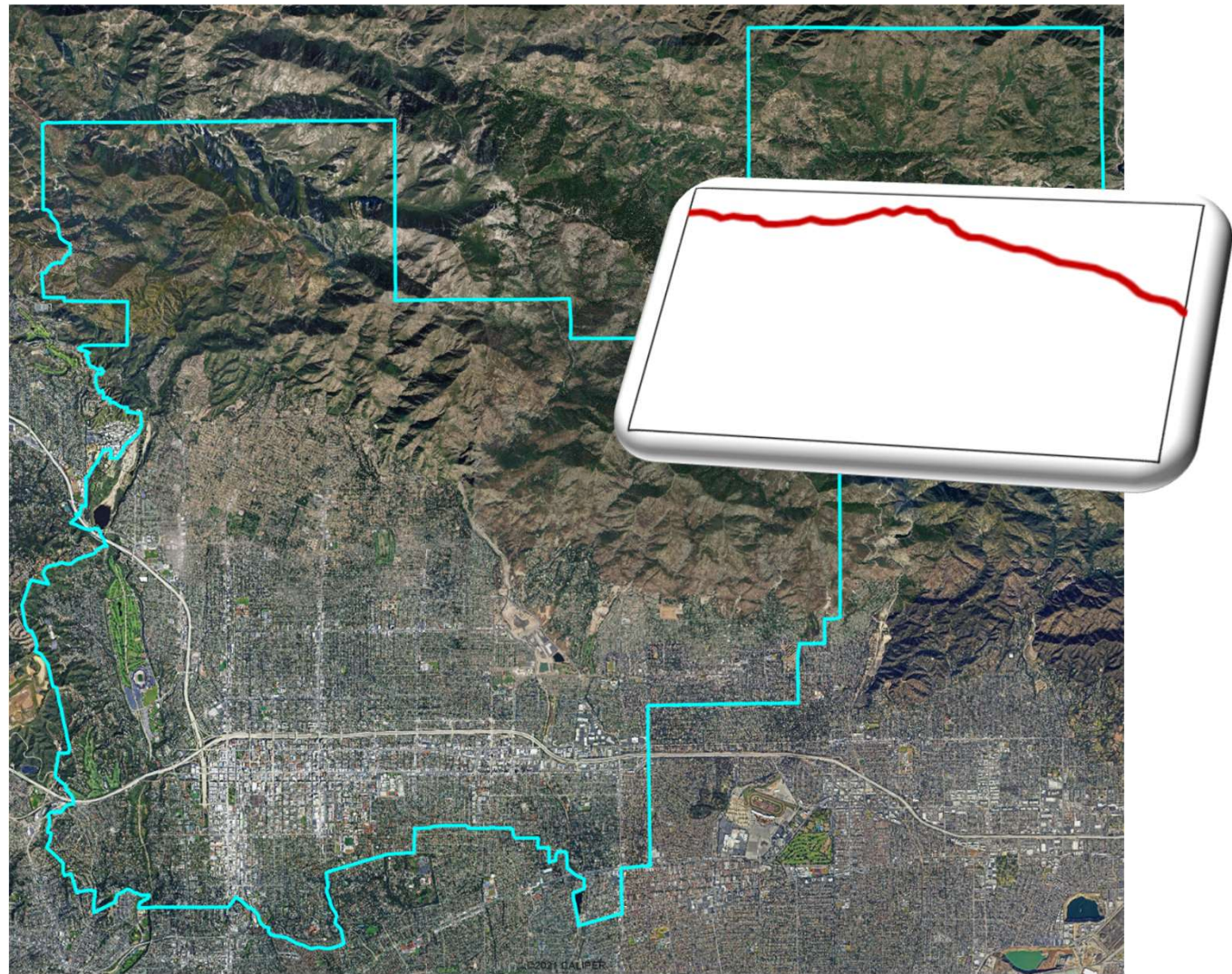




Pasadena Unified School District

August 6, 2026

Enrollment Forecast Progress Report

Introductions

Douglas Johnson



Kristen Parks



Shelley Lapkoff



Justin Levitt



Robin Merrill



Jeff Tilton

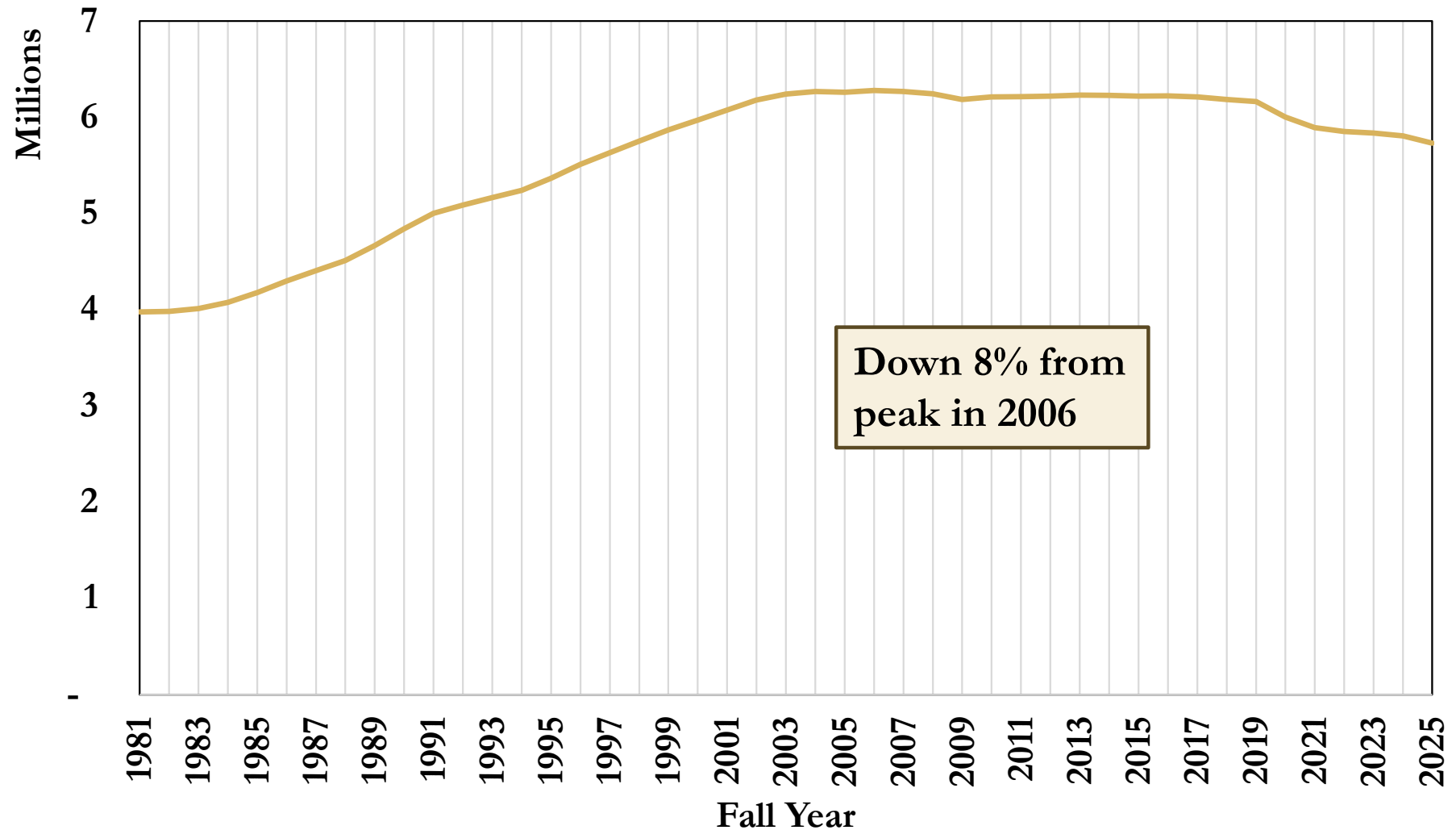
Agenda

1. **Enrollment Trends**
 - ▣ PUSD, Private and Charter
2. **Birth Trends**
3. **Kindergarten Trends**
4. **Transitional Kindergarten (TK) Trends**
5. **“Cohort Survival” Analysis (Student Mobility)**
6. **Housing Analysis**
7. **Transfer Students Analysis**
8. **Eaton Fire Recovery**
9. **Summary & Next Steps**
10. **Appendix**

Enrollment Trends

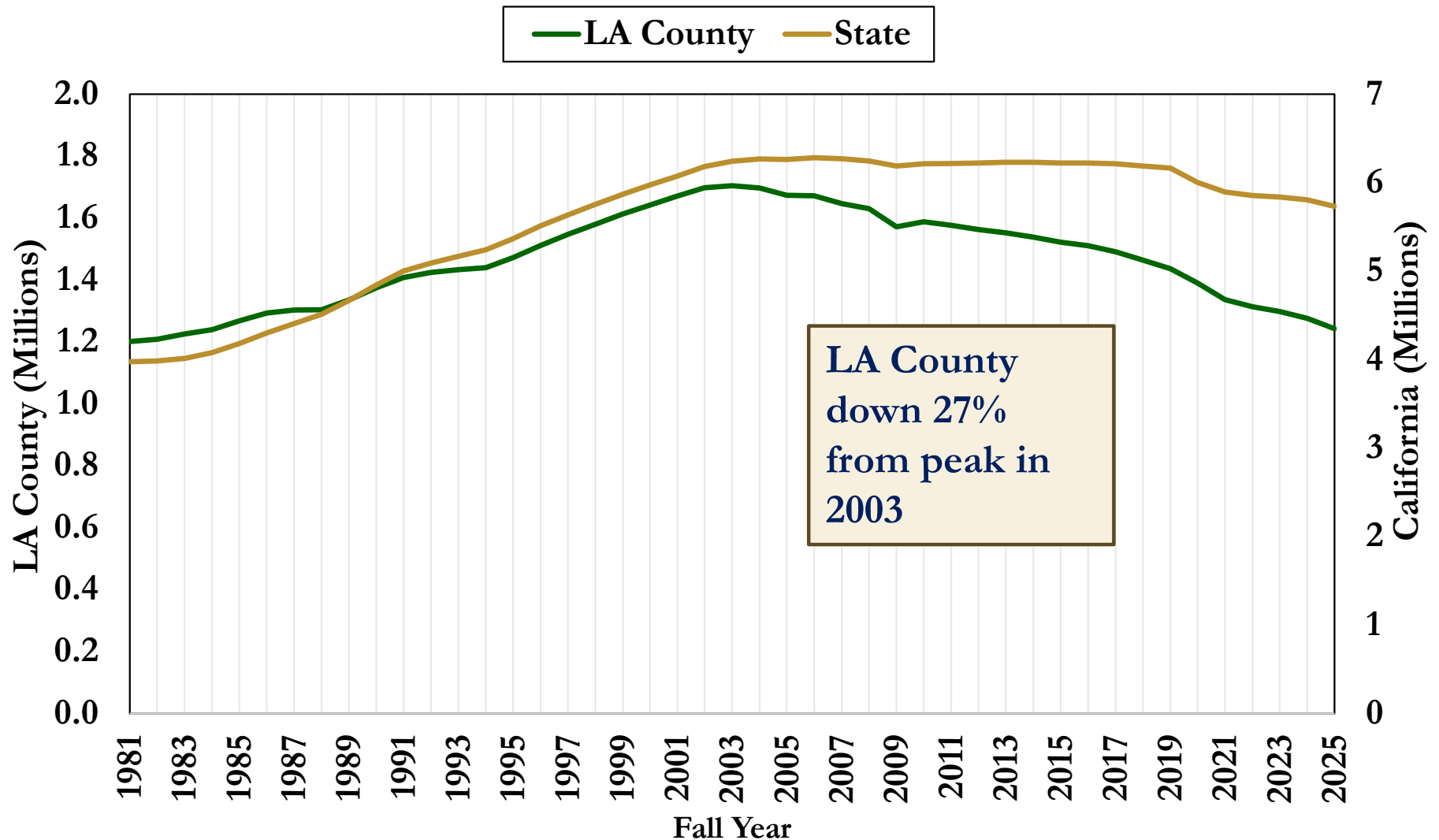
Statewide Enrollment is Down

California TK-12 Enrollment, 1981-2025

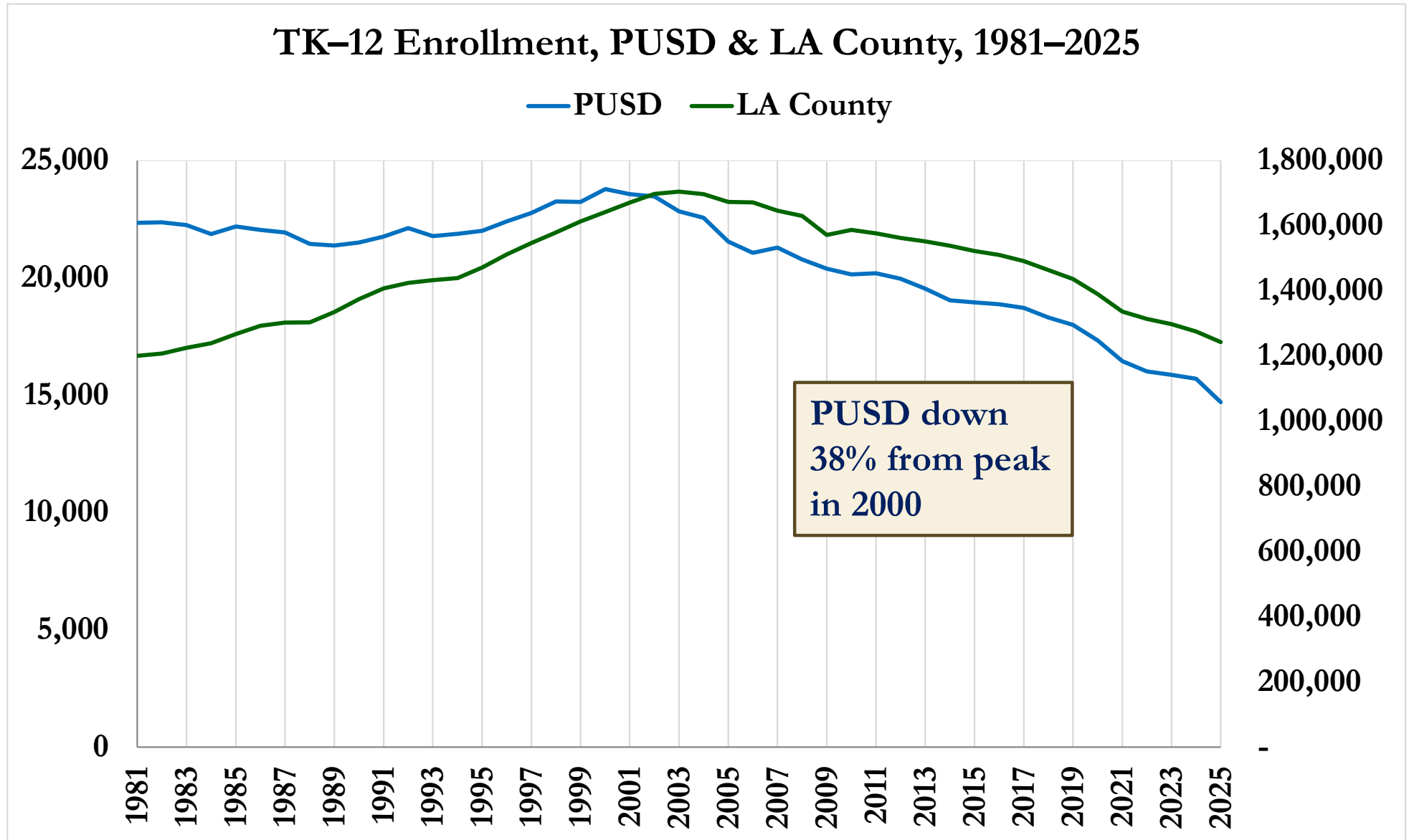


LA Declined More Than State

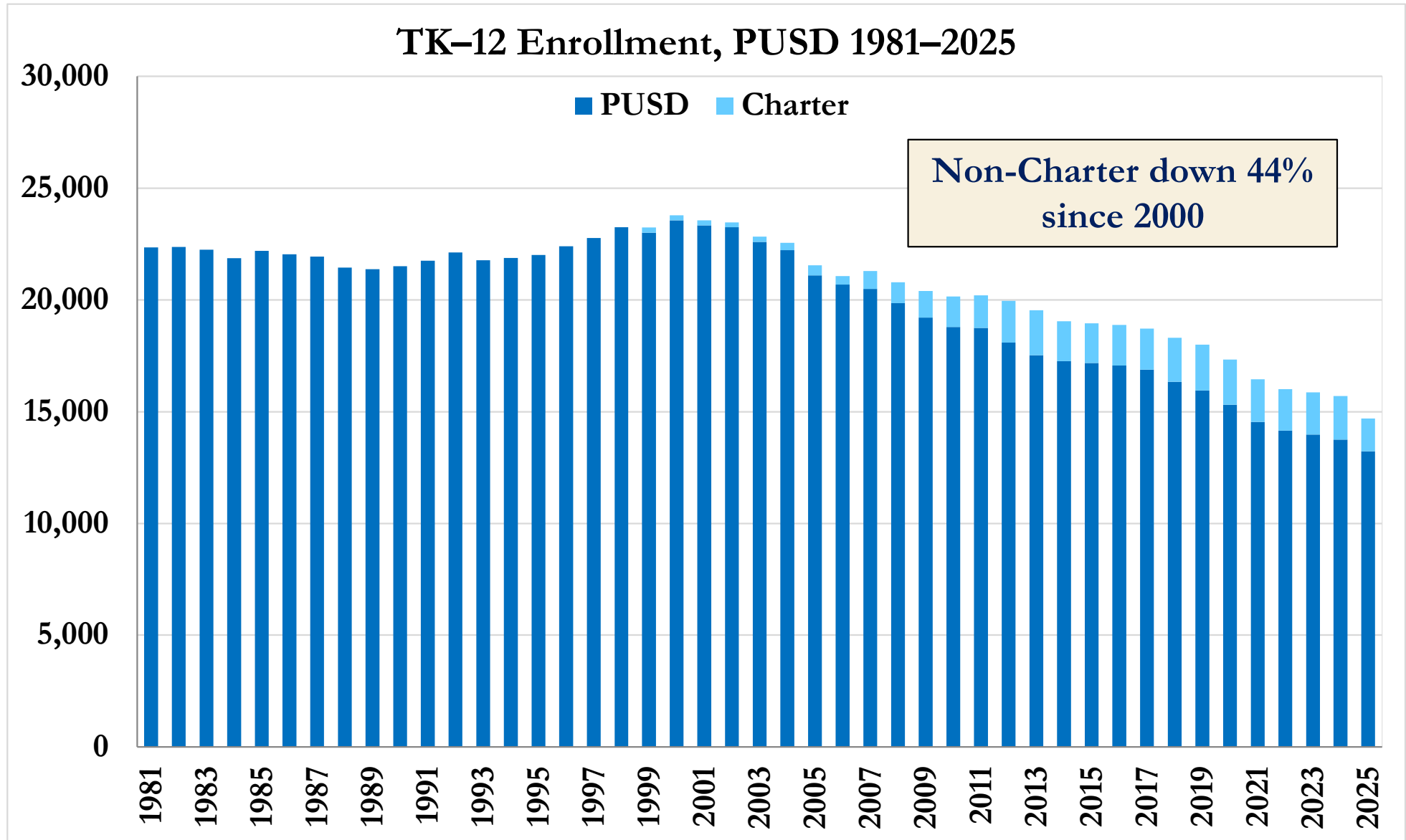
TK-12 Enrollment, 1981-2025



PUSD Declined More Than County

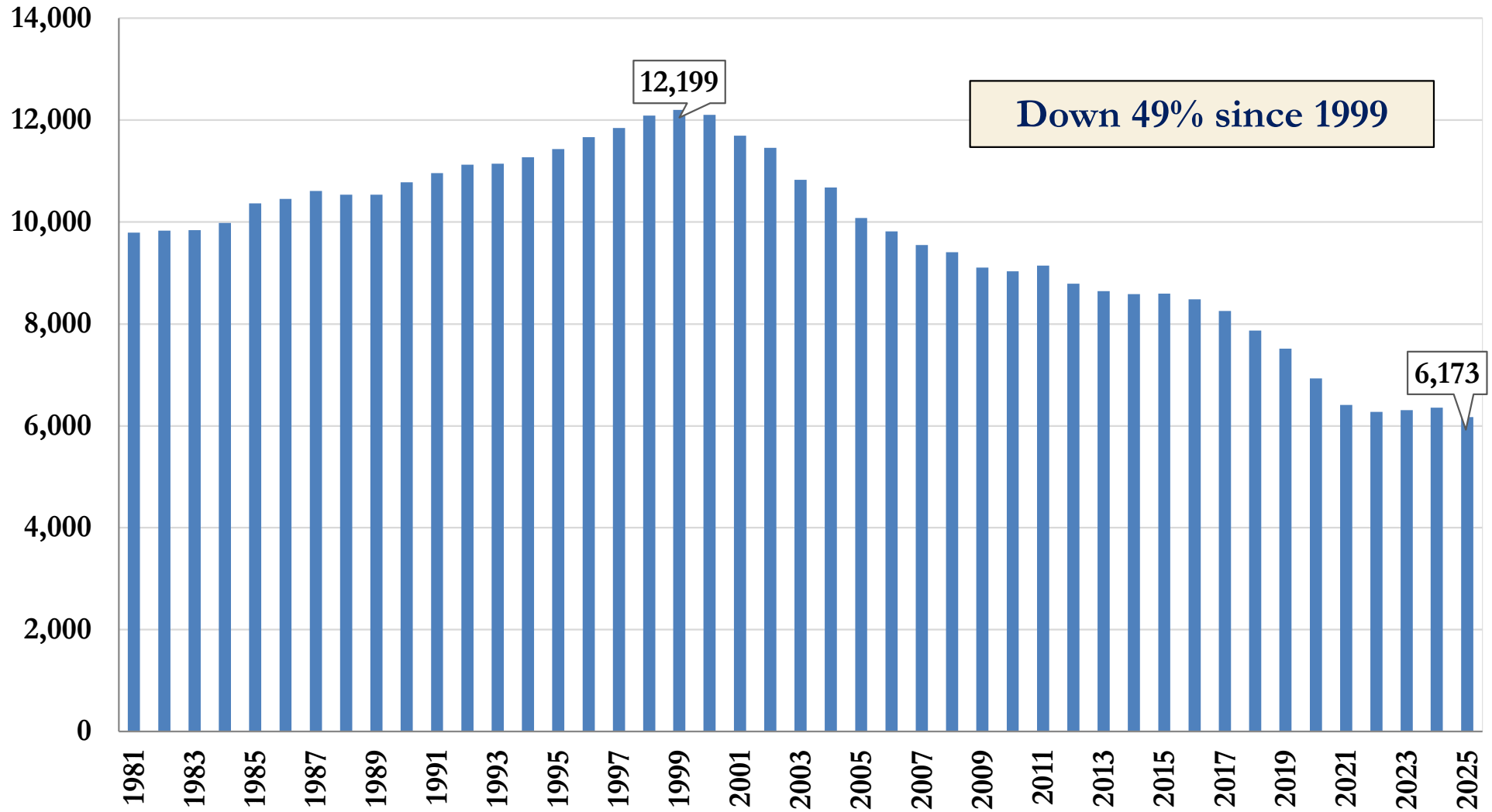


20+ Years of Enrollment Decline

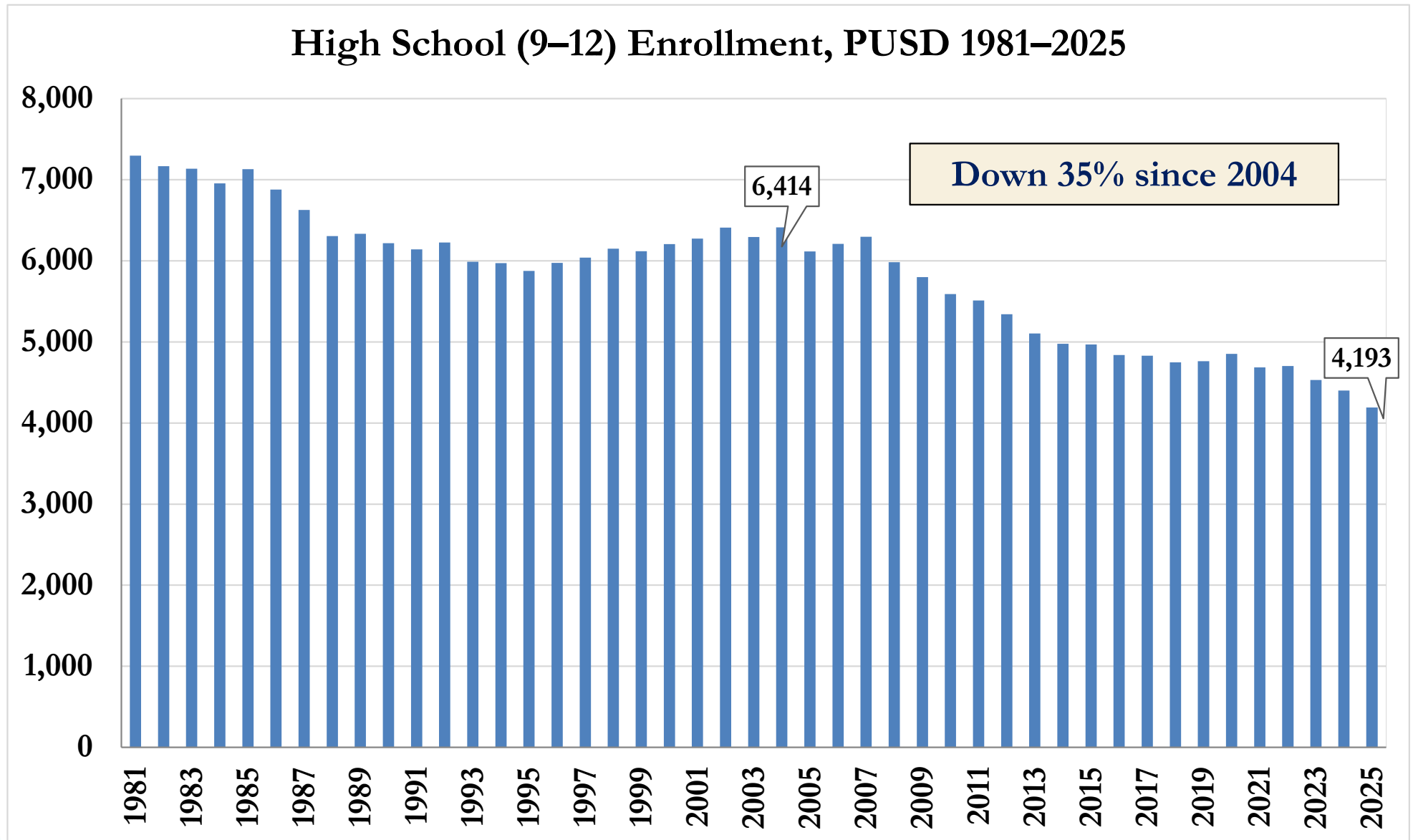


Steeper Drop in Elementary Grades

Elementary (TK–5) Enrollment, PUSD 1981–2025

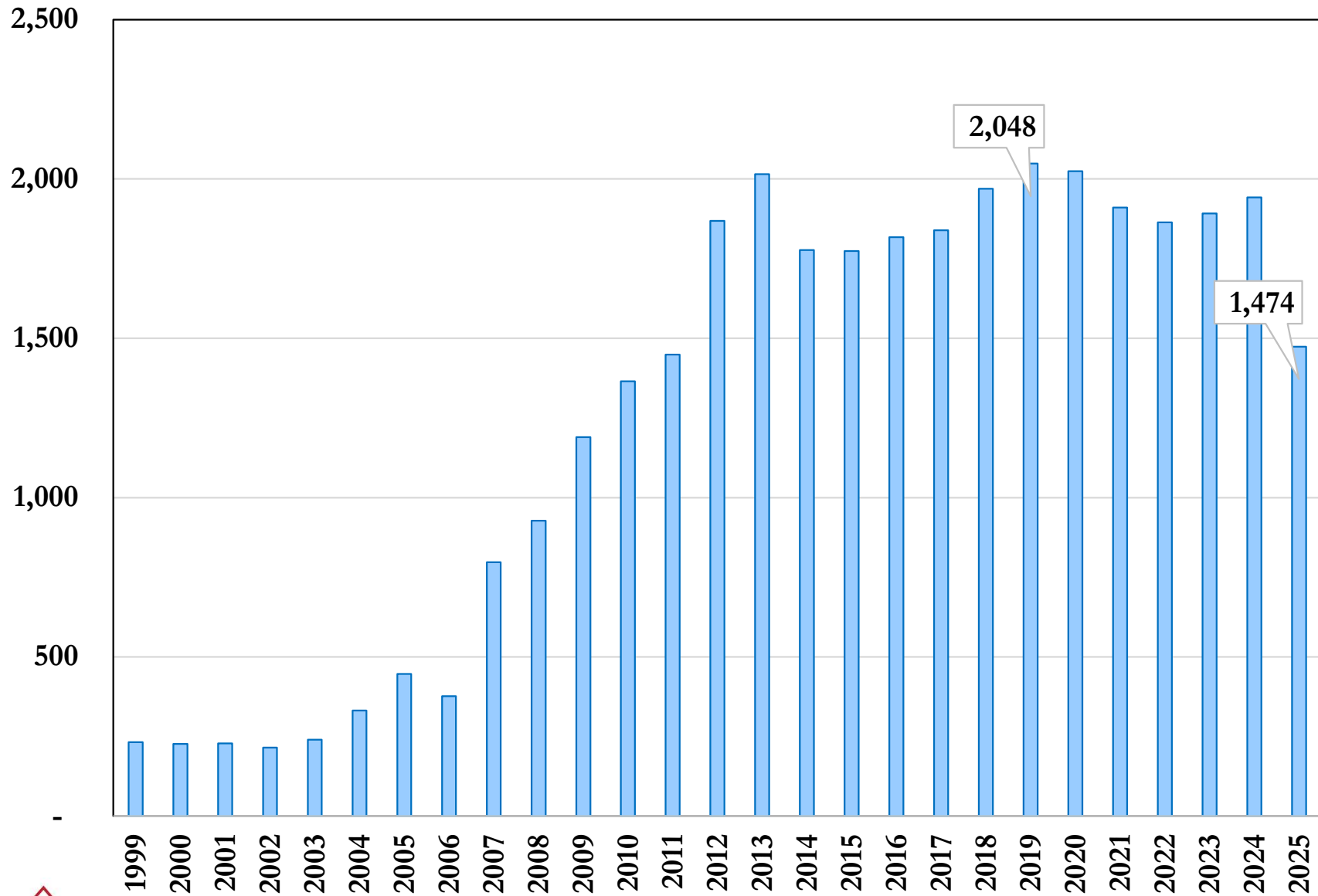


High School Yet to Experience Full Decline



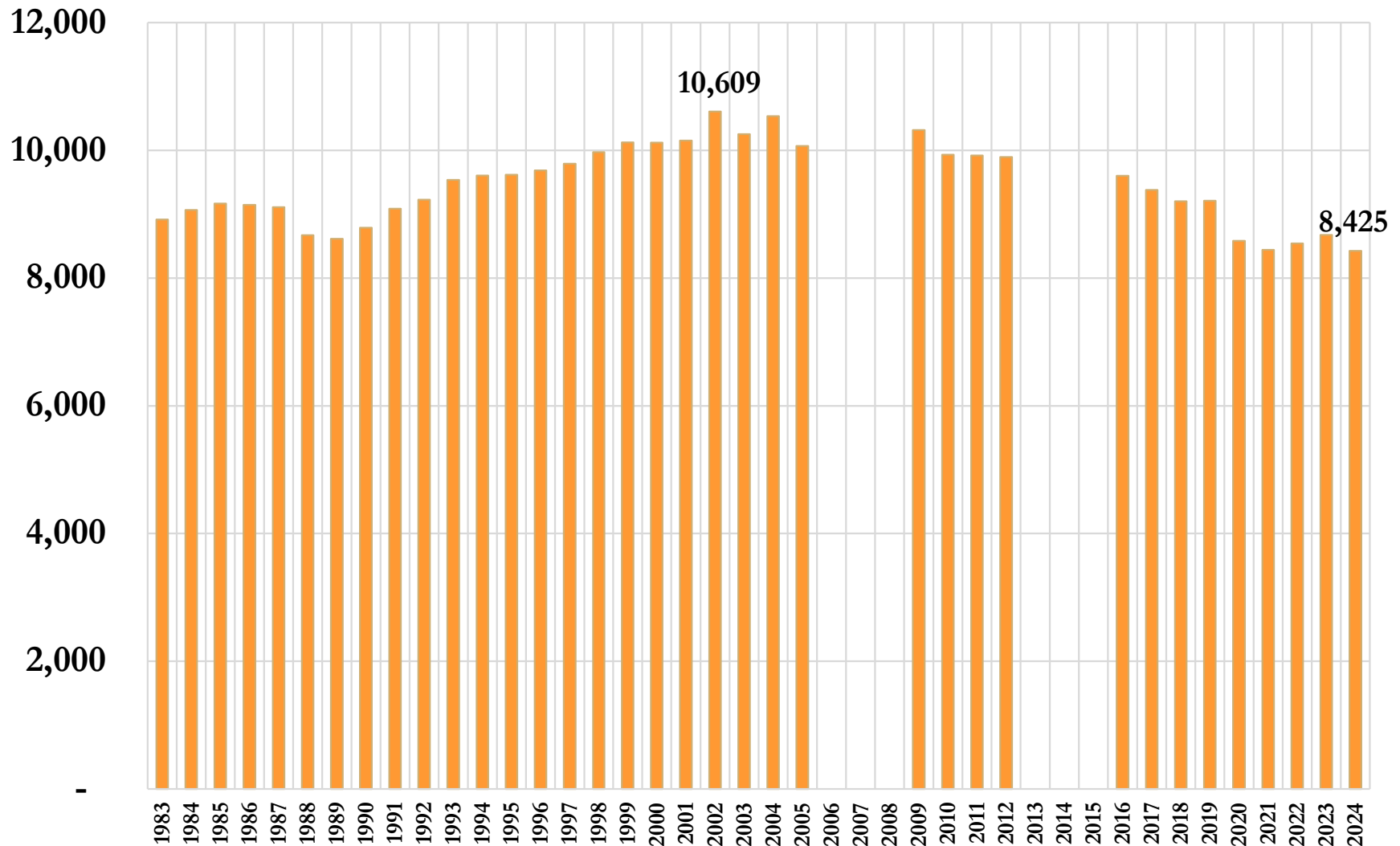
Charter Enrollment Peaked in 2019

Charter School Enrollment, 1999 - 2025

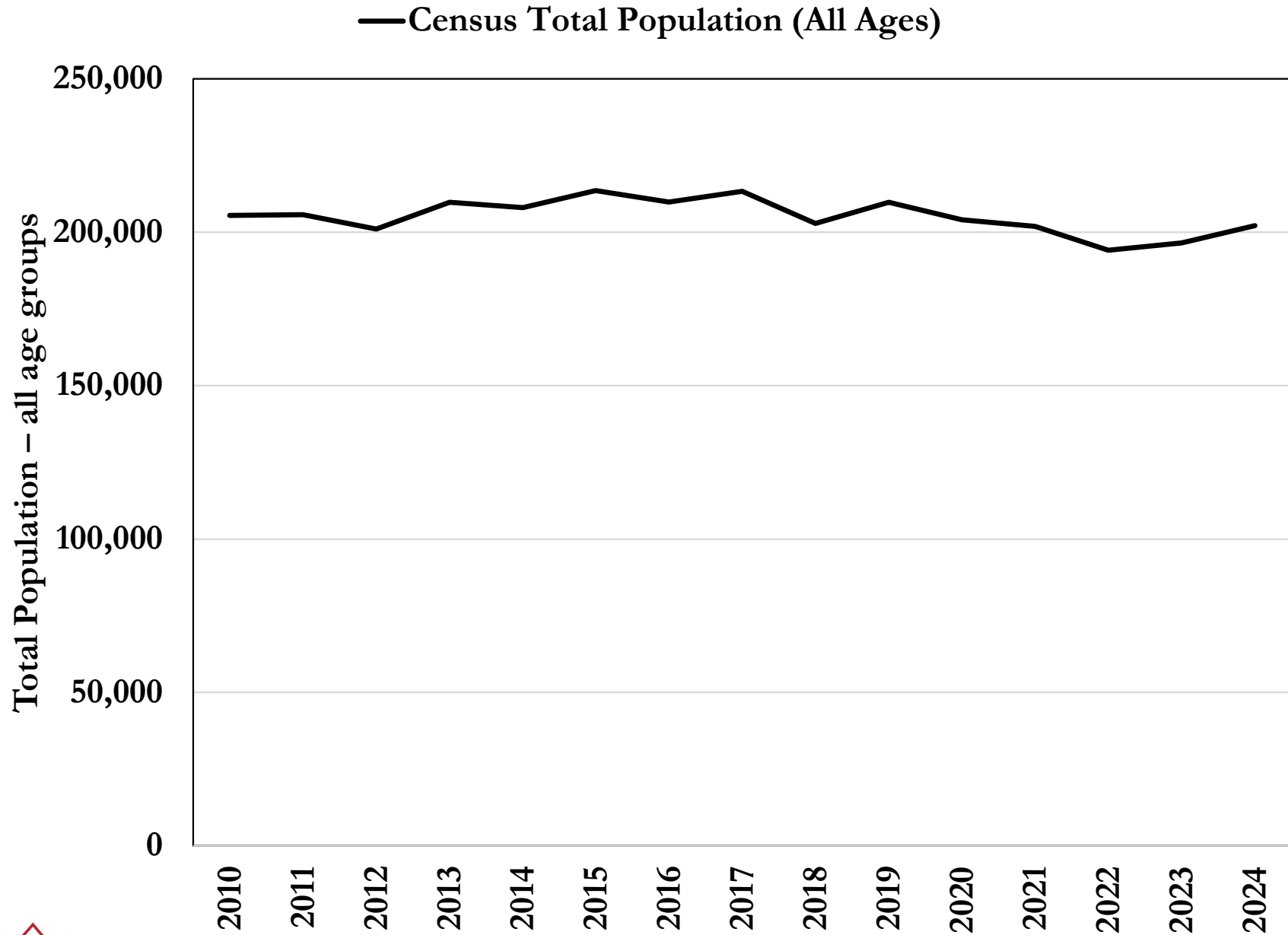


Private School Enrollment Also Declining

State CBEDS Reports, 1983-2024



Population is Not Driving the Decline



Inter-District Transfer Ratio

- ❑ Inter-District Transfer Ratio is one indication of PUSD's positive regional image:

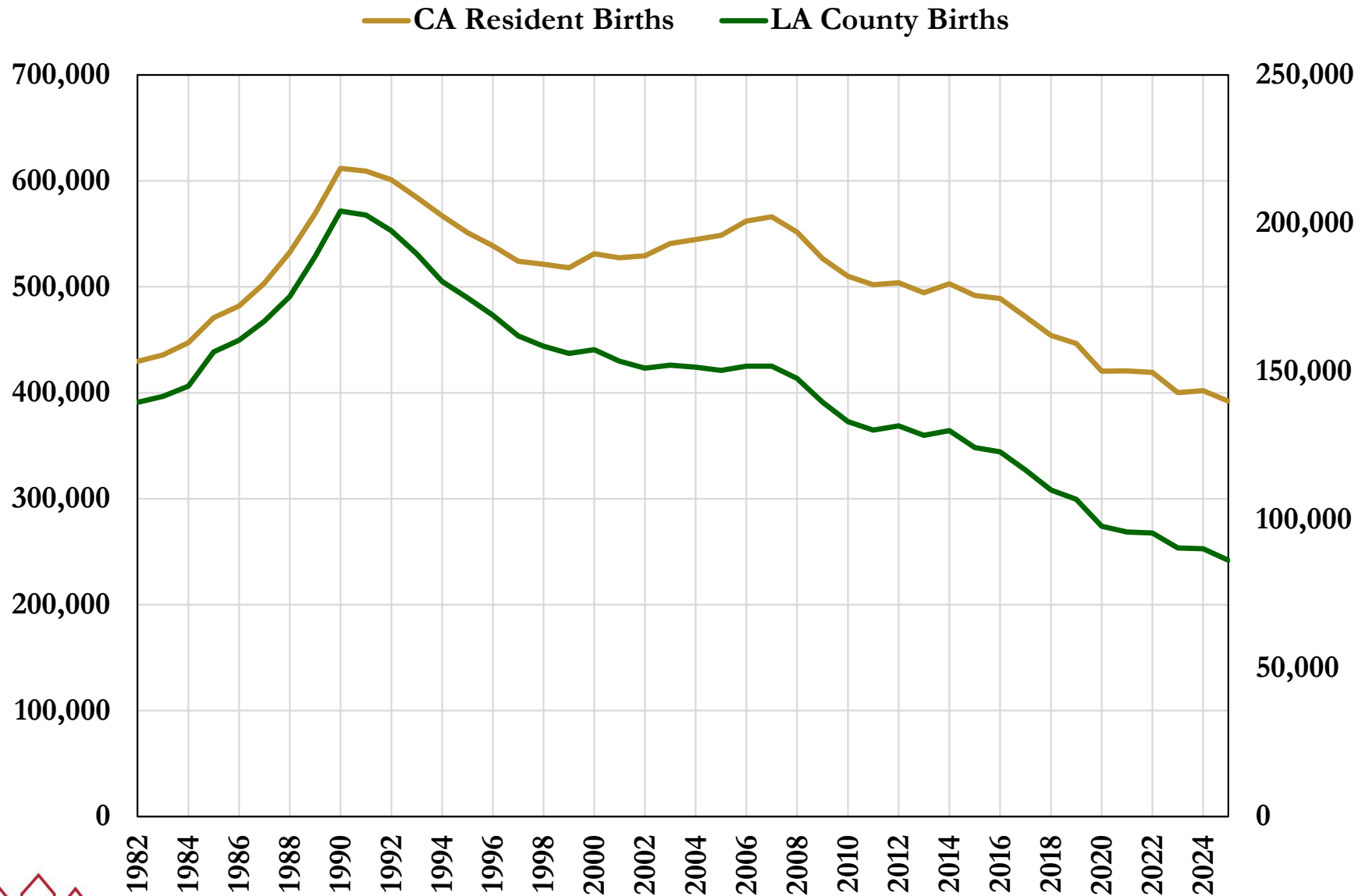
Year	Transfer into PUSD (Students)	Transfer out of PUSD (Permits)	Appeal Ratio
2025	1,020	325	3.14 to 1
2024	923	276	3.34 to 1

These are not Eaton Fire displaced students.

Births

LA Births Decline Steeper than State

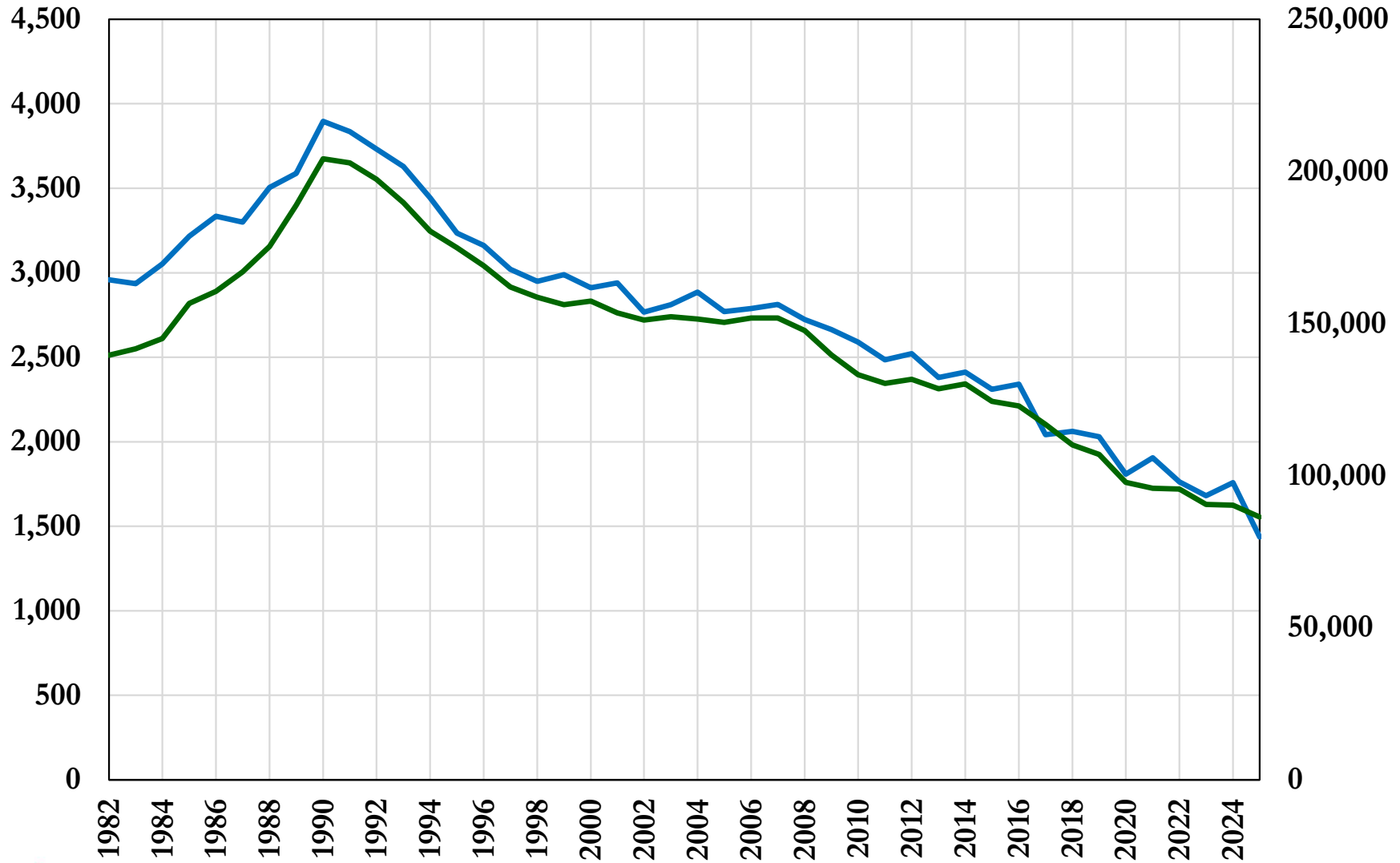
Resident Births, 1982-2025



PUSD and LA County – Similar Birth Trends

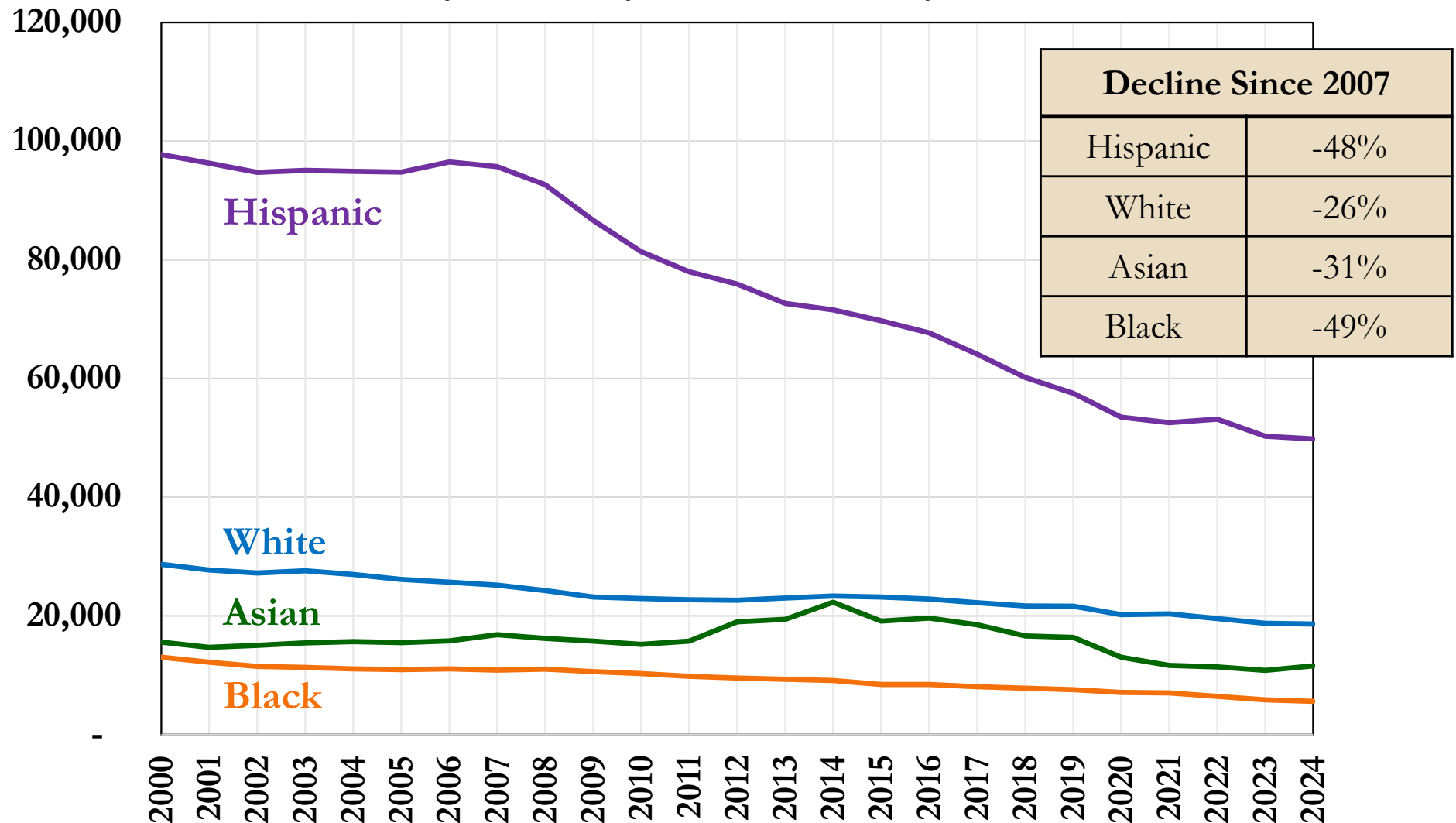
Resident Births, 1982-2025

— PUSD Births — LA County Births



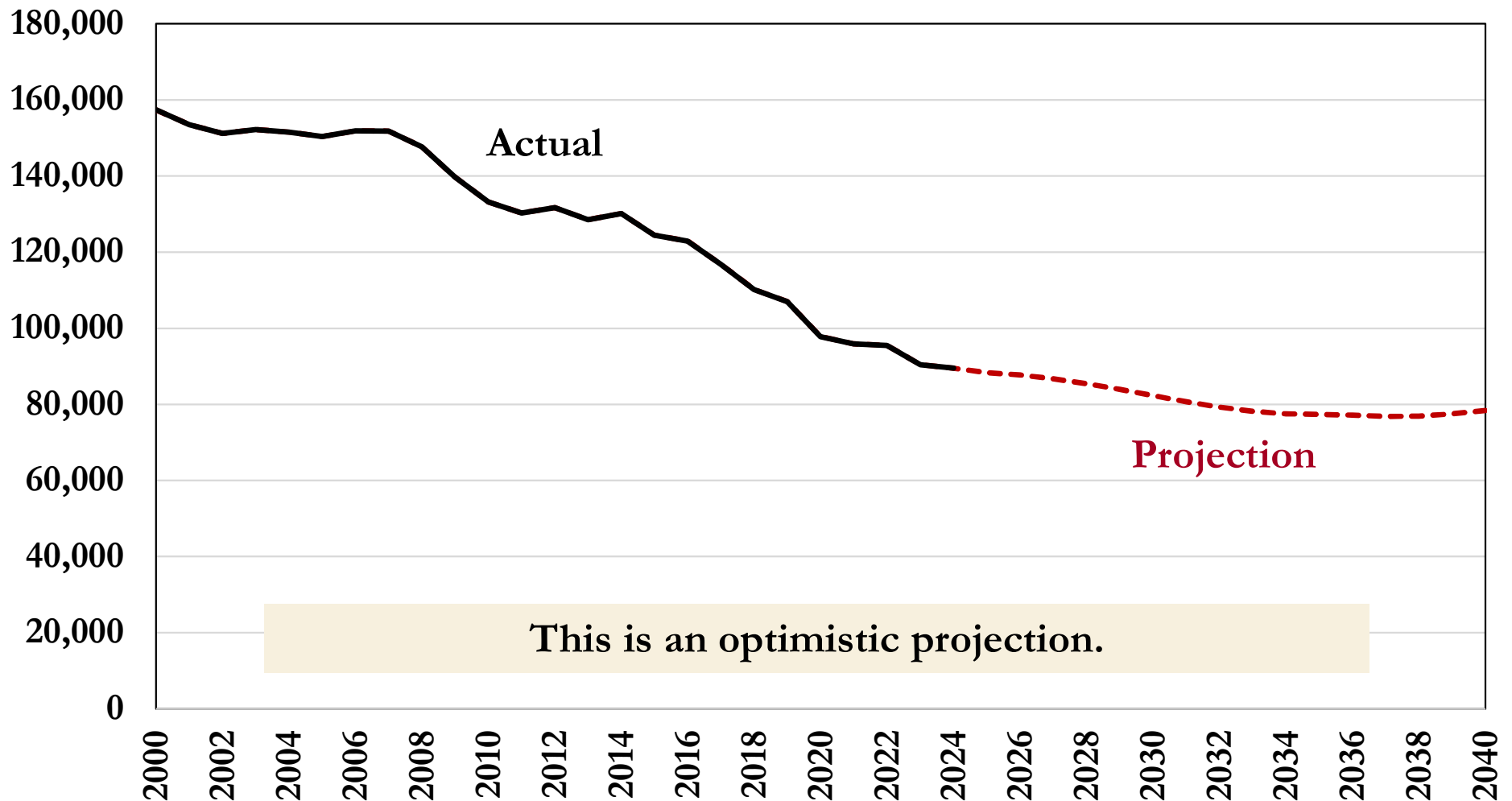
LA Births Decline Across All Major Groups

LA County Births by Race/Ethnicity, 2000-2024



Birth Decline Expected to Continue

LA County Births 2000 – 2025 &
Projection by State Demographers



Summary of Birth Trends

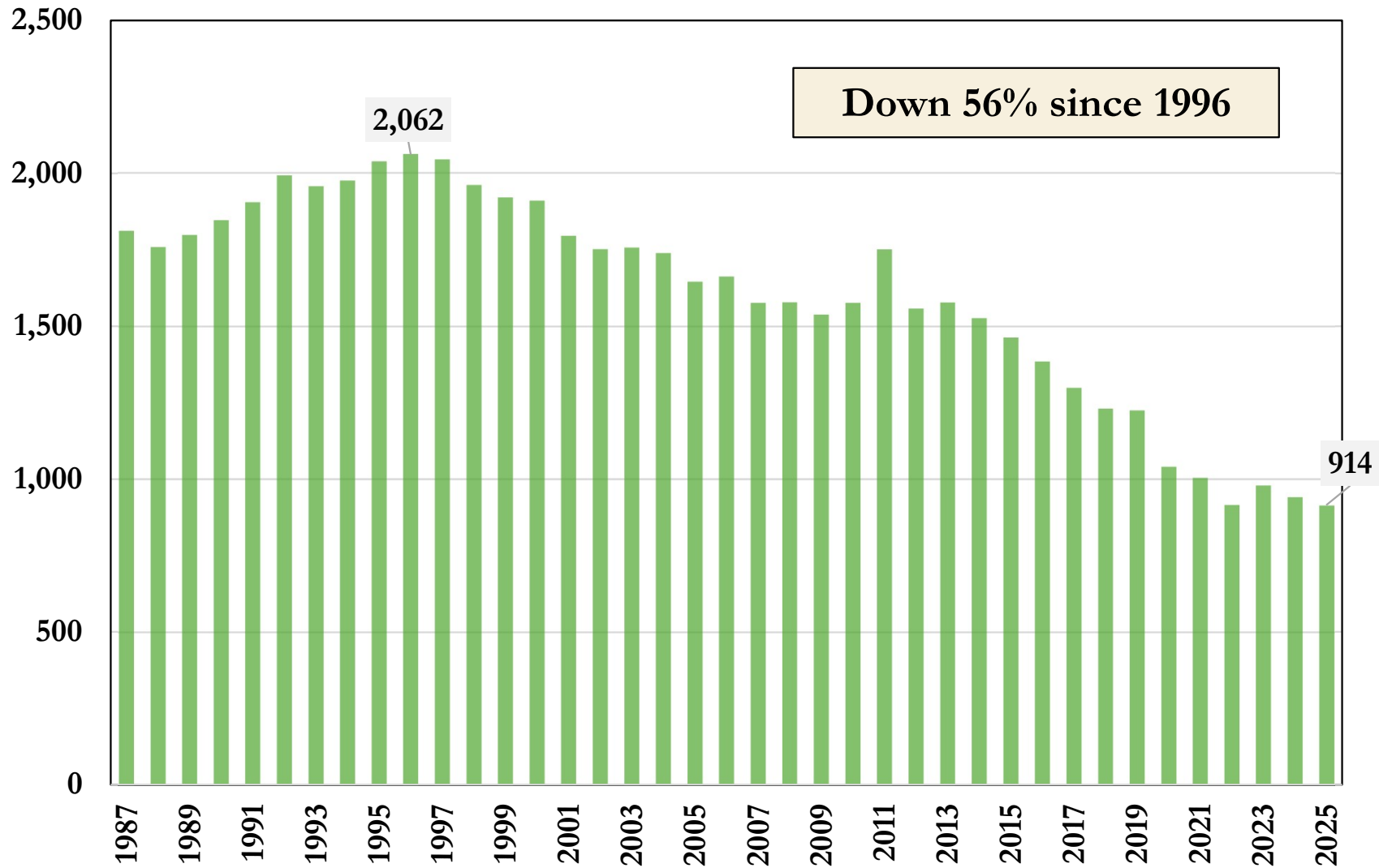
- ❑ Births are a key predictor of future enrollment
- ❑ PUSD birth decline is substantial, declining faster than state
- ❑ Births down significantly across all racial/ethnic groups
- ❑ State demographers forecast continued decline for the county

Kindergarten

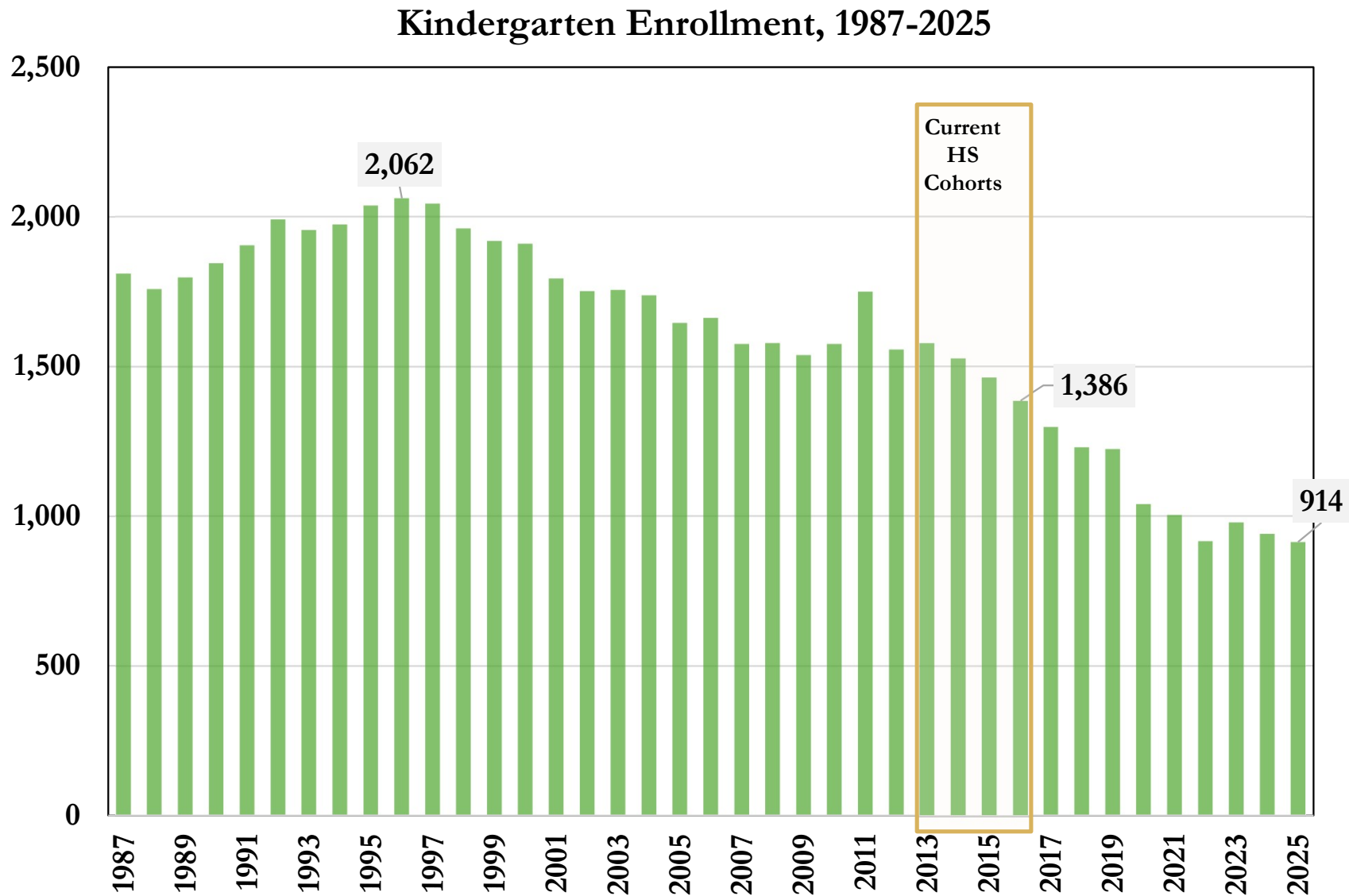
Fewer Births Means Fewer Students

Smaller Kindergarten Cohorts

PUSD Kindergarten Enrollment, 1987-2025

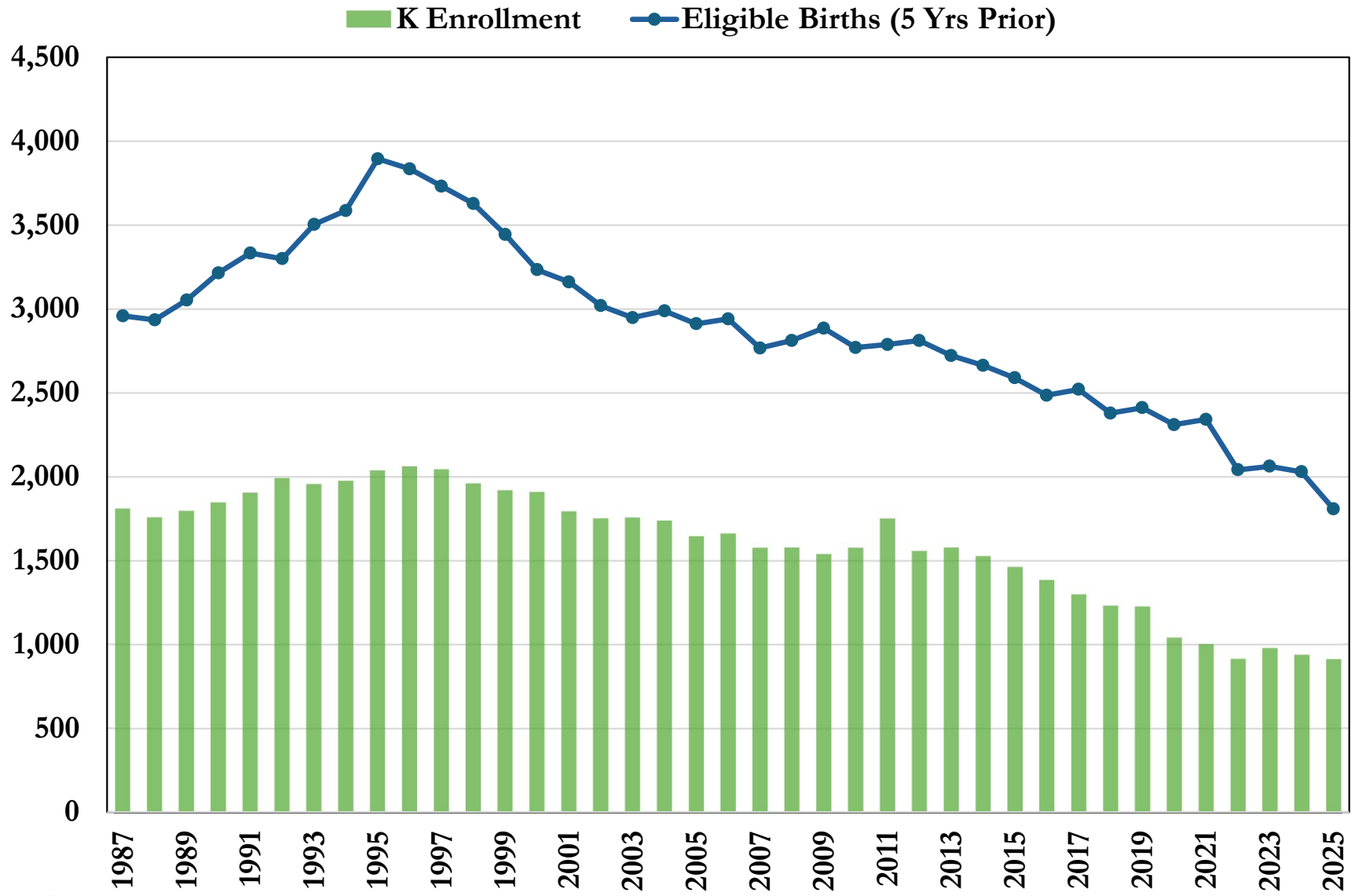


K Counts Foreshadow Future HS Declines



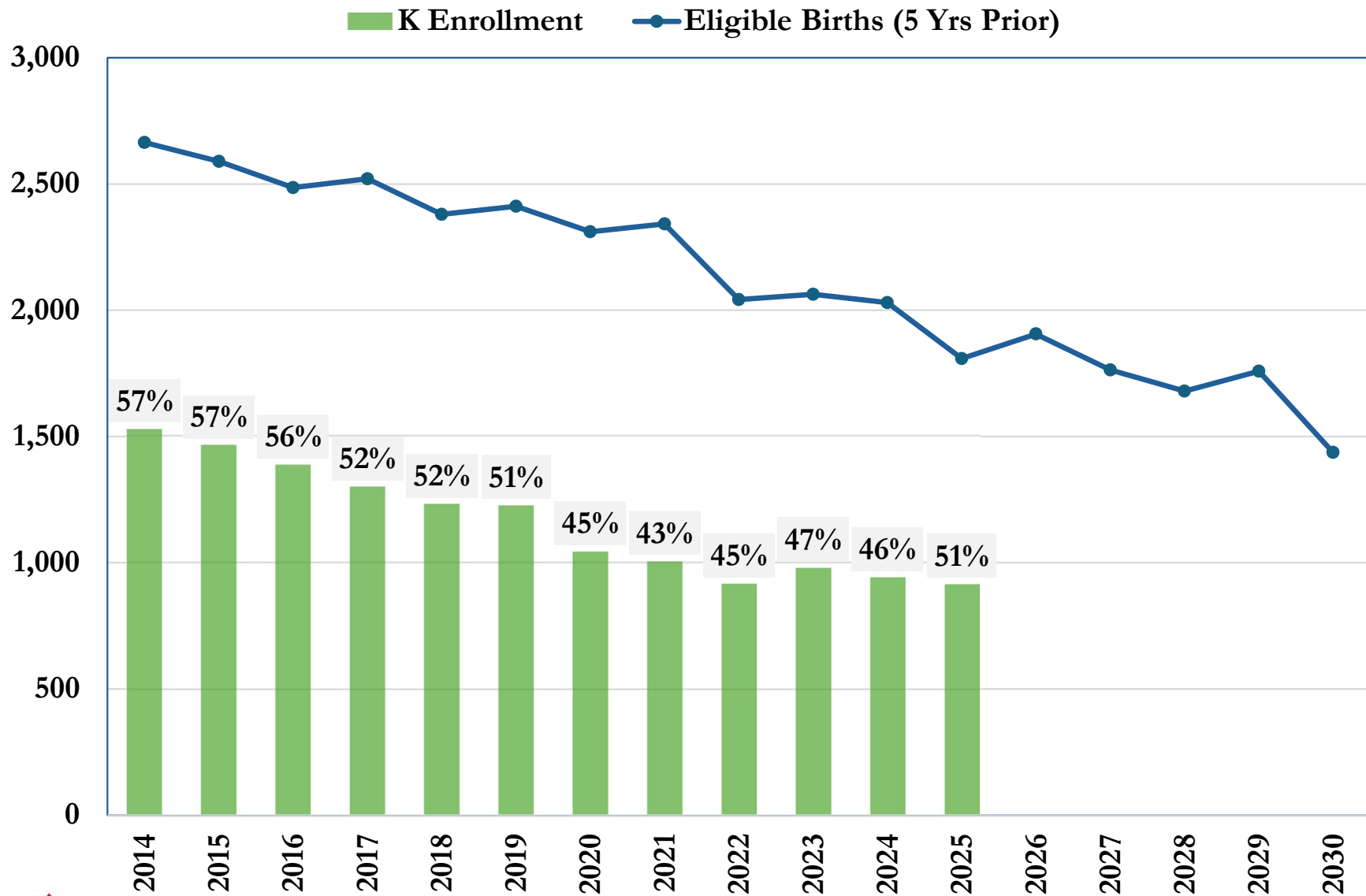
PUSD Births-to-Enrollment Pipeline

Among those eligible, how many enrolled in Kindergarten?



Looking Ahead

Among those eligible, how many enrolled in Kindergarten?



TK

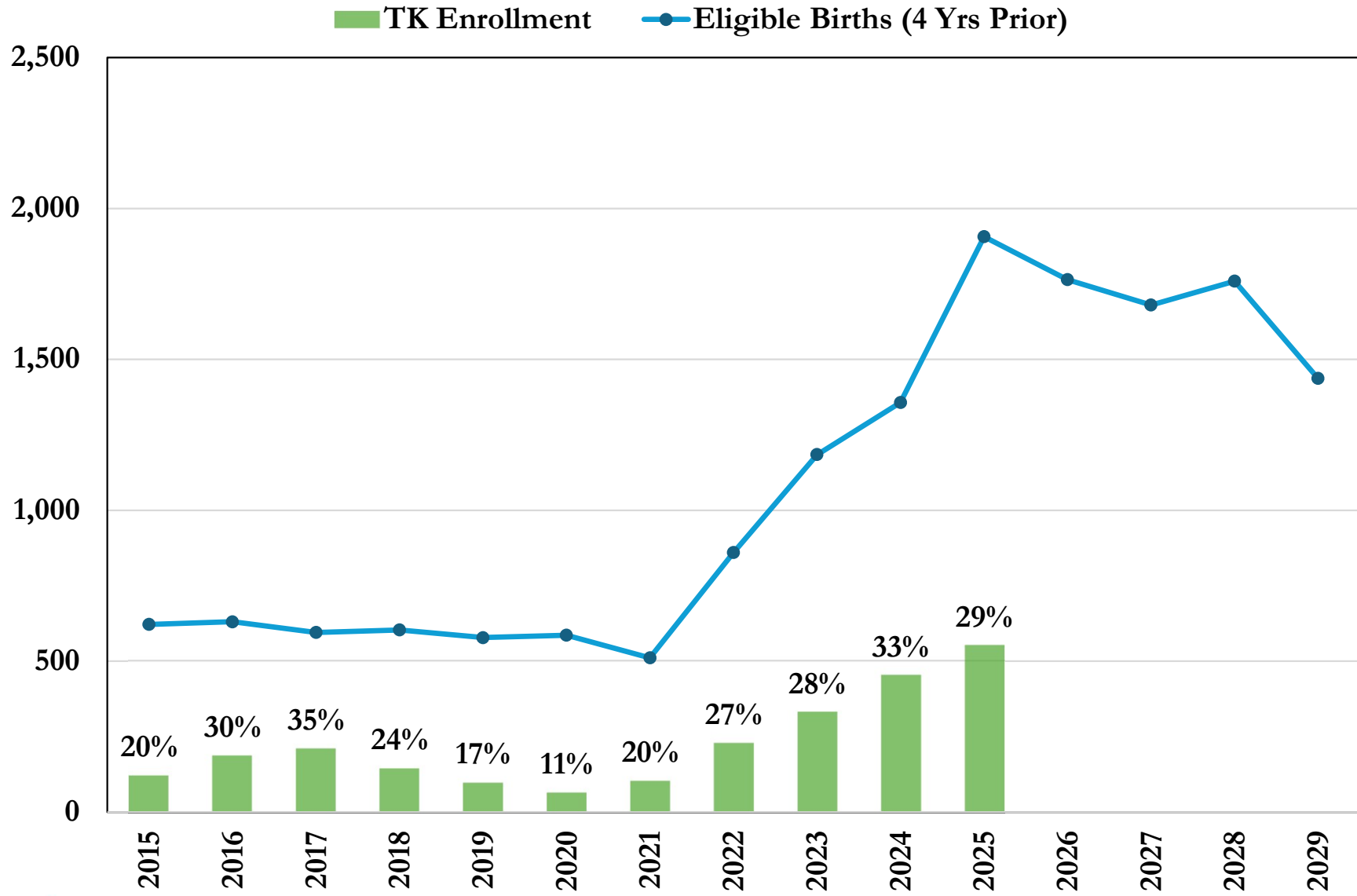
Future Growth Not Guaranteed

TK Rollout Timeline

School Year	Eligibility	Cohort Size (Months)
2012-2013	Nov. 2 – Dec. 2 Birthdays	1
2013-2014	Oct. 2 – Dec. 2 Birthdays	2
2014-2015	Sept. 2 – Dec. 2 Birthdays	3
2015-2016		
2016-2017		
2017-2018		
2018-2019		
2019-2020		
2020-2021		
2021-2022		
2022-2023	Sept. 2 – Feb. 2 Birthdays	5
2023-2024	Sept. 2 – April 2 Birthdays	7
2024-2025	Sept. 2 – June 2 Birthdays	9
2025-2026	All children who turn 4 by Sept. 1	12

PUSD TK Enrollment Rates

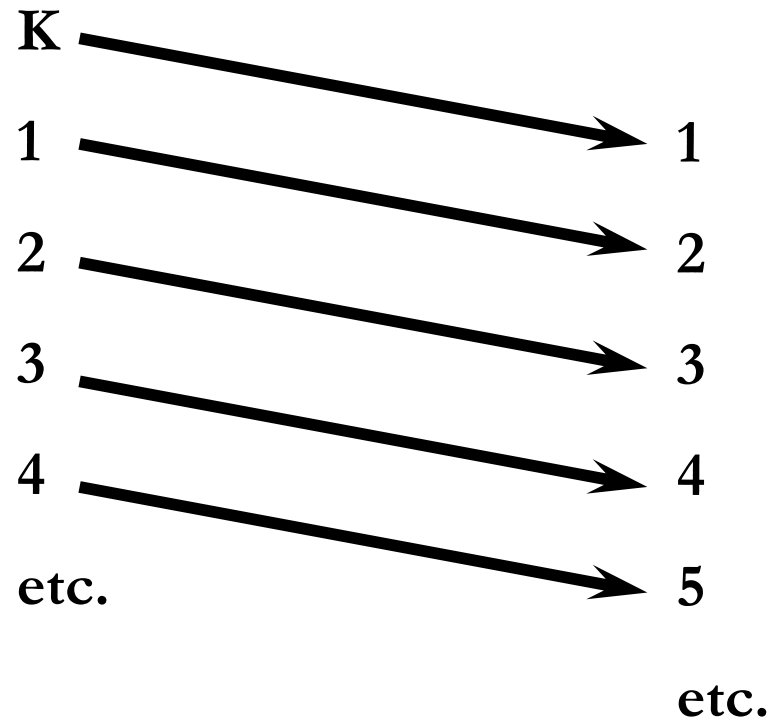
Among those eligible, how many enrolled in TK?



Cohort Progression

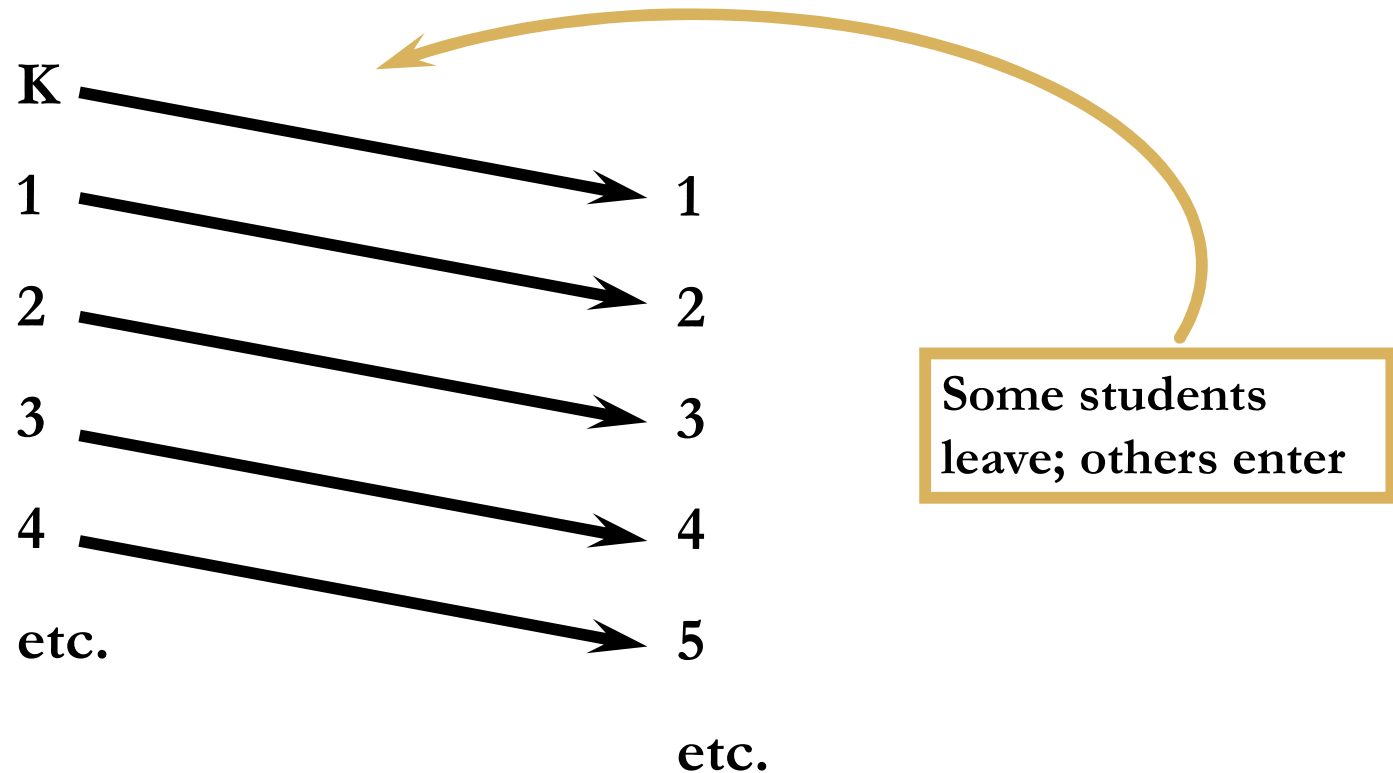
Cohort Progression (Student Mobility)

Start with today's students by grade cohort,
then progress the students one grade



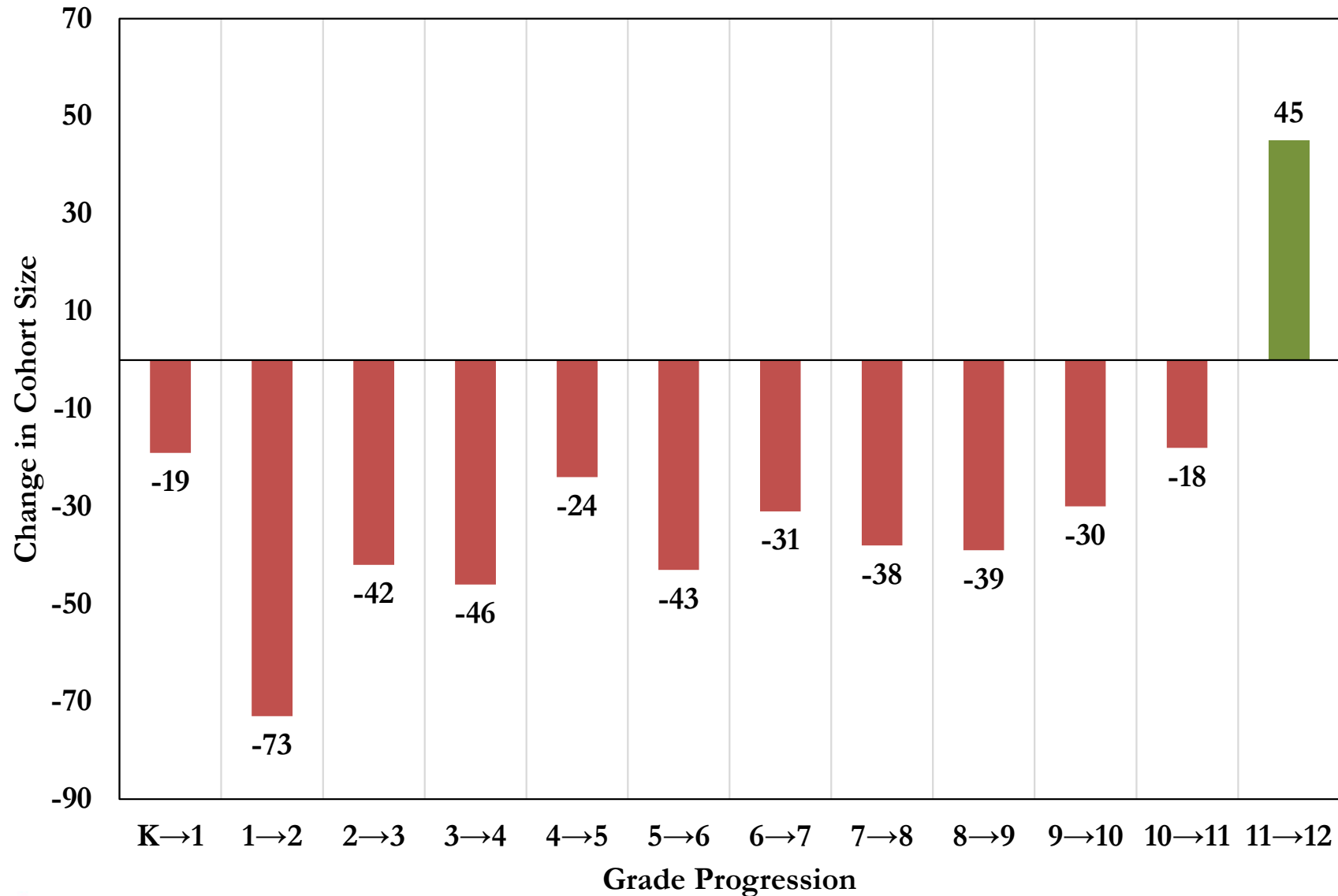
Cohort Progression (Student Mobility)

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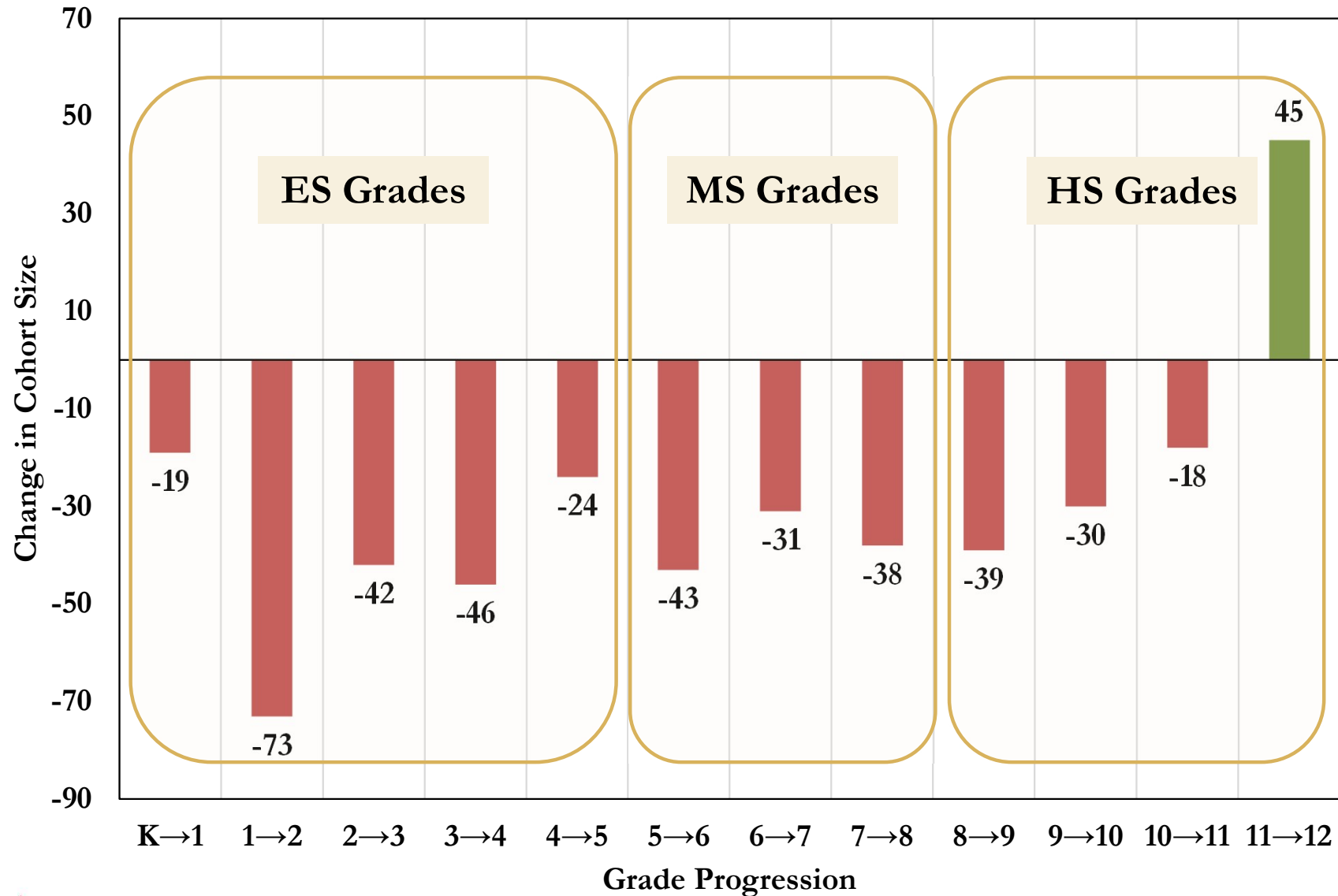
Grade Progressions by Grade, 2024 to 2025

Grade Progression Differences, Fall 2024 to Fall 2025

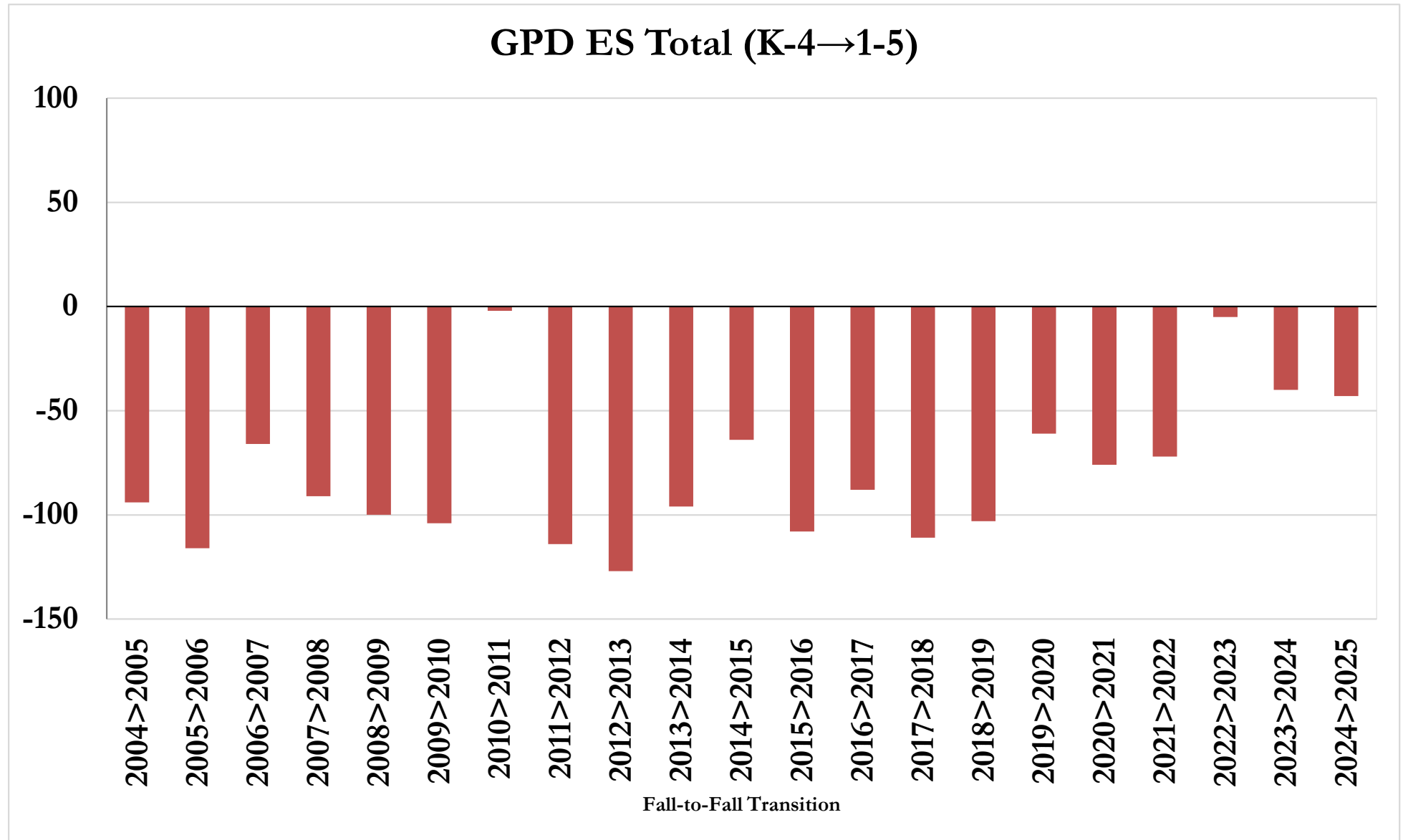


Grade Progressions, 2024 to 2025

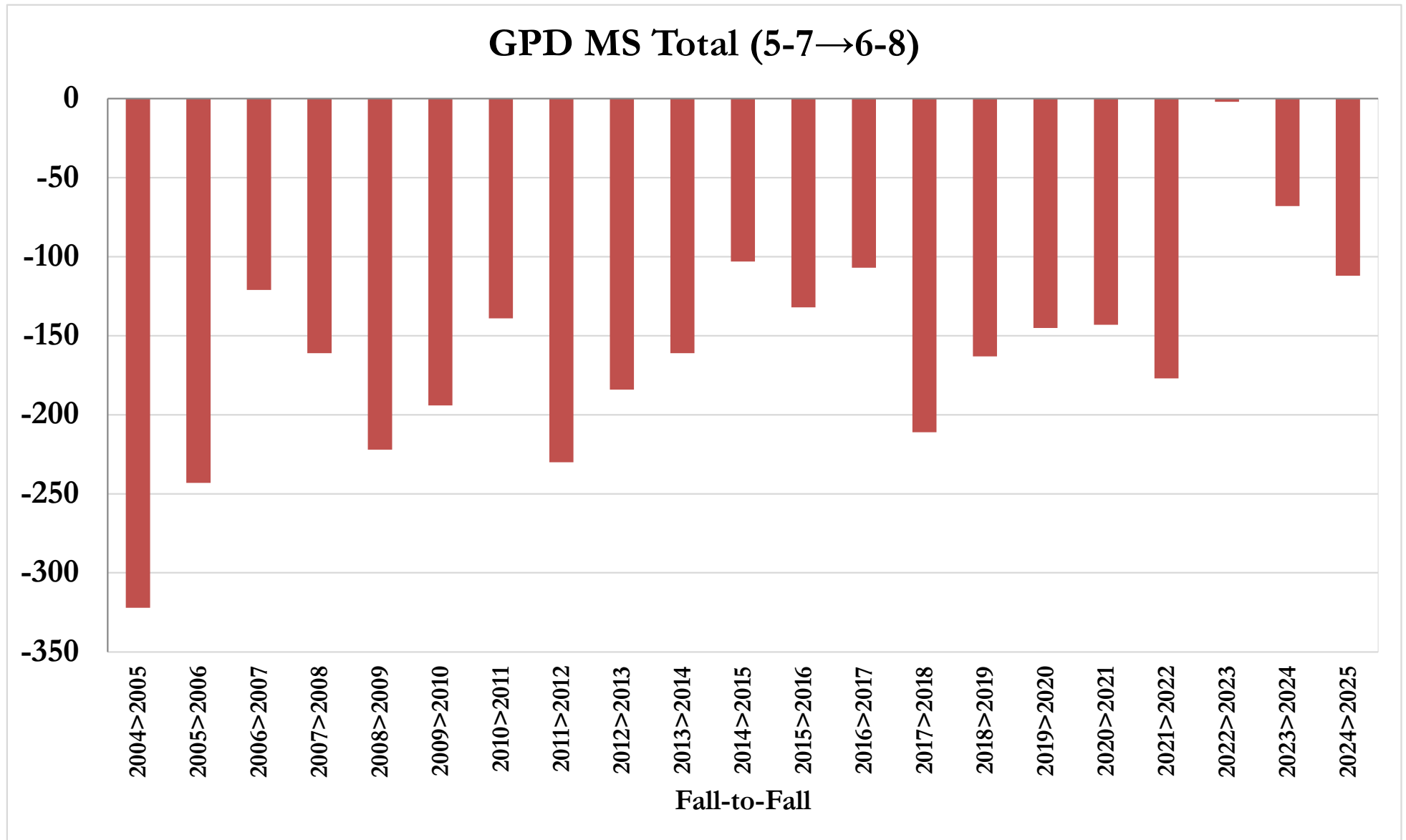
Grade Progression Differences, Fall 2024 to Fall 2025



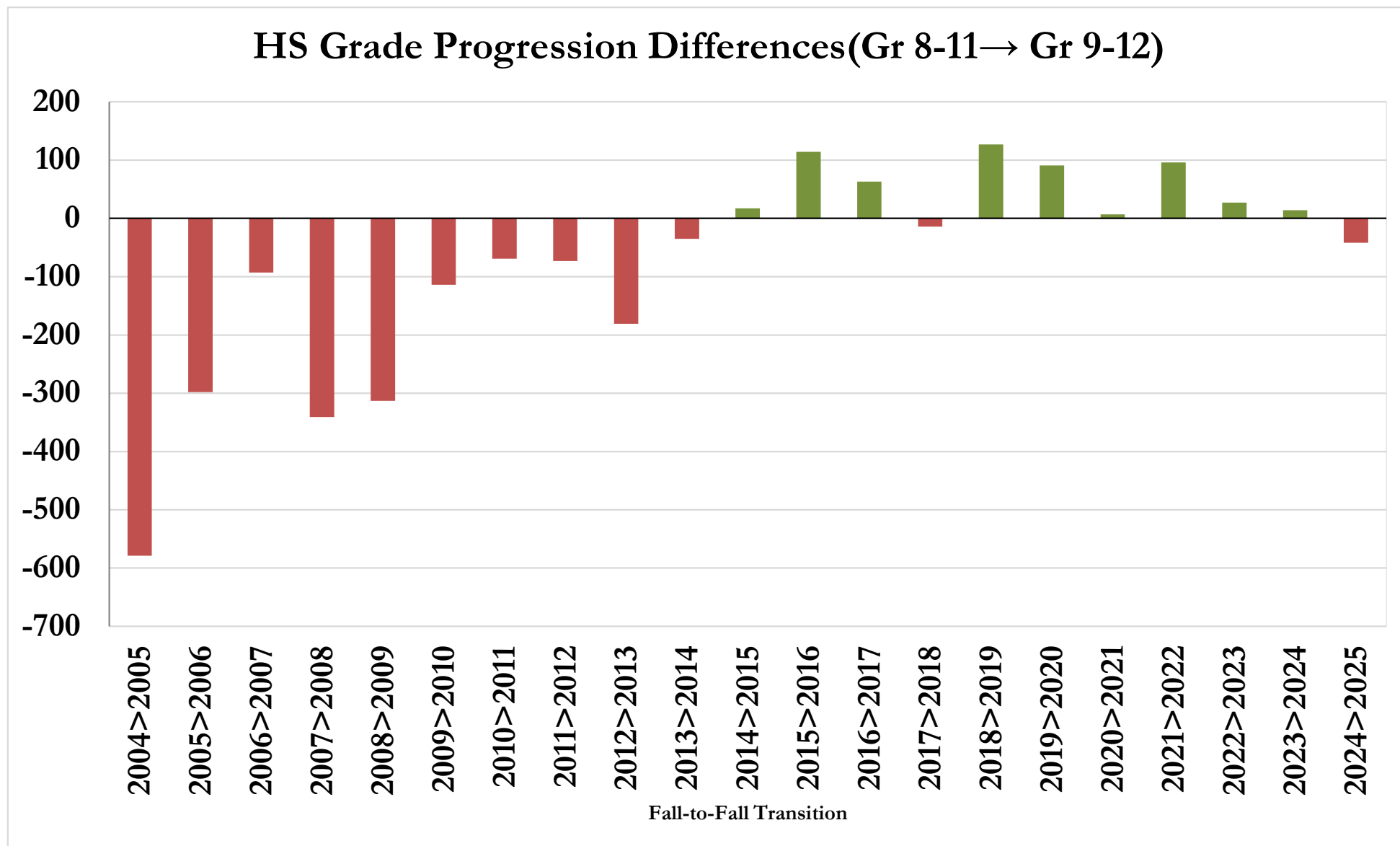
Elementary School Grade Progressions, 2004-2025



Middle School Grade Progressions, 2004-2025



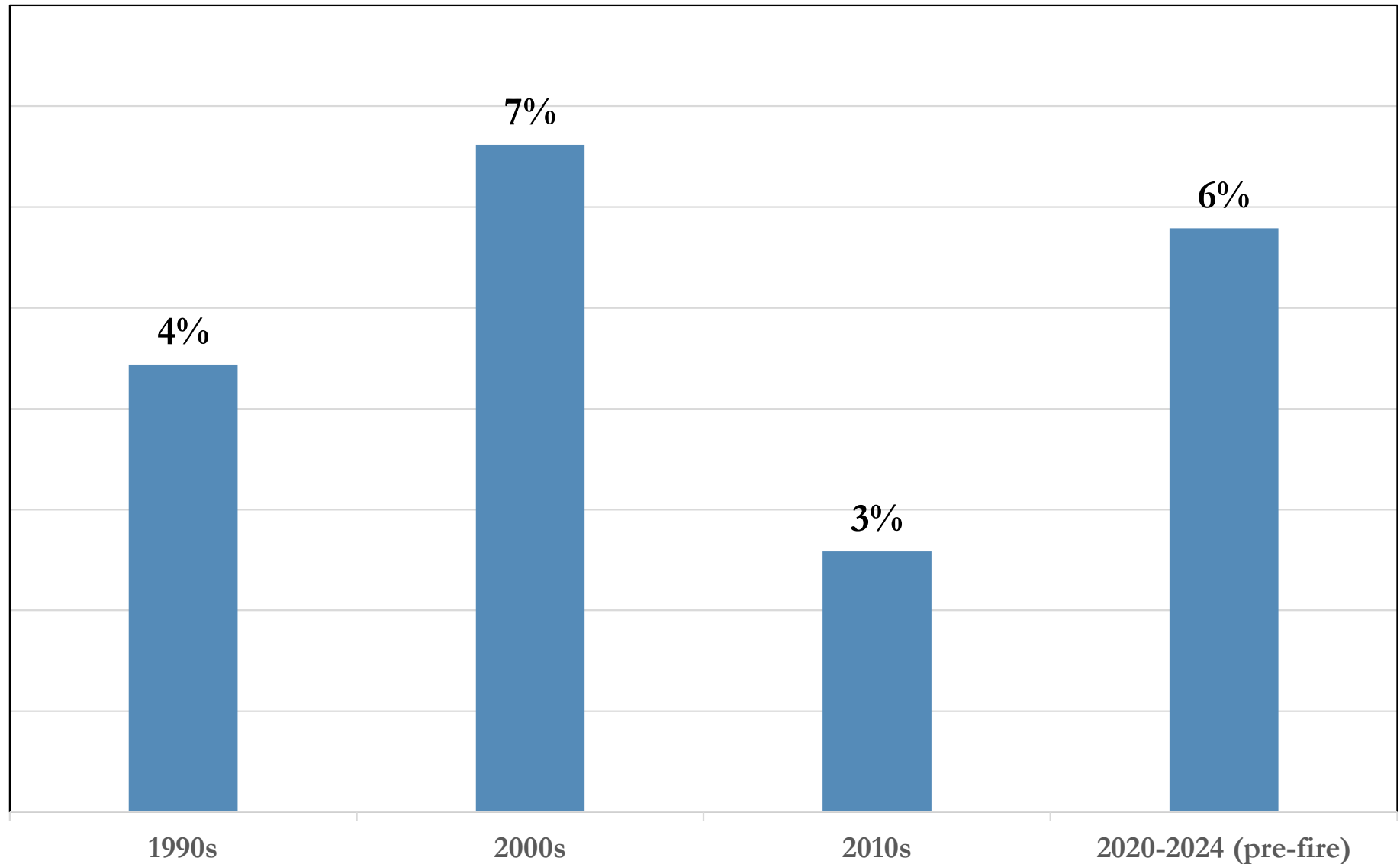
High School Grade Progressions, 2004-2025



Housing

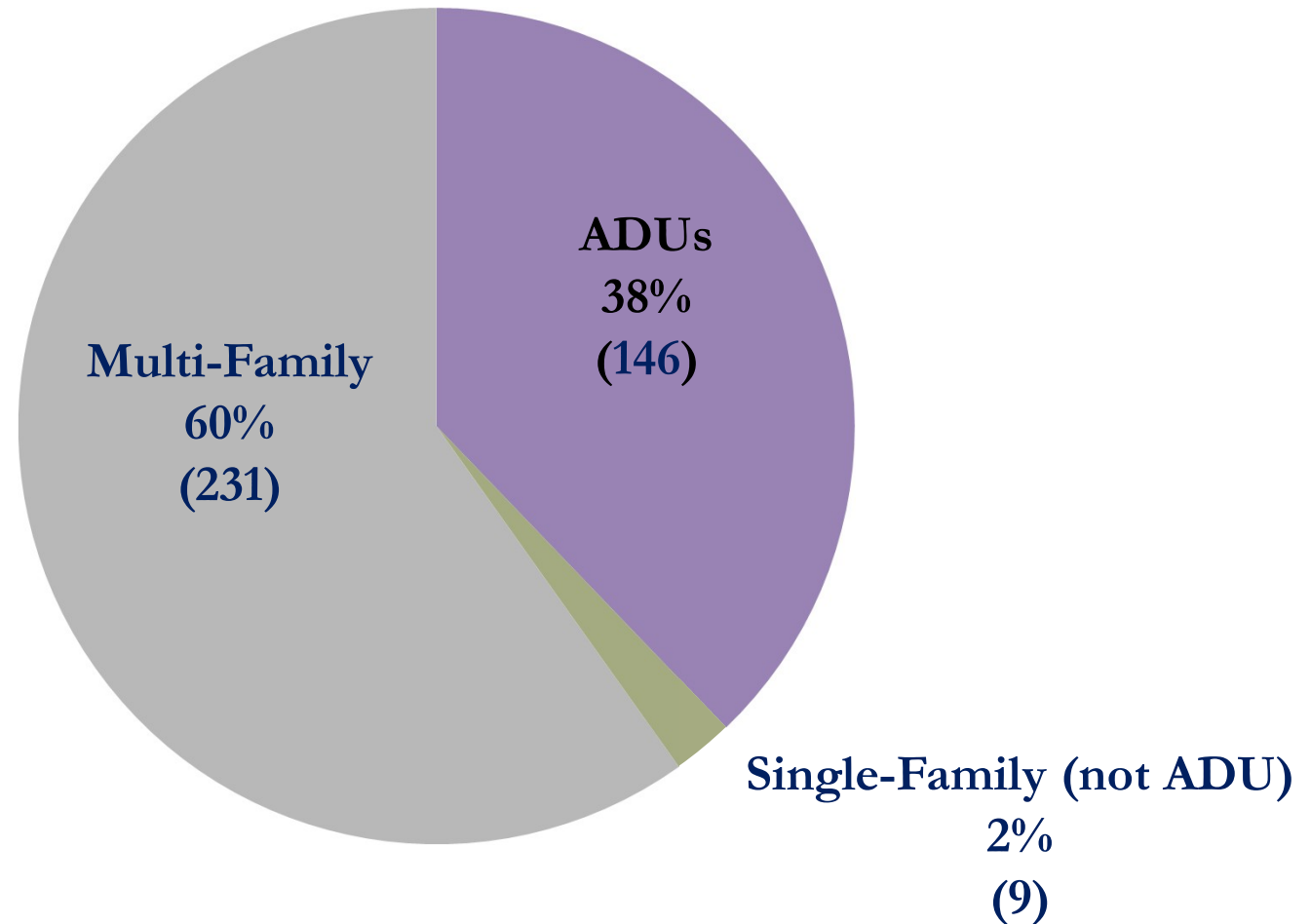
Family-friendly housing increases enrollment

PUSD Housing Growth



Schools Need Family-Friendly Housing

City of Pasadena, New Housing Units by Type, 2025



ADUs and small apartments are unlikely to generate additional students.

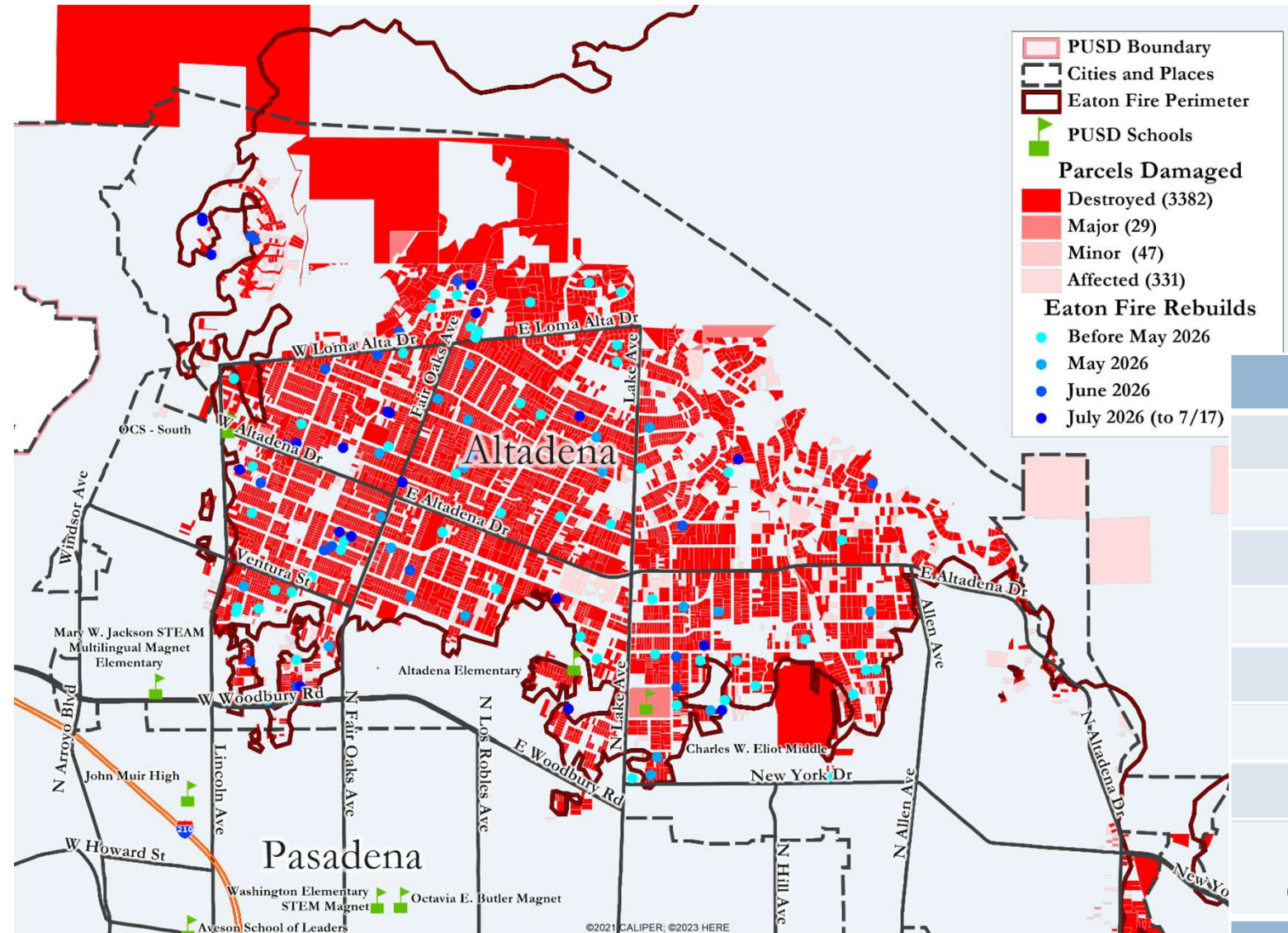
Few Students from Recently-Built Housing

Housing Built Since 2015			
	Total Units	# Students 2025	Student Yield
All Housing	2,852	129	0.05
Affordable Family or Workforce Housing	90	45	0.50
Affordable Non-Family Housing	308	3	0.01
Market Rate Apartments	1,555	58	0.04
Triplex	3	1	0.33
Single Family	16	0	0.00
Market Rate Condos/THs	880	22	0.03

- ❑ Only affordable family housing generates many students (0.5 yield, or 1 student for every two units)
- ❑ The 2,454 market rate housing units built since 2015 contain only 81 students (0.033 yield, or 1 student for every thirty units)

Eaton Fire Recovery

Eaton Fire Area and New Housing



Month	Completions
2025	11
Jan 2026	6
Feb 2026	7
Mar 2026	15
Apr 2026	14
May 2026	25
June 2026	20
July 2026 (to July 17)	23
Total (to July 17)	121

Eaton Fire Recovery Summary

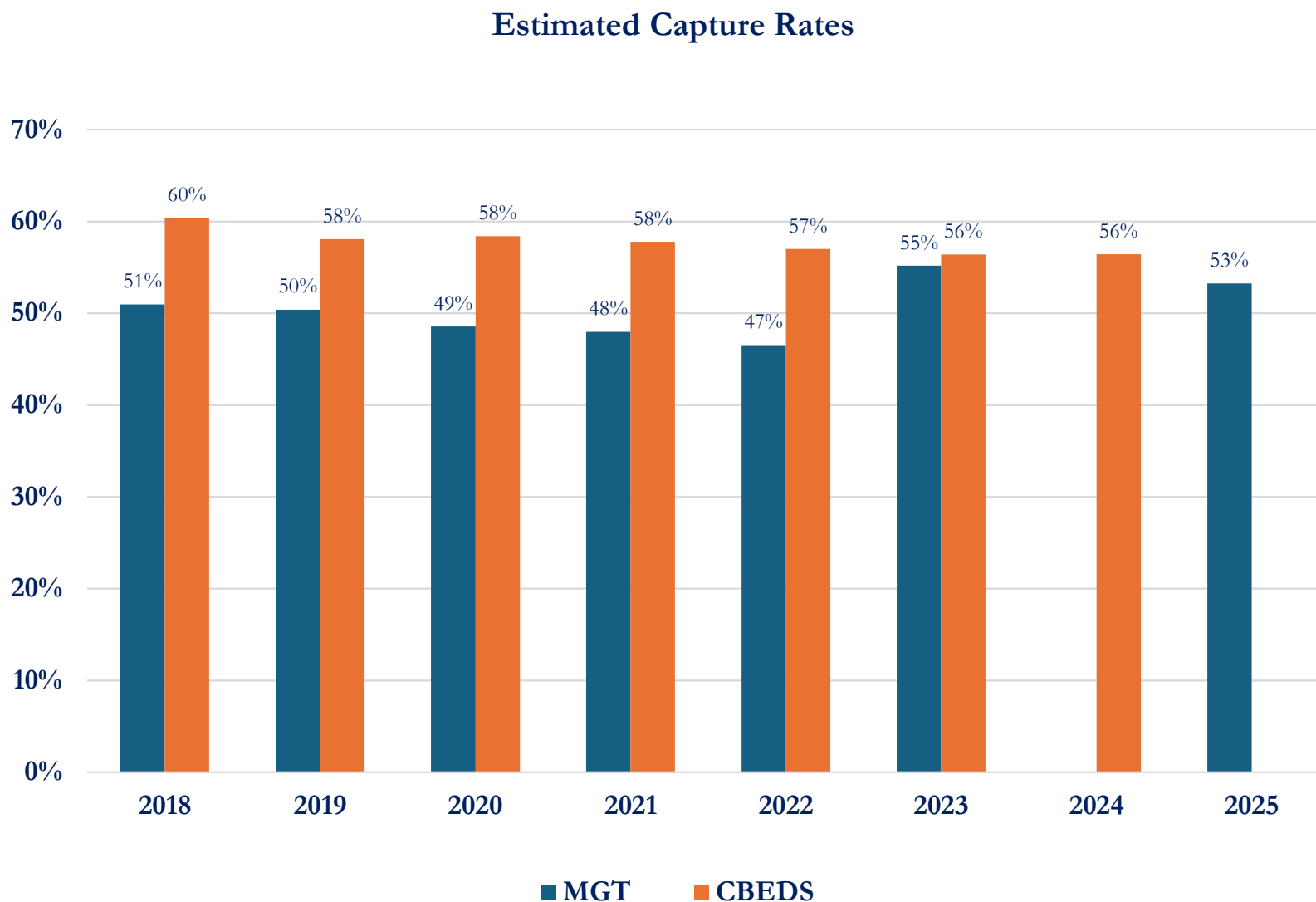
- ❑ 3,382 Altadena homes were destroyed
- ❑ 121 Altadena rebuilds were completed by July 17
- ❑ Of the damaged and destroyed units, only about half have started the permitting and rebuilding process
- ❑ While the pace of completion has increased, it will take many years to fully rebuild the areas destroyed by the Eaton Fire

Future Housing Forecast

- Analyze housing data from City of Pasadena and LA County
- The “710 Stub” Vision Plan optimistically hopes for residential construction starting in 10 – 15 years
 - ▣ Ultimately (in 20 – 30 years) the 710 Stub Vision expects 1,800 new residential units with about 30% affordable
- Eaton Fire Recovery
 - ▣ Confirm number of affected students who stayed at PUSD
 - ▣ Develop rebuilding scenarios

Student “Capture Rate”

MGT and CBEDS Estimates



Transfer Students Analysis

Inter-District Transfer Ratio

- ❑ Inter-District Transfer Ratio is one indication of PUSD's positive regional image:

Year	Transfer into PUSD (Students)	Transfer out of PUSD (Permits)	Appeal Ratio
2025	1,020	325	3.14 to 1
2024	923	276	3.34 to 1

These are not Eaton Fire displaced students.
To do: Intra-District Transfer Matrix

Summary

Summary

- ❑ Enrollments declining steeply since 2000
- ❑ Steep birth decline drives the District's enrollment decline
- ❑ PUSD also loses students as they progress through the grades as families leave the area
- ❑ Charter enrollments are a relatively small share of the District's enrollments and are declining
- ❑ The share of students in private schools is much higher in PUSD than in the county and state and has been so for decades
- ❑ Overall, recently constructed housing contains few students
 - ❑ The type of housing matters—affordable family housing contains the most students per unit
- ❑ Rebuilding after the Eaton Fire is slow and will take many years

Next Steps

1. Future Housing Scenarios
2. Eaton Fire Recovery Scenarios
3. Resulting Enrollment Forecasts
 - ▣ PUSD and school-by-school

Target date for NDC demographic report to facility master plan team is August 31.

Enrollment forecasts need to be updated when official 2026-2027 data are available.

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Appendix

Student Yield Detail

Private School Enrollments/Student Capture Rate

Charter Enrollment

Individual Grade Progressions

Additional Birth Data

Additional PUSD Slides

County Trends

State Trends

Student Yield Detail

YSA Name	Housing Type	Total Units	% Affordable	Year Built	# Students 2025	Student Yield
All Housing		2,852			129	0.05
Affordable Family or Workforce Housing						
Marv's Place	Apts	20	100%	2016	18	0.90
Gill Court	Condos	7	100%	2020	5	0.71
Decker Court	Condos	9	100%	2020	5	0.56
Lincoln at Orange Grove	Condos	54	89%	2023	17	0.31
Subtotal		90			45	0.50
Affordable Non-family						
Pasadena Studios	Apts	180	100%	2023	2	0.01
Agave (special needs)	Apts	58	100%	2025	0	0.00
Heritage Square Sr Apts	Apts	70	100%	2016	1	0.01
Subtotal		308			3	0.01
Market Rate Apartments						
Residences at Westgate	Apts	820	12%	2015	20	0.02
Andalucia	Apts	118	0%	2015	2	0.02
Avila Apts	Apts	201	0%	2018	8	0.04
Vinedo Gardens	Apts	26	0%	2017	3	0.12
177 E Del Mar Apts	Apts	17	0%	2018	0	0.00
Los Patios de Cordova	Apts	21	0%	2018	0	0.00
THEO	Apts	105	0%	2019	12	0.11
Bell Pasadena	Apts	212	0%	2016	11	0.05
Madison Courtyard	Apts	35	0%	2023	2	0.06
Subtotal		1,555			58	0.04
2186 Corson Triplex	Triplex	3	0%	2020	1	0.33
The Oak Grove	SFU	16	0%	2024	0	0.00

YSA Name	Housing Type	Total Units	% Affordable	Year Built	# Students 2025	Student Yield
Market Rate Condos/THs						
405-417 Mariposa Condos	Condos	7	0%	2015	4	0.57
118 N Allen Townhomes	THs	5	0%	2020	2	0.40
106 E Orange Grove Condos	Condos	21	0%	2018	6	0.29
Monaco Terrace	Condos	21	0%	2017	3	0.14
Hampton Court	Condos	8	0%	2017	1	0.13
547 & 549 N Wilson Condos	Condos	8	0%	2019	1	0.13
281 Mar Vista Condos	Condos	27	0%	2015	2	0.07
The Cassini	Condos	30	0%	2019	2	0.07
Los Robles Condos	Condos	85	0%	2015	1	0.01
The Grove at Ambassador Gardens	Condos	21	0%	2015	0	0.00
Terraces & Villas at The Ambassador Gardens	Condos	78	0%	2018	0	0.00
The Del Mar	Condos	55	0%	2022	0	0.00
178 S Euclid Ave Condos	Condos	42	0%	2022	0	0.00
482 Arroyo	Condos	26	8%	2015	0	0.00
388 Cordova Condos	Condos	57	0%	2019	0	0.00
West Grove Pasadena	Condos	25	0%	2018	0	0.00
Del Mar Gardens	Condos	17	0%	2017	0	0.00
The Village at Los Robles	Condos	16	0%	2019	0	0.00
383-395 S Marengo Condos	Condos	24	0%	2017	0	0.00
536 S El Molino Condos	Condos	12	0%	2018	0	0.00
712 S Marengo Condos	Condos	8	0%	2021	0	0.00
Town Country 158	Condos	59	0%	2018	0	0.00
Chelsea Court	Condos	28	0%	2016	0	0.00
Oswego Garden Courtyard	Condos	8	0%	2022	0	0.00
The Ivy	Condos	6	0%	2019	0	0.00
262 N Wilson Condos	Condos	5	0%	2022	0	0.00
275 N Wilson Condos	Condos	6	0%	2015	0	0.00
93 N Sierra Bonita Condos	Condos	4	0%	2019	0	0.00
81 & 89 Grand Oaks Villa	Condos	6	0%	2024	0	0.00
1046 E Villa Condos	Condos	4	0%	2018	0	0.00
1968 N Lake Condos	Condos	14	0%	2015	0	0.00
8831-8851 E Fairview Condos	Condos	10	0%	2017	0	0.00
Jamieson Place at Ambassador Gardens	Condos & THs	57	0%	2017	0	0.00
The Collection at 380 Cordova	Condos & THs	48	0%	2024	0	0.00
Marengo Villa	THs	12	0%	2020	0	0.00
941 E California Condos	THs	4	0%	2024	0	0.00
El Molino Lofts	THs	6	0%	2016	0	0.00
388 & 394 S Oakland THs	THs	5	0%	2019	0	0.00
262 Ohio Townhomes	THs	5	0%	2023	0	0.00
Subtotal		880			22	0.03

Private Schools

Private School Data Sources Imperfect

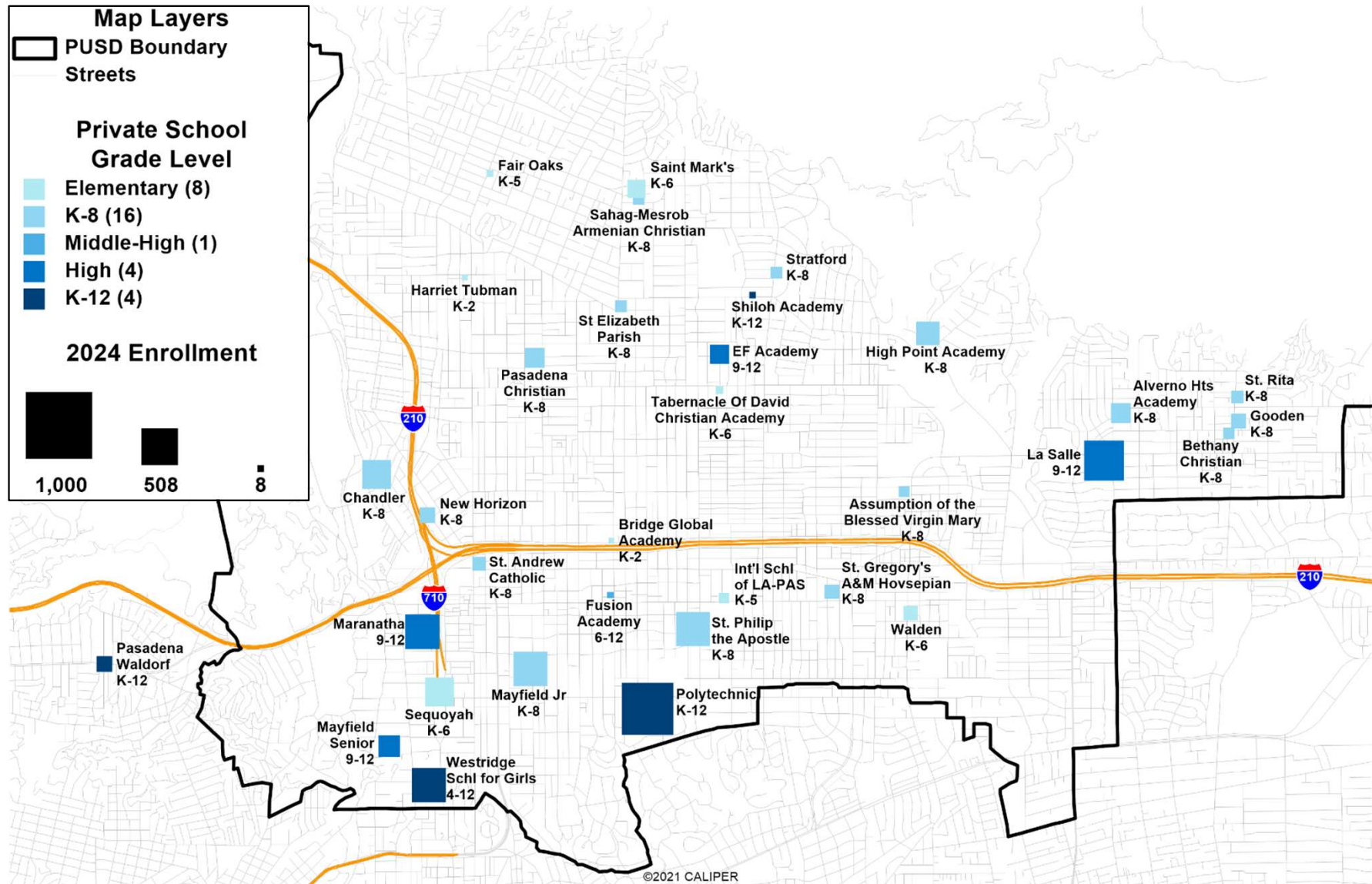
□ State Reports – Private School CBEDS

- No penalty for non-reporting; missing data for some schools
 - NDC has fixed obvious data errors
- Does not include home schooling and very small private schools
- Most importantly, enrollments count students where they attend, regardless of where they live – some students attending private schools located within PUSD may not live in PUSD

□ Census Bureau survey – American Community Survey (ACS)

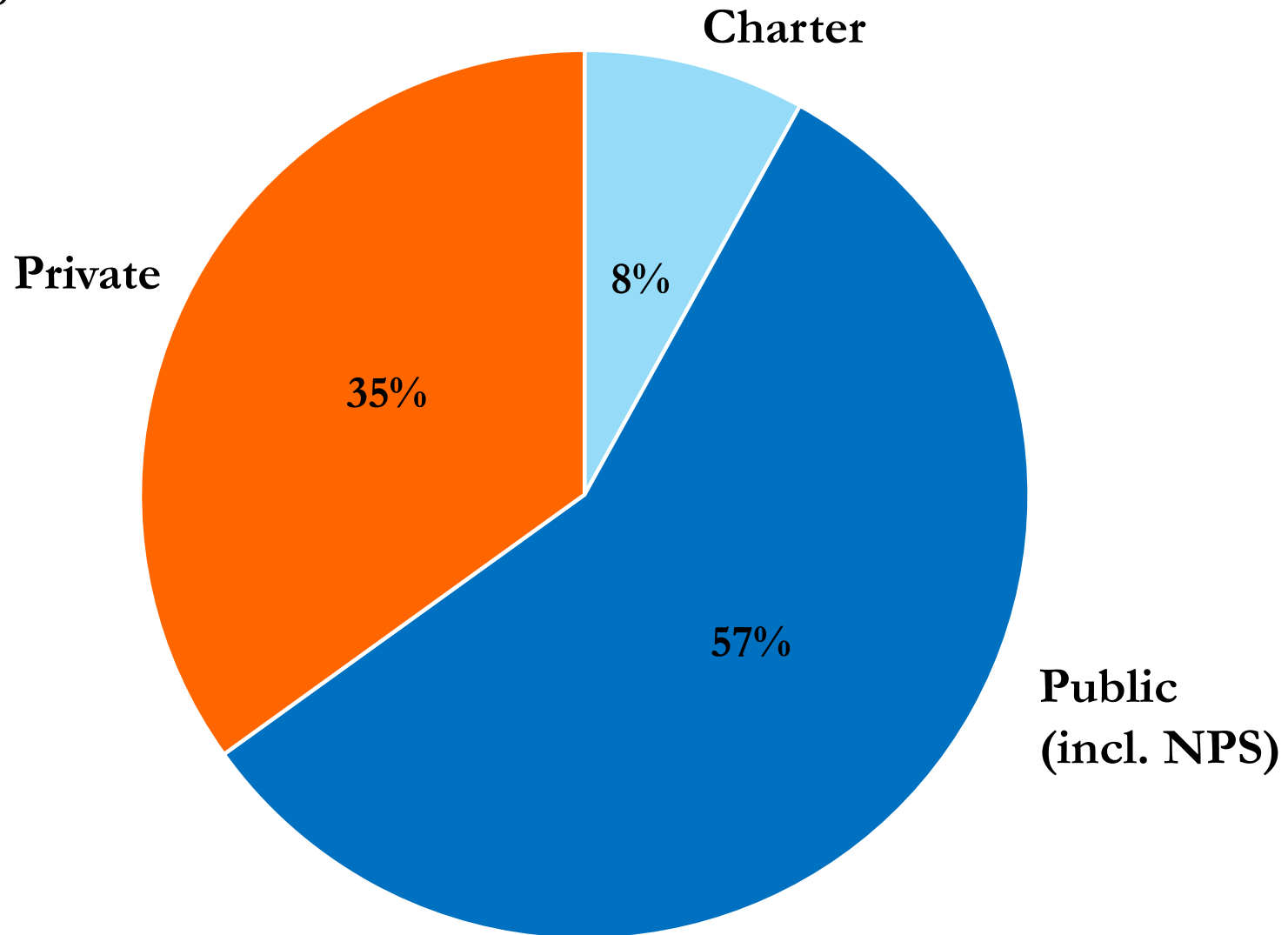
- Small survey of the population – big margins of error for small geographies like PUSD
- ESRI estimates are based in part on ACS and decennial Census data

PUSD-Area Private Schools



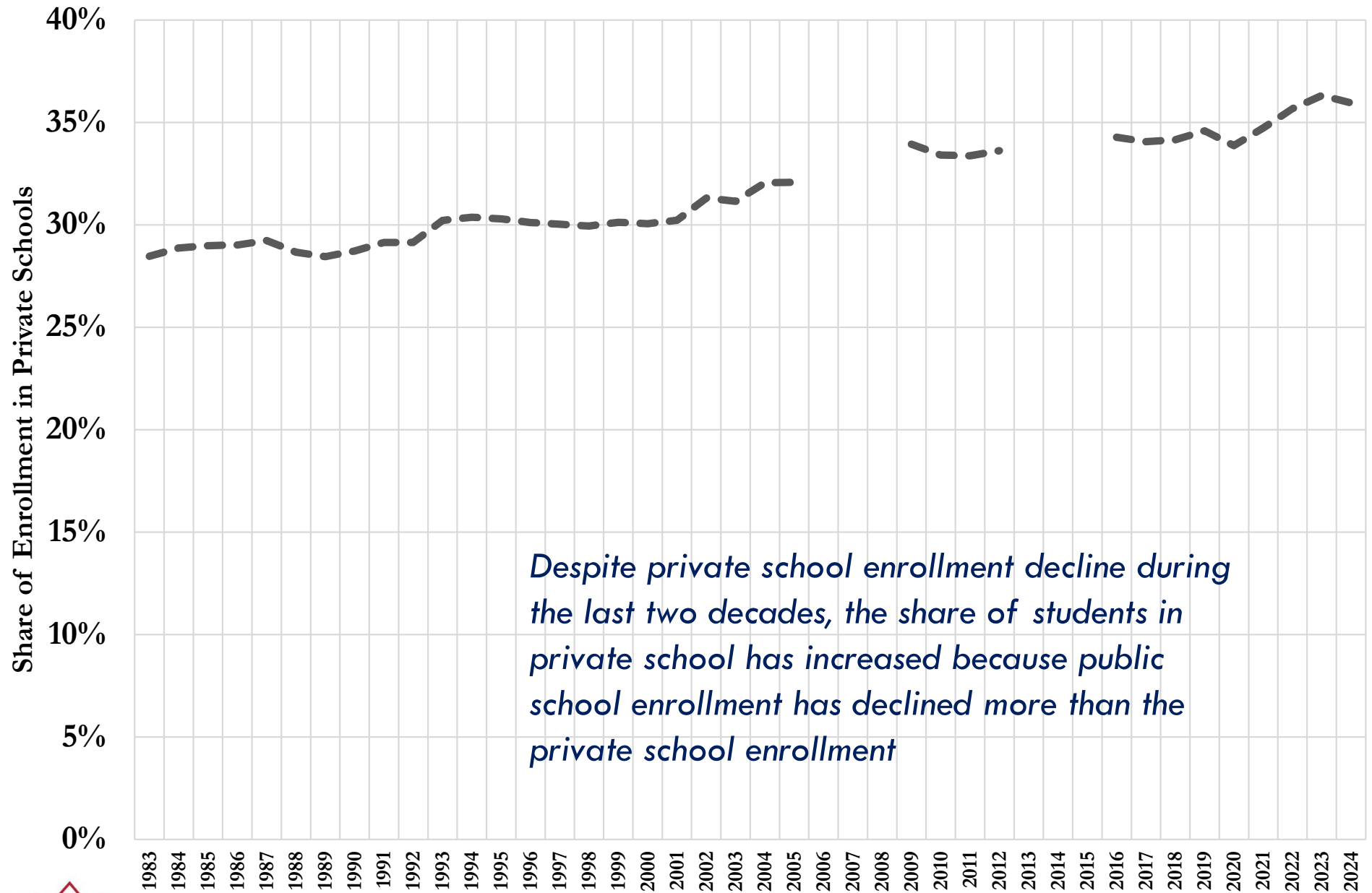
Enrollment by School Type

2024-2025



Enrollment Share in Private Schools within PUSD, 1983-2024

State Reports (Private School CBEDS)



Private Schools – Census Survey Data

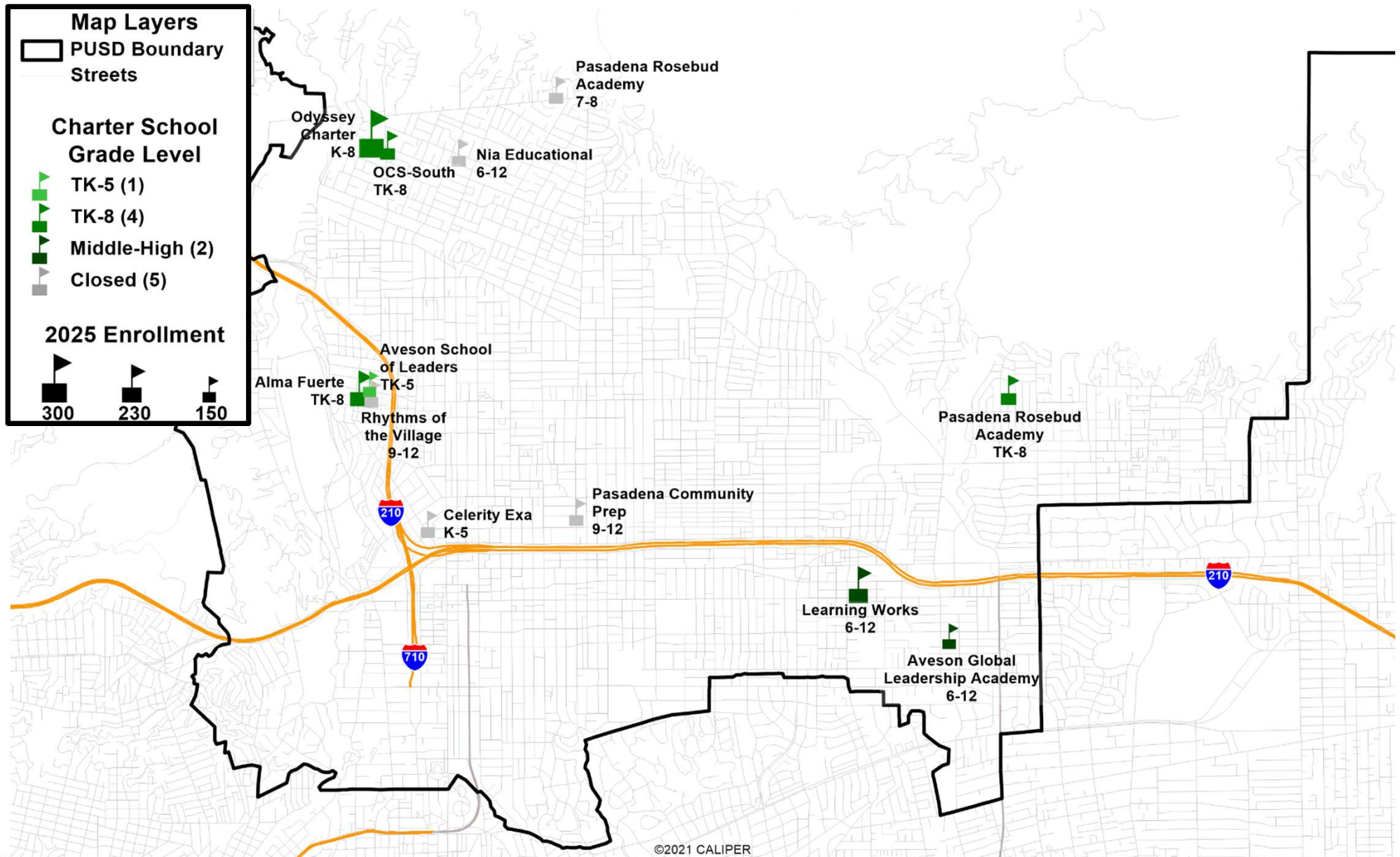
Charter Schools

No Longer Growing

Active Charter Schools in PUSD

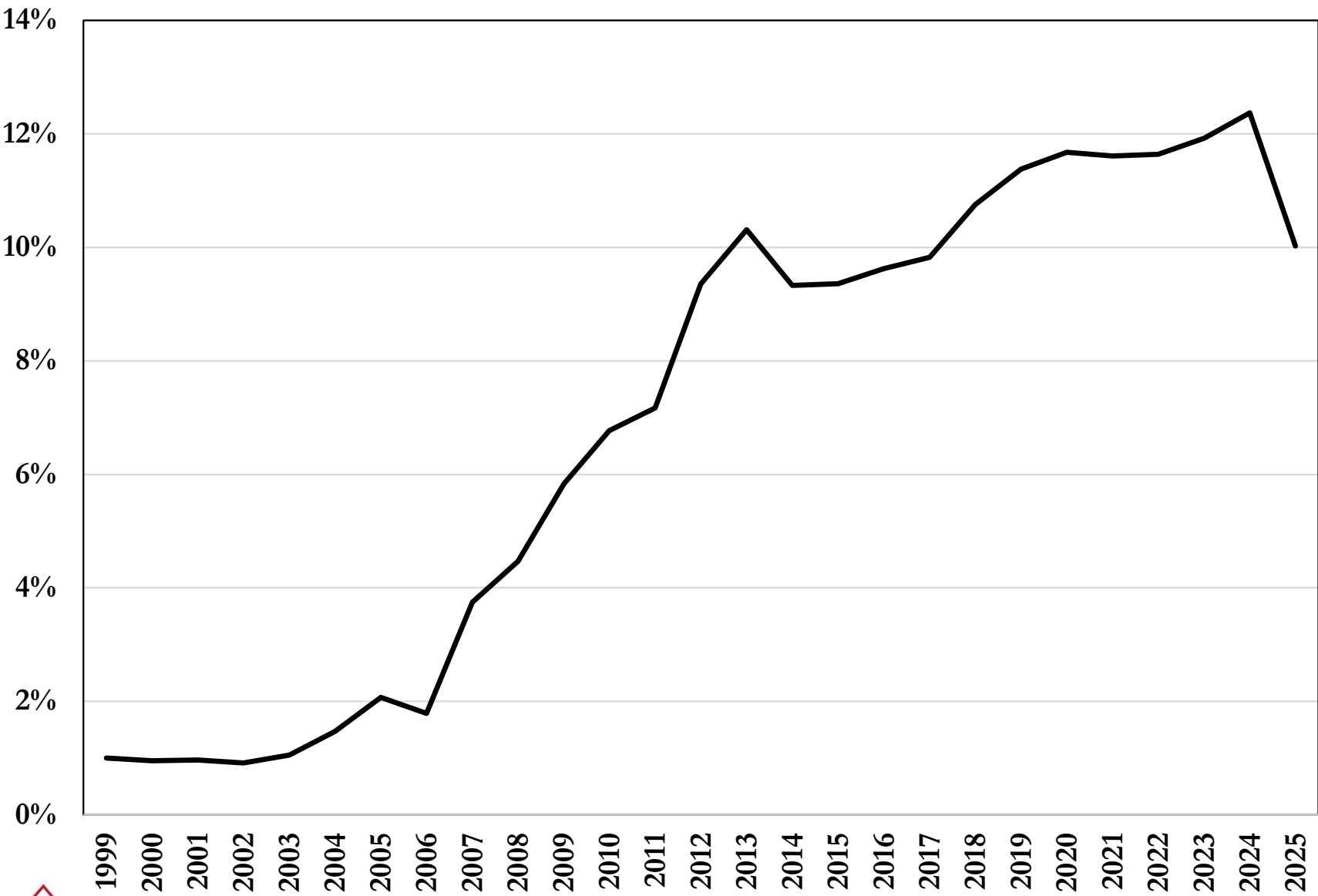
Charter School	2025 Enrollment	Grades
Alma Fuerte Public	229	TK-8
Aveson Global Leadership Academy	163	GR 6-12
Aveson School of Leaders	158	TK-5
Learning Works	238	GR 6-12
OCS - South	184	TK-8
Odyssey Charter	315	K-8
Pasadena Rosebud Academy	187	TK-8

Charter Schools



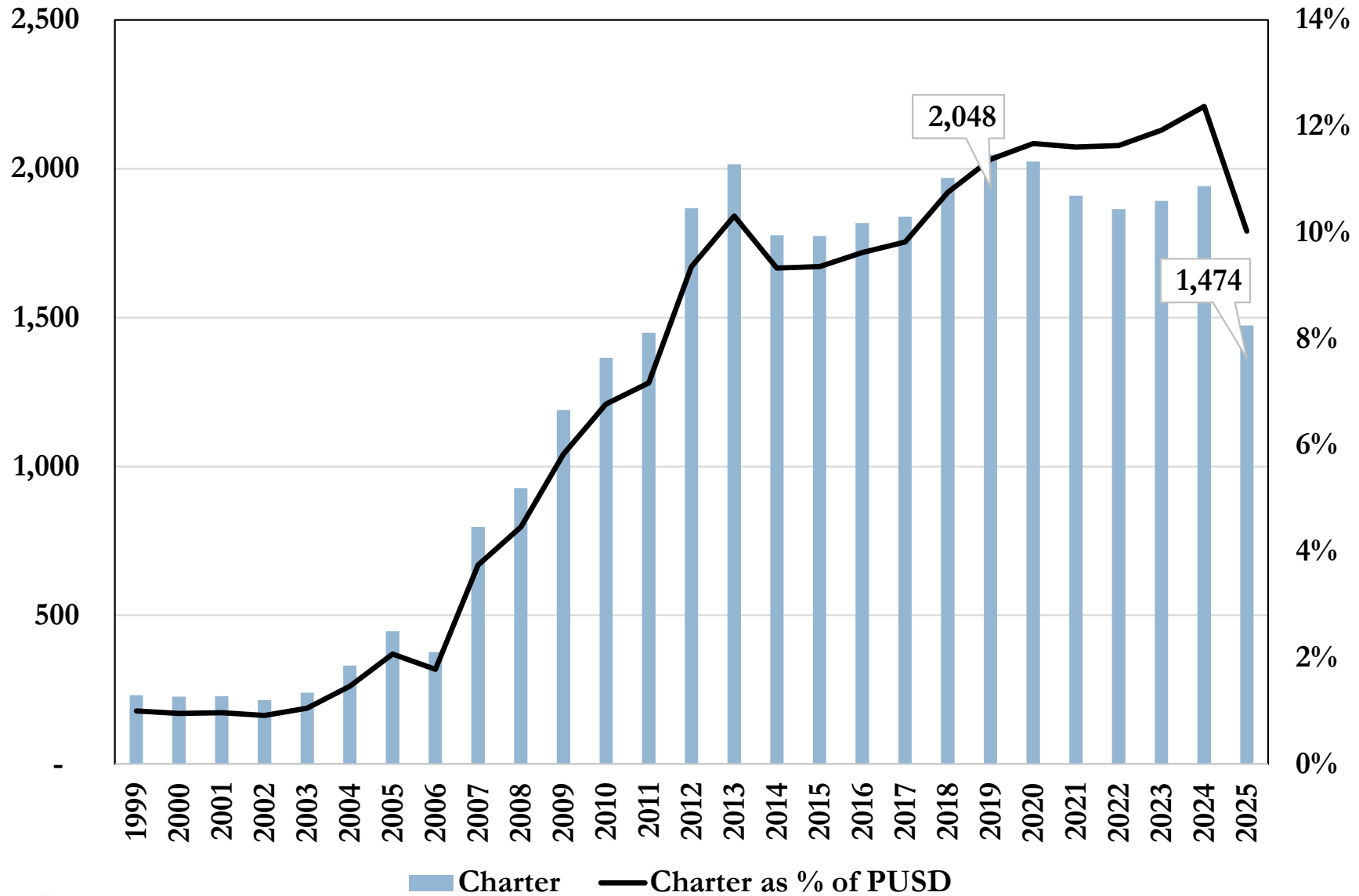
Charter Share Grew as Non-Charter Enrollments Declined

Charter Enrollment as a Percentage of PUSD



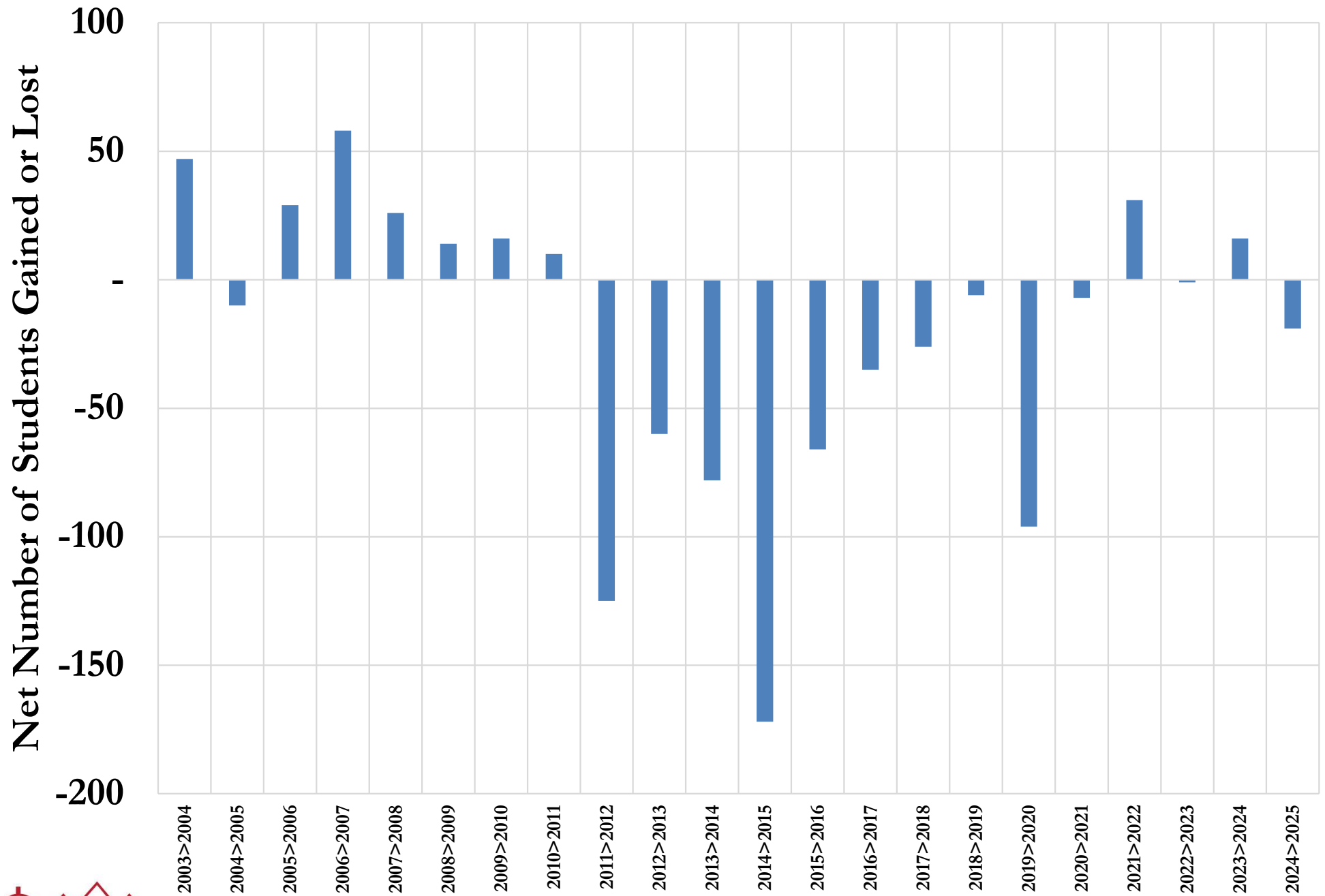
Charter Enrollment Peaked in 2019

Charter School Enrollment, 1999 - 2025

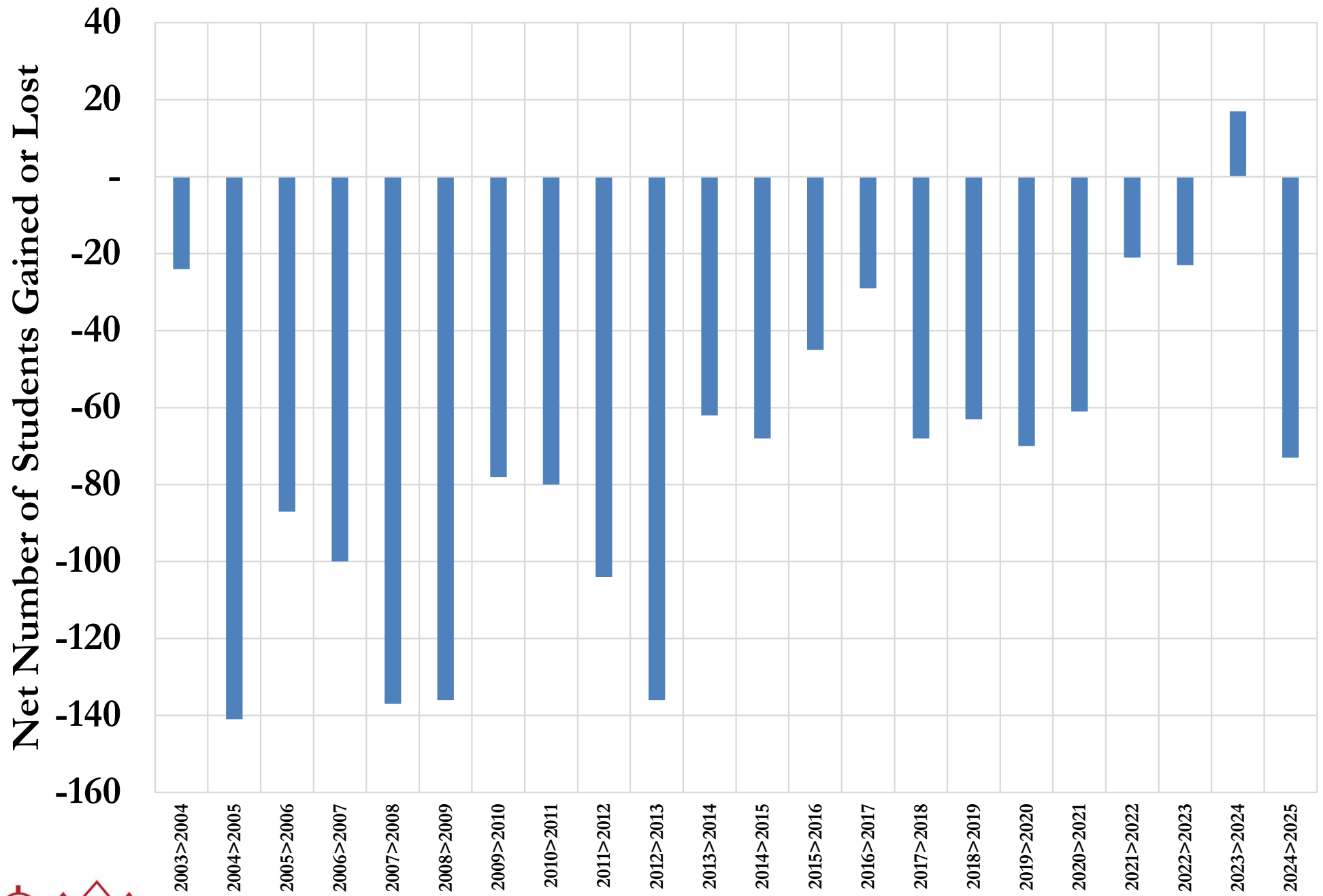


Individual Grade Progressions

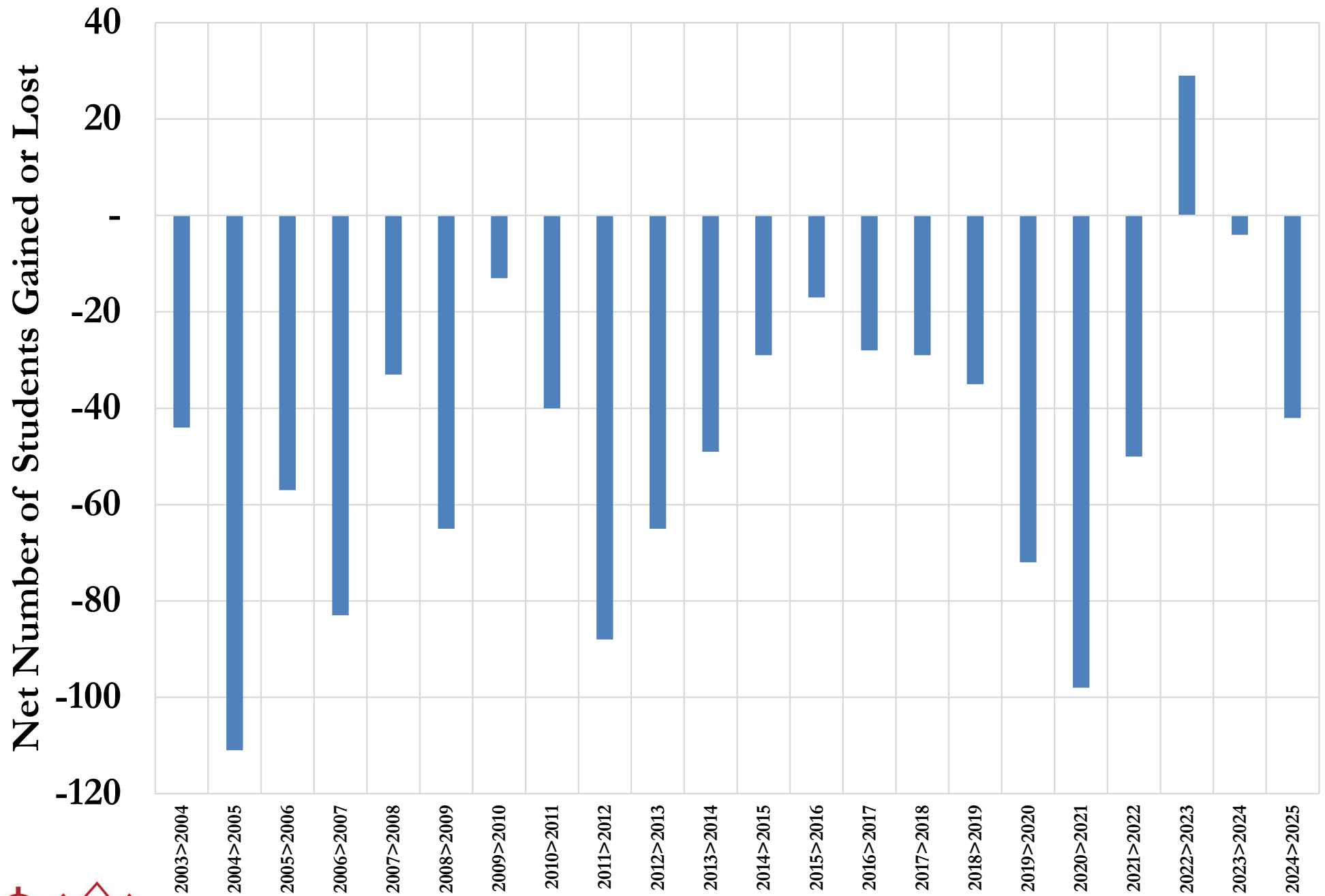
K>1 Grade Progression Difference



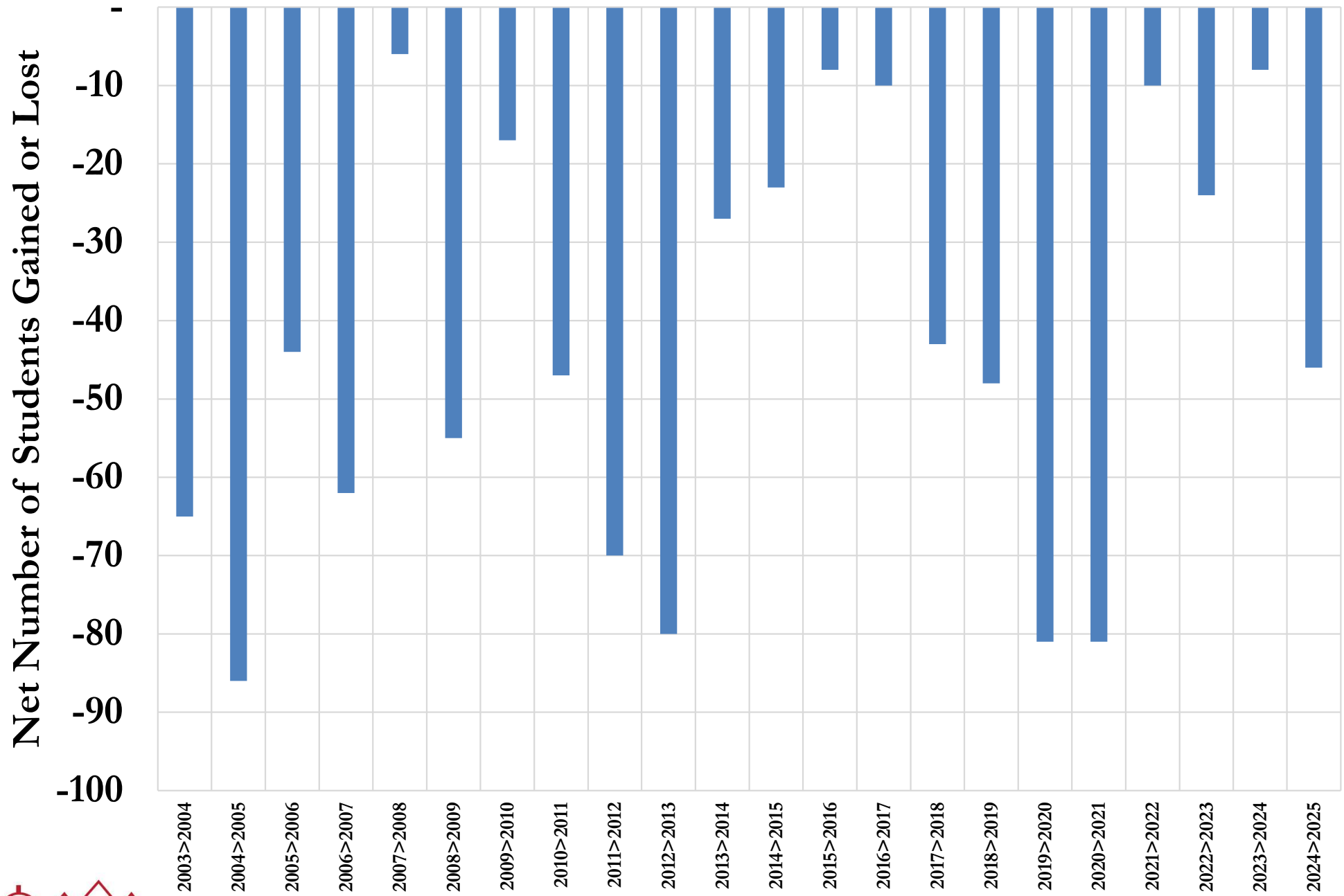
1>2 Grade Progression Difference



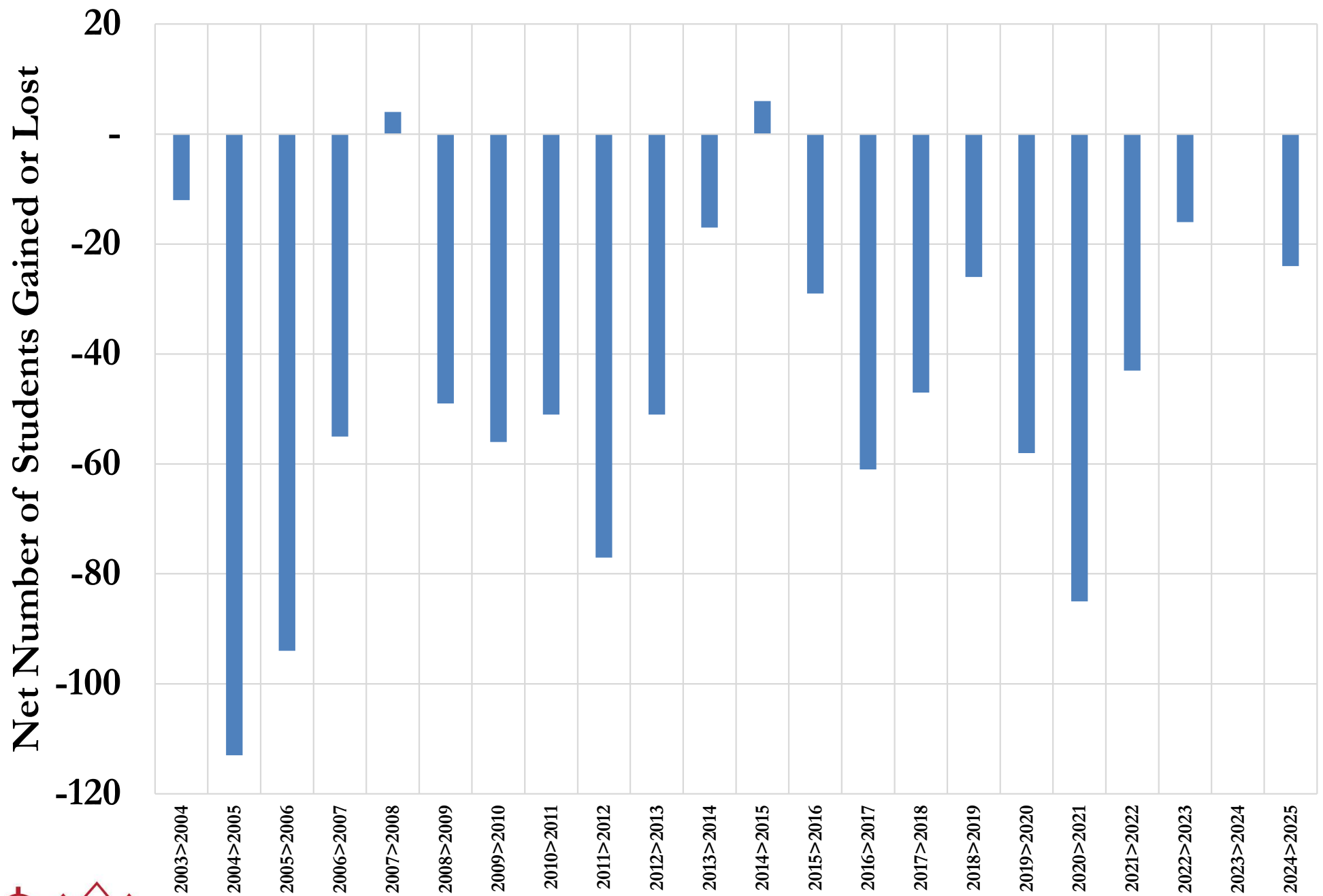
2>3 Grade Progression Difference



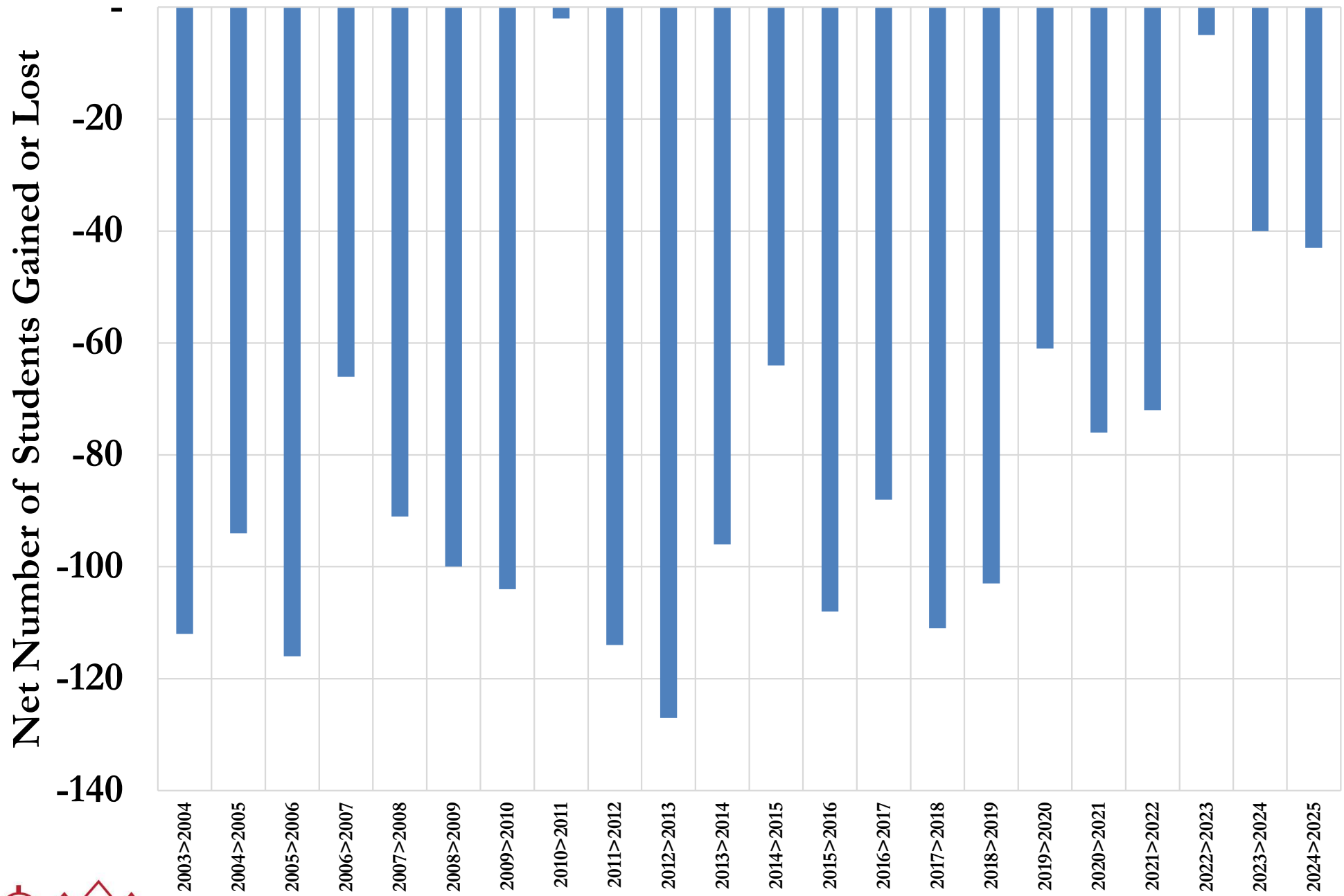
3>4 Grade Progression Difference



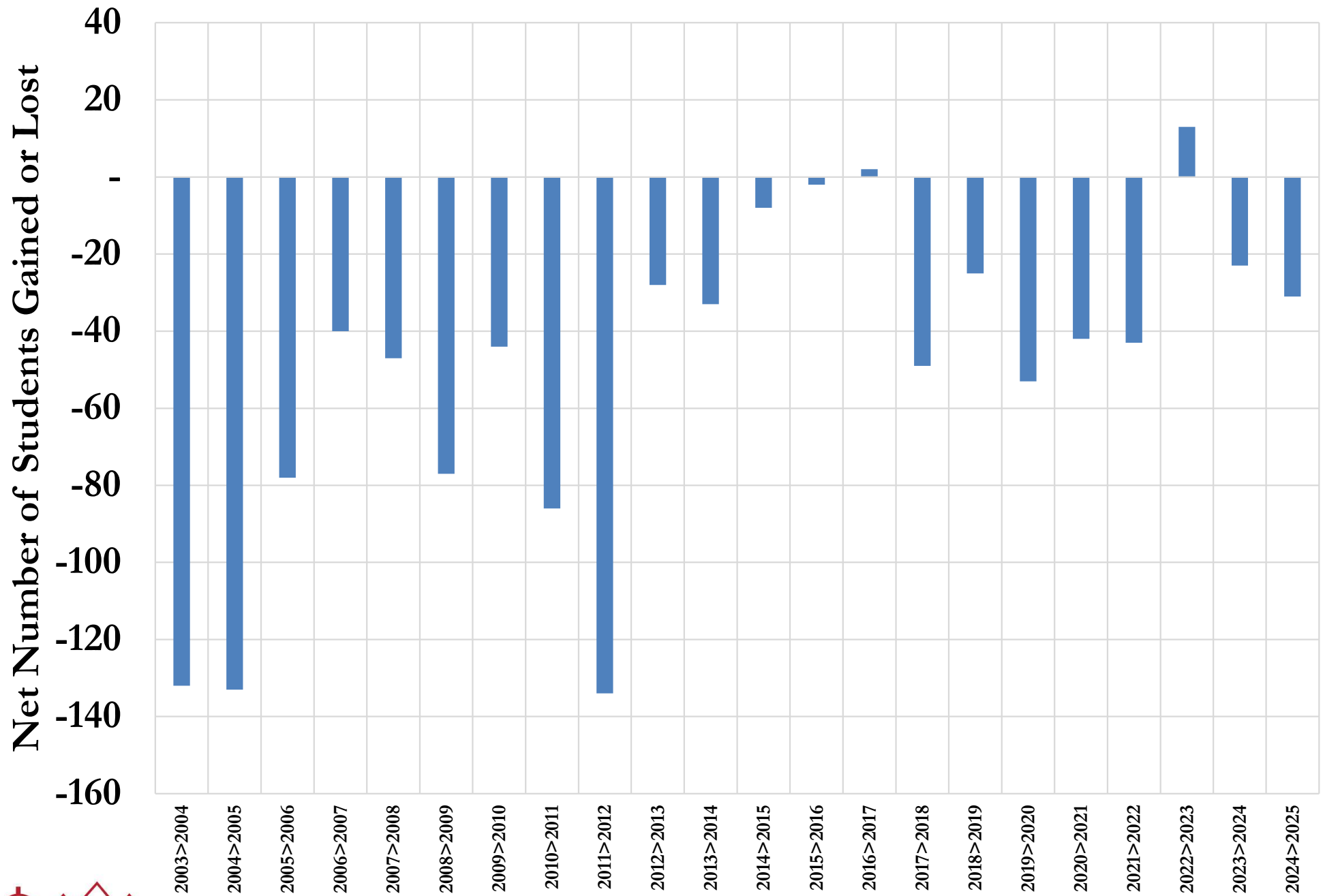
4>5 Grade Progression Difference



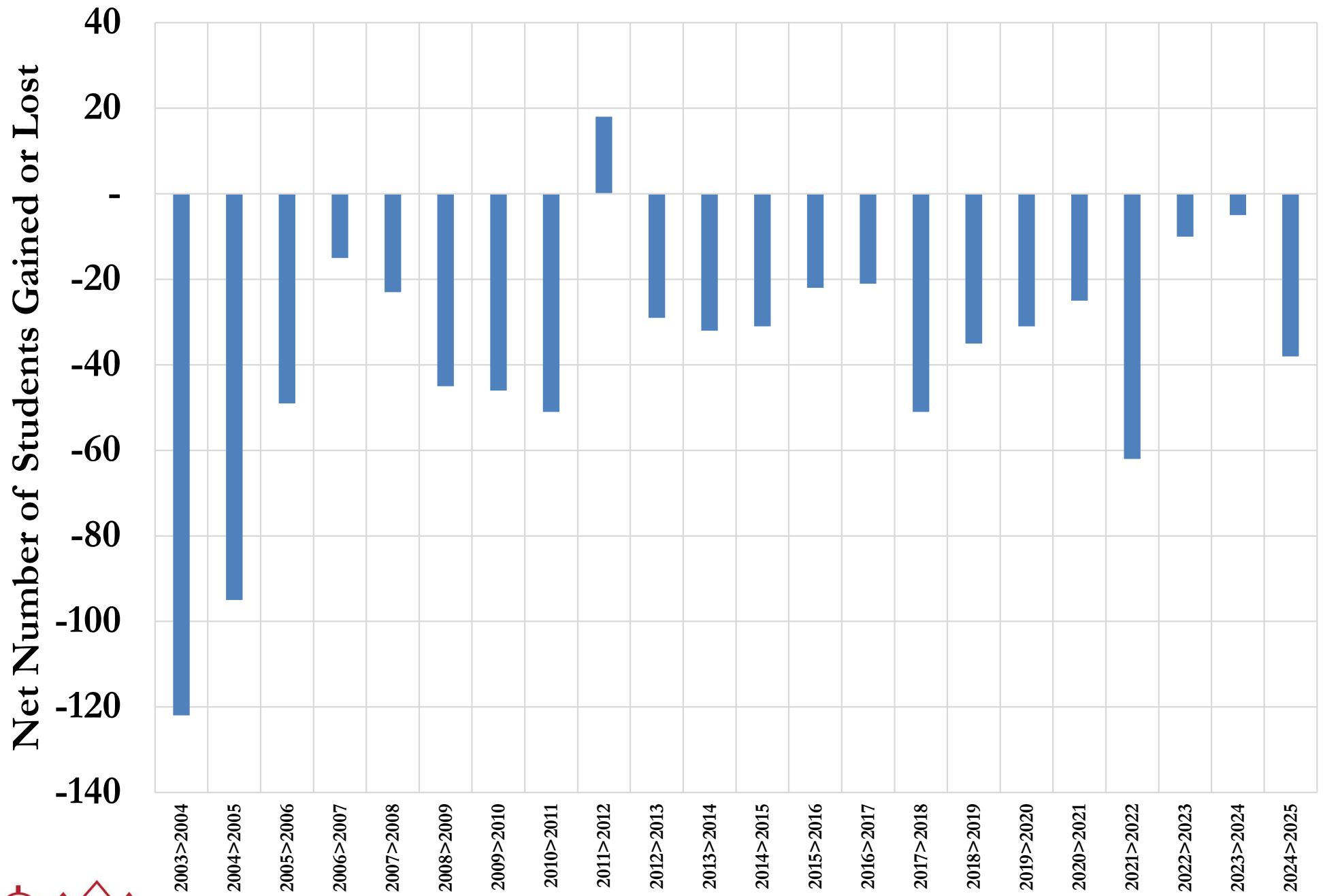
5>6 Grade Progression Difference



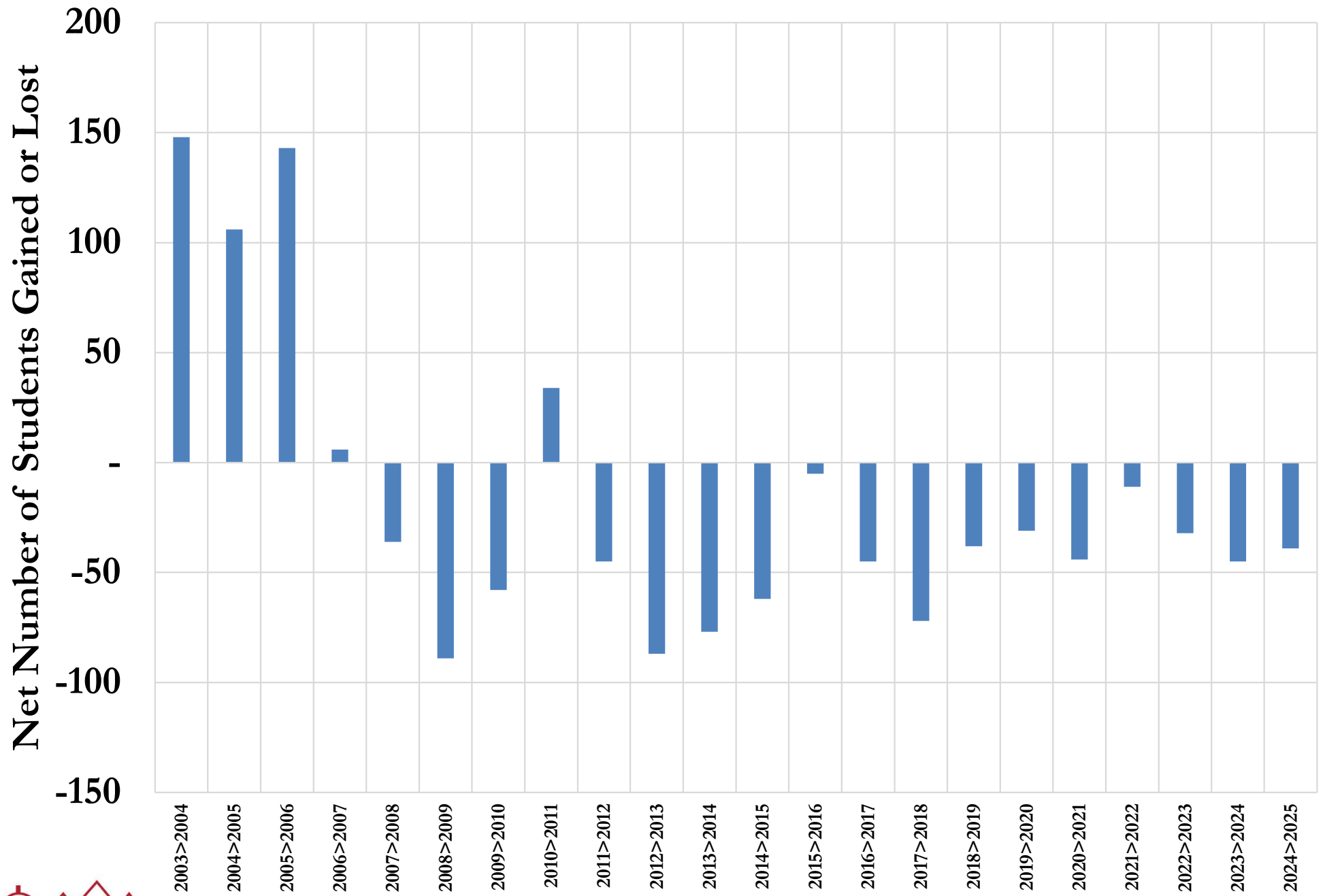
6>7 Grade Progression Difference



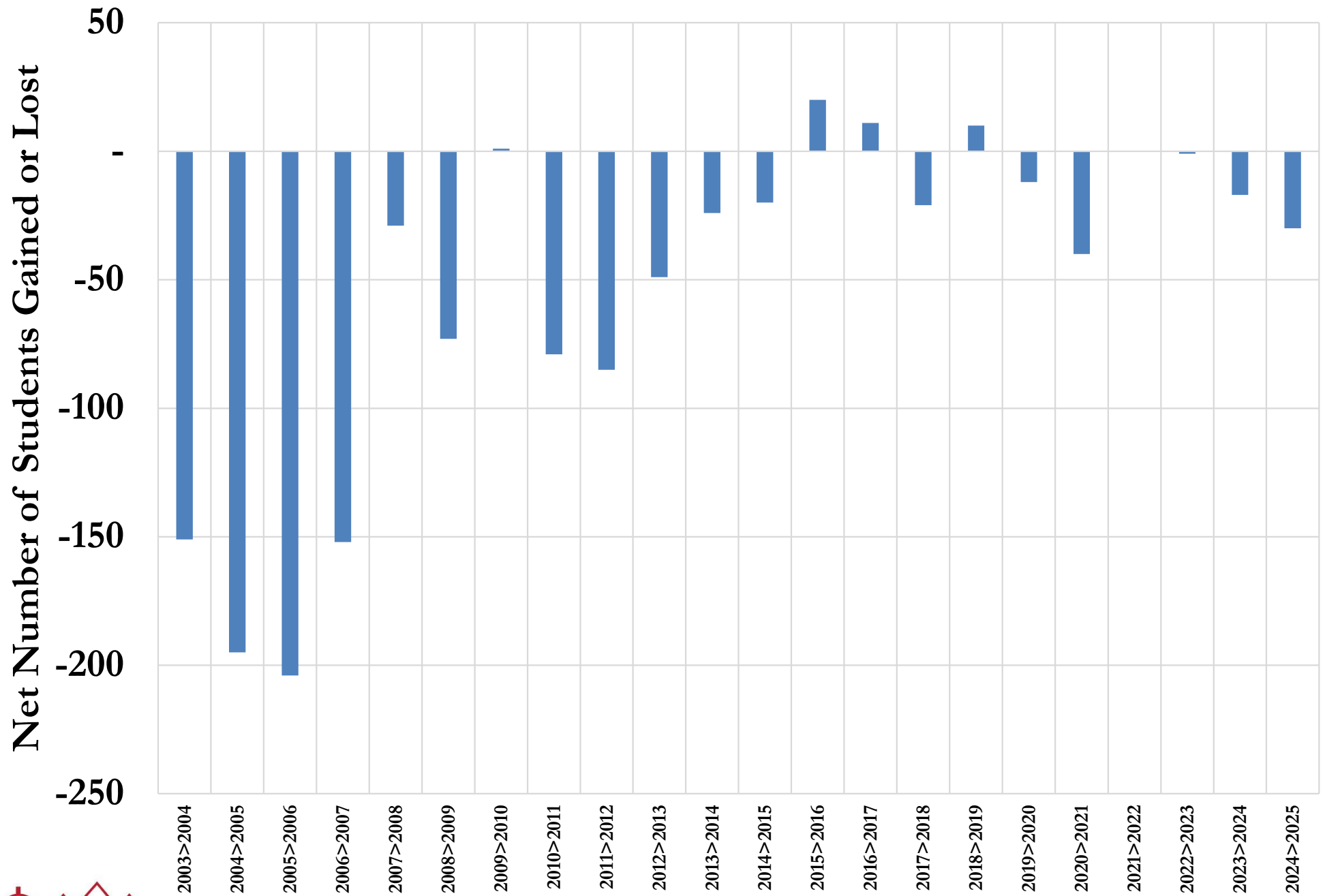
7>8 Grade Progression Difference



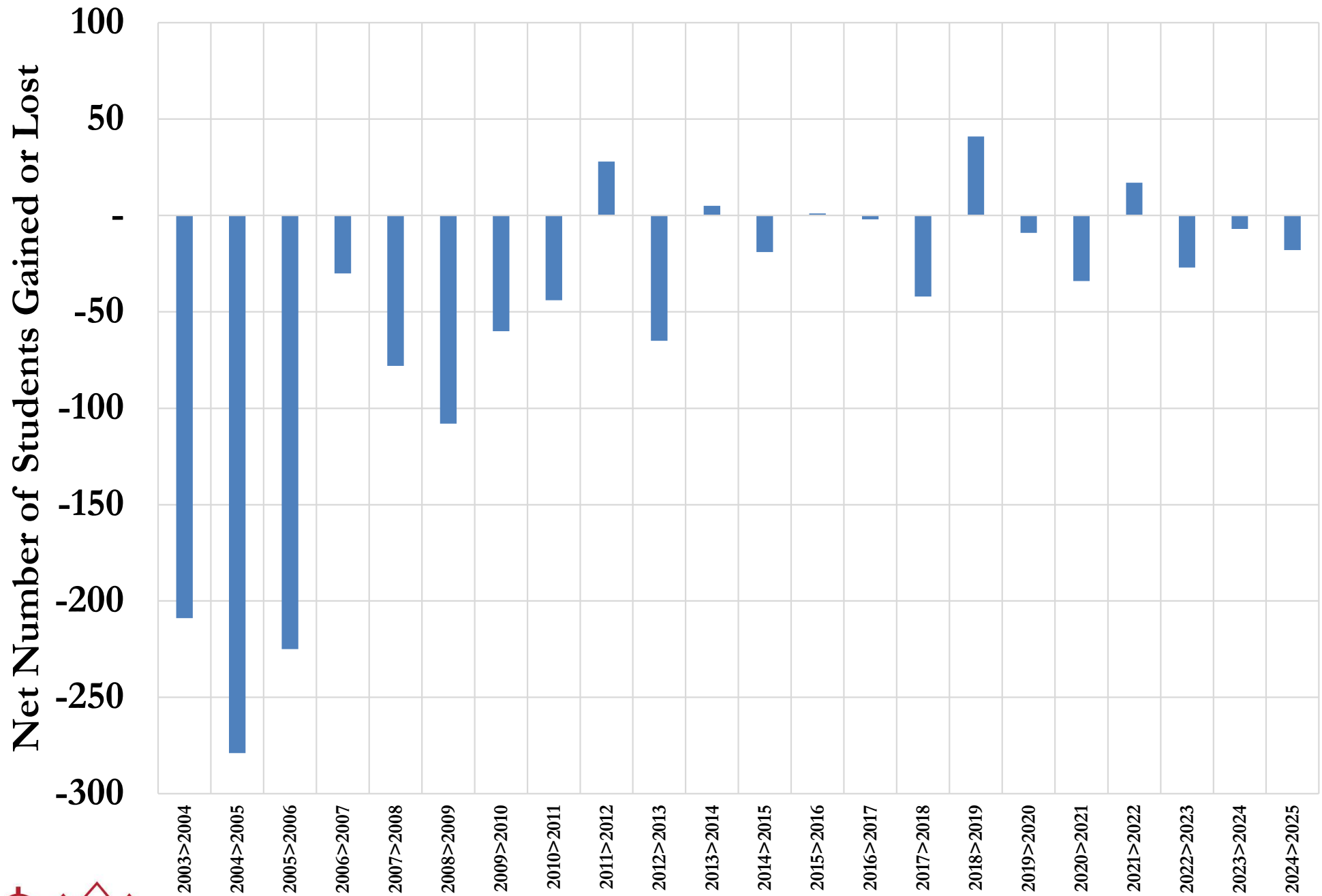
8>9 Grade Progression Difference



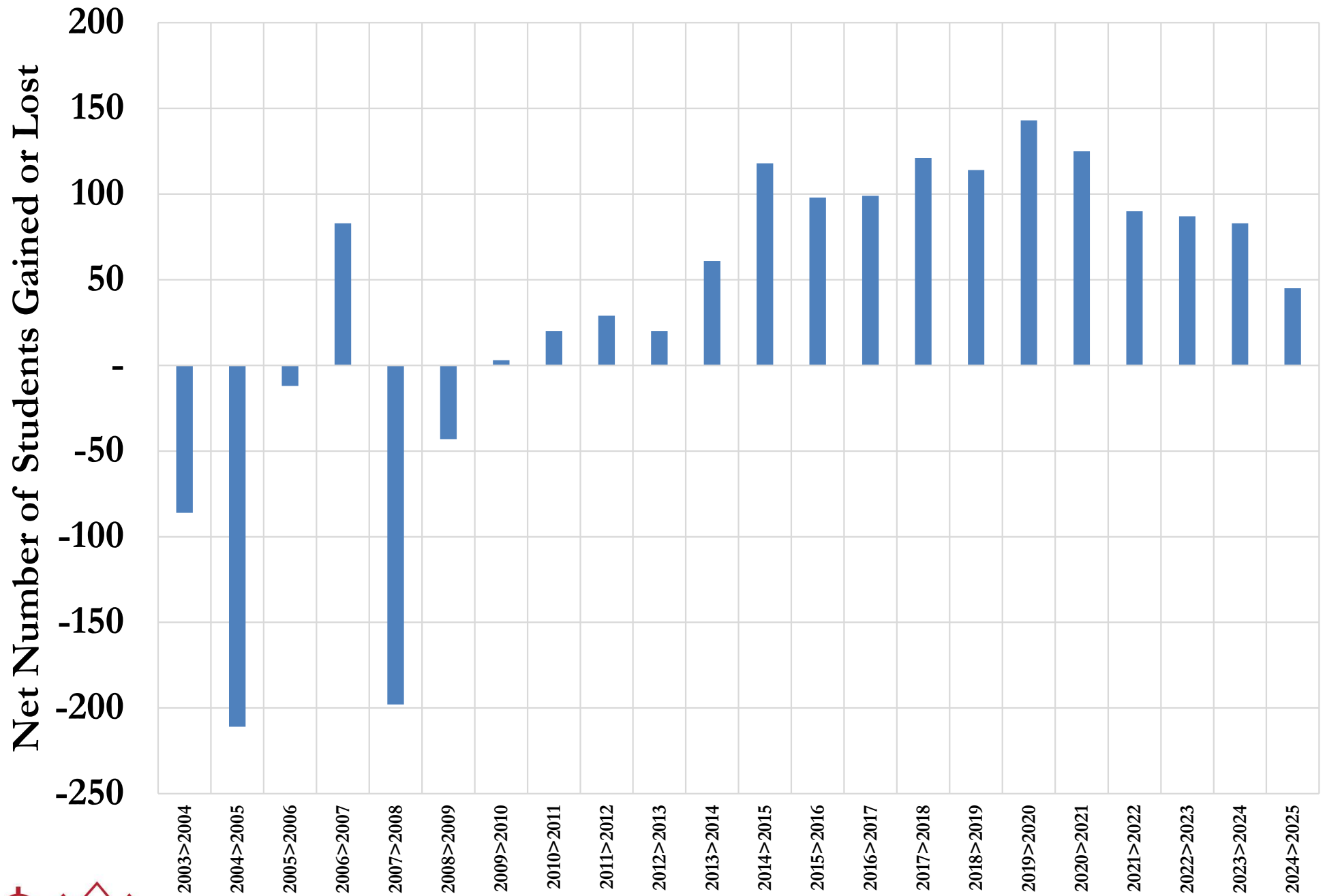
9>10 Grade Progression Difference



10>11 Grade Progression Difference



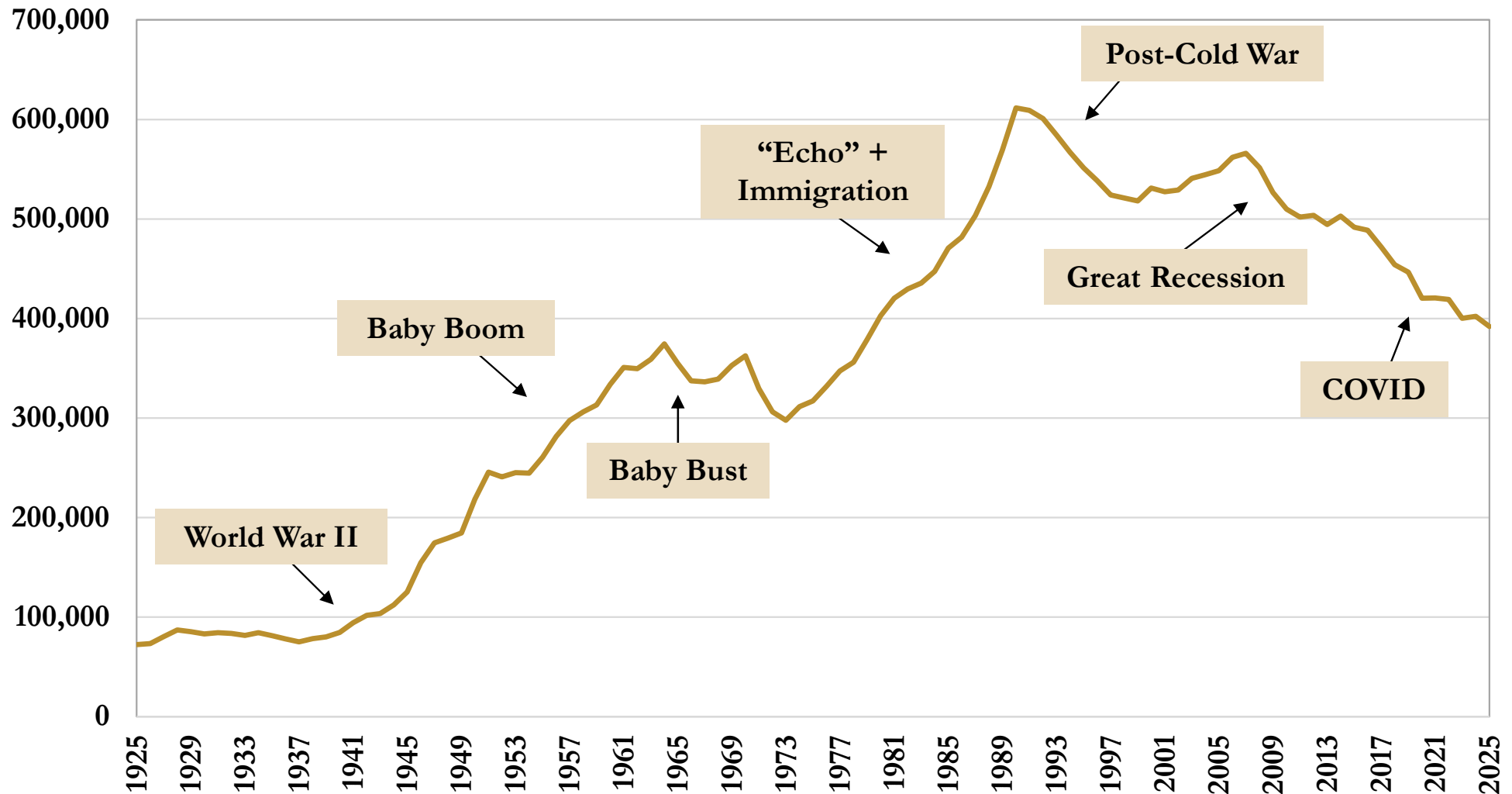
11>12 Grade Progression Difference



Births

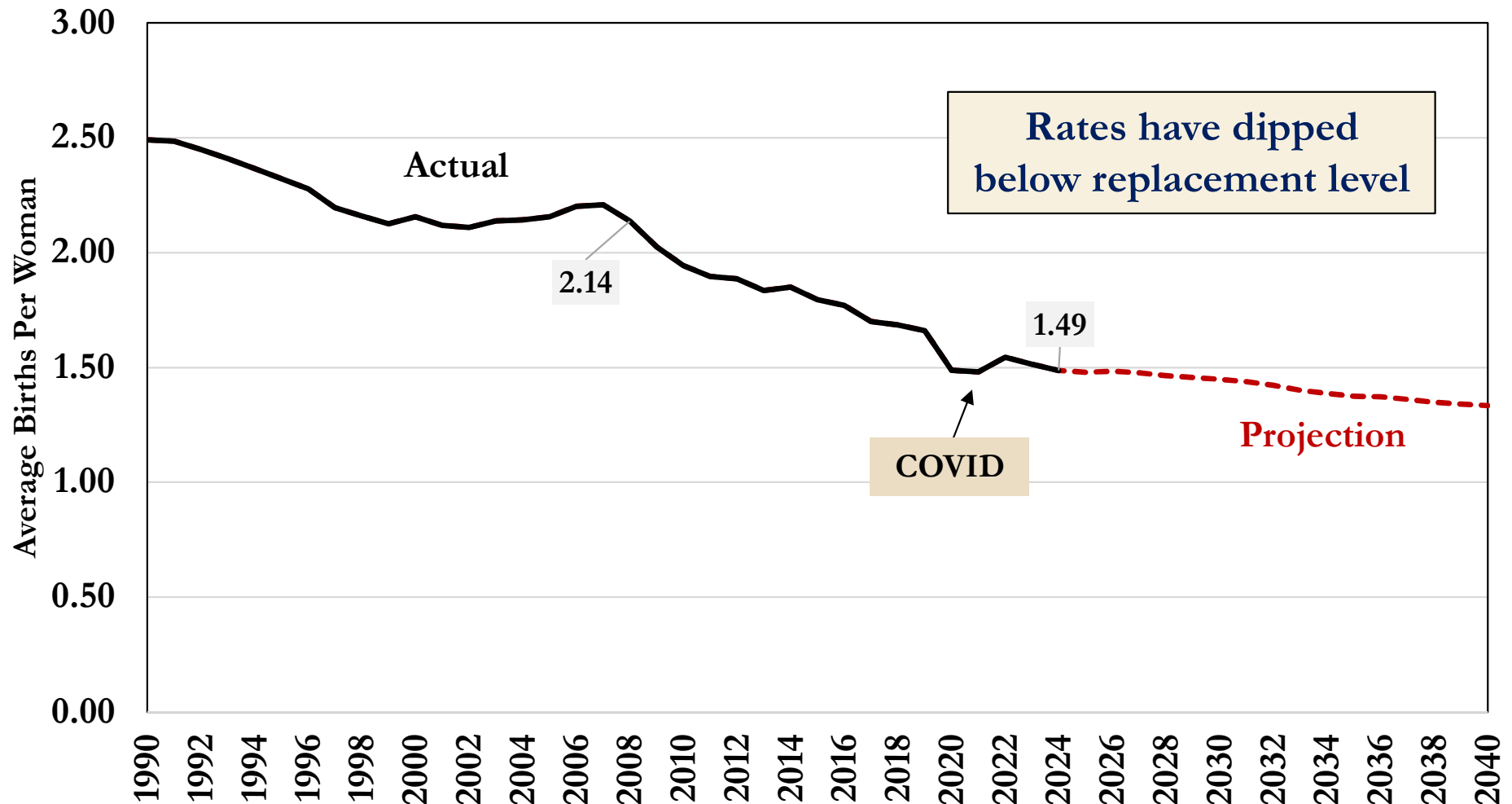
CA Births at Lowest Point in 40 Years

California Resident Births, 1925 - 2025



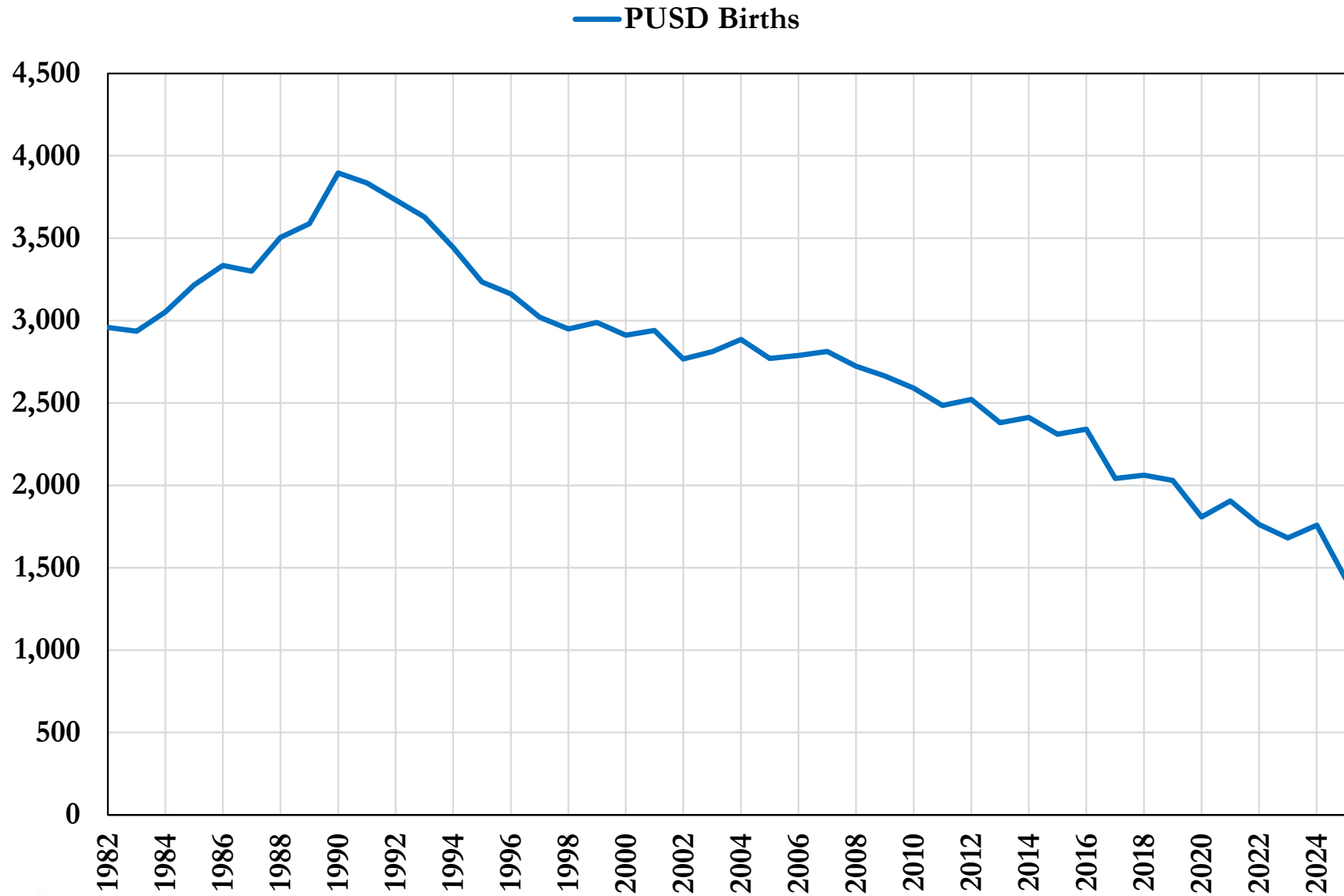
CA Fertility Rates at Historic Lows

California Total Fertility Rate 1990 – 2024
& Projection by State Demographers



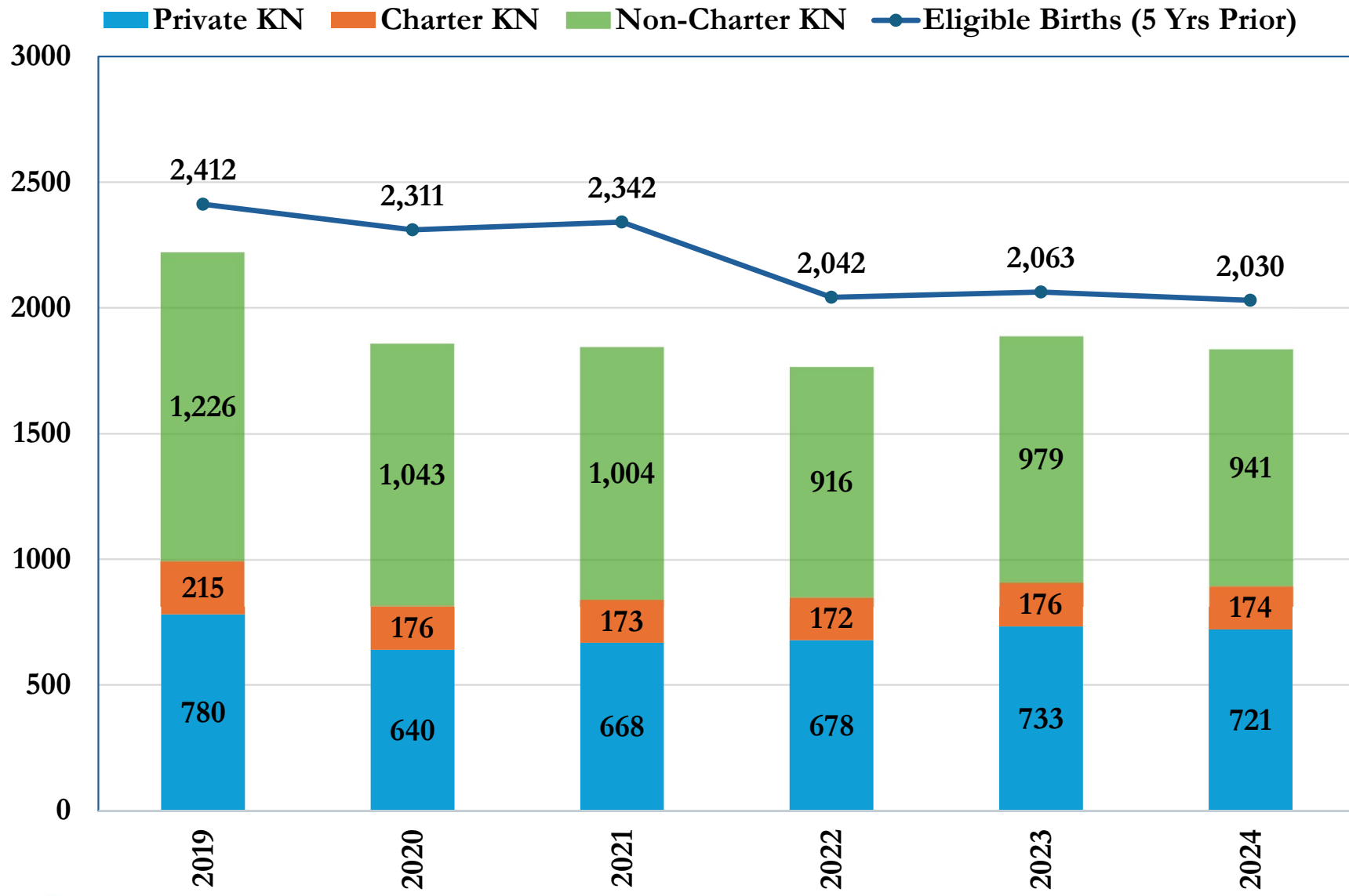
PUSD Births Down 63% Since 1990

Resident Births, 1982-2025



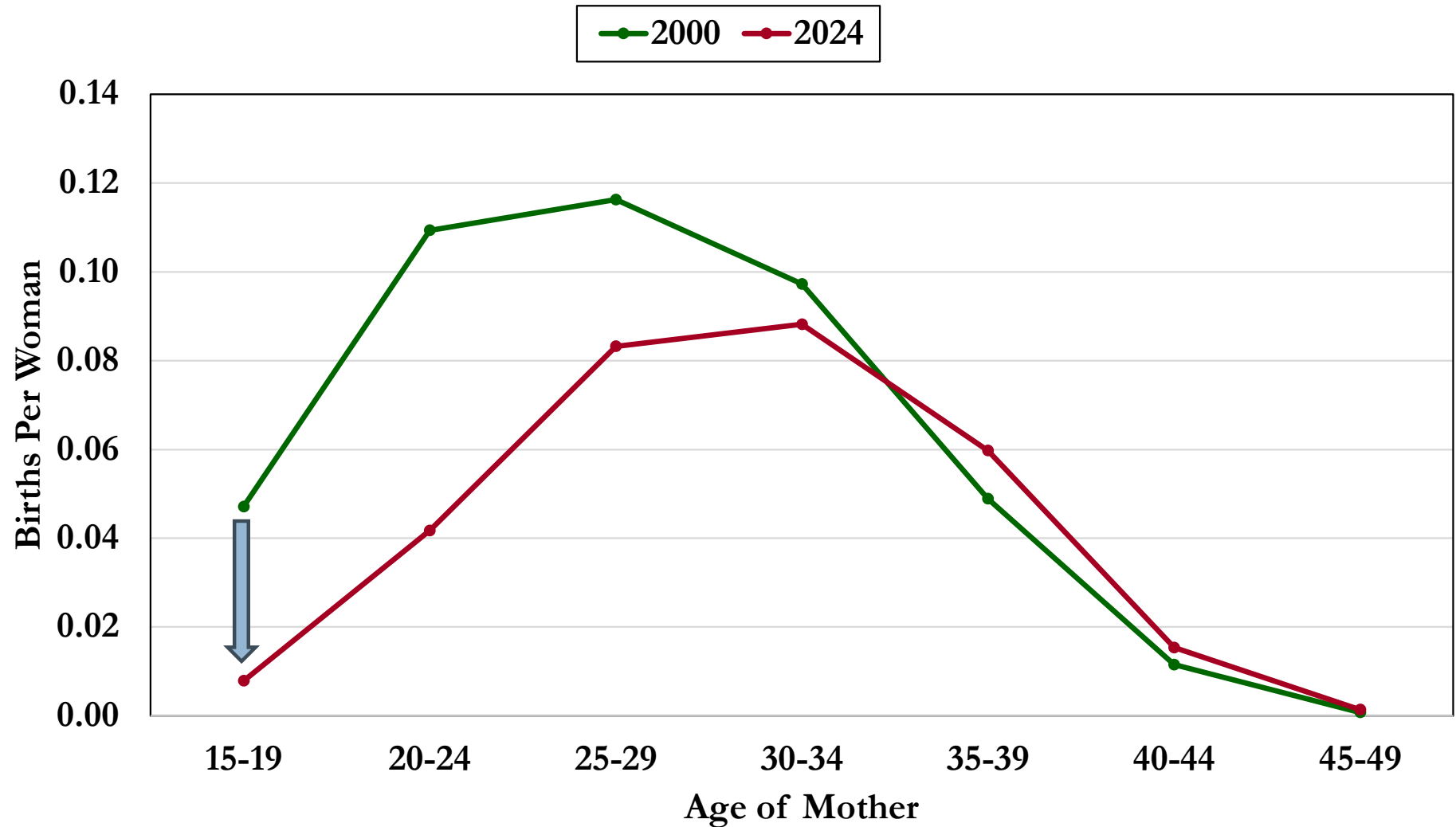
PUSD Births-to-Enrollment Pipeline

Among those eligible, how many enrolled in Kindergarten?



Sharp Decline in CA Birth Rates

CA Birth Rates by Age of Mother, 2000 and 2024



Student “Capture Rate”

Tools to measure the share of school-age population attending PUSD schools.

Capture Rate Challenges

- ❑ **The denominator: how large is the “school age population”?**
 - ❑ Census estimates?
 - ❑ ESRI’s “supplemented” Census data?
 - ❑ Sum of California public, charter & private enrollment counts?

- ❑ **The numerator: who to count as attending PUSD schools?**
 - ❑ All enrolled PUSD students?
 - ❑ Enrolled PUSD students minus inter-district transfers?
 - ❑ Also excluding TK and/or special education students?

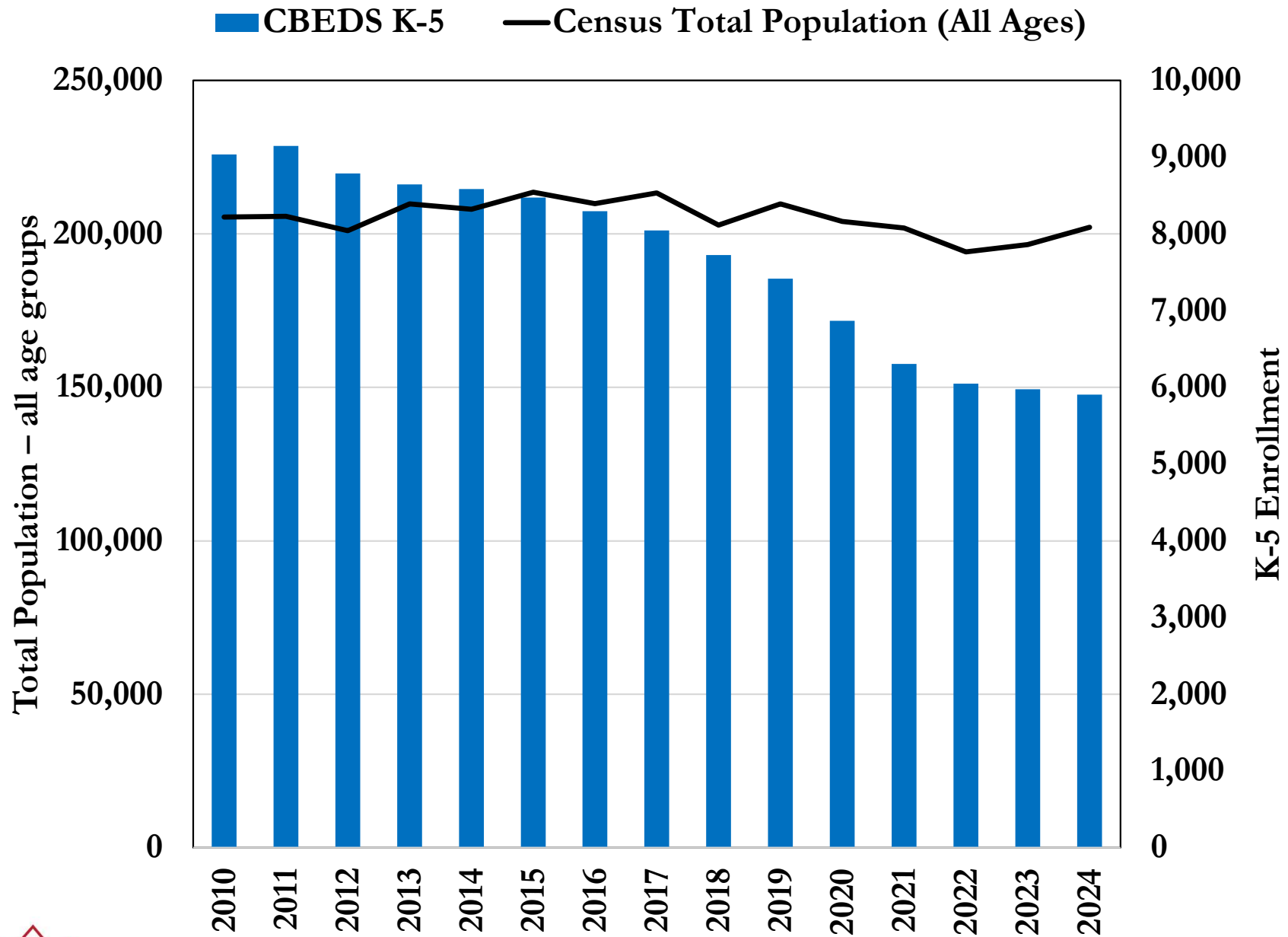
- ❑ **Each choice comes with tradeoffs and uncertainty**

Additional Analysis

- Compile and compare each option for numerators and denominators
- Report known issues with each measure

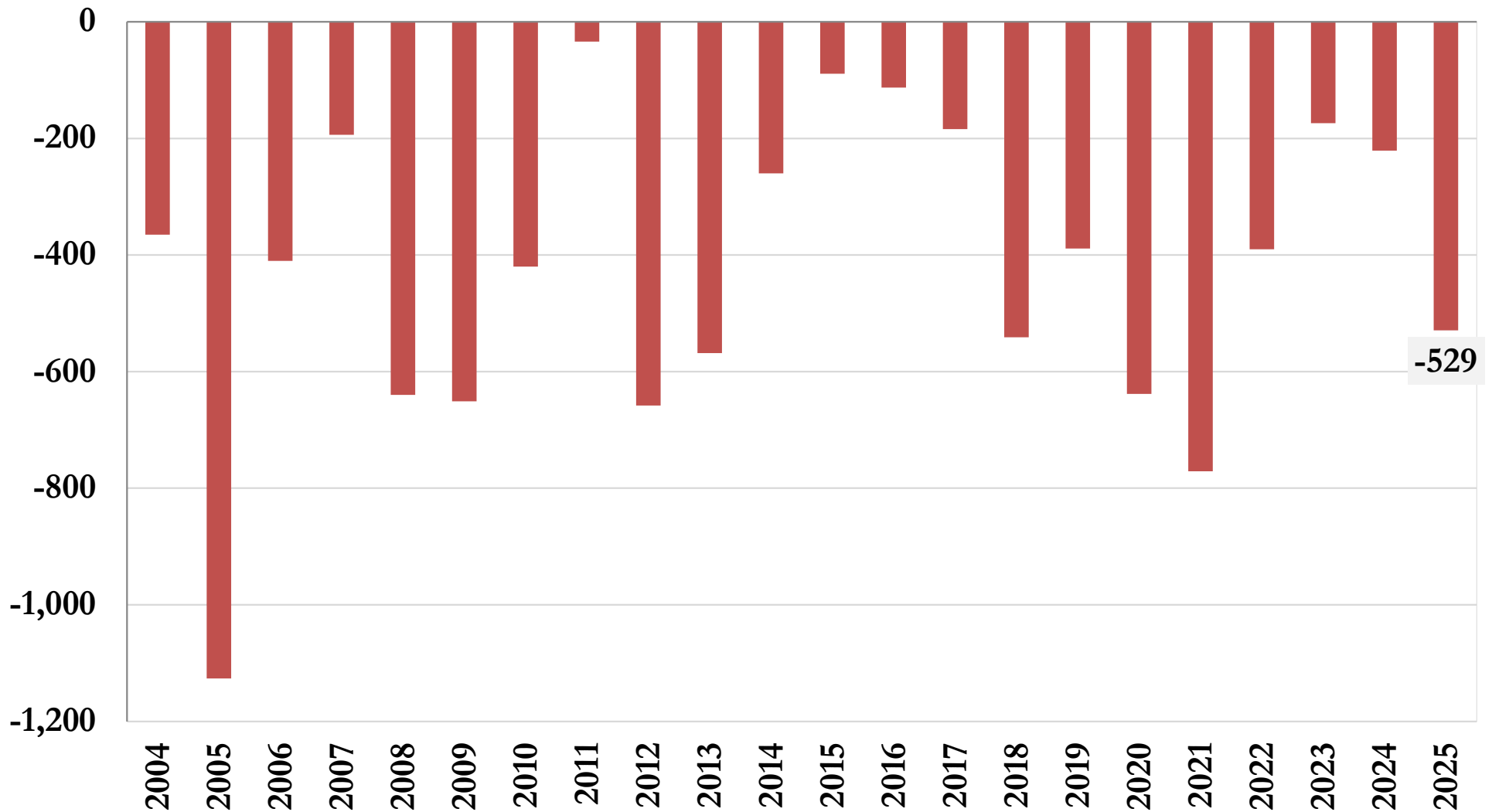
Additional PUSD Slides

Population is Not Driving the Decline



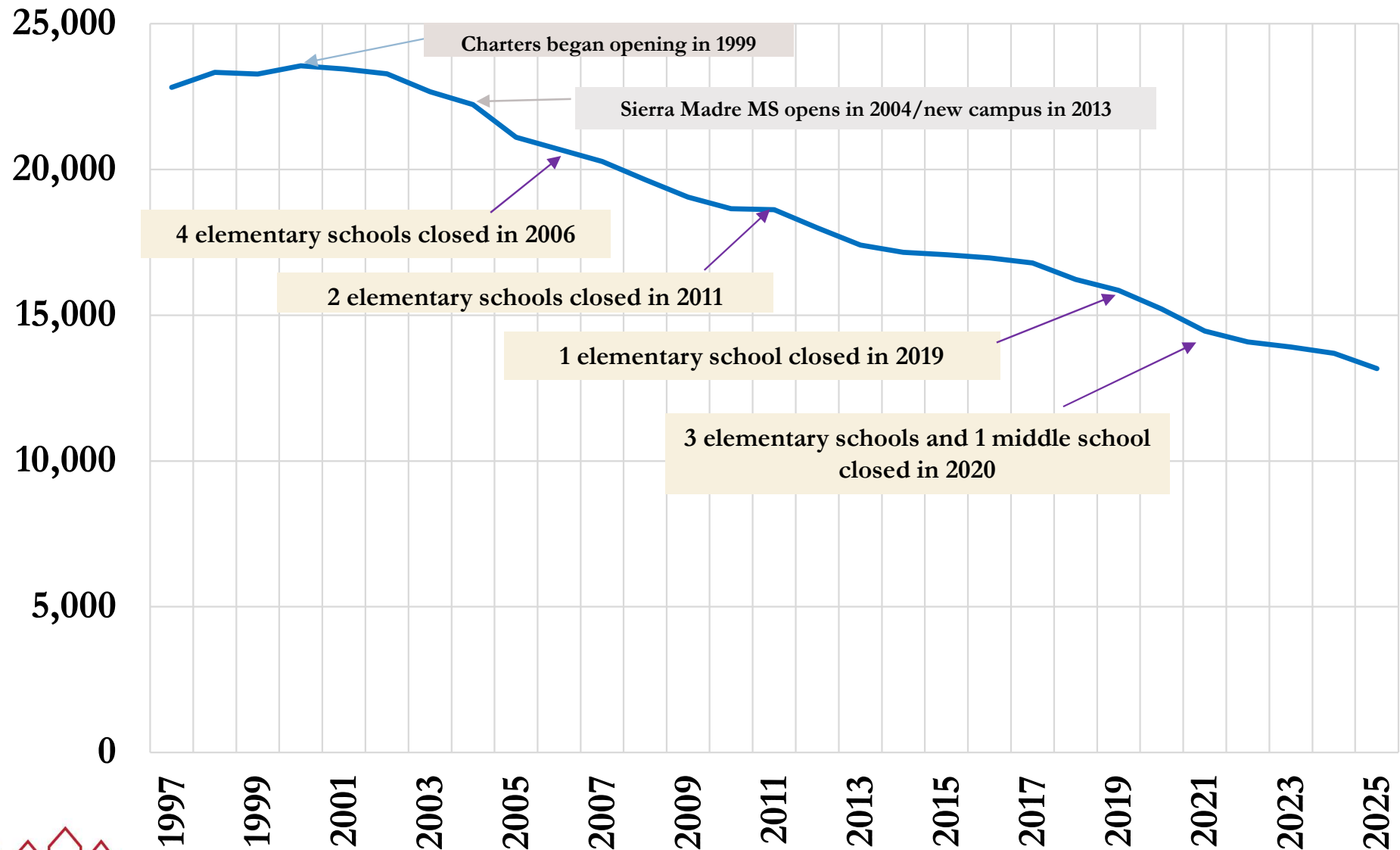
20+ Years of Enrollment Decline

Annual Change in TK-12 Enrollment (Non-Charter), 2004-2025



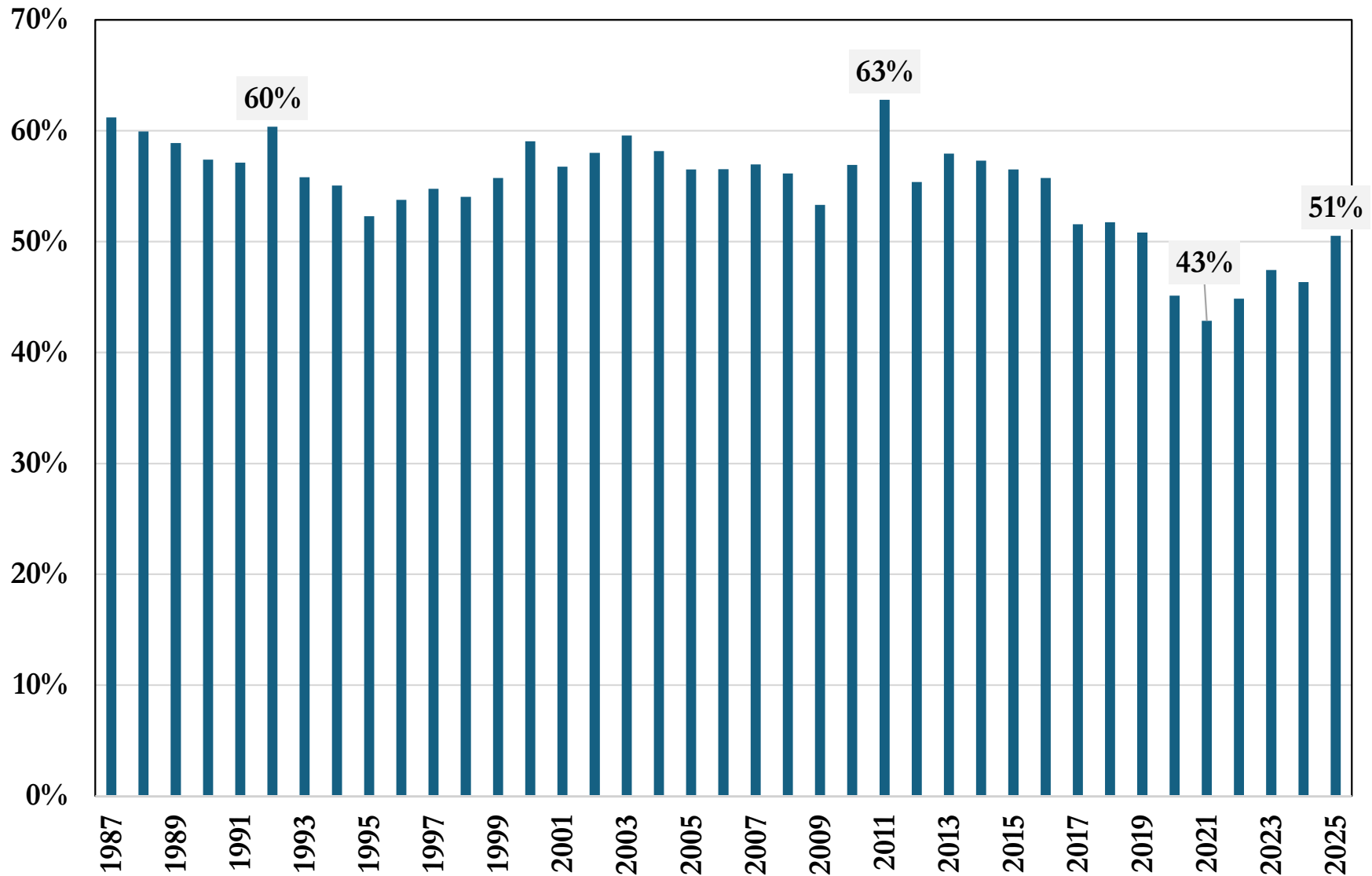
Major Facilities Events

Total Enrollments (Excluding Charters)



PUSD Kindergarten Enrollment Rates

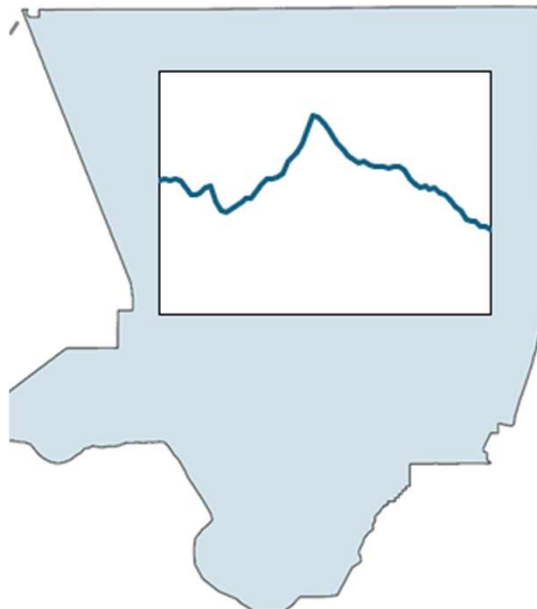
K/B Ratio



“To Do” Analysis of the Eaton Fire

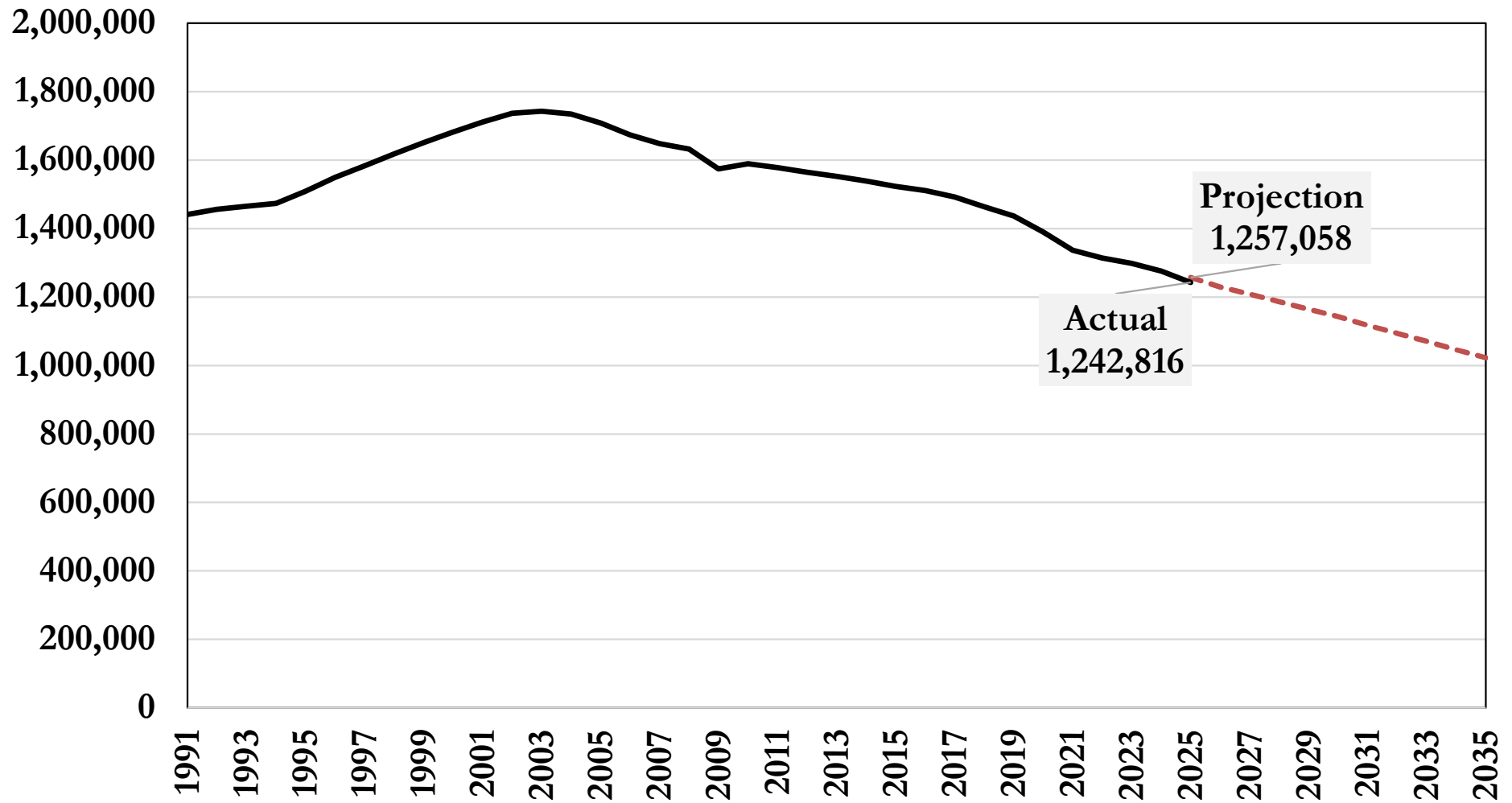
- Confirm number of Altadena students who stayed at PUSD
- Develop rebuilding scenarios
 - ▣ Optimistic:
 - continuous growth in completions by month
 - not-yet-started parcels starting in 1 year
 - slight increase in officially affordable units from pre-fire levels
 - slight increase in student yield from rebuilt housing, even after including students who stayed
 - ▣ Pessimistic: steady completions by month
 - steady number of completions by month
 - not-yet-started parcels starting in 4 years
 - no increase in officially affordable units from pre-fire levels
 - student yield matches pre-fire yield minus students who stayed

Los Angeles County Trends



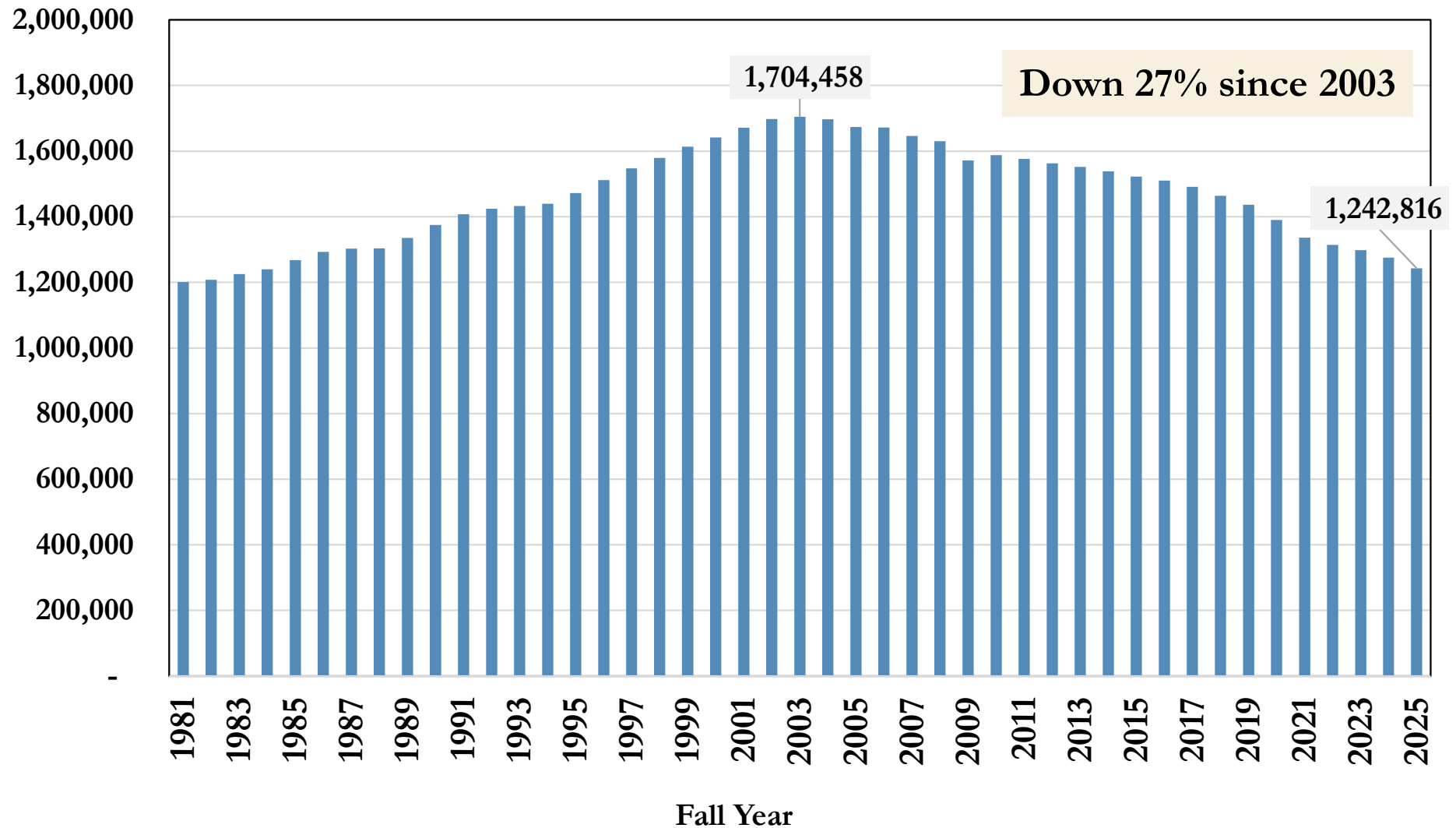
Enrollment Expected to Decline 20% by 2035

Los Angeles County TK-12 Enrollment With Projection by
State Demographers



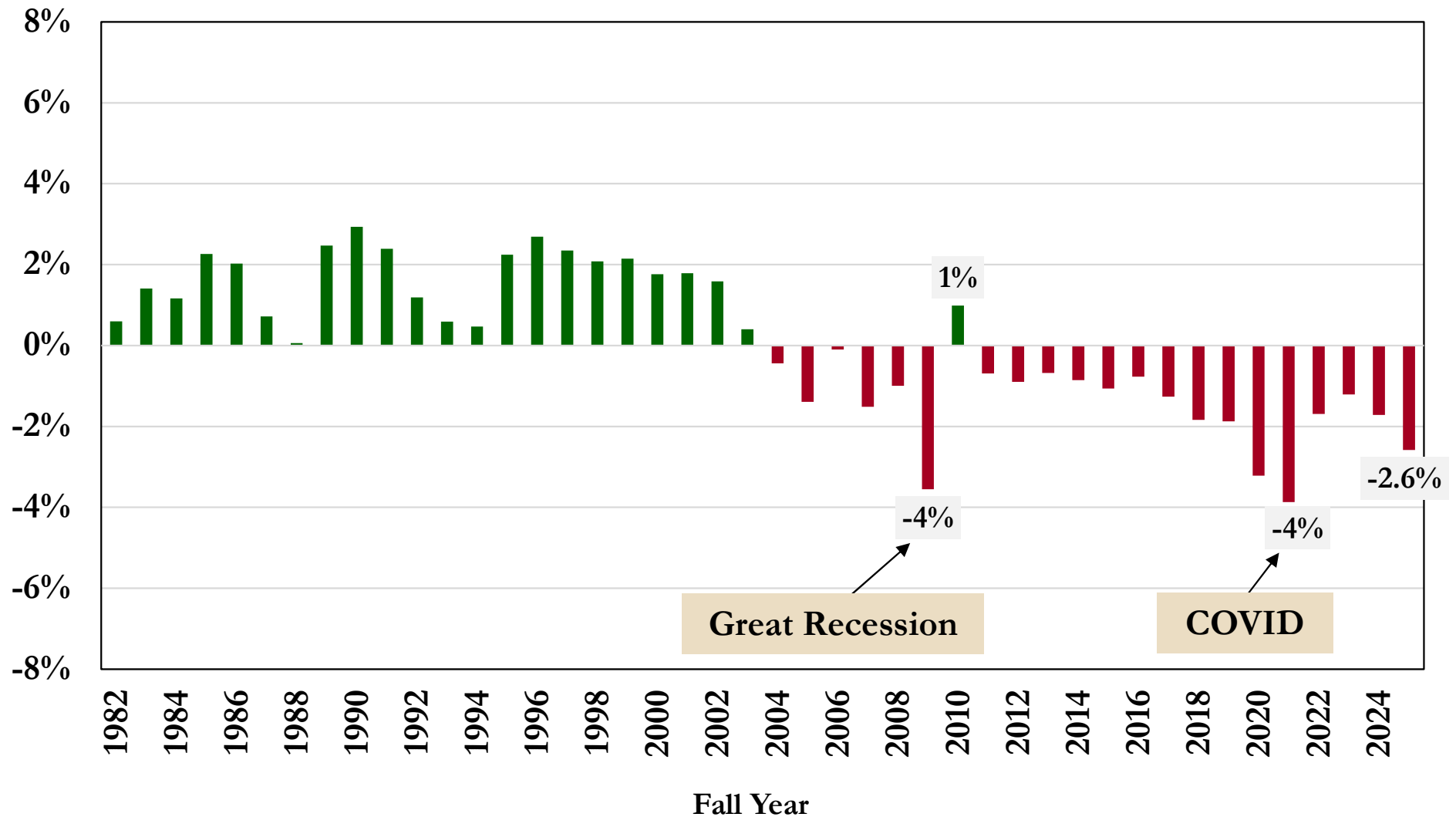
20+ Years of Enrollment Decline

LA County TK-12 Enrollment, 1981-2025



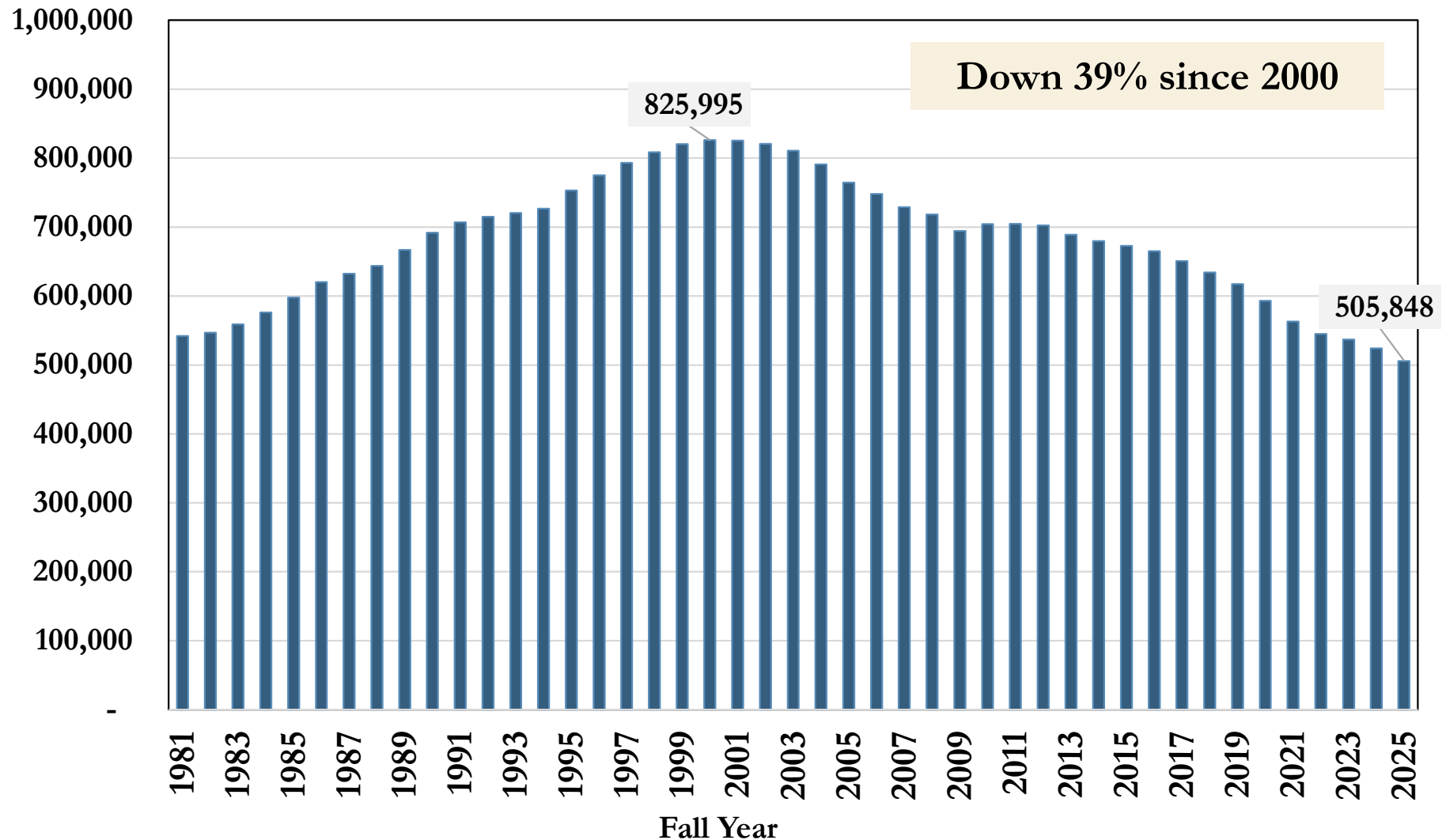
COVID Pandemic Accelerated Decline

LA County Annual % Change in TK-12 Enrollment



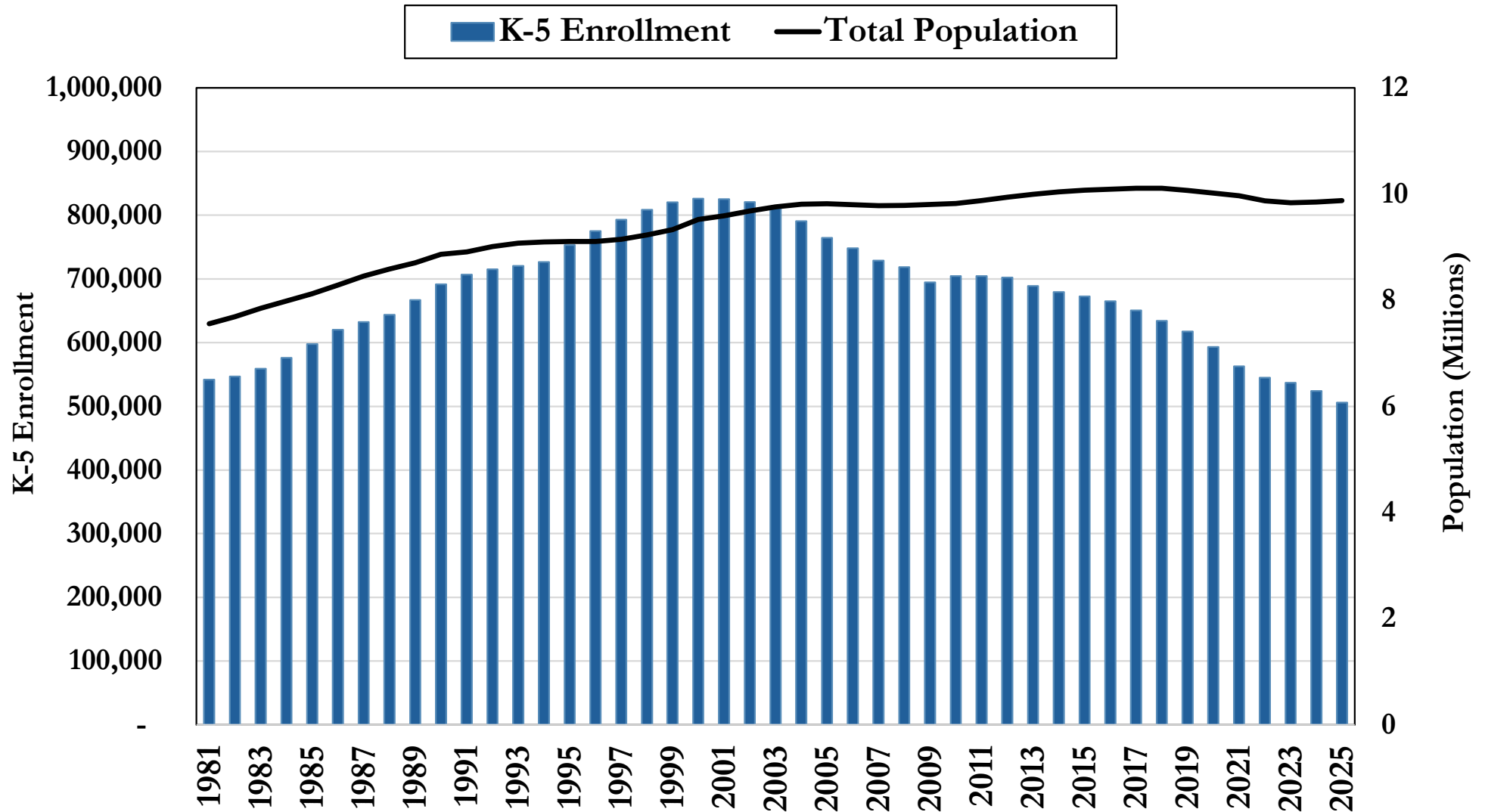
Steeper Drop in Elementary Grades

LA County K-5 Enrollment, 1981-2025



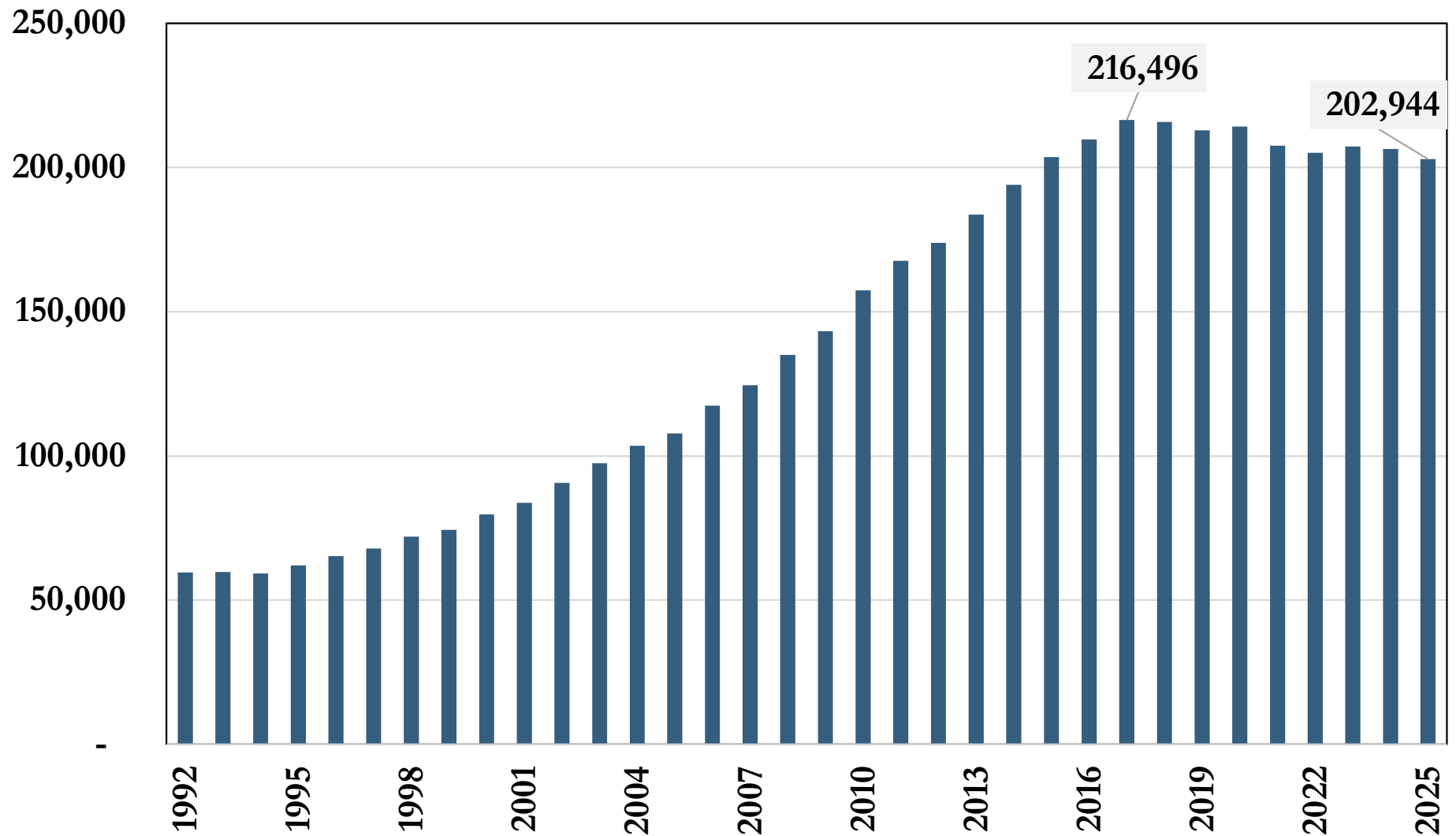
Population is Not Driving the Decline

LA County 1981-2025



Charter Enrollment

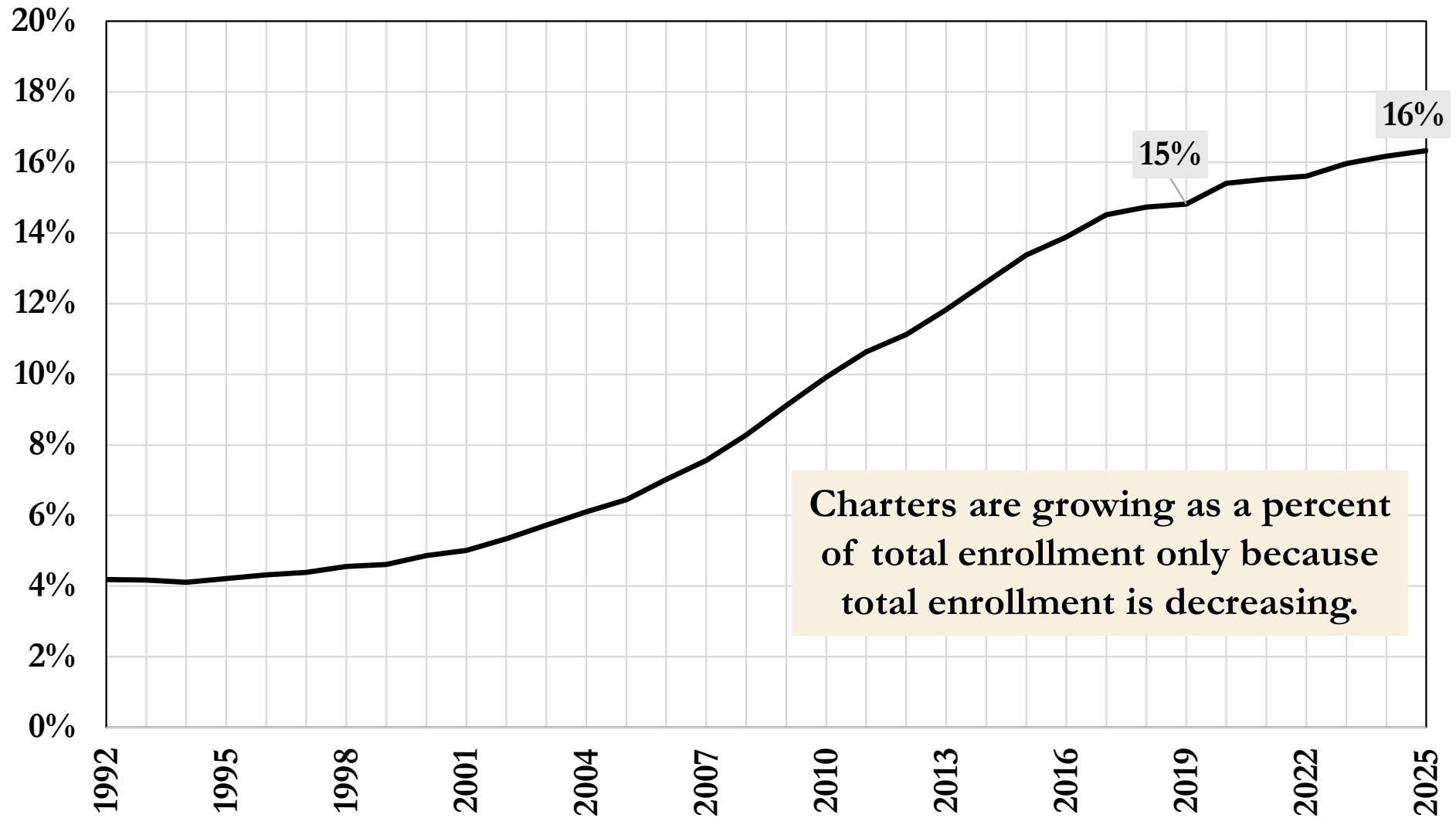
LA County Charter TK-12 Enrollment, 1992-2025



After rapid growth, charter enrollment is relatively stable.

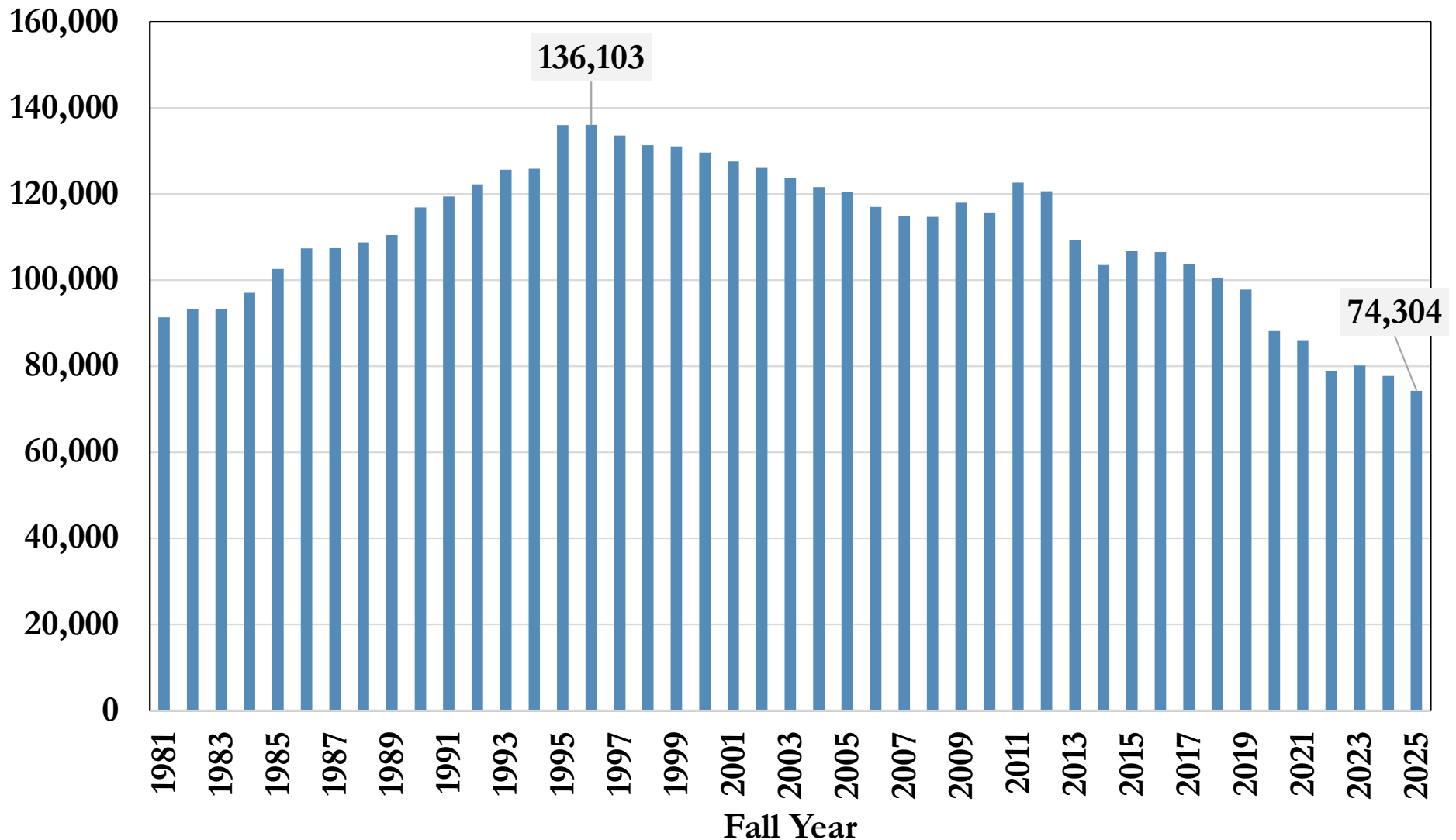
Charter Enrollment

LA County Charter % of Total TK-12 Enrollment, 1992-2025



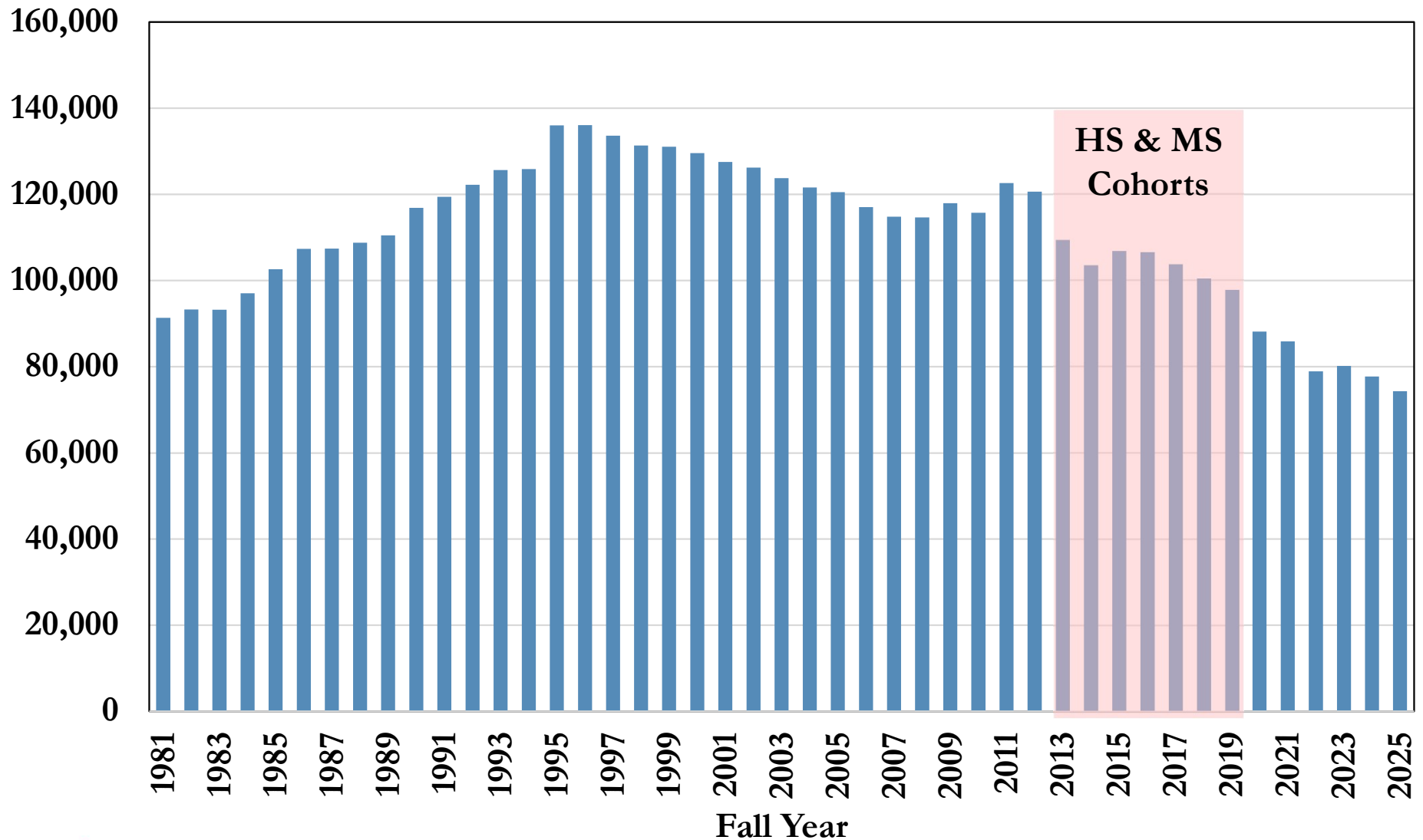
LA Kindergarten Down 45% Since 1996

LA County Kindergarten Enrollment, 1981-2025



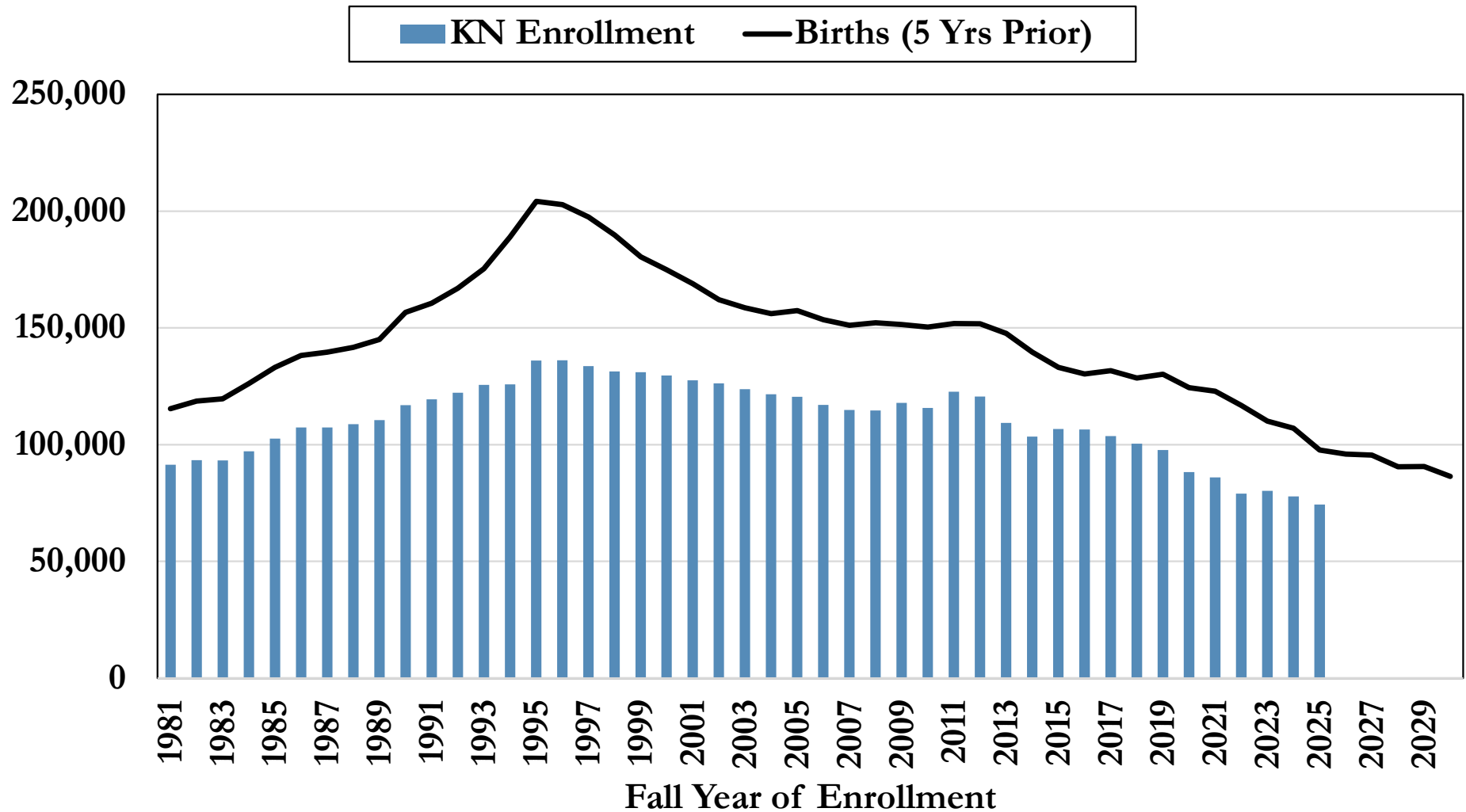
Foreshadowing Future Declines

LA County Kindergarten Enrollment, 1981-2025



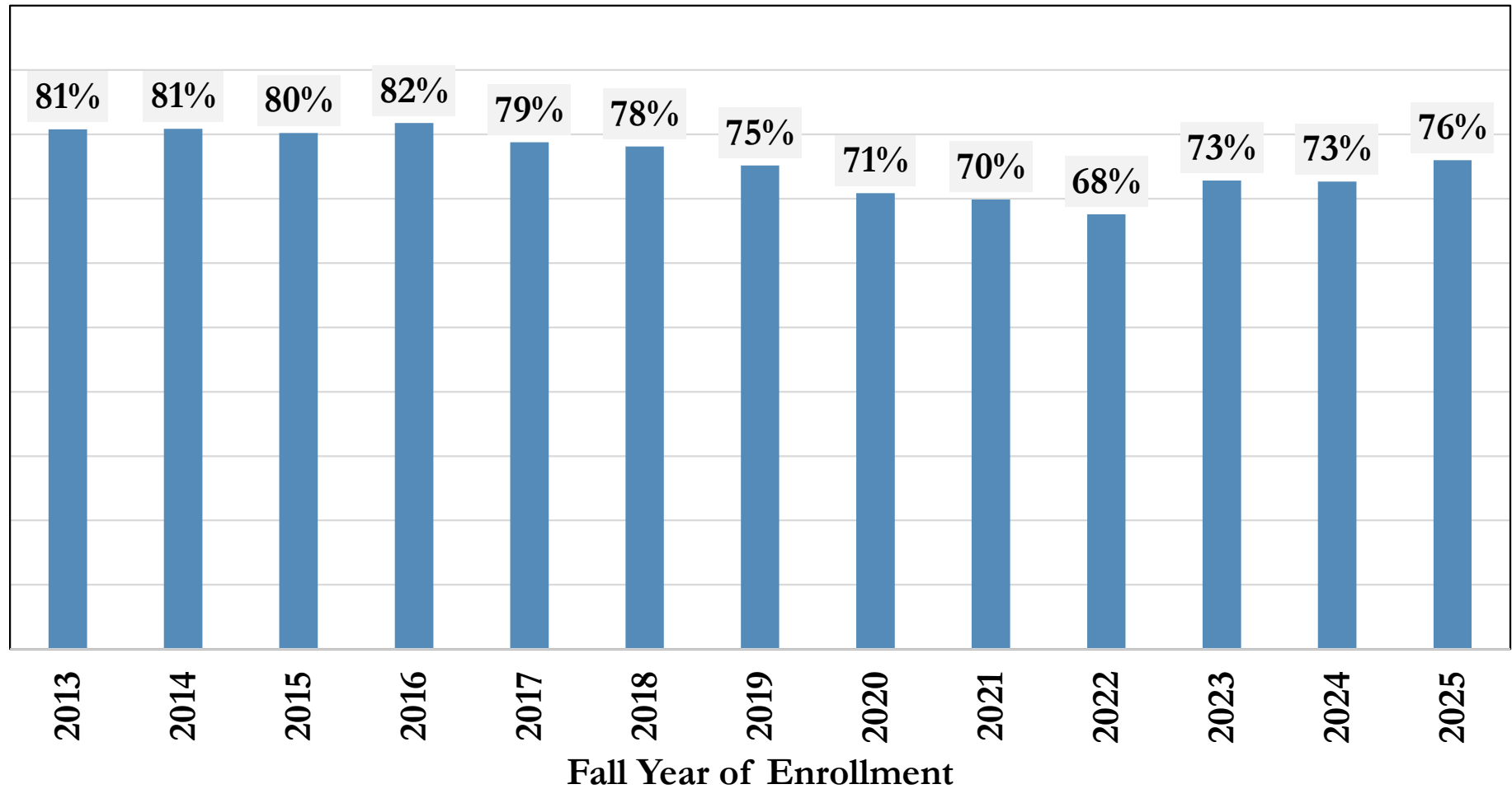
LA Births-to-Enrollment Pipeline

LA County Births 1976 – 2025 &
Kindergarten Enrollment 1981 – 2025



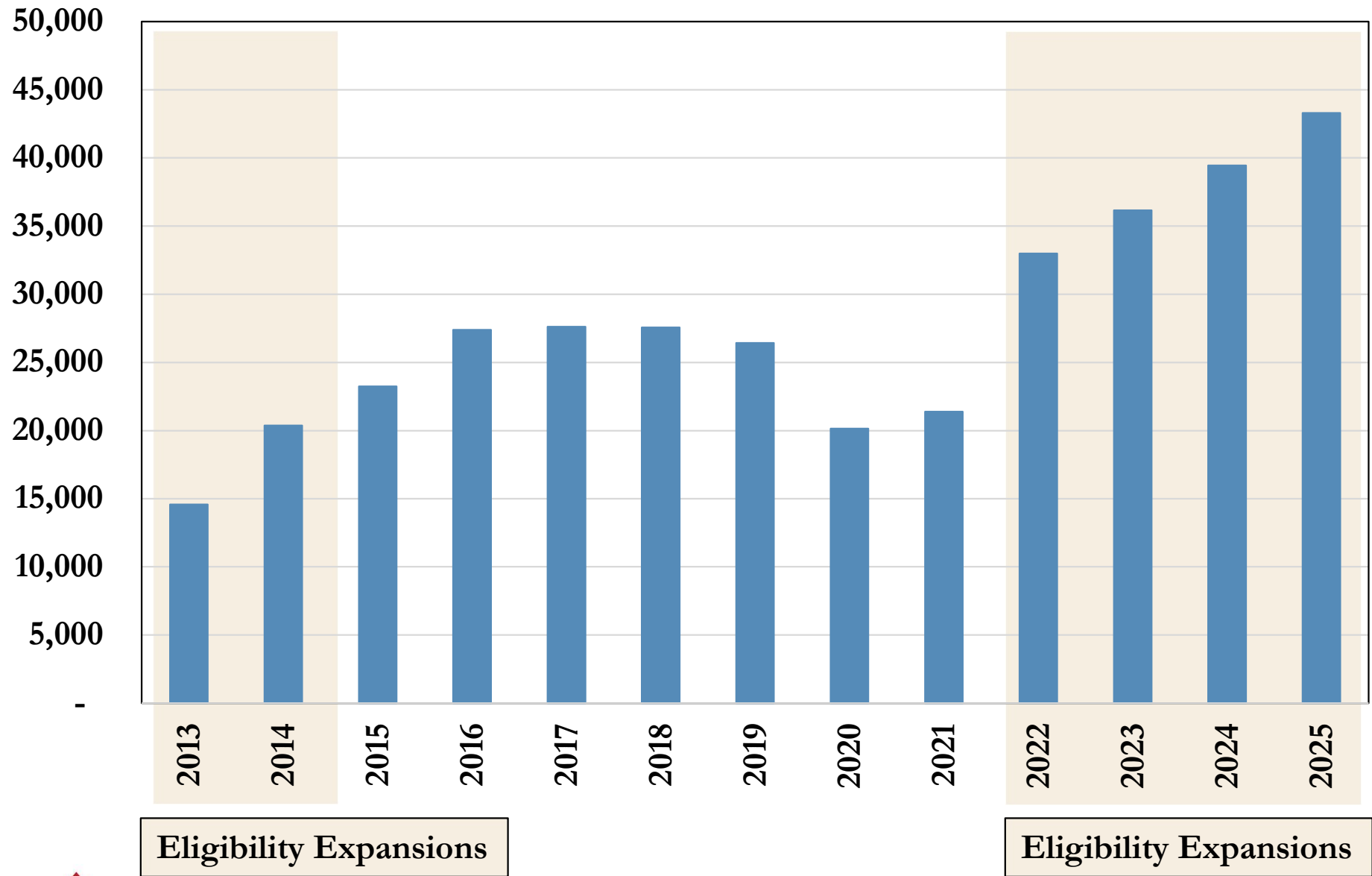
LA Kindergarten Enrollment Rates

LA County KN Enrollment 2013 - 2025
as % of Births 5 Years Prior



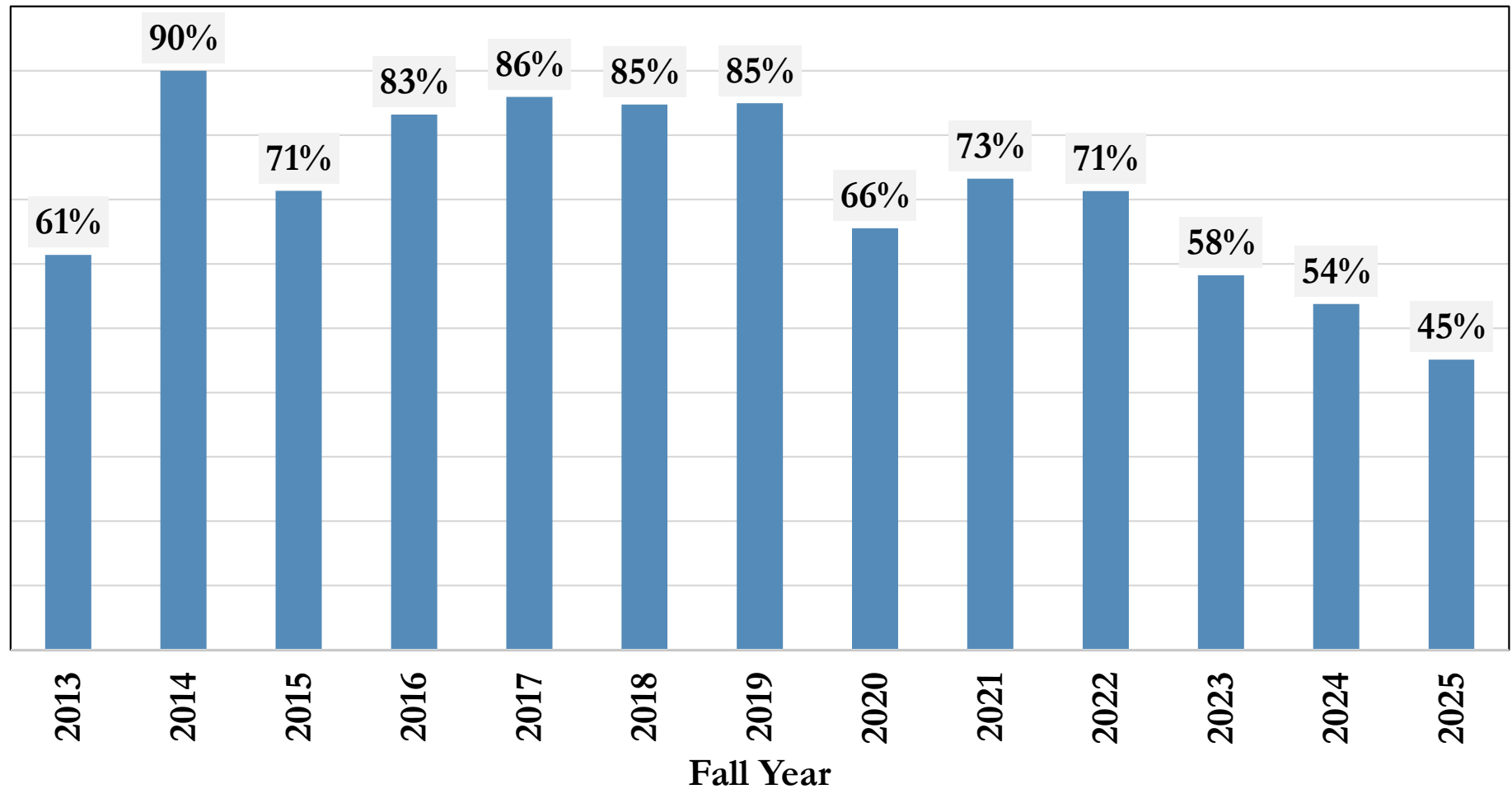
TK Grew with Eligibility Expansions

LA County TK Enrollment, 2013-2025



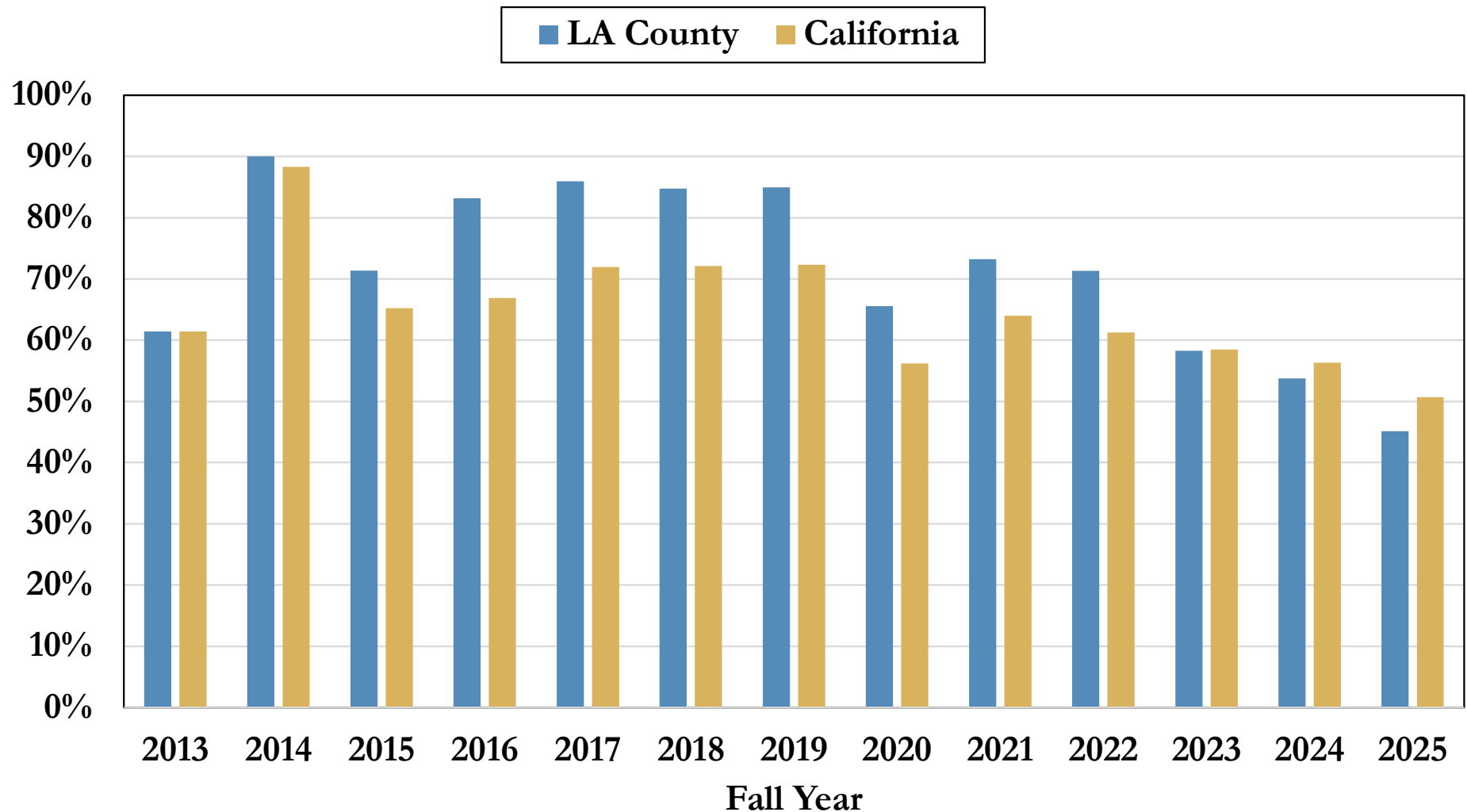
LA TK Enrollment Rates Dropping

LA County TK Enrollment 2013-2025
as % of Eligible Births



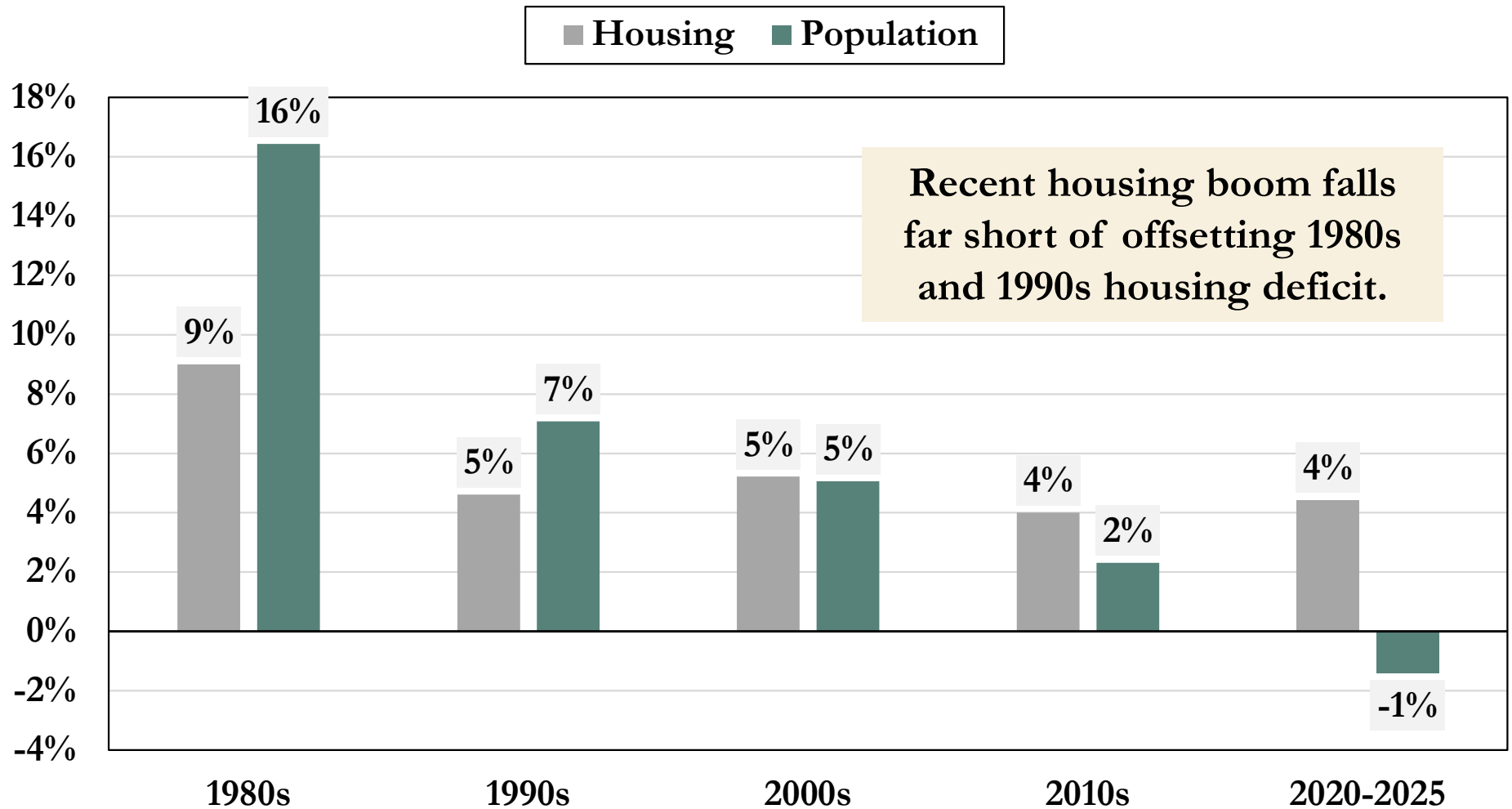
LA Now Trails State in TK Rates

TK Enrollment 2013-2025
as % of Eligible Births



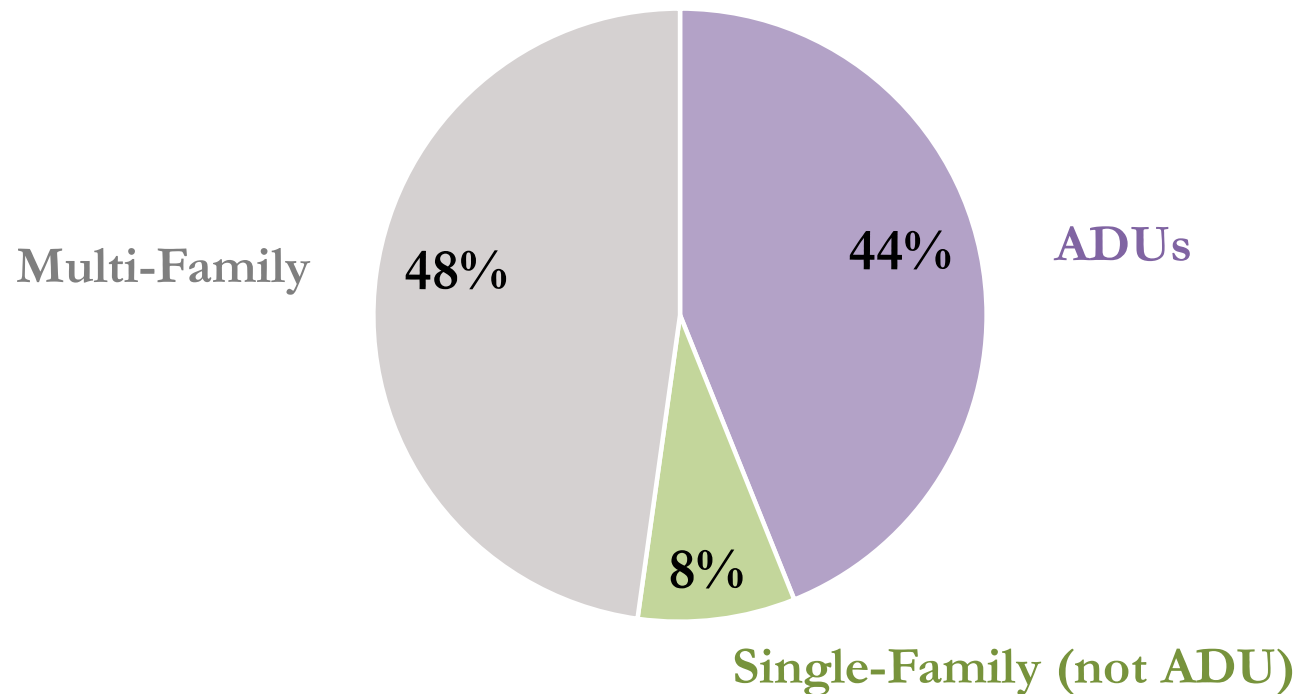
Population Grew Faster Than Housing

LA County Housing Construction & Population Growth by Decade



Shift from Houses to Multi-Family

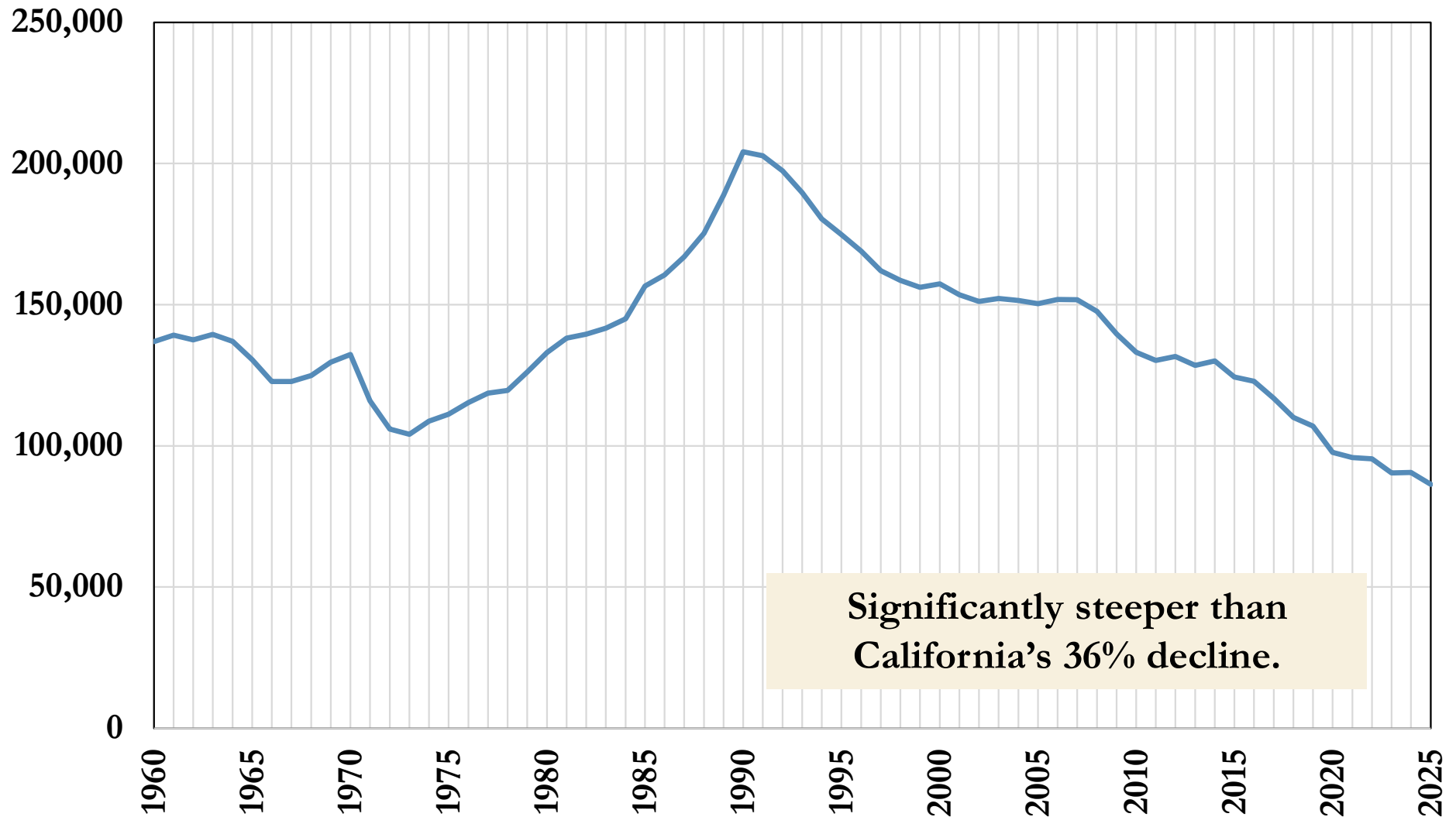
LA County New Housing by Type, 2025



ADUs and small apartments are unlikely to generate additional students. Schools need family-friendly housing.

LA Births Down 57% Since 1990

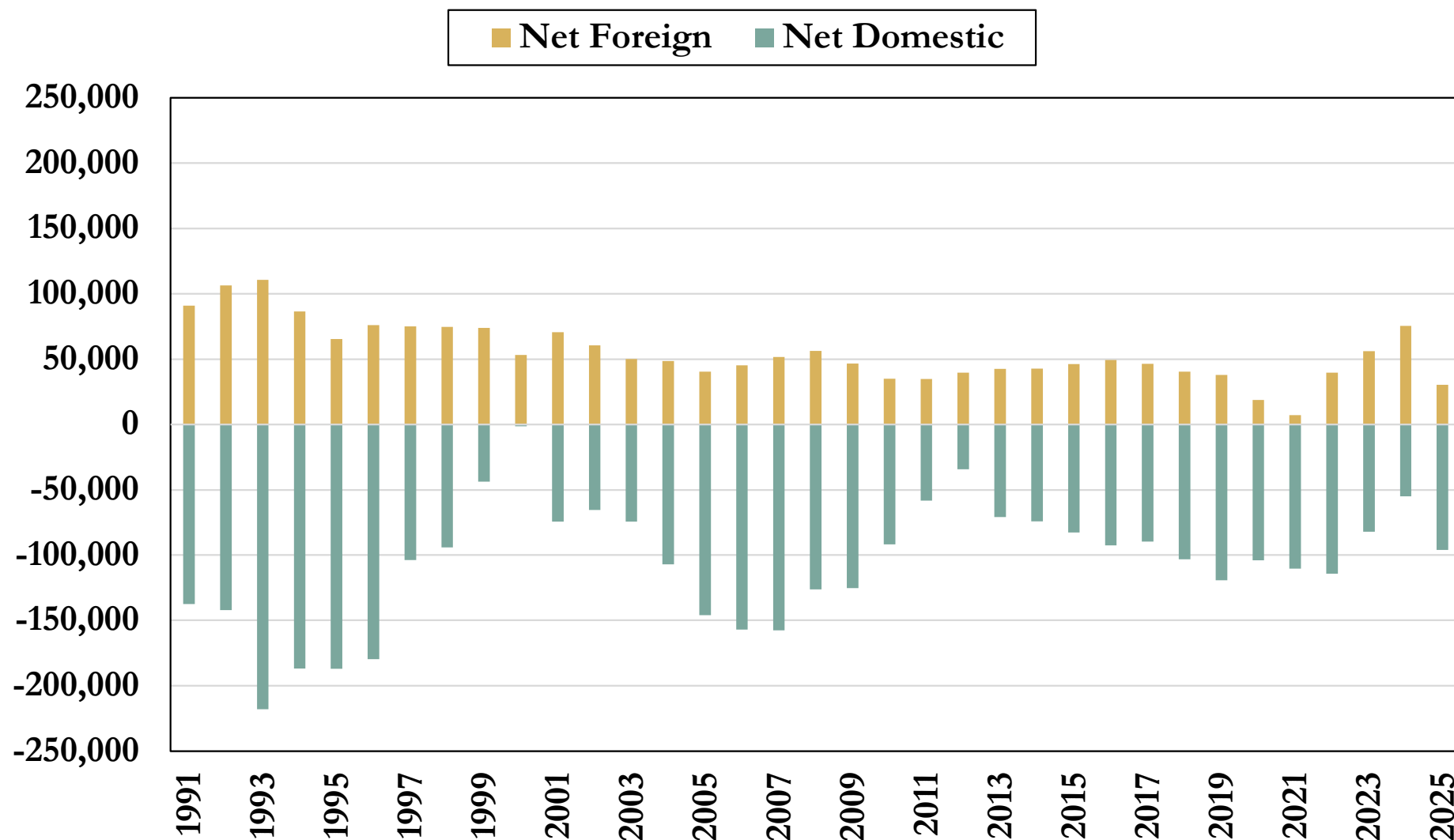
LA County Resident Births, 1960-2025



Significantly steeper than
California's 36% decline.

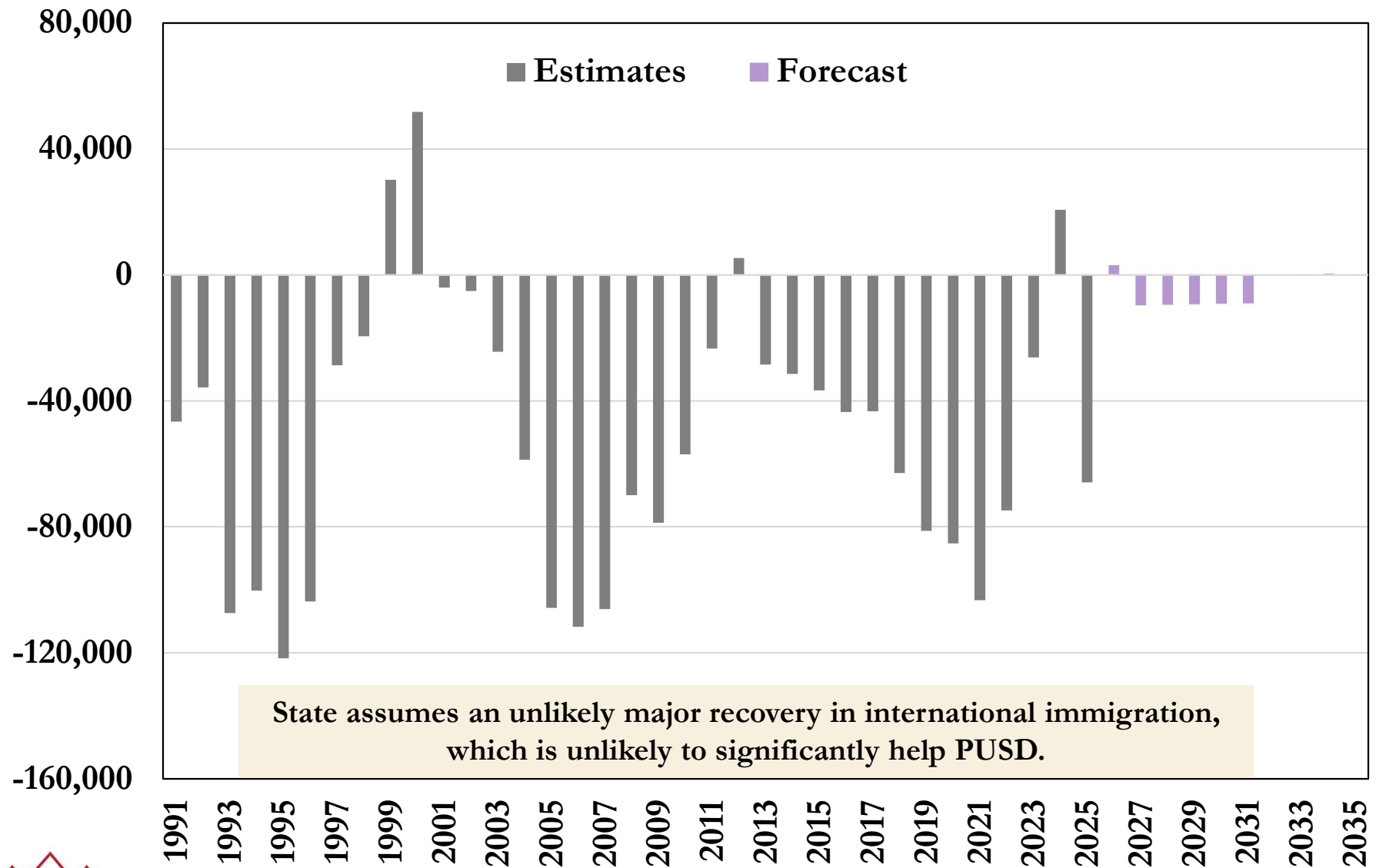
Domestic Losses Outpace International Gains

LA County Net Migration by Type, 1991-2025

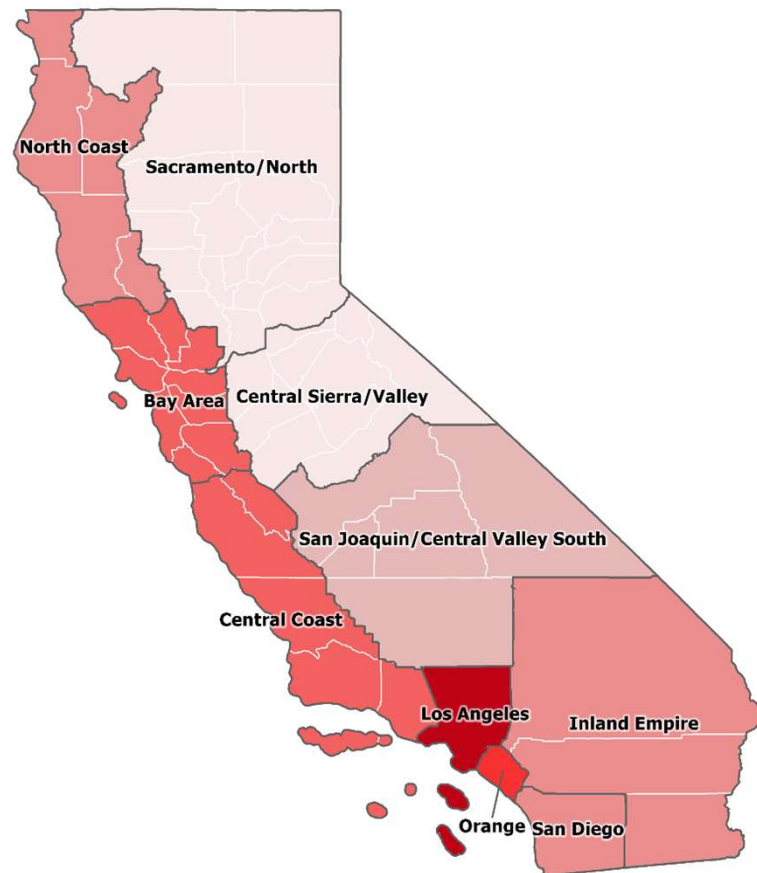


LA Forecast: Near-Zero Net Migration

LA County Net International & Domestic Migration

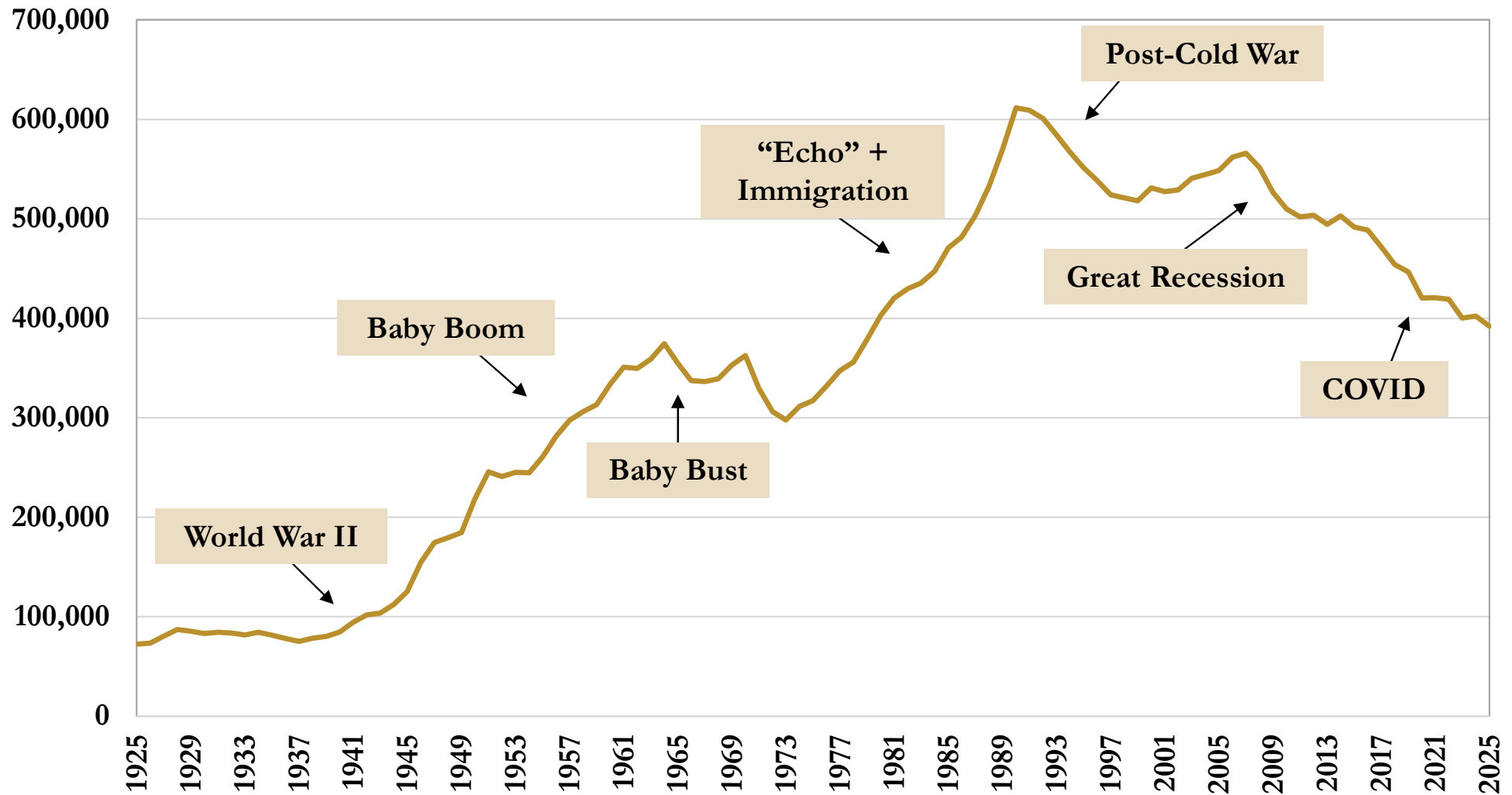


State Trends

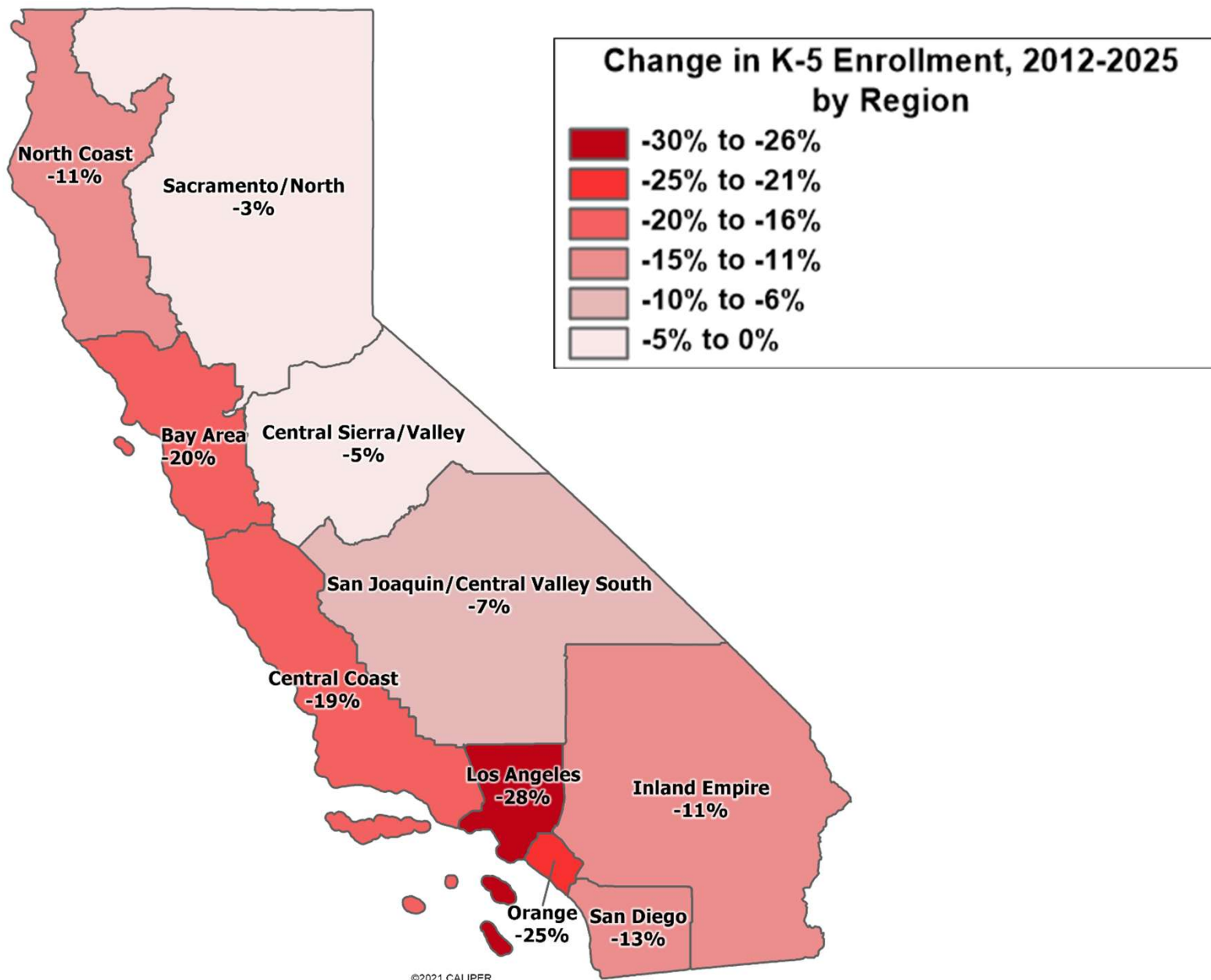


CA Births at Lowest Point in 40 Years

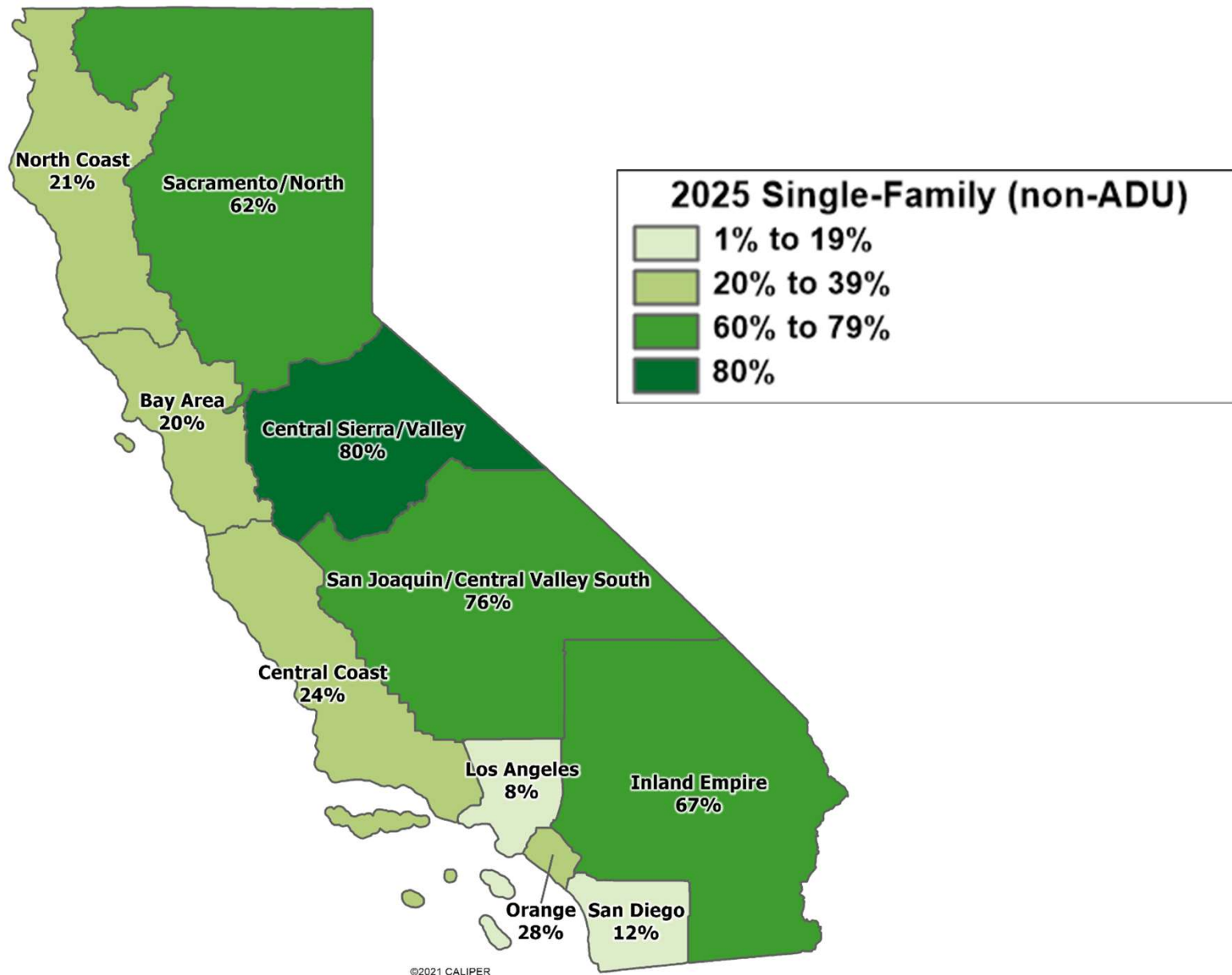
California Resident Births, 1925 - 2025



K-5 Declining in All Regions Since 2012

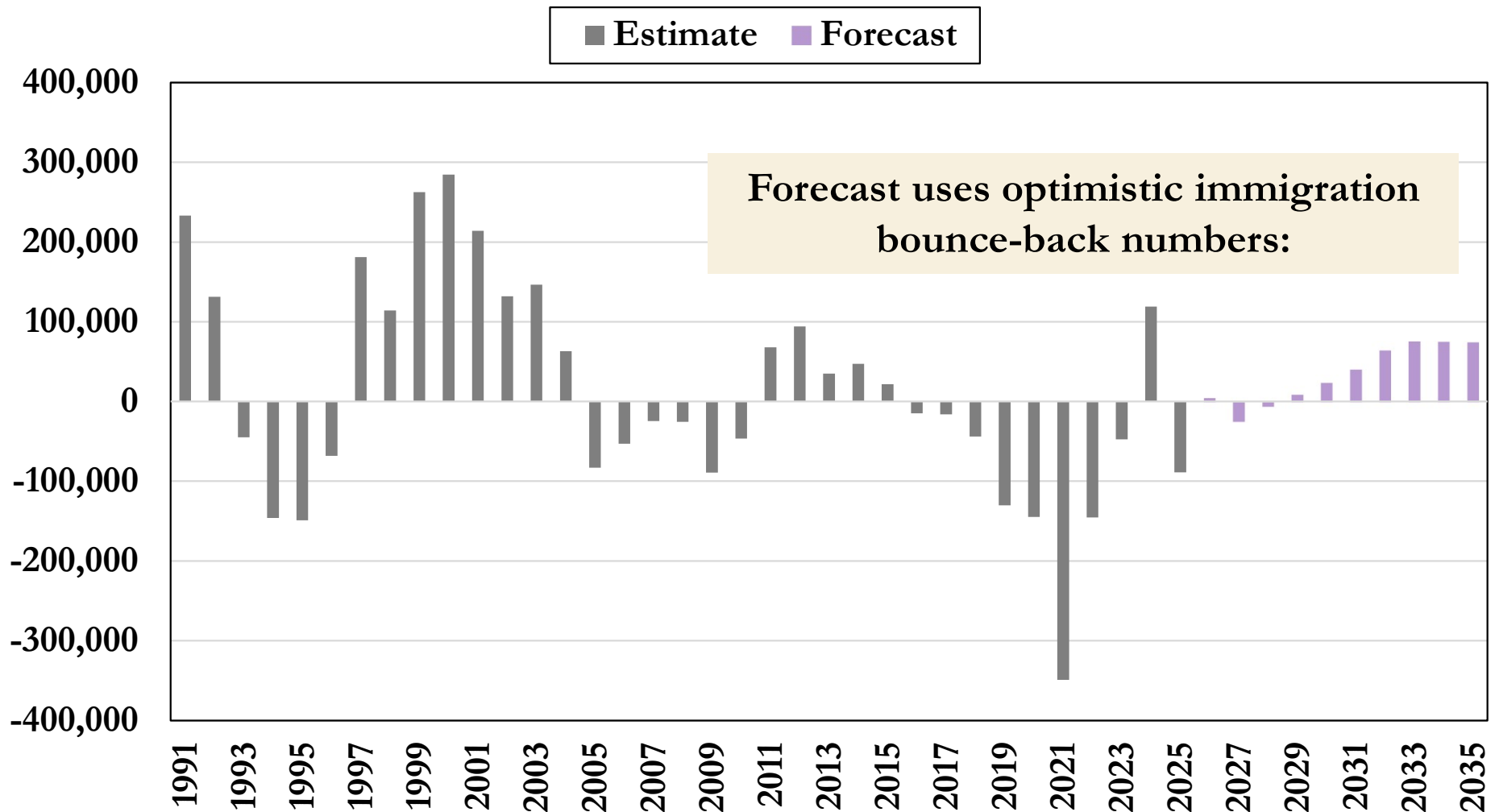


Single-Family Share of New Housing Varies by Region



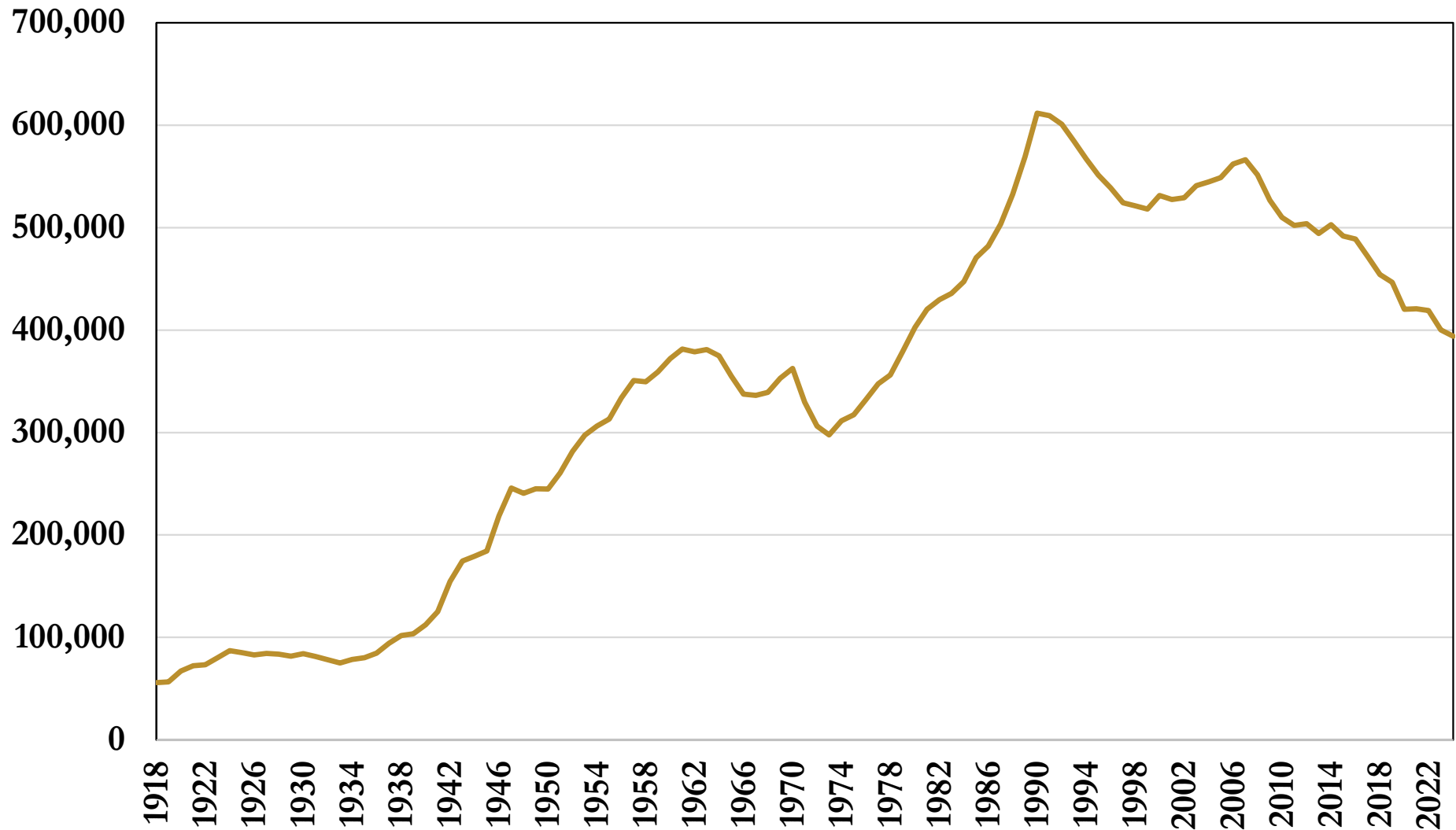
Statewide Net Migration Trends

CA Net International & Domestic Migration 1991-2025 & Projection by State Demographers



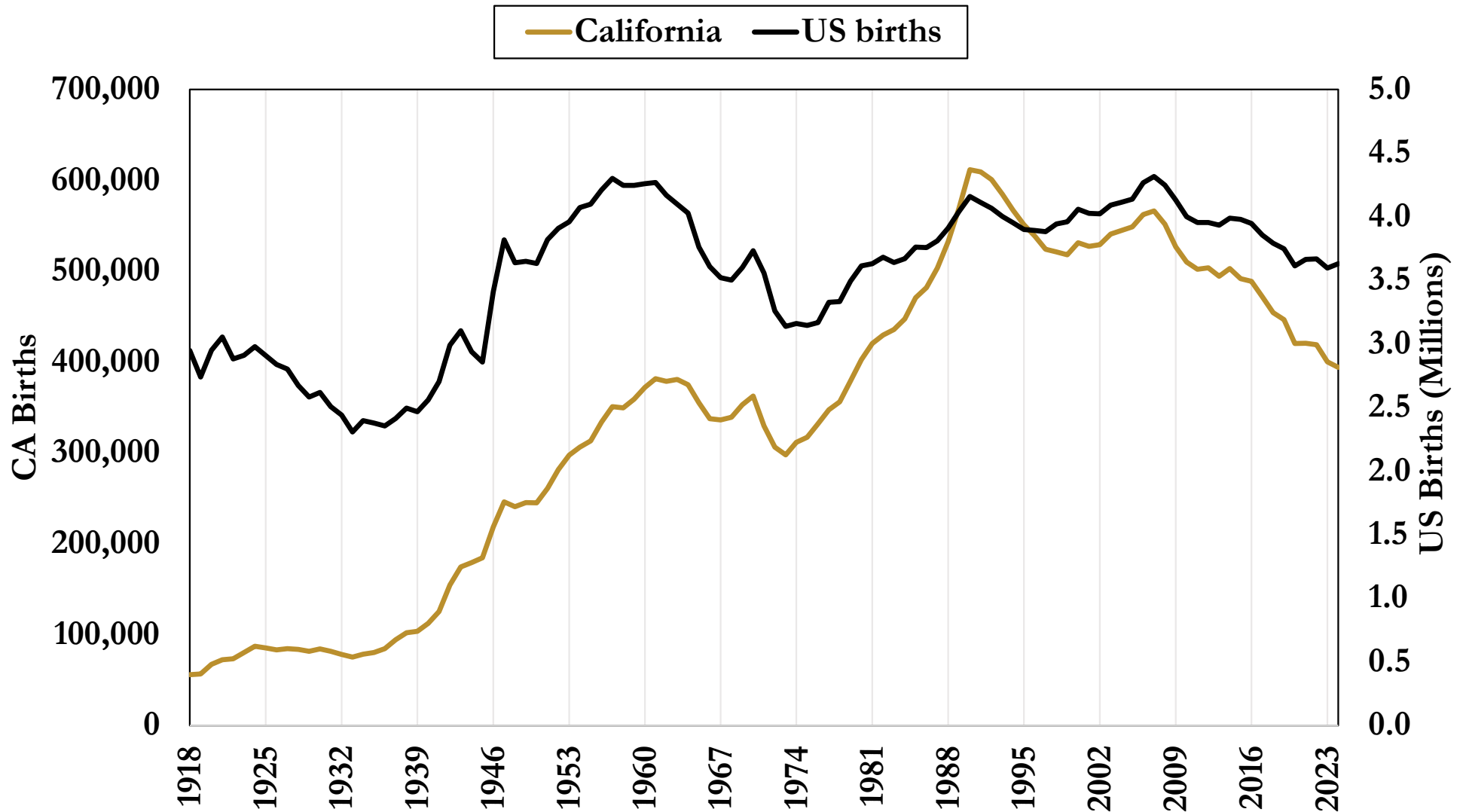
The Roller-Coaster of Births

California Resident Births, 1918 - 2024



CA Births Declining Faster than US

California and US Births, 1918 - 2024



Births Declining in All Regions

