

Summary

Due to the facility expansion under consideration and the addition of the three portable buildings, short-term growth at Westlake Academy can be managed by controlling the number of students that are enrolled from the secondary boundaries. This short-term enrollment management will provide the Academy the necessary space to accommodate approximately 30% growth in the PYP Programme. **The most significant challenge the Academy will face while reducing the overall student population, in anticipation of Westlake resident growth, is managing the transition from a majority of secondary boundary students to a majority of primary boundary students.**

Capacity Analysis

When reviewing the potential number of students that could be generated, staff started with the current available housing stock, vacant developed lots, and exemption policies that current residents may use in the future.

Table 1 - Current Westlake Housing Stock

Westlake Current Housing Stock	# of Units	SDS Scenario		P&A Scenario		HPISD Scenario	
		Ratio	# of Students	Ratio	# of Students	Ratio	# of Students
Available Housing Stock	17	.65	11	.68	12	.66	11
Grandparent Exemption	205	.65	133	.68	139	.66	135
Vacant Developed Lots	162	.65	105	.68	110	.66	107
Total	384		249		261		253

Table 2 - Potential Housing Stock (Granada)

Granada	# of Units	SDS Scenario		P&A Scenario		HPISD Units	
		Ratio	# of Students	Ratio	# of Students	Ratio	# of Students
Single Family Housing	89	.65	58	.68	61	.66	59
Total	89		58		61		59

Table 3 - Potential Housing Stock (Vallacito)

Vallacito	# of Units	SDS Scenario		P&A Scenario		HPISD Scenario	
		Ratio	# of Students	Ratio	# of Students	Ratio	# of Students
Single Family Residents	12	.65	8	.68	8	.66	8
Townhomes/Condos	121	.65	79	.68	82	.17	21
Apartments	137	N/A	N/A	.68	93	.10	14
Age Restricted	289	N/A	N/A	.68	197	.10	29
Total	559		87		380		72

Table 4 - Total Potential Housing Stock

Total Housing Stock	# of Units	SDS Scenario	P&A Scenario	HPISD Scenario
		# of Students	# of Students	# of Students
Grand-total	1,032	394	702	384

The long-term growth of the Academy needs to be carefully managed in order to balance the desire to have available seats for Westlake residents while maintaining a sustainable financial outlook. The table and charts in Appendix A show how the Academy can create additional space for Westlake residents over the next five years, but the excess capacity must be balanced with the Town’s and Academy’s financial ability to provide support for the “Westlake Reserve”. To manage the potential growth, staff recommends:

- Removal of the two-year clause allowing Westlake residents to leave the primary boundary and still have their children attend the Academy
- Adjust the Building Permit Exemption to allow the superintendent to determine whether space is available and allow entry based upon the current classroom size

It is sometimes difficult to see the forest for the trees and the recent explosion of classroom size has created a sense of crisis, but planning for significant enrollment growth has been ongoing since the end of 2010. Many stakeholders have expressed concern about the Academy becoming “full” and having to turn away Westlake residents, but it is possible through careful management, to accommodate the potential future growth through natural attrition and by reducing or eliminating enrollment of secondary boundary students. Historically the Academy has seen an average student mobility rate of 7%. In the current year, the Academy has seen an approximate student mobility rate of 2.2%. If we include a reduced ratio of student mobility (5%), it further increases the number of opening that will be created in the next five years.

Table 5 - Transition Plan Enrollment Scenario

Enrollment Area	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Primary Boundary	240	255	268	280	289	295
Faculty/Staff	43	48	48	48	48	49
Siblings	229	200	157	119	96	68
Lottery	153	151	151	144	124	112
Foreign Exchange	1	0	0	0	0	0
Student Mobility (5%)	N/A	-33	-31	-29	-28	-26
DP Attrition	N/A	-6	-6	-6	-6	-6
Total	666	615	587	556	523	492

This model only includes enrollment of Westlake residents in Kindergarten. If Westlake student enrollment continues in other primary and secondary grades, as in years past, the total population will increase slightly but attrition should still outpace new enrollment.

Appendix A further illustrates how dramatically the Academy can influence the enrollment numbers over the next five years through simple management of the lottery and sibling list. In Table 15, it shows

that the total population can be reduced by 174. This would reduce the student population to 60% of the proposed 817 students seen in the Academy expansion. In addition to freeing up 174 seats over the next five years, the Academy expansion plan will add 189 seats to the campus in FY 2014-15. In phase two of the Academy expansion, an additional 283 seats are created KG through grade 12. In the next five years, the Academy could introduce 363 new students into the Academy without impacting the total campus population or 647 students with the completion of phase two of the Academy expansion.

Expansion Phase	Potential # of Students Served
Phase One	855
Phase Two	1,140
Phase Three	1,300

In addition, as the Academy continues to graduate a new class each year, capacity is continuing to increase as the secondary boundary students are filtered out of the Academy. Also, historical enrollment numbers show that as the primary boundary students move upward into the Secondary Programme, a significant portion leave the Academy. The Academy could introduce secondary boundary students into the Academy in the Middle Years and Diploma Programme to maintain ideal classroom sizes.

Figure 1 - Current Year Enrollment

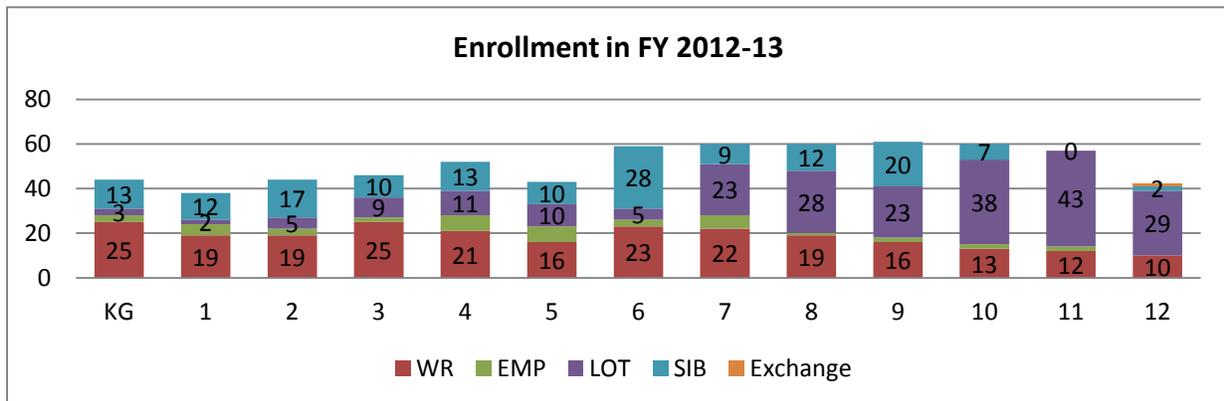
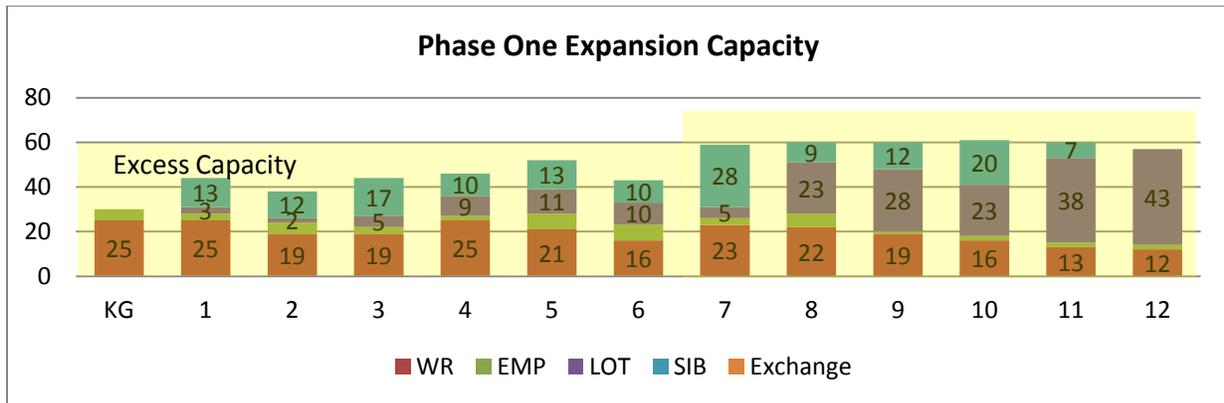


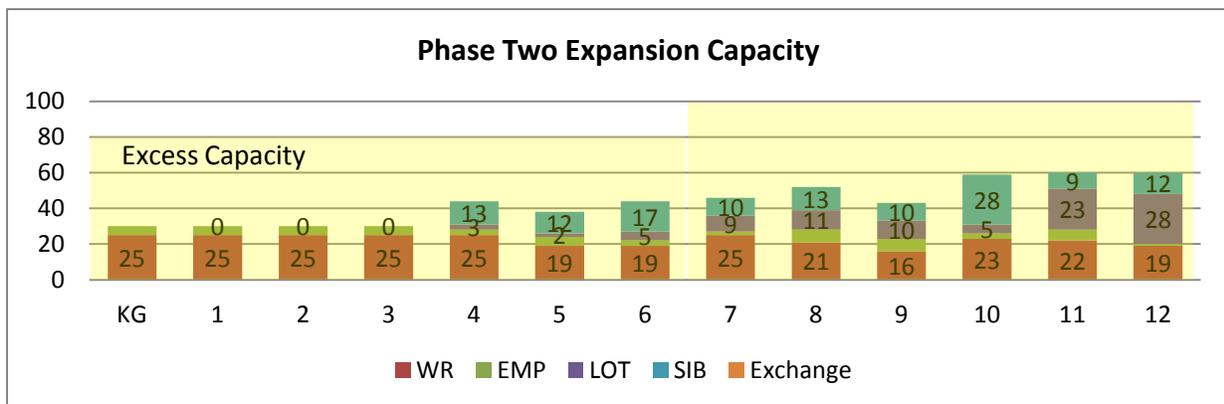
Figure 1 illustrates how the secondary boundary students complement the current trend of primary boundary students exiting the Academy in the MYP and DP years. By carefully managing the enrollment in the Secondary Programme, the Academy can maintain a stronger financial outlook without placing additional financial obligations on the Town.

Figure 2 – Phase One Expansion Capacity



This capacity is achieved in phase one of the Academy expansion. The Academy capacity would increase another 25% or another 283 seats in KG through grade 12.

Figure 3 - Phase Two Expansion Capacity



Admissions Policy

The current admissions policy, which has been attached to this memo, outlines the Federal, State, and Local Option Policies that drive enrollment at the Academy. Federal and State policies are mandated and there is little or no local control. The locally adopted policies are the areas under discussion in the memo, and more specifically, how these local policies impact enrollment at the Academy and the Town of Westlake.

Admissions Policy in Context

When reviewing the exemptions outlined in the Admissions Policy, it is important to understand the context of the policy when implemented. A number of the local option exemptions allowed in the Board adopted Admissions Policy was developed to meet the current needs of that time. For example, the grandparent's exemption was adopted to help provide value to members of the Westlake community who are empty nesters but may have grandchildren they would like to enroll at the Academy.

In addition, the Academy was built as an economic development tool and the annual debt service payment is paid by an economic development sales tax. The hope was that the Academy would encourage growth in both residential and commercial development. In fact, recent citizen surveys show that the Academy has played a key role in the decision for many of our new Westlake residents.

Keeping this in mind, we must understand changes to the admissions policy will have a numeric impact on enrollment, but may also have an impact on civic engagement as well as economic development activity. This has been under discussion at the staff and Board level beginning in the 2010-11 school year when the initial facility plan was developed by Peter Hayes with Project Management Services (PMSI). PMSI recommended to the Board significant growth of the Academy to accommodate the future growth of students and to place the Academy on a path to cover the full-cost of service. This initial facility plan was expanded upon by Bennett – Bennett – Pettit and was adopted by the Board in November 2012.

Impact Analysis

As the demand for Westlake Academy increases and more families choose to reside in Westlake to take advantage of the residency exemption, the Academy has been increasing the number of students in classrooms. This scenario and continuing interest in the Academy have made this a priority as the available seats are being outpaced by demand for those seats. Ultimately, we are tasked with managing both the short-term and long-term financial outlook for the Academy which is closely tied to enrollment. We must ask ourselves, what is best for the Town, the Academy, and the students.

In the December 2012 Board of Trustees Workshop, staff was asked to rank the local option exemptions by their potential impact on enrollment at the Academy. When reviewing the current exemptions, outlined in the Admissions Policy, there are two potential short-term, high impact exemptions; first, the Building Permit Exemption, and second, the Grandparents Exemption. There is also one long-term

potentially high impact exemption related to Westlake residents keeping their students enrolled in the Academy after moving from the primary boundary.

FY 2012-13 Student Attrition

The Academy has seen a large reduction in the total number of student attrition. A total of fifteen (15) students have withdrawn from the Academy in the current school year.

Table 6 - 2012-13 Student Attrition

Grade	KG	G1	G2	G3	G4	G5	G6	G7	G8	G9	G10	G11	G12
# of Students	3	1	2	0	0	0	1	1	2	1	0	4	0

The students withdrawing from the Academy have been an almost even split between the Primary and Secondary Programmes (eight students (8) from Primary Programme and seven students (7) from Secondary Programme).

Category 1 Students

Children attending from the primary boundary (Town of Westlake), children of the Academy’s founders, and children of the faculty and staff of the Town of Westlake and Westlake Academy. The enrollment of children coming from one of the following list of exemptions is entitled to enrollment under the current admissions policy.

- Residency Exemption – children that reside in the Town of Westlake are granted immediate enrollment in the Academy as soon as they prove residency within the Town.
 - Two-year residency requirement, allowing students who enter under this exemption and live in Westlake for two-years, to leave the primary boundary and maintain enrollment at the Academy.
- Building Permit Exemption – children whose family has received a building permit from the Town of Westlake
- Grandparents Exemption – children whose grandparents reside in the Town of Westlake and provide 10 or more hours per week of childcare.
- Children of Faculty and Staff Exemption – children of full-time employees of the Town of Westlake and Westlake Academy

Building Permit Exemption – Currently there are 162 vacant developed lots (VDL) in Westlake. Vaquero broke all previous sales records in 2012, selling over 40 lots. This means in the most extreme scenario, the Academy could see potentially 162 new building permits. If each of these lots were to obtain a building permit prior to the start of next school year and we apply the current ratio of students from each lot, **we can anticipate approximately 110 new students.** In the 2012-13 school year, we had two (3) students enter the Academy through building permits.

Table 7 - Total Students Enrolled through the Building Permit Exemption

Grade	KG	G1	G2	G3	G4	G5	G6	G7	G8	G9	G10	G11	G12
# of Students	1	1	0	0	1	0	0	0	0	0	0	0	0

Grandparent Exemption – In the 2010 Citizen Survey, we can see that anywhere from 39% to 68% of Westlake residents may have grandchildren. This number represents from 117 to 205 households. If we apply the same ratio of students generated by other single family households, these potential grandparent homes **could generate between 70 and 130 new students.**

Table 8 - Grandparent Exemption Data

Grade	KG	G1	G2	G3	G4	G5	G6	G7	G8	G9	G10	G11	G12
# of Students	3	0	1	1	1	0	1	1	0	2	0	0	0

There are currently 10 students enrolled through the Grandparent Exemption.

Residency Exemption – Currently there are 17 homes on the market in the Town of Westlake. There are thirteen (13) homes in Vaquero, two (2) in Glenwyck Farms, one (1) on Aspen Lane, and one (1) on Paigebrooke. If each of these homes were to sell prior to the beginning of next school year and we apply the current ratio of students from each home, **we can anticipate approximately 12 new students.**

Table 9 - Students Enrolled No Longer Living in Primary Boundary

Grade	KG	G1	G2	G3	G4	G5	G6	G7	G8	G9	G10	G11	G12
# of Students	0	2	3	2	3	0	0	3	1	1	2	1	1

There are currently 19 students enrolled that were admitted as residents, who have moved to the secondary boundary.

Children of Faculty and Staff Exemption – The ability to enroll your children at the Academy is viewed as a benefit and recruitment tool by the administration. Under the current policy, the student must leave the Academy at the end of the school year when the faculty or staff member no longer works for the Town of Westlake or Westlake Academy.

Table 10 - Students Enrolled through the Employee Exemption

Grade	KG	G1	G2	G3	G4	G5	G6	G7	G8	G9	G10	G11	G12
# of Students	3	5	3	2	7	7	3	6	1	2	2	2	0

Currently there are 43 students attending the Academy that have entered through the Faculty and Staff Exemption. This makes them approximately 6.4% of the Academy’s total student population.

Category 2 Students

Children attending that are admitted through the sibling waiting list and residing in the secondary boundary.

Table 11 - Siblings Currently Enrolled

Grade	KG	G1	G2	G3	G4	G5	G6	G7	G8	G9	G10	G11	G12
Sibling	13	12	17	10	13	10	28	9	12	20	7	0	2

Currently we have 153 students that are enrolled in the Academy through the Sibling Exemption.

Table 12 - Sibling Waiting List Data

Grade	GK	G1	G2	G3	G4	G5	G6	G7	G8	G9	G10	G11
# of Students	1	3	3	15	9	13	2	10	0	1	0	0

Currently we have 57 students on the sibling waiting list. This list of students is constantly changing as students new students enter or students leave the Academy.

Category 3 Students

Children attending that are admitted through the lottery waiting list that is renewed each year.

Table 13 - Lottery Applicants Currently Enrolled

Grade	KG	G1	G2	G3	G4	G5	G6	G7	G8	G9	G10	G11	G12
# of Students	3	2	5	9	11	10	5	23	28	23	38	43	29

Currently the Academy has 229 students enrolled through the Lottery.

Table 14 - 2013-14 Lottery Applications

Grade	KG	G1	G2	G3	G4	G5	G6	G7	G8	G9	G10	G11
# of Students	406	226	201	166	189	159	157	120	103	85	34	35

Currently, the Academy has 1,881 student lottery applications for the 2013-14 school year.

Appendix A – Five-year Student Enrollment Forecast

Table 15 – Five-year Forecast of Potential Student Enrollment

Fiscal Year	Westlake Resident	Employee	Lottery	Sibling	Exchange	Total Population	Total Capacity
FY 12-13	36%	6%	34%	23%	0%	666	100%
FY 13-14	39%	7%	31%	23%	0%	648	97%
FY 14-15	43%	8%	25%	24%	0%	618	81%
FY 15-16	48%	8%	20%	25%	0%	585	77%
FY 16-17	52%	9%	17%	23%	0%	551	72%
FY 17-18	57%	9%	13%	22%	0%	518	62%

