

Underwood & Ward
Facility & Enrollment Study
Task Force

May 9, 2023



Agenda

1. Opening Exercise
2. Review Working Agreements
3. Confirm Mission and Guiding Principles
4. Change and Transition Discussion
5. Educational Program Introduction
 - Strengths and challenges of small schools
6. Historic and Projected Enrollment and Methodology
7. Next Meeting Topics and Materials
 - Educational program

Activator: Commonalities

When prompted to start, brainstorm a list of things the members of your table group have in common. The goal is to find as many commonalities in 5 minutes as you can!

Working Agreements

We will share responsibility for creating a safe, collaborative, and productive environment by:

- Centering students' educational needs and best interests in our conversations and using data to guide our inquiry and discussions
- Listening attentively to one another and considering varied perspectives and ideas
- Participating and sharing our ideas, while monitoring and sharing airtime and inviting all voices to be heard
- Coming prepared to each meeting and limiting distractions as much as possible
- Assume positive intentions and take ownership for impact, despite intentions
- Asking questions for clarification



Task Force Mission and Guiding Principles

“Working with a consultant to support and help guide the process, this initiative will focus on studying the current and projected student enrollment, the physical facilities and sites, as well as the current and ideal education programs. Further, these studies will generate reports of existing conditions and potential solutions for the district.”

“The results of this work will be to present short and long term options to the School Committee and Superintendent on the future of both school buildings by December of 2023.”

DRAFT Underwood and Ward Mission and Guiding Principles



Guiding Principles

1. A task force composed of representatives from the parent communities of each school, teachers from each school, members of the School Committee, City Council, and School and City staff shall be formed for the purpose of reviewing and analyzing information, providing feedback, and identifying feasible options to present to the School Committee. The process shall be transparent and collaborative and will include regular community updates with ample public dialogue.
2. Existing condition reports, analysis, and supporting documents shall be posted on the Newton Public Schools website to provide easy access to information as it becomes available.
3. To maintain Newton's standards of academic excellence and student diversity, the target number of general education classrooms in any proposed solution should be in the range of 18-22, similar to other recently completed and planned elementary school projects. Additional classrooms may be warranted based on either current or projected enrollment, or district wide programming.



Guiding Principles

4. This initiative will analyze and provide reports and recommendations for several potential scenarios including but not limited to:

- Renovation of both Schools.
- New construction for both Schools.
- Renovation of one school and new construction of the other.
- New construction for the Ward or Underwood Elementary School to be the new home for both schools, resulting in consolidation of the two schools.
- Redistricting Ward and Underwood Elementary School students into other elementary schools in the district.

5. The educational program options and inadequate learning environments in these aging facilities are the primary driving factors for this initiative.

Guiding Principles

6. Capital and operating costs will be one of many factors considered when determining the favorability of potential solutions. Conceptual cost estimates will be generated and considered, and when all things are considered equal, cost implications may be considered when determining a recommended solution.

7. Newton's long-standing tradition of neighborhood schools will be one of many factors considered as part of the context of the review and analysis process for proposed options.

8. The study will not present a final solution but rather will present several options and will use a criteria matrix to help determine option viability and favorability to help inform the Newton School Committee, who will make the final decision in a formal public vote. Recommendations for both short and long term solutions that improve educational programming and address building challenges will be presented.

9. Evaluations and recommendations will consider the impacts of each scenario on multimodal transportation needs and transportation costs to both Newton Public Schools and families.



Embarking on a change & transition process

"It isn't the changes that do you in, it's the transitions. Change is not the same as transition. Change is situational: the new site, the new boss, the new team roles, the new policy.

Transition is the psychological process people go through to come to terms with the new situation. Change is external, transition is internal"

~ William Bridges



Embarking on a change & transition process

- A change & transition process that went well
- A change & transition process that went poorly

How might these examples help guide our work as we consider the future of Ward and Underwood schools?

**NEW
BEGINNINGS**

**Confusion
Undirected energy
Apathy
Impatience**

**NEUTRAL
ZONE**

**Trust
Excitement
Acceptance**

**Shock
Denial
Fear
Anger
Anxiety**

ENDINGS

Embarking on a change & transition process: Endings

- Identify who is losing what
- Accept the reality and importance of the subjective losses
- Don't be surprised at overreaction
- Acknowledge the losses openly and sympathetically
- Expect and accept the signs of grieving
- Compensate for the losses
- Give people information, and do it again and again
- Define what's over and what isn't
- Mark the endings
- Treat the past with respect
- Let people take a piece of the old way with them
- Show how endings ensure the continuity of what really matters

Education Program Introduction - Strengths & Challenges

Strengths of Underwood & Ward Schools

UNDERWOOD

Strengths
Awesome Green Team, space, composting etc.
Farlow Park / playground (shade)
Families and community members
Diversity of community (SES, Lang/ELL/race)
Staff – family-like, highly qualified
Walkable and accessible
Largest # of students from Boston (METCO)
Special education/full inclusion
Gymnasium & multi-purpose room can be used to meet school/community needs
One main hallway creates community and connection
Office is central
Blue zone/bus drop off works well
Van drop-off is straightforward
Proximity to Bigelow

WARD

Strengths
Lots of walkers and bikers
Enthusiasm, involvement among families/communities
Ethnic diversity/linguistic diversity
Strong staff/leadership
Playground, garden, green space
Curb appeal
Private, quiet street
Relationship with After School program

Education Program Introduction - Strengths & Challenges of Small Schools

- Potential for small class sizes, strong sense of community
- Challenges of “right sizing” classrooms—potential for sizes markedly lower or higher than district average
- Partial FTEs for specials makes scheduling difficult; scheduling driven by staffing. Challenges of hiring and retaining qualified staff with partial FTEs
- Limited social opportunities
- Flexible grouping challenges, limited cohort clusters for academic/programmatic purposes
- Staff teaming by grade level; annual changes in team composition
- 18 classrooms = 3 classrooms/grade - this configuration better supports the educational plan, staffing, scheduling and social and emotional well-being of staff, students and families, while also allowing for enrollment fluctuations.



New and Planned K-5 Schools in Newton

- Angier 2015* – 24 classrooms
- Zervas 2017 – 24 classrooms
- Cabot 2019* – 24 classrooms
- Lincoln-Eliot (fall '25) - 18 + 2 classrooms (in design)
- Countryside* (fall '27) - 21+2 classrooms (in feasibility)
- Franklin (fall '27 or '29) - 18+2 classrooms proposed (feasibility)
- Horace Mann - 18 classrooms (in feasibility, on hold)

*MSBA funding - Angier and Cabot were partially funded by the State.
Countryside is anticipated to be partially funded by the State.



Enrollment Projection methodology: Grades 1-12

- Cohort Survival Ratio (CSR) methodology
 - Compares the number of students in a particular grade level cohort in one year to the number of students in that cohort in the prior year
 - Calculated by grade and school (Underwood grades 1-2, for example)
- This year, used a modified 5-year average CSR
- Omits 2020 (COVID) and uses 2022, 2021, 2019, and 2018
 - Large enrollment decline in 2020, mainly due to pandemic, results in low CSRs for 2020
- 5-year average CSRs by school/grade are used with the current year's enrollment by school/grade to calculate projections by school/grade
- Non-resident student projections and projected students from new developments are then added to projections by school/grade
- Projections are aggregated by school, grade, and district

Enrollment Projection methodology: Kindergarten

- Utilize prior K enrollment by school for initial estimate
 - This year, used an adjusted 3 year average by school
- Calculate 3 year average by school for resident students
- Add non-resident student projections and projected students from new developments by school
- Sum school totals for districtwide total
- Compare districtwide total to birth rate to calculate the birth to K ratio
- Based on ratio, adjust the districtwide K total to reflect birth to K ratio trend
- Distribute the K adjustment across elementary schools
 - Adjustment made based on the percentage of housing stock in each district, the percentage of apartments in each district, and the home sale trend in each district in recent years

Birth to K ratio history

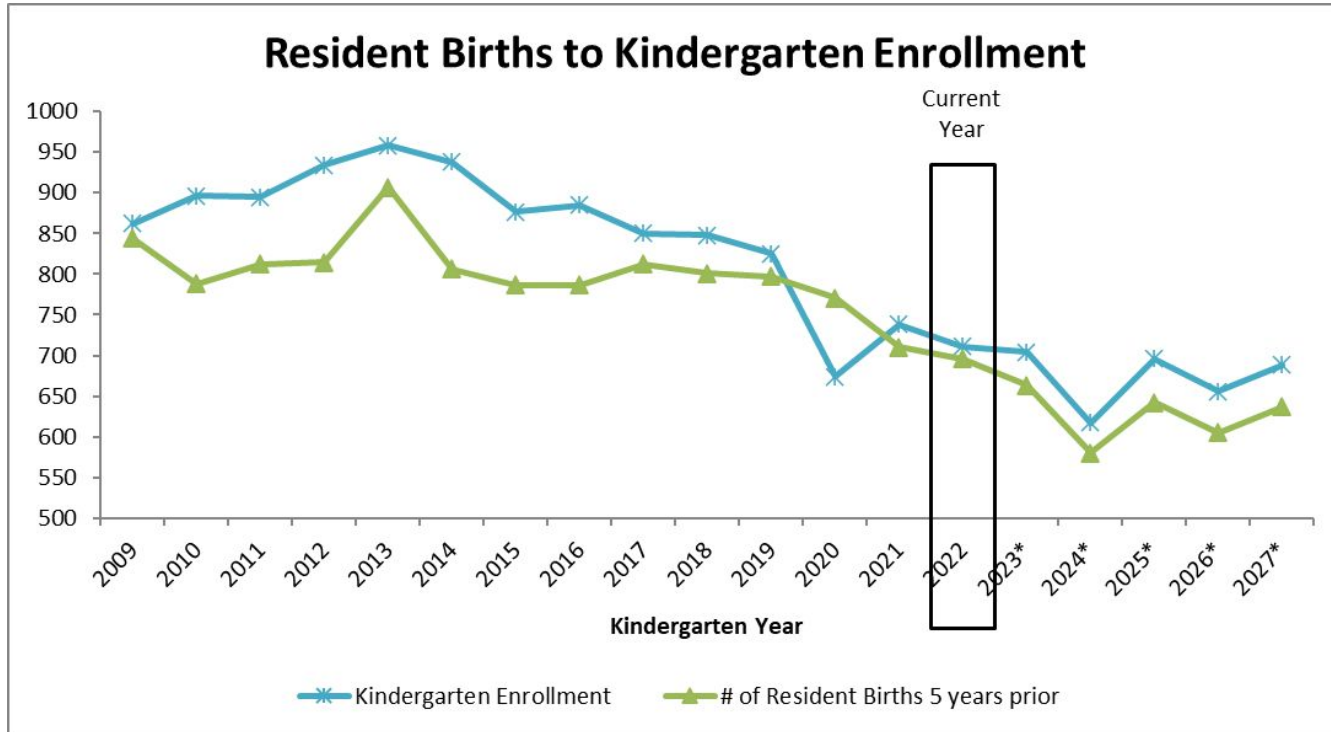
Resident Births* to Kindergarten Ratios

Birth Year	Births to Kindergarten Ratios															
	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018**	2019**	2020**	2021**	2022**
# of Births	815	907	806	787	787	812	801	797	771	710	696	663	580	642	605	637
Kindergarten Year	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Kindergarten	934	958	938	877	885	850	848	825	674	738	711	704	617	696	656	688
Ratio	1.15	1.06	1.16	1.11	1.12	1.05	1.06	1.04	0.87	1.04	1.02	1.06	1.06	1.08	1.08	1.08

*Source is the Massachusetts Department of Public Health, Vital Statistics (obtained through NESDEC).

** Kindergarten class is projected.

Resident Births* to Kindergarten Ratios



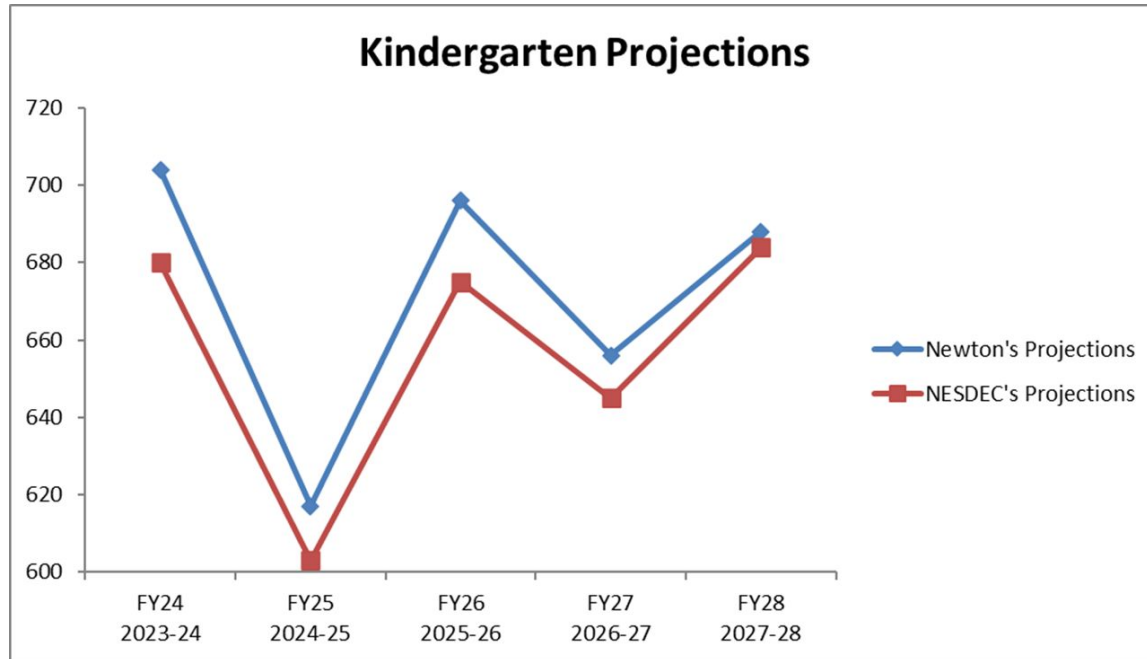
Source: Massachusetts Dept. of Public Health, Vital Statistics (obtained through NESDEC)

*Kindergarten class is projected



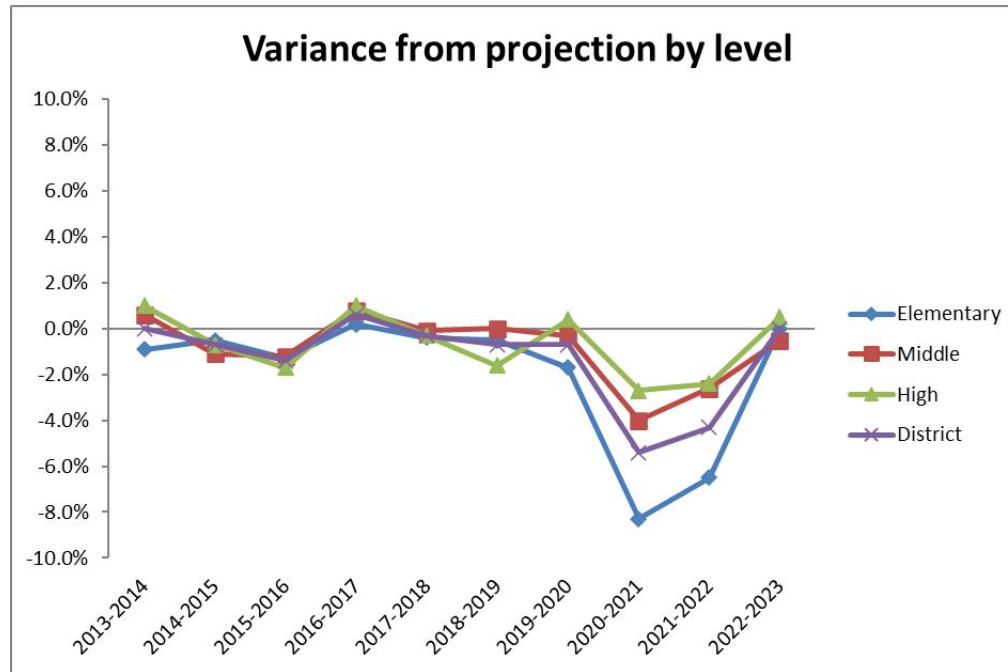
Newton vs. NESDEC K projections

- NESDEC uses a different districtwide K projection, but is similar to Newton's overall projections in the next 5 years



Variance from projection

- Typical variance for district and level projections is within +/-2%
- COVID resulted in larger negative variances (enrollment below projection)

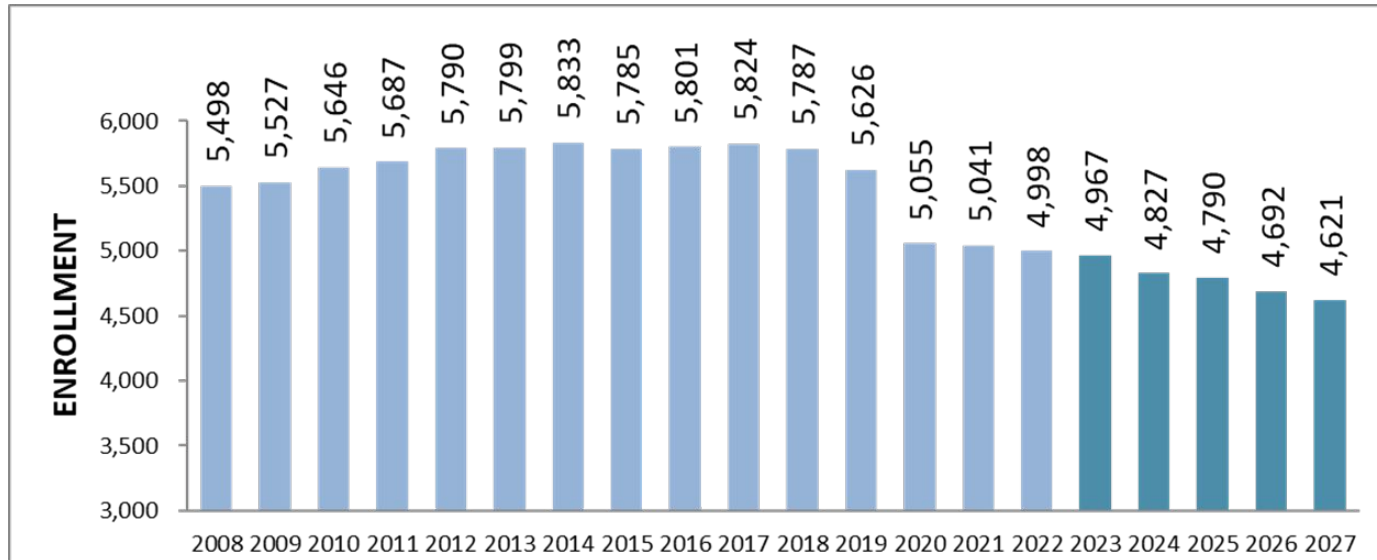


External factors that can impact projections

- **Leading indicators (data available far enough in advance to shift planning)**
 - Birth rates (5 years prior to school enrollment)
 - Residential development
 - Home sales
 - Mortgage rates
- **Immediate impact (data not available in advance for planning)**
 - Natural disaster
 - Pandemic
 - Shifts in immigration (may have some information available in advance)
 - Large shift in family school choices that differ from prior years (such as shifts in private school enrollment)

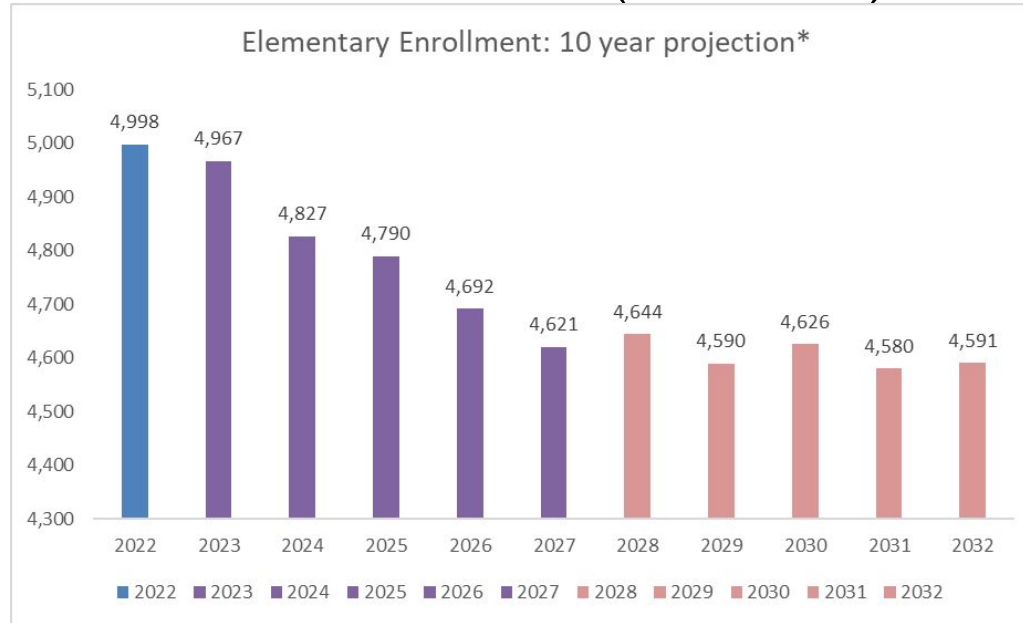
5-Year Projections: Elementary

- **Elementary: -377 students (-7.5%)**
 - Assumes decreasing K classes in 3 of the next 5 years



Current 10-Year Projections: Elementary

-407 students (-8.1%)



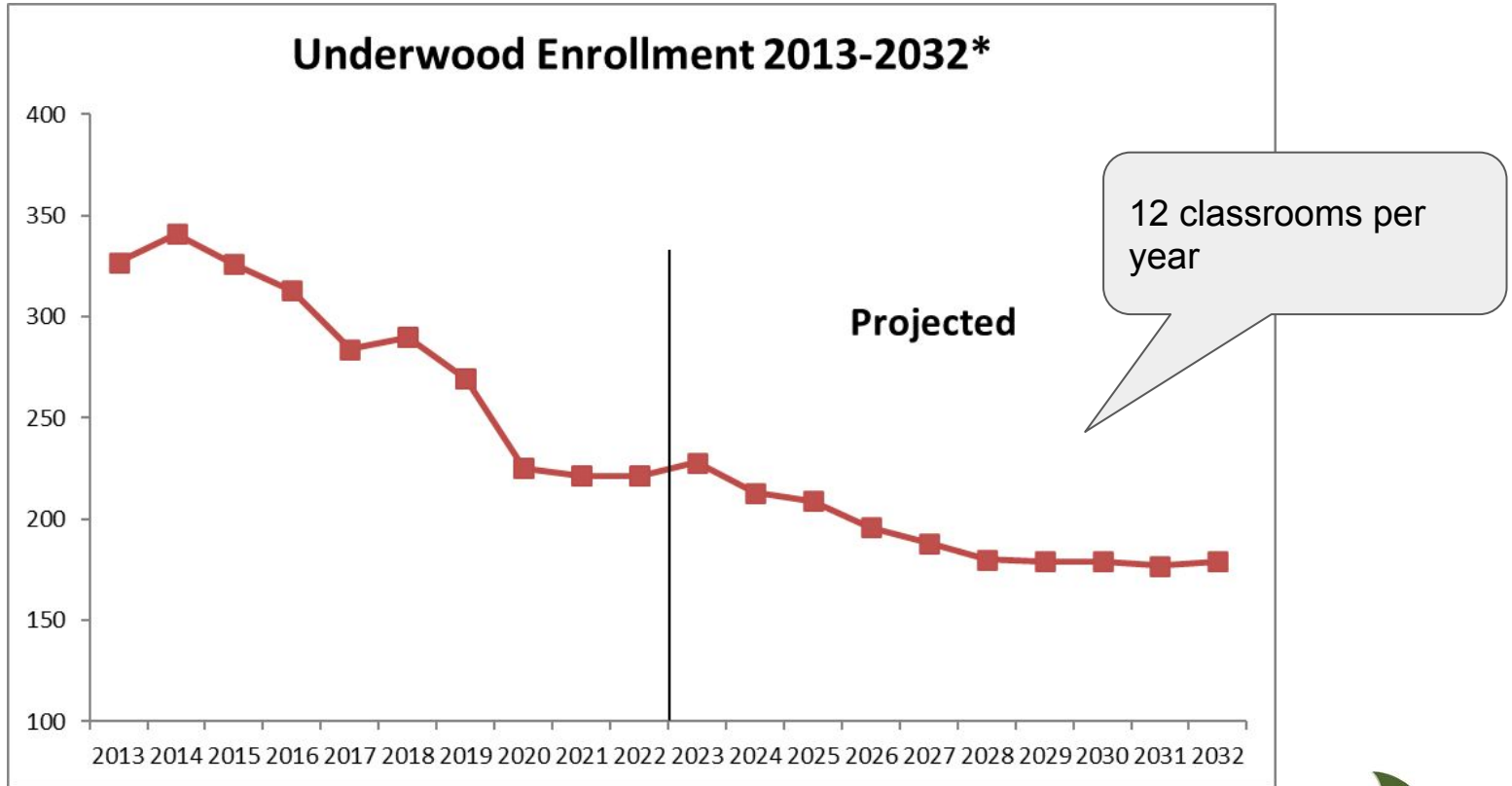
*Elementary projections that are pink (2028-2032) include estimates for students not yet born. These years utilize estimated birth rates from NESDEC, which stabilize due to the estimation methodology.



Why is enrollment declining at Ward and Underwood?

- Decline in birth rate overall
- Little development in either school district
- Non-public school enrollment has been consistent in both schools for many years, with an increase in recent years

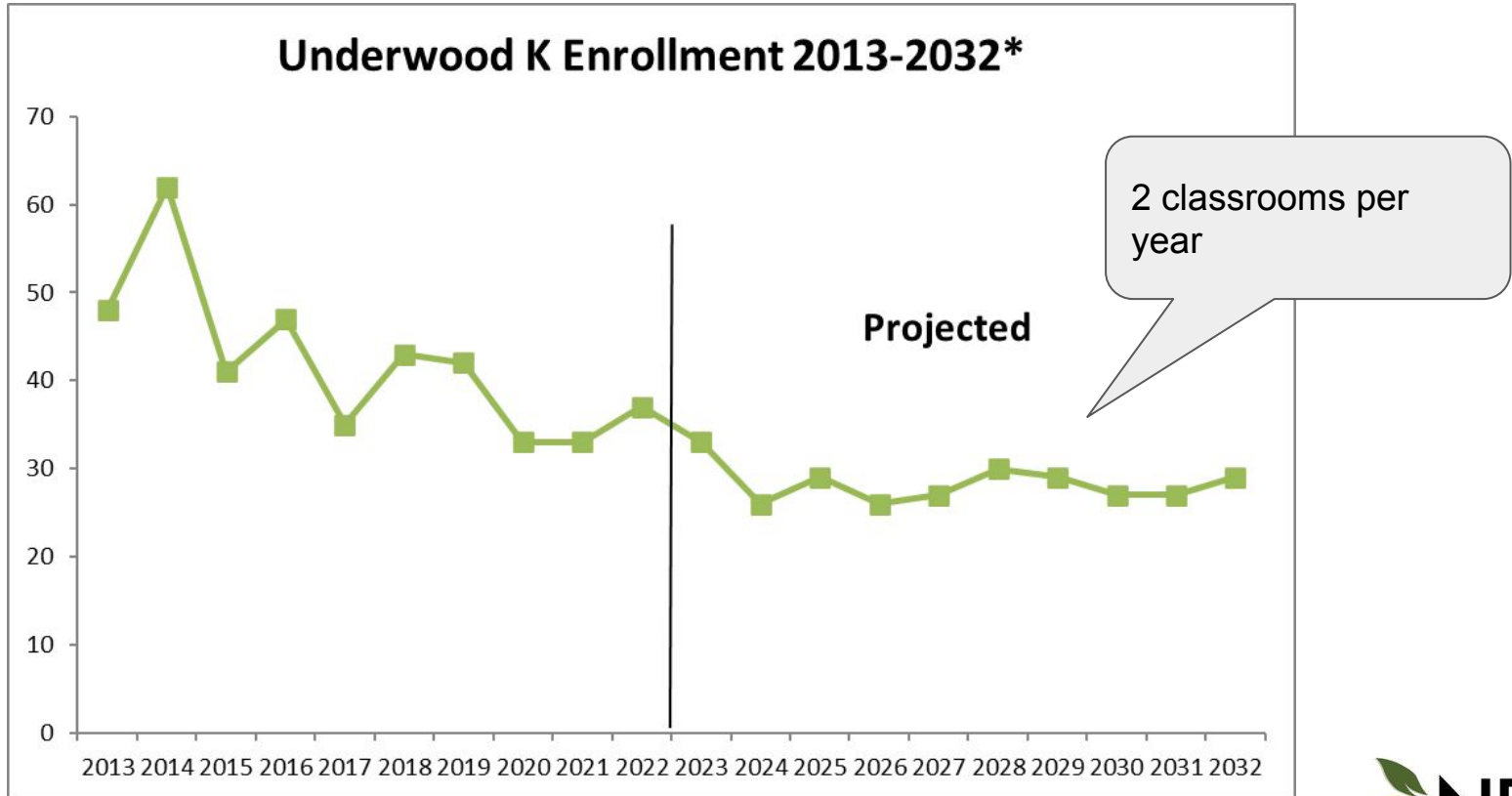
Underwood Elementary School: Current and Projected Enrollment



*Projections for 2028-2032 include estimates for students not yet born. These years utilize estimated birth rates from NESDEC, which stabilize due to the estimation methodology.



Underwood: Current and Projected K Enrollment



*Projections for 2028-2032 include estimates for students not yet born. These years utilize estimated birth rates from NESDEC, which stabilize due to the estimation methodology.

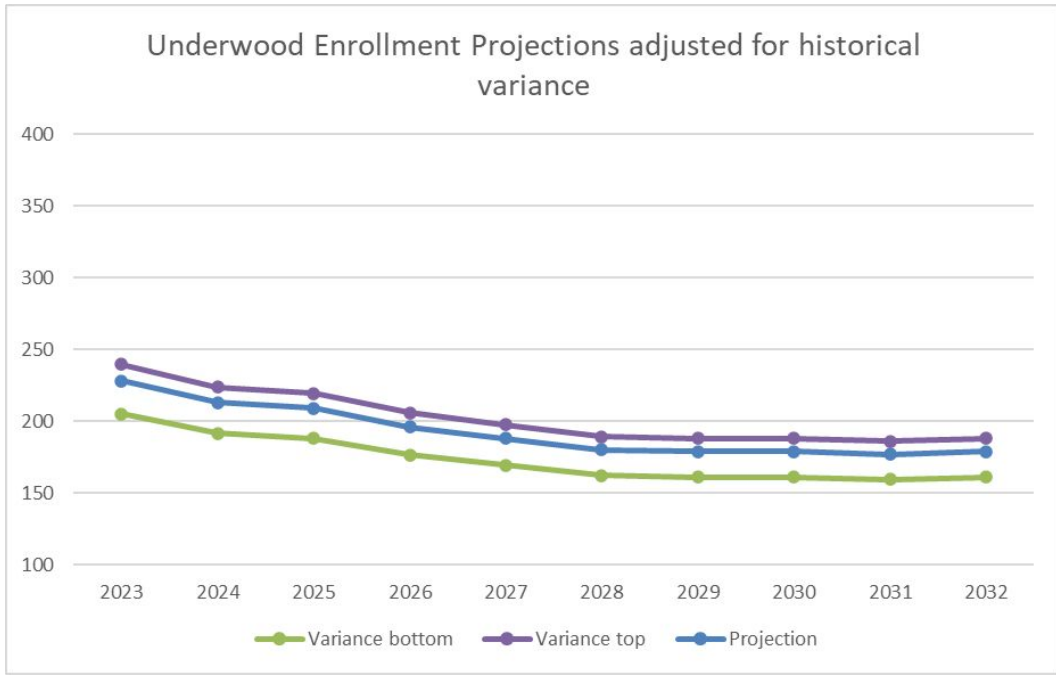


Underwood: Variance from projection

- Overall: ranged from -10% (-32 students) to 5% (+16 students) over the past 10 years
- Overall 10 year average is -2.7%
- Kindergarten: ranged from -26% (-12 students) to 17% (+9 students) over the past 10 years
- Kindergarten 10 year average is -7%

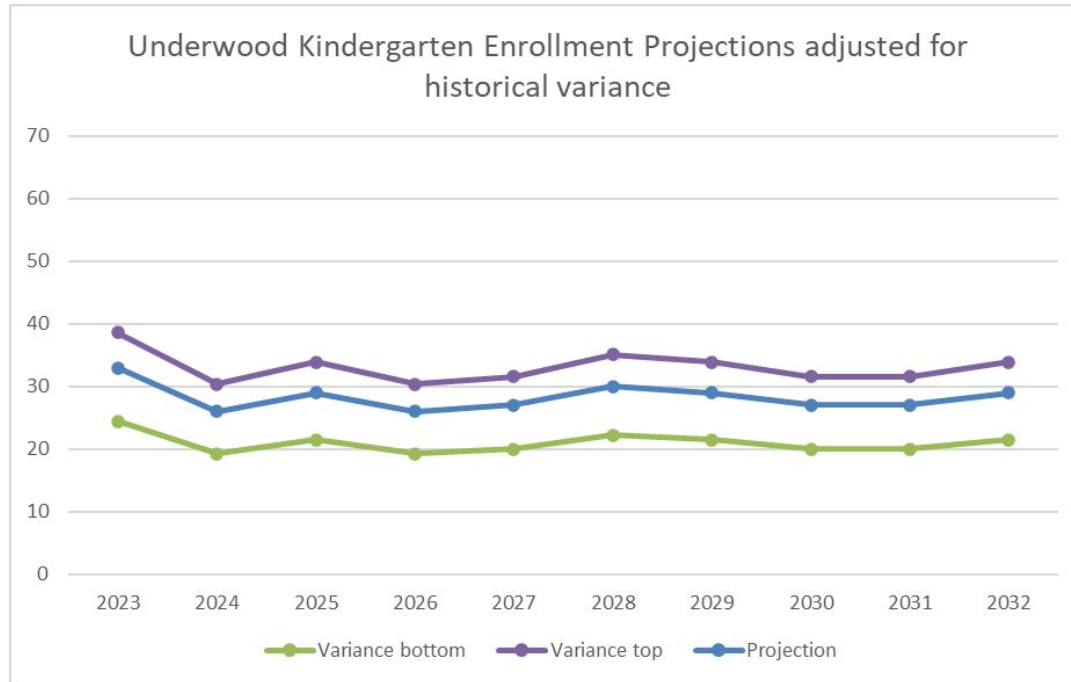
Underwood historical variance from projection with current projections

- Utilizing historical variance maximums and minimums, Underwood's projected enrollment in 5 years falls within a range of 170-200 students (around 12 classrooms)



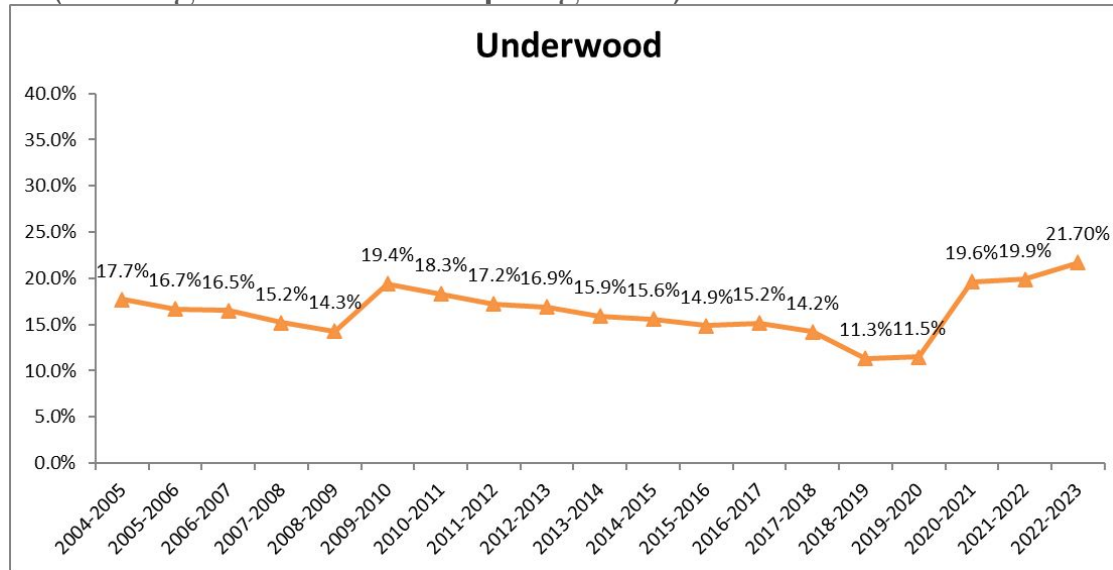
Underwood K historical variance from projection with current projections

- Utilizing historical variance maximums and minimums, Underwood's K projected enrollment in 5 years falls within a range of 20-32 students (1-2 classrooms)

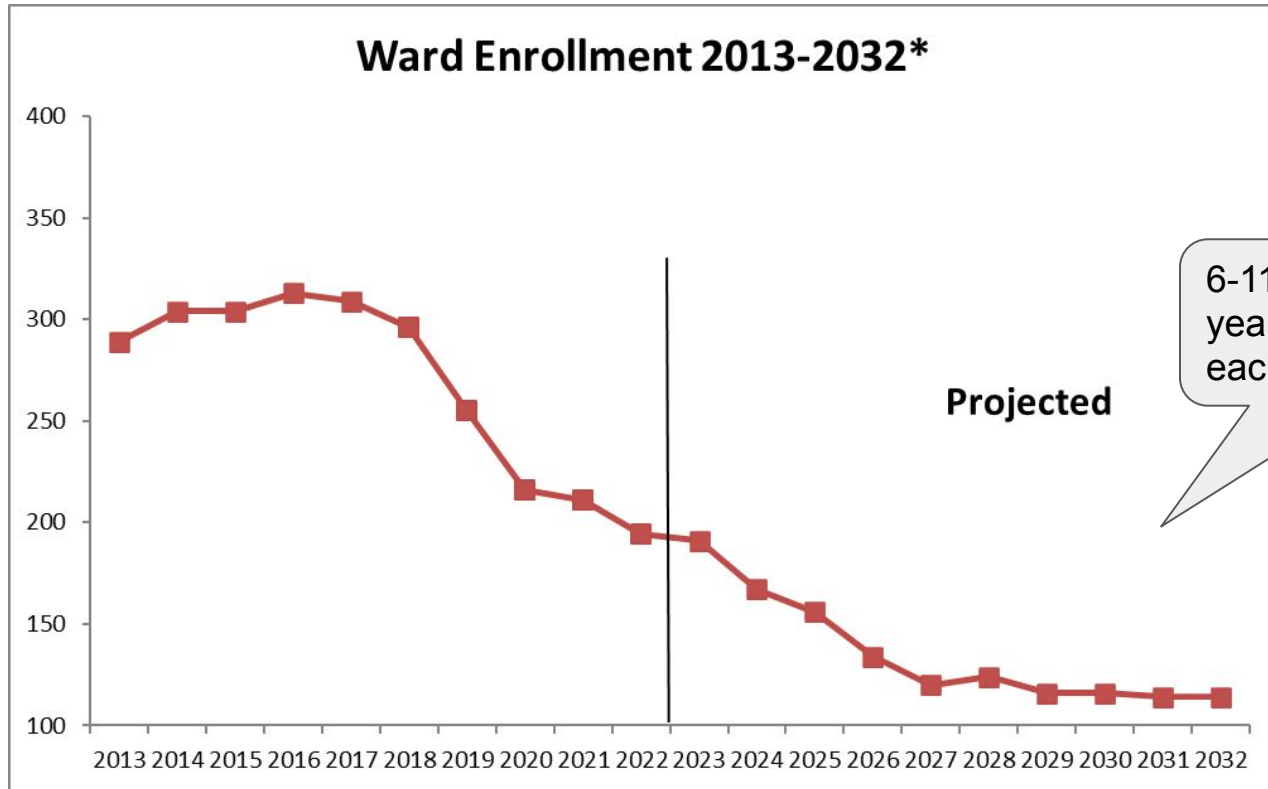


Underwood: Non NPS enrollments as a % of the school-age population

- Enrollment in non NPS schools increased in the Underwood district beginning in 2020-2021, and is distributed across K-5
- A return to pre-pandemic levels of approximately 15% is an increase of 9 students at Underwood (average 1.5 students per grade)



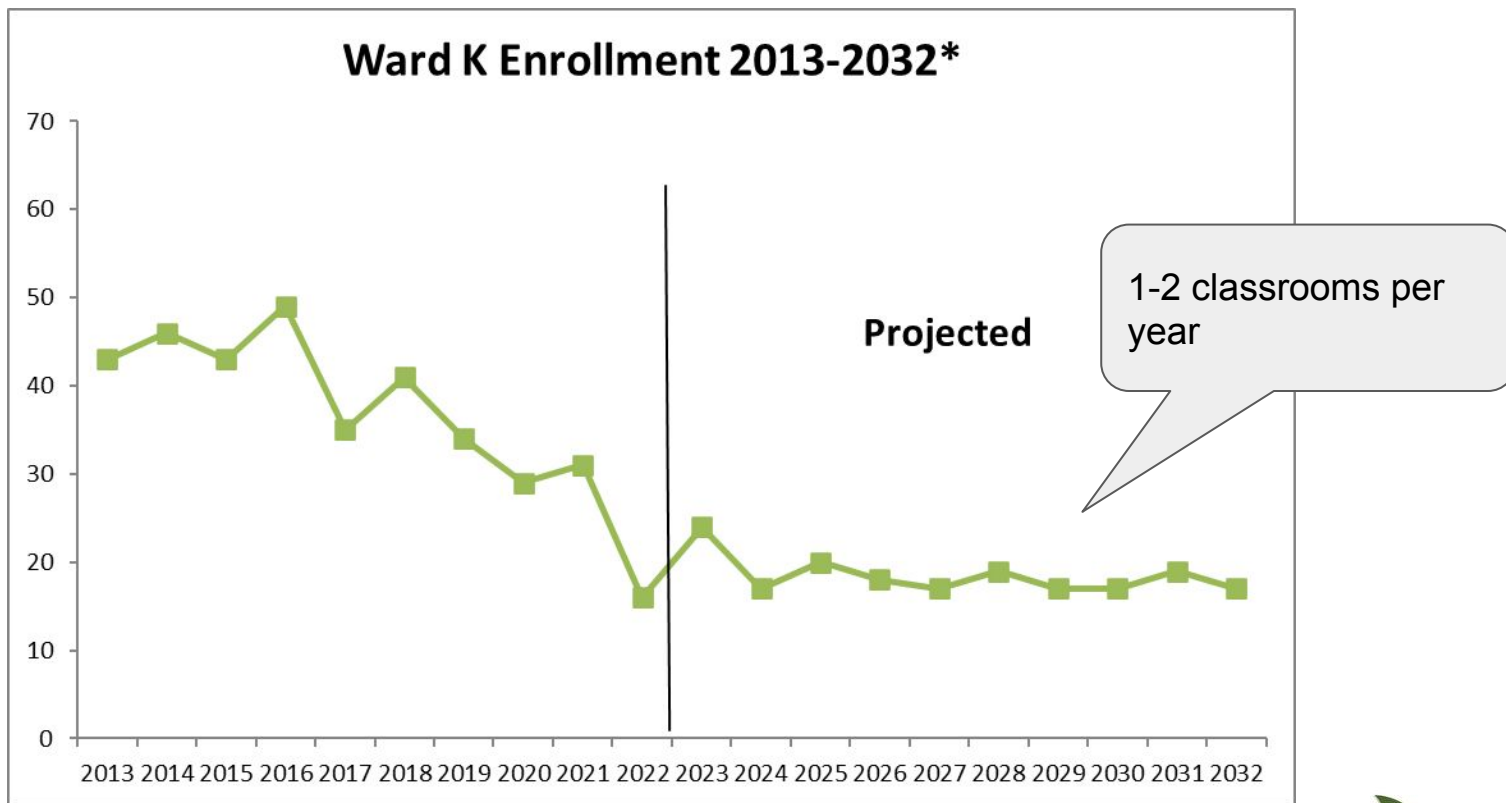
Ward Elementary School: Current and Projected Enrollment



*Projections for 2028-2032 include estimates for students not yet born. These years utilize estimated birth rates from NESDEC, which stabilize due to the estimation methodology.



Ward: Current and Projected K Enrollment



*Projections for 2028-2032 include estimates for students not yet born. These years utilize estimated birth rates from NESDEC, which stabilize due to the estimation methodology.

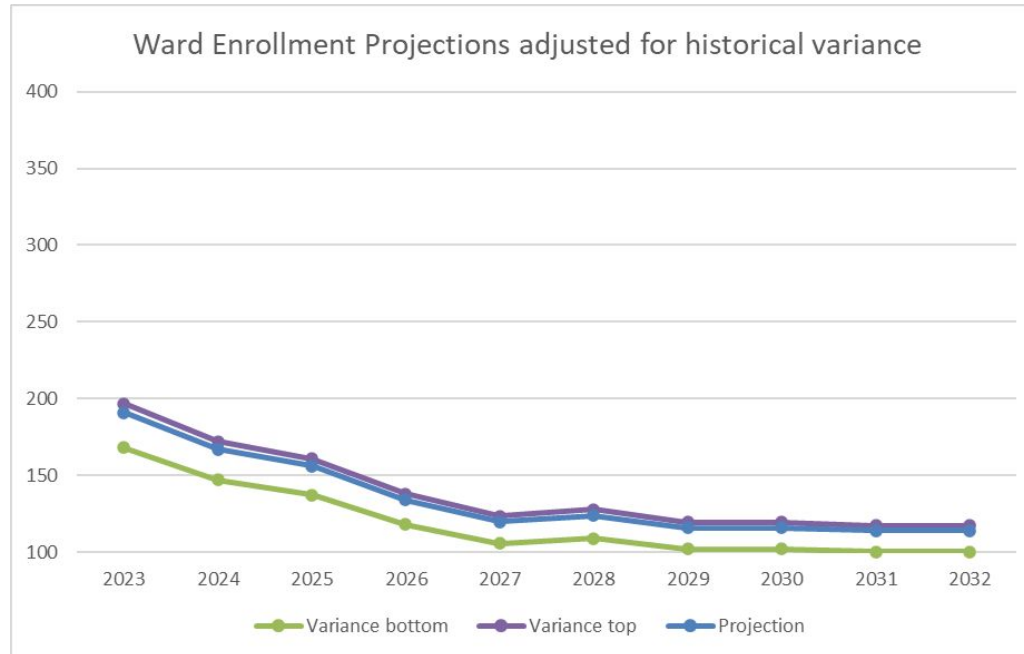


Ward: Variance from projection

- Overall: ranged from -12% (-29 students) to 3% (+8 students) over the past 10 years
- Overall 10 year average is -3.6%
- Kindergarten: ranged from -47% (-14 students) to 20% (+8 students) over the past 10 years
- Kindergarten 10 year average is -9%

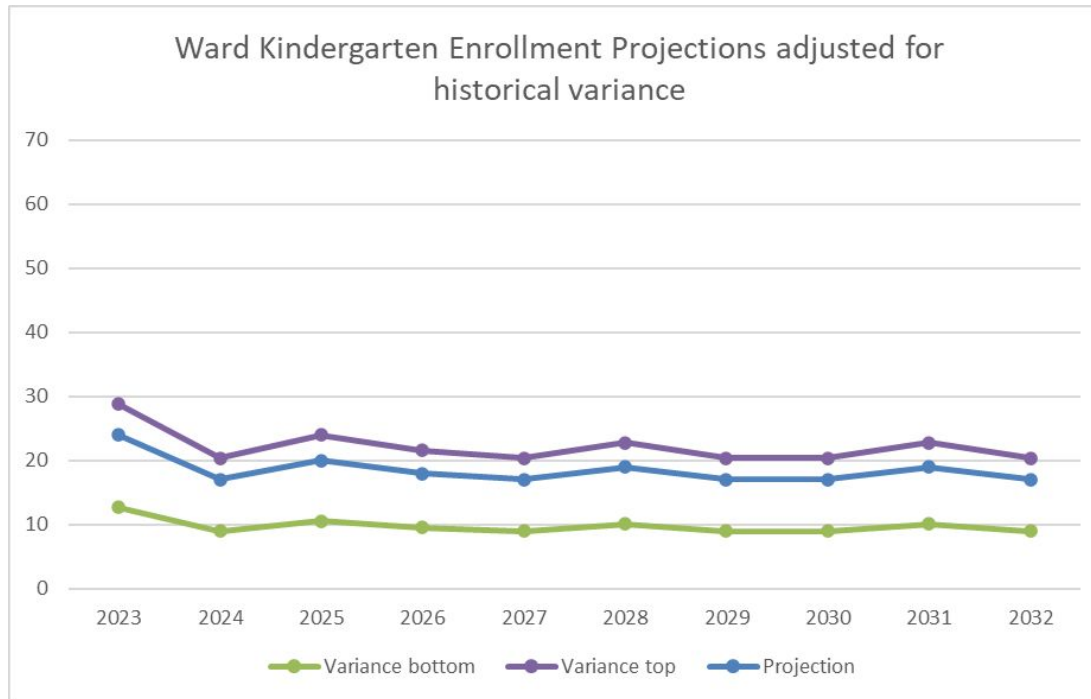
Ward historical variance from projection with current projections

- Utilizing historical variance maximums and minimums, Ward's projected enrollment in 5 years falls within a range of 105-125 students (around 6 classrooms)



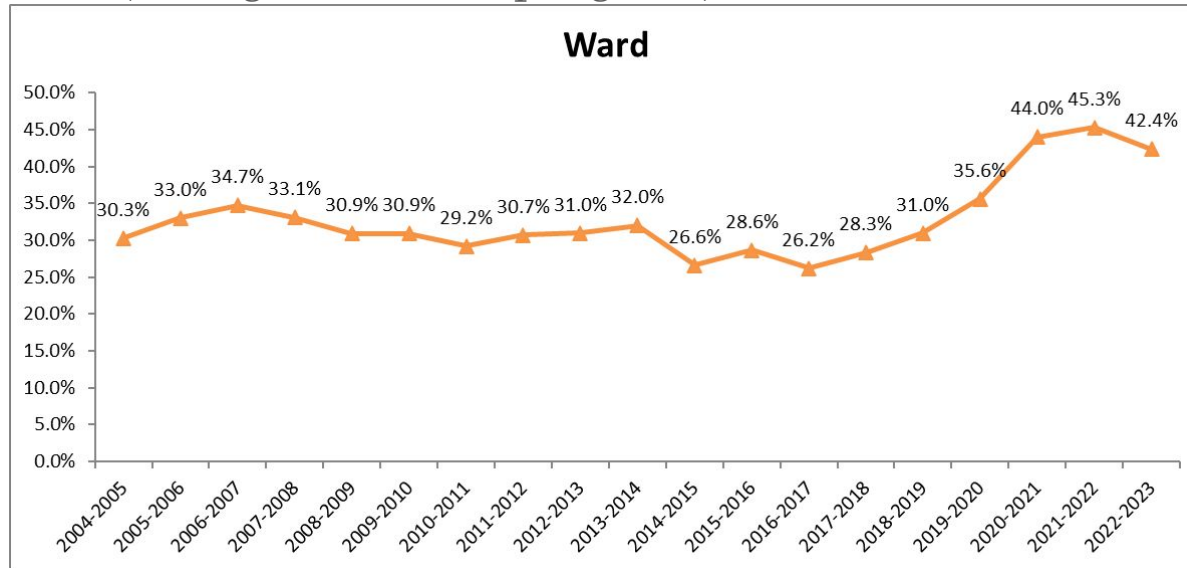
Ward K historical variance from projection with current projections

- Utilizing historical variance maximums and minimums, Ward's K projected enrollment in 5 years falls within a range of 9-20 students (1 classroom)



Ward: Non NPS enrollments as a % of the school-age population

- Enrollment in non NPS schools increased in the Ward district beginning in 2019-2020, and is distributed across K-5
- A return to pre-pandemic levels of approximately 30% is an increase of 43 students at Ward (average 7 students per grade)



Housing sales in Underwood and Ward

- Have been relatively consistent in recent years
- Both districts saw an increase in housing sales in 2021 (as did most districts in the city)

Next meeting topics and materials

- **Next Meetings:** **May 23, 2023, 3:00 pm?**
June 13, 2023, 3:00 pm, Ed Center, Rm 210
(staff 5/10/23, Ward PTO 5/18/23, Underwood PTO 6/6/23)
- **Topics:** Enrollment and Educational Plan
Site & Building Existing Conditions and Space Use
- **Meeting Preparation:** Review Educational Program
- **Task Force Building tour:** May 30, 2023 at 3:30 pm

Feedback and questions?

Information will be posted on:

[Underwood and Ward Schools Study Webpage](#)

Questions and feedback can be sent to:

npsunderwoodwardstudy@newton.k12.ma.us

Sign up for Email Updates on:

[Underwood and Ward Schools Study Webpage](#)