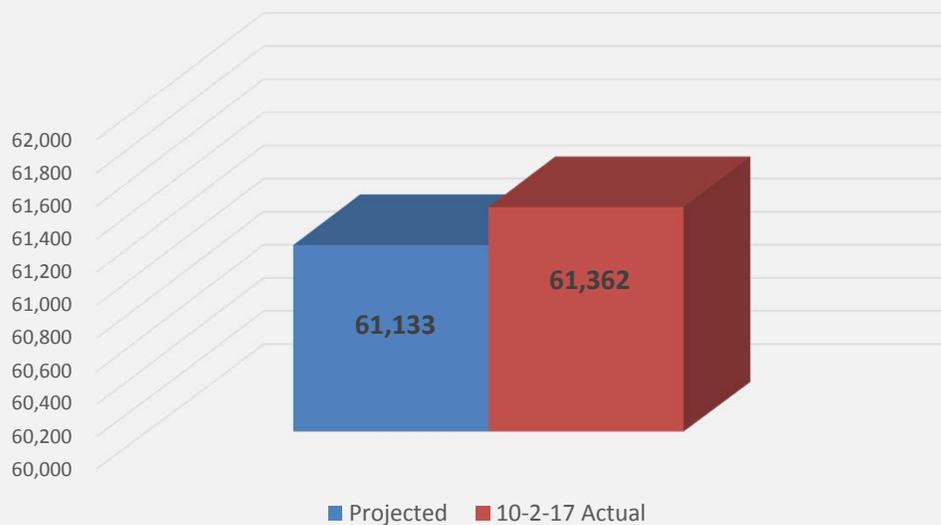
- AISD offers an open transfer policy
 - Students can transfer to any campus within the district as long as there is capacity at the receiving campus
 - Fees for New Transfers:
 - In-district transfers requested in March transfer window: \$65
 - In-district transfers requested after March transfer window: \$100
 - Out-of-district transfers: \$100
 - Fees for Transfer Renewals:
 - \$50/year



AISD Out-of-District Transfers



2017-18 Student Enrollment





AISD Enrollment Study

Gibson Consulting

June 2017



Gibson Consulting Study

- Study of enrollment and withdrawal trends for 2014-15, 2015-16 and first semester of 2016-17
- Focused on withdrawals
- Analyzed TReX data and AISD data to understand where students go when they leave AISD
- 169 parent phone interviews
- 800 parent on-line surveys
- Investigated factors that are likely associated with student withdrawal patterns
- Provided recommendations for student retention





Gibson Study Findings

- Declines in enrollment are strongest for particular campuses, grade levels, and geographic areas
 - *Most grade-level declines are in grades below 7th grade*
 - *Total enrollment is down by 2.6% since 2014 (sharper decline than surrounding districts)*
 - *EE/PK & K have largest decreases*
 - *PK enrollment decreases occur mostly in smaller schools with lower academic performance, high % of economically-disadvantaged students and high mobility rates (mainly impacting north and east portions of the District)*



Gibson Study Findings

- Aggregate declines in local demographic (e.g., birth/fertility rate and population levels) and economic (e.g., unemployment) factors are associated with enrollment declines, particularly for lower grade levels.
 - *Birth rates declined during the economic downturn from 2008 to 2011*
 - *Children born in those years are now in early elementary grades*



Historical Birth Rates



Figure 41: Change in birth rate over time



Gibson Study Findings

- Many of the student withdrawals are to geographically proximate schools and for strategic reasons.
 - About half of all transfers are to schools in nearby districts or to charter schools
- Parent surveys:
 - 169 parent phone interviews
 - 800 parent on-line surveys



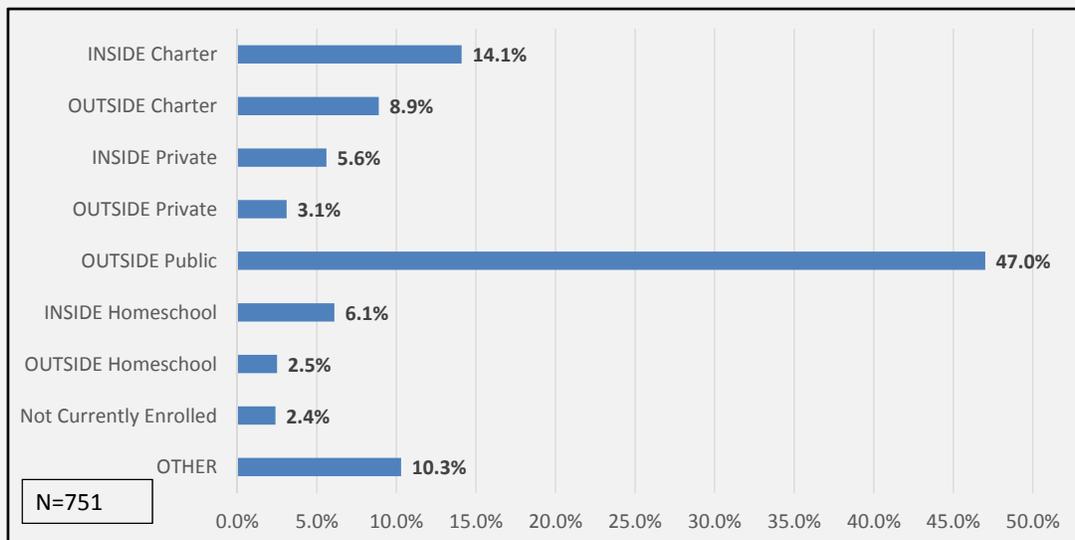
Gibson Study Findings

- Parent survey results *(all respondents)*:
 - *About 60% of parents of students who move to another district or withdraw do so for unavoidable life changes (e.g., residential, job move, custody change).*
 - *25% leave to enroll the student in what they consider a better schooling environment.*
 - *11% left because they are dissatisfied with their AISD school in some way.*
 - *One-quarter of student withdrawals are (hypothetically) “recoverable” (in the sense that the student potentially still resides within district boundaries).*

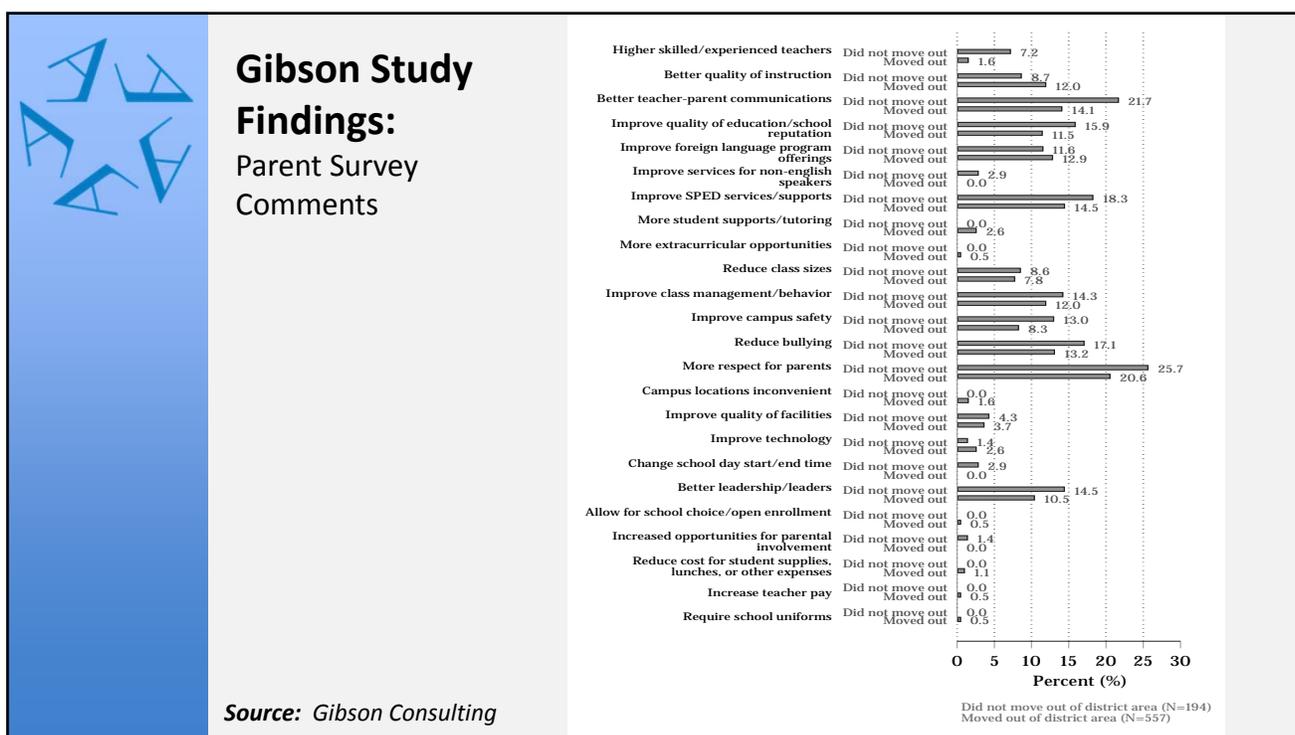
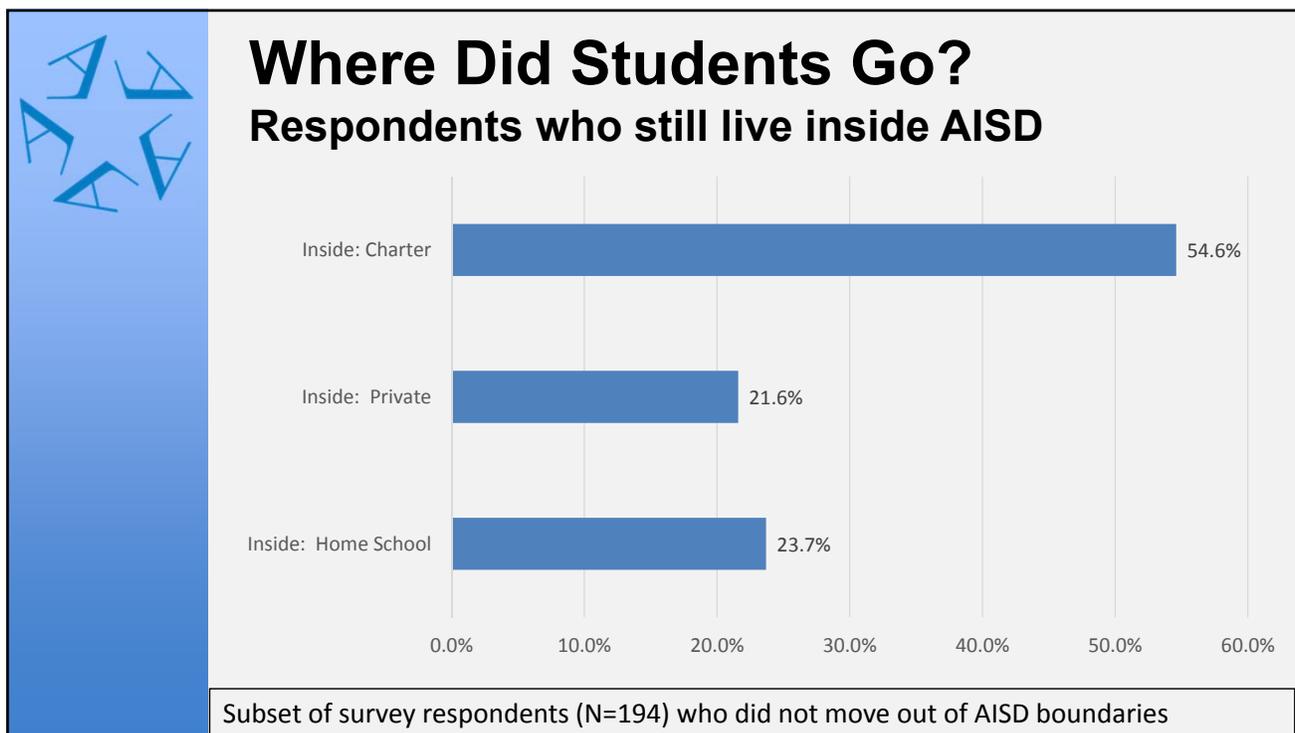


Where did Students Go?

All survey respondents



Source: Parent Survey Results, Figure 49 (pg. 70) of Gibson Enrollment Study





Gibson Study Findings

- Parents of students who withdrew but still live in AISD (*194 respondents*) say they want:
 - *More respect for parents (25.7%)*
 - *Better teacher-parent communication (21.7%)*
 - *Improve SPED services & supports (18.3%)*
 - *Reduce bullying (17.1%)*
 - *Improve quality of education/school reputation (15.9%)*
 - *Better leadership/leaders (14.5%)*
 - *Improve classroom management/behavior (14.3%)*



Gibson Recommendations

- Specialty Program Offerings
 - Academic
 - Extracurricular
 - Student supports
- Data Analysis
 - Annual student and parent surveys
 - Class sizes
 - Accurate withdrawal info (for Leaver data)
 - TEA TREx data
 - Post-exit surveys



Gibson Recommendations

- Marketing, Communications & Outreach/Recruitment
 - Elementary student focus
 - Student engagement and extracurricular offerings
 - Customer service

[Online](#)
[Survey overview](#)
[Study methodology](#)
[Findings](#)

Arlington Independent School District Annual Student Survey

Description of the 2016-17 student survey data collection effort and findings

Eric A. Booth
Senior Research Scientist

September 2017

GIBSON
AN EDUCATION CONSULTING & RESEARCH GROUP

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Review of approach

Fifth year collecting data for Grade 12 students

Fourth year collecting data for Grades 6, 8, and 10 students

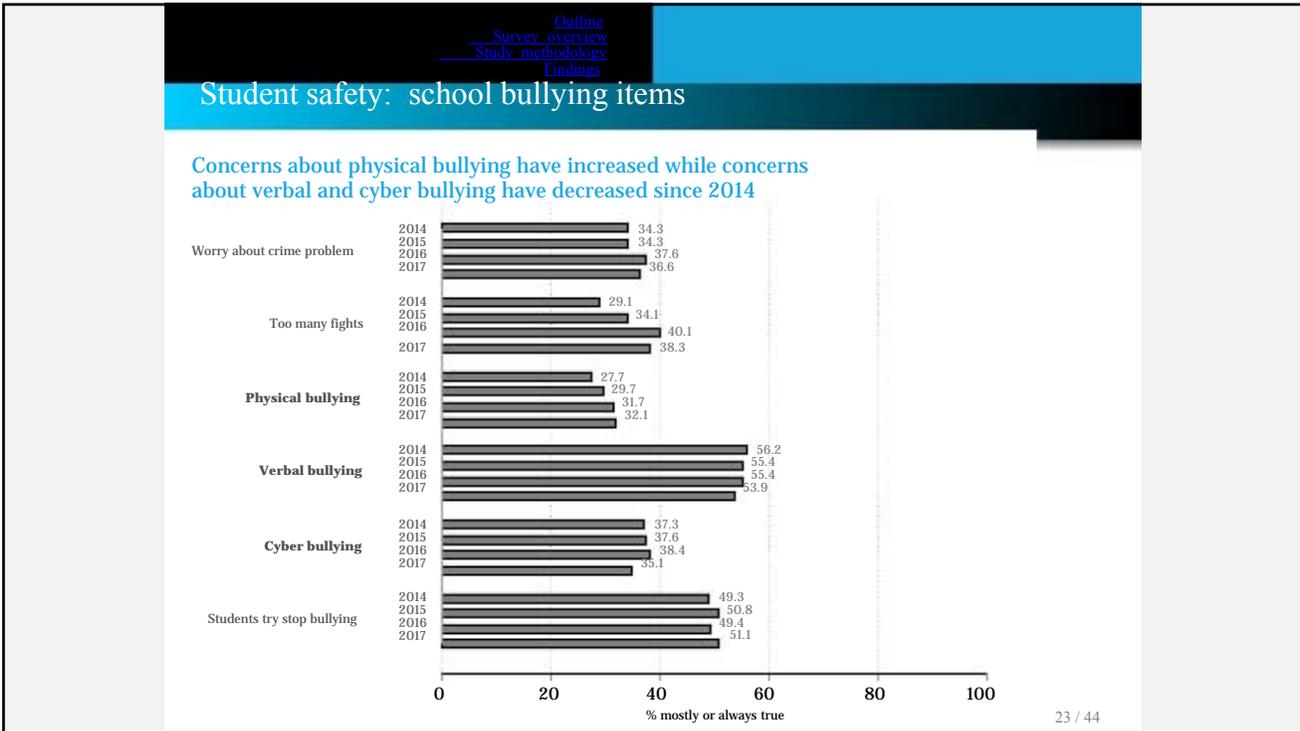
Grade	2013	2014	2015	2016	2017
Grade 6	x	1st	1st		
Grade 8	x	1st	1st	2nd	2nd
Grade 10	x	1st	1st	2nd	2nd
Grade12				2nd	2nd

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Response rates

- 82.4% response rate (last year 83.1%)
- Large sample size each campus
- 14,871 surveys collected; 14,339 after data cleaning
- Over 90% of survey respondents in 2017 have participated previously

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- [Outline](#)
[Survey overview](#)
[Study methodology](#)
[Findings](#)
- ## After-school activities
- School-affiliated activities not associated with a class (e.g., academic student club)
 - Off-campus community engagement activities
 - Community service/volunteer work outside of school
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[Outline](#)
[Survey overview](#)
[Study methodology](#)
[Findings](#)

After-school activities

	Grade 6	Grade 8	Grade 10	Grade 12
At least 1 co-curricular class	25%	90%	85%	82%
Extracurricular activity	88%	87%	80%	81%
Off-campus engagement	66%	68%	67%	69%
Outside community service	29%	40%	46%	55%
At least 1 of the above (91%)	95%	93%	88%	85%

● = Increased since last year
○ = Did not change
● = Decreased since last year

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Studer Parent Survey Overall Results Spring 2017

Date of Administration	Surveys Completed	Percent of Total Completed Non-English	Overall District Mean
2013	7,178	19.6	4.22
2014	7,169	16.9	4.39
2015	7,200	5.3	4.33
2016	8,282	18.9	4.38
2017	8,771	24.5	4.40

Note: The overall District mean is on a scale of 1-5 with 5 being the highest.



Studer Parent Survey Selected Items Spring 2017

	2013	2014	2015	2016	2017
School rules/discipline plans are enforced consistently at this school.	4.18	4.34	4.29	4.32	4.35
My family is treated with respect at this school.	4.39	4.54	4.51	4.54	4.56
My child has the necessary classroom supplies and equipment for effective learning.	4.40	4.52	4.48	4.53	4.55
I would recommend this school to other parents.	4.21	4.40	4.34	4.40	4.43
This school provides a safe environment for my child to learn.	4.32	4.49	4.43	4.46	4.48



Enrollment Management



Enrollment Management

- Definition:
 - *well-planned strategies and tactics to shape the enrollment of an institution and meet established goals*
 - *an organizational concept and a systematic set of activities designed to enable educational institutions to exert more influence over their student enrollments*



Short-term Strategies for Enrollment Management

- Waive student transfer fees effective with spring 2018 transfer season (*approx. \$225,000 annual revenue*)
- Staffing
- World Language program expansion
 - Expand language programs, including dual language & languages other than English
 - Support implementation of new LOTE textbook adoptions
 - Add grade 3 dual language Spanish to Jones & Corey Academies
 - Identify bilingual campuses for transition to one-way dual language



Short-term Strategies for Enrollment Management

- Pre-K Programming
 - Review current Pre-K locations (half-day & paid full-day) and identify possible expansion opportunities
 - Review current community-based Pre-K locations and identify possible expansion opportunities
 - Develop and implement Pre-K recruitment strategies
 - Explore possibility of adding dual language programming opportunity to full-day paid Pre-K learning experiences
- Branding/Marketing
 - Social media
 - General and targeted campaigns



Short-term Strategies for Enrollment Management

- Customer Service Training
 - Convene a Customer Service Focus Group to assist in developing the AISD framework (SERVE) for internal and external customer service expectations
 - Determine evidence and artifacts that support customer service framework
 - Train AISD staff on customer service framework
 - Design and display marketing materials that highlight customer service standards and expectations
 - Stakeholder surveys on customer service

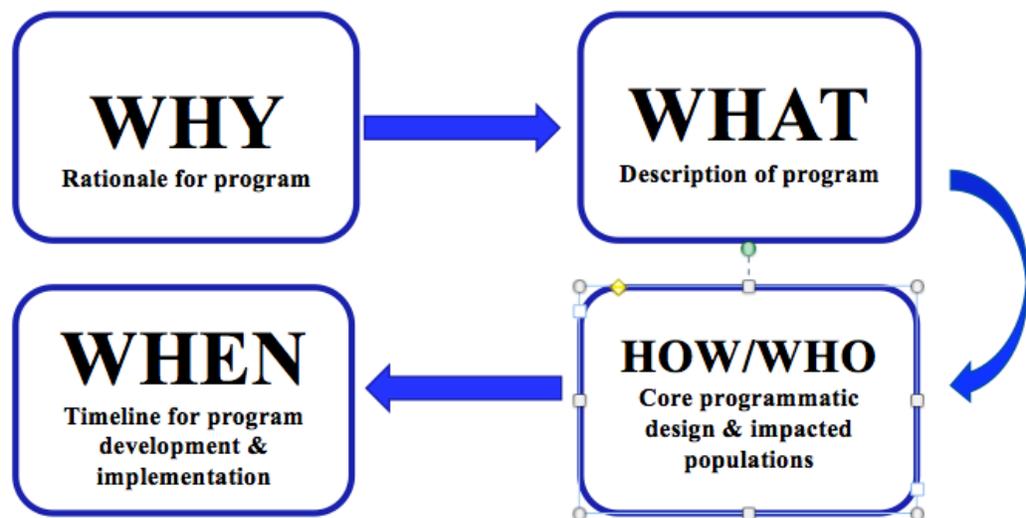


Long Range Strategies for Enrollment Management

- Evaluate elementary experience for possible enhancements (*e.g., world languages and other possible electives, STEM, pre-k, athletics/fitness, facility needs*)
- Evaluate secondary level programming options (*e.g., dual language/fine arts, IB Middle Years, STEM*)
- Continue to promote the AISD brand



New Program Design





Considerations for Program Development

- **Program gap/interest analysis**
- **Instructional Model**
 - Research-based Design
 - Professional learning/training
 - Technology integration
- **Sustainability**
 - Pathways of learning & student interest
- **Student Enrollment**
 - Grade level bands
 - Boundary implications
- **Budgetary Impact**
 - Funding sources
 - Staffing
 - Transportation
 - Materials
- **Facility Implications** in alignment with intended instructional delivery
- **Communication/marketing** strategy



Branding/Marketing



INSIGHTS

“The Arlington of the future will be built through education.”

“Our community's health is a direct reflection of how we educate kids. It's what we give the community.”

“The opportunities that exist today have never existed to this extent before.”

“They want to do what's best for the kids.”



INSIGHTS

“The district is on a much better path through opportunities.”

“When students have a future or goal orientation, they are successful.”

“Intense desire to engage community: churches, nonprofit organizations.”

“Every child has great potential.”

“We make every student prepared for whatever their goals are.”



SURVEY SAYS

“... truly care and it is apparent in how they treat their students.”

“We prepare students for the changing world.”

“... we’re rebuilding and restructuring with the purpose of creating the premier school.”

“... invested in new technology and implementing new and innovative ways to use technology in the classroom.”

“... branching out into different education choices/options for students.”

“Teacher training and professional development provided are excellent. Every opportunity to improve is provided.”

“The district is making goals clear and understandable. Students are being supported and recognized.”



SURVEY SAYS

“Everyone working for the same goal: Do what is best for each student.”

“... working toward remaining on the cutting edge in academic support, professional development, technology and special support services.”

“We are working ever harder to address the things that hold students back from success: hunger, abuse, poverty, homelessness, lack of school supplies and bullying.”

“... a sound plan leading forward and is doing great with helping high school students make plans to help them in the future.”

“... proud to work for a district that sees improvements needed and acts on those needs.”



SURVEY SAYS

“I believe the district is truly trying to use innovative approaches to education.”

“A spirit of cooperation from the top down.”

“... our teachers are working hard to create a positive, challenging environment for our students.”

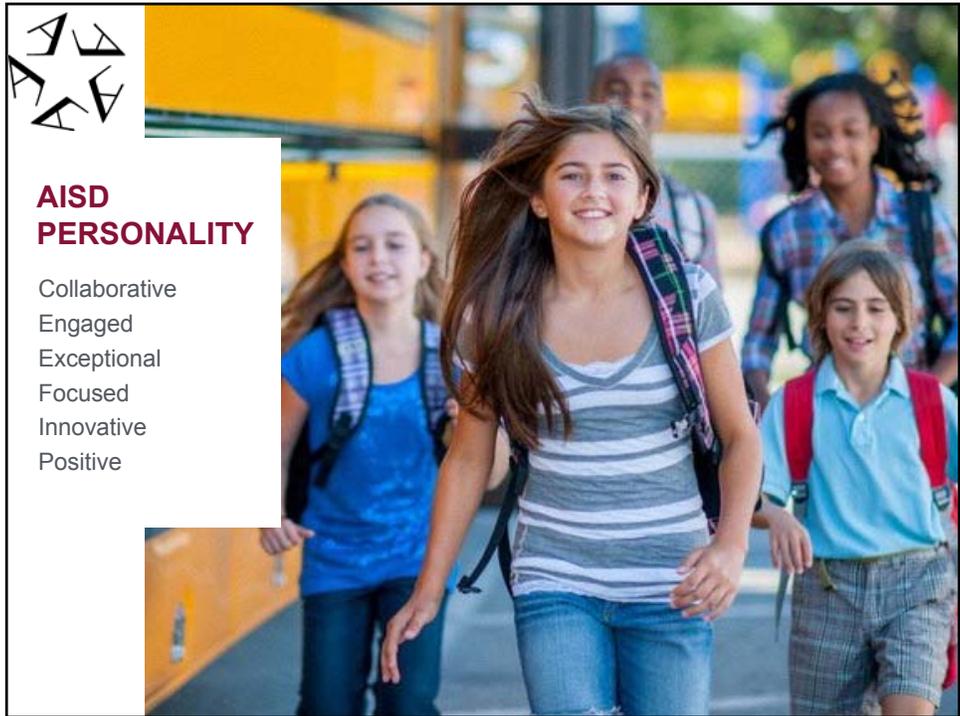
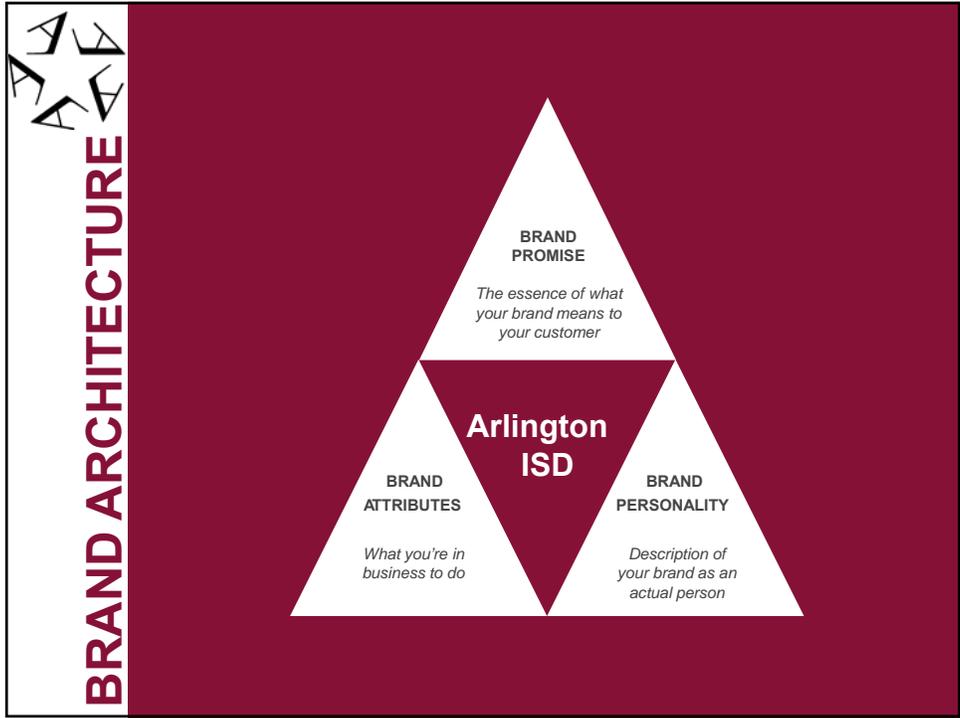
“I appreciate the general care for me as a person.”

“There is a true ‘kid first’ mentality that is obvious at the school and district level.”

“... impressed by the kindness that employees show to one another.”

“The focus on my child's learning is unmatched. The teachers and administration make sure the learning is structured so that my child excels.”

“A great environment and my child is thriving.”

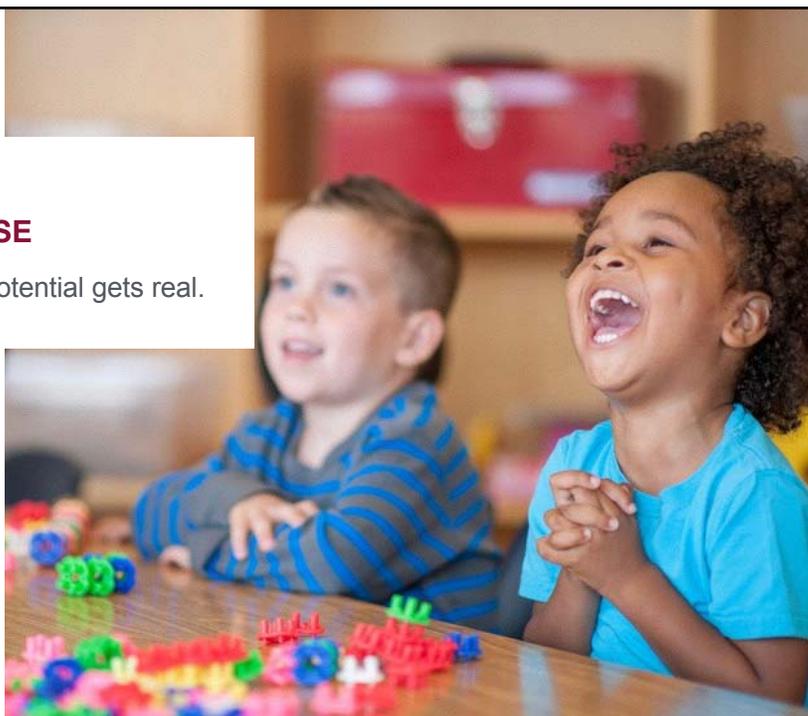






**AISD
ATTRIBUTES**

The AISD brings real resources, real conviction and real opportunity to help our students and staff be successful on their chosen paths.





**AISD
PROMISE**

Where potential gets real.



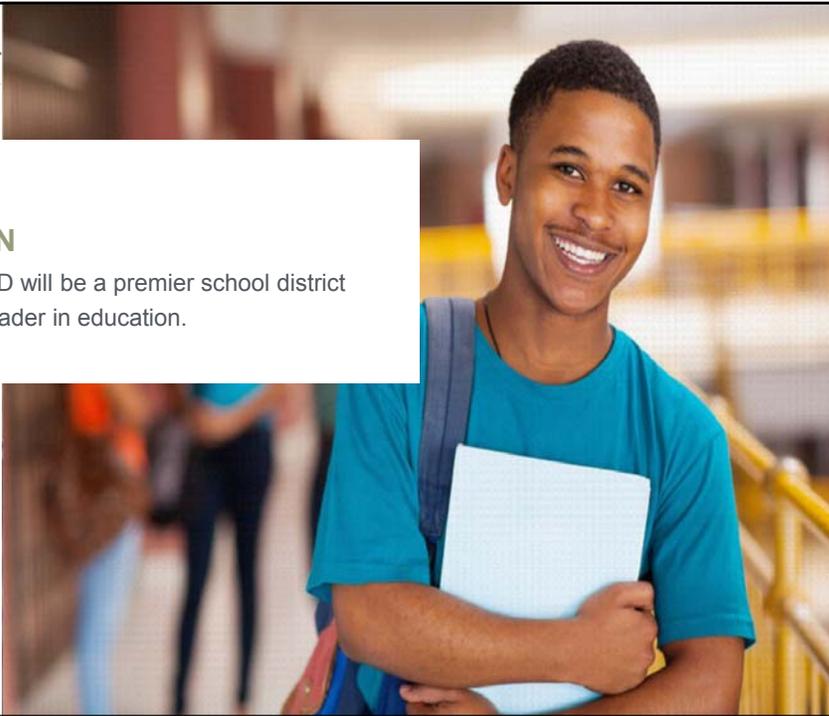
AISD OVERVIEW

The Arlington ISD has a population of more than 61,000 students – and we’re dedicated to realizing the potential of every single one of them. With a highly engaged faculty and an array of learning opportunities that foster each student’s unique interests and talents, our goal is to have 100 percent of AISD students graduate exceptionally prepared for college, career and citizenship.

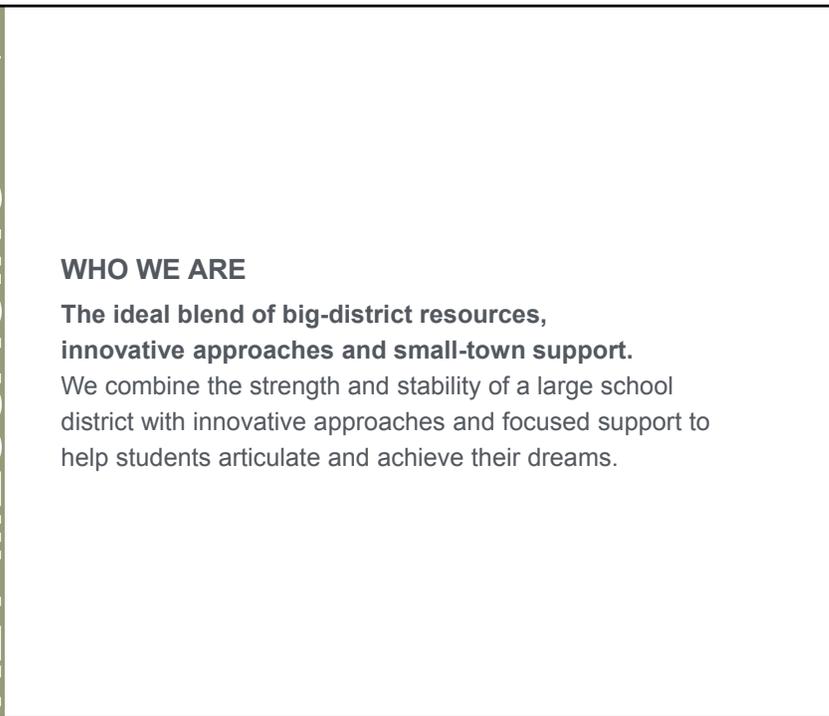


OUR MISSION

The mission of the Arlington ISD is to empower and engage all students to be contributing, responsible citizens striving for their maximum potential through relevant, innovative and rigorous learning experiences.




OUR VISION
The AISD will be a premier school district and a leader in education.




KEY MESSAGING

WHO WE ARE
The ideal blend of big-district resources, innovative approaches and small-town support.
We combine the strength and stability of a large school district with innovative approaches and focused support to help students articulate and achieve their dreams.



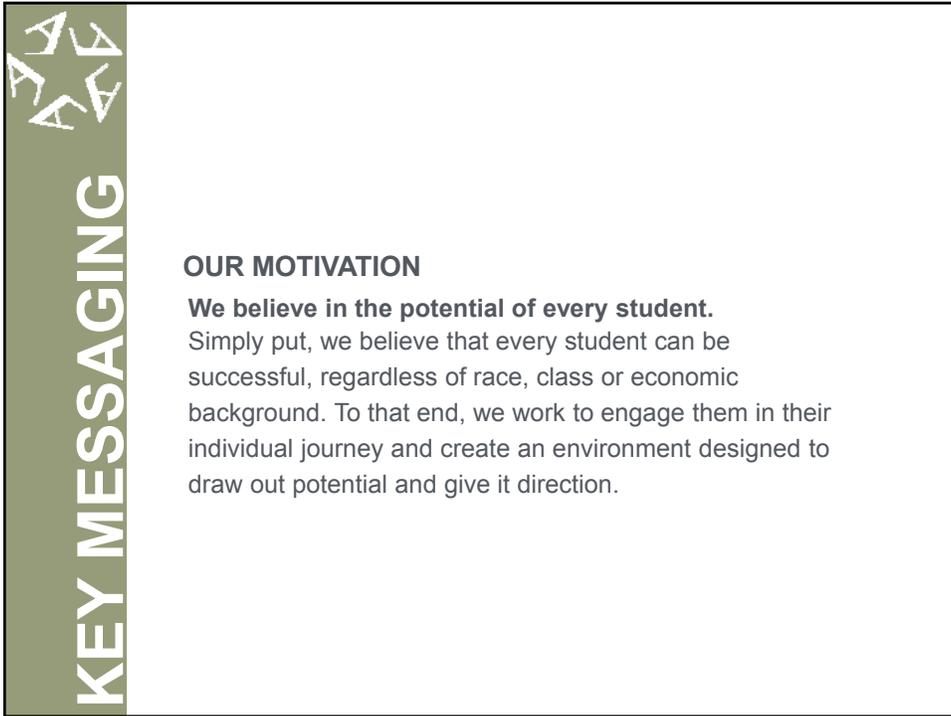
KEY MESSAGING

WHAT WE DO
We prepare our community's students for whatever they are called to be.
Through effective teaching and leadership, a positive culture and an engaged community, we equip students to graduate exceptionally prepared for college, career and citizenship.



KEY MESSAGING

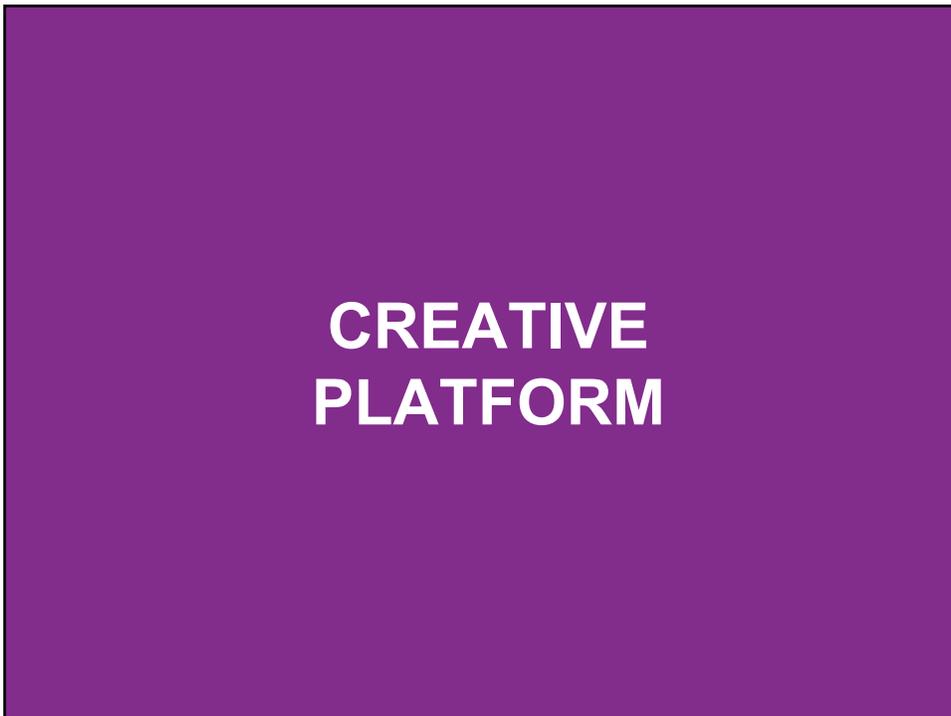
HOW WE'RE DIFFERENT
We help each student find their path and be successful on it.
At every stage in a student's journey, we provide a wealth of opportunities – from fine arts to college prep to technical training – to help them identify their unique dreams and realize their potential.



KEY MESSAGING

OUR MOTIVATION

We believe in the potential of every student.
Simply put, we believe that every student can be successful, regardless of race, class or economic background. To that end, we work to engage them in their individual journey and create an environment designed to draw out potential and give it direction.



**CREATIVE
PLATFORM**

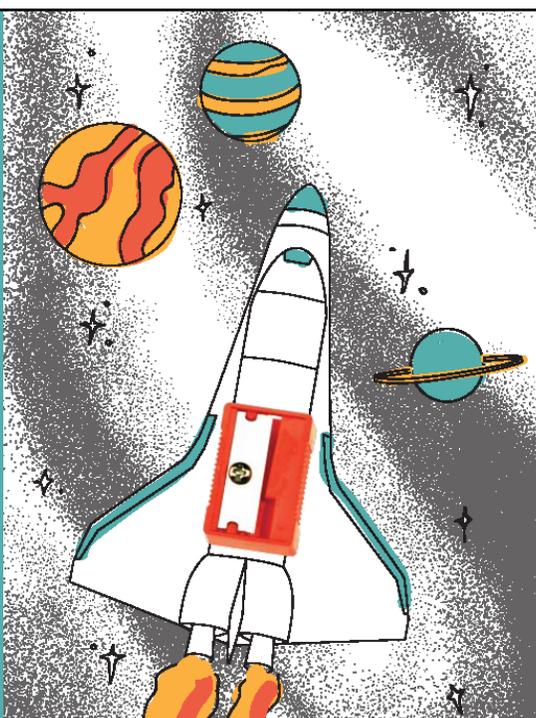
WHAT DO WE WANT THEM TO DO?

- Go to aisd.net or visit us online
- Request additional information
- Call or visit a school

NOT EVEN THE SKY'S THE LIMIT

From fine arts to college prep to technical training, we help students identify their unique dreams and realize their potential.

- Free and low-cost prekindergarten programs
- Strong science, technology, engineering and math instruction
- College- and career-readiness programs, including technical dual credit, workforce certifications and internships
- Award-winning fine arts programs





**Careers at AISD:
This way up.**

AISD.net/HR



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INDEPENDENT SCHOOL DISTRICT
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Save the way.
Drivers wanted. Apply at AISD.net/HR



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It's grow time.

Pre-K and Kinder
Roundup | April 3-13

 **Arlington**
INDEPENDENT SCHOOL DISTRICT
More Than a Remarkable Education



ARLINGTON ISD



Questions?



Discussion Topics

- Other considerations for short-term strategies?
- Other considerations for long-term strategies?