The Changing Educational Landscape

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Download the slides www.knocking.wiche.edu/presentations
Our Focus: High School Graduate Projections

Dec. 2016: Detailed public and private school projections, graduates to 2032, enrollments to 2021

Dec. 2017: Updated information and data for private school trends
Recent Private School Enrollments

Long-term Decline and Recent Stabilization

WICHE unpublished analysis of data from

Private School Universe Survey (PSS)
Schools Not Affiliated with an Independent School Association

Catholic* 1.75 M
Recent stabilization but still down 25%

Other Religious 1.26 M

Non-sectarian 0.28 M

School Members of an Independent School Association

Total 1.07 M

Religious* 0.47 M

Non-sectarian 0.60 M

Source: WICHE unpublished analysis of 2001-02 to 2015-16 PSS data. All Catholic school students counted here regardless of association membership.

‘Independent schools’ includes members of NAIS, NIPSA, TABS or state or regional independents association (not including Catholic schools).
….rapid shuttering of Catholic parochial schools [were the largest] source of the declining enrollment in private schools overall. **NAIS research, however, shows that it’s not just parochial schools that have been struggling.**

The past decade has been challenging for many independent schools. Nearly half of 939 schools lost students between 2006-2007 and 2013-2014, while a bit more than half grew in enrollment.

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**Chart:** WICHE analysis of 2001-02 to 2013-14 PSS data; 2015-16 excluded due to data anomalies. ‘Independent schools’ includes members of NAIS, NIPSA, TABS or state or regional independents association.
In the East region, which consists of New York and New Jersey and includes the powerful New York City economy, almost 65 percent of the schools are in the growth categories, and nearly half of these are high growth.

The same story applies to the West and Southwest.

In contrast, the Mid-Atlantic region, dominated by Baltimore and Philadelphia, has more decliners than gainers. The New England, Midwest, and Southeast regions are equally divided between gaining and declining schools.


Chart: WICHE analysis of 2001-02 to 2013-14 PSS data; 2015-16 excluded due to data anomalies. ‘Independent schools’ includes members of NAIS, NIPSA, TABS or state or regional independents association.
Population Trends
Constraints in Traditional Populations, Potential in New Minorities
U.S. Child Population Under Age 18

1990-2000  13.7%
2000-2010  2.6%

Child Populations 2000-10
Declined in 23 states & D.C.
• Fewer White children in 46 states

Increased in 27 states
• Half or more of all increase, overall, was from Hispanic children in these growing states

100 Largest Metro Areas 2000-10
• 86 had declines of White child populations
• 35 became minority White
• Hispanics accounted for bulk of increase in 57 of the 68 with overall child increases
Children vs. Seniors Spending Considerations

Dependency Ratio is each age group as a percentage of the working-age 18-64 year olds.

**Elderly dependents and their own retirement loom large for White working-age adults.**

**Replacement by Populations with Fewer Resources**

**Hispanic and Black Children**

Twice as likely to be low-income
- 29% White, Asian/Pac. Isl.
- 59% Hispanic
- 61% Black

Half as likely to have college-educated parent

**Children vs. Seniors Spending Considerations**

**Hispanic and Black Children**

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- 29% White, Asian/Pac. Isl.
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Half as likely to have college-educated parent
All Increase is Underrepresented Minority H.S. Grads

Private School Enrollments
Non-White Populations, 2013-14, by School Type

WICHE unpublished analysis of data from
Private School Universe Survey (PSS)
48% of U.S. children under 18 were non-White in 2013

Private schools, nationally, in 2013-14

- Mean non-White student percent was 33%
  - Averages influenced by most and least diverse schools
- Median non-White student percent was 21%
  - Half of private schools, nationally, were 21% non-white, or less

Source: WICHE, unpublished analysis of 2001-02 to 2013-14 PSS data. Non-White includes American Indian/Alaska Native, Asian/Pac. Isl., Black, Hispanic and Two or more races. New schools existed in 2013, but not 2001. Shaded bar segments represents middle 50% of schools, the "whiskers" represent the full range of school non-white student percentages.
In 2013-14, nationally, higher among:

- Nonsectarian & independent schools
- Newer schools, opened after 2001

See supplemental slides on knocking.wiche.edu for detail by region

Source: WICHE, unpublished analysis of 2001-02 to 2013-14 PSS data. Non-White includes American Indian/Alaska Native, Asian/Pac. Isl., Black, Hispanic and Two or more races. New schools existed in 2013, but not 2001. ‘Independent schools’ includes members of NAIS, NIPSA, TABS or state or regional independents association.
Enrollment Trends by Family Income

Strong decline in enrollment rates of middle-income families
- Overall: 11% in 1969, 7% in 2013
- Hispanic middle-income families: 15% in 1969, 3% in 2013

High-income families
- Shifts from religious to nonsectarian schools
- Increased most in the South
- Share of high-income urban families in private schools peaked at 30% in 1989, down to 24% in 2013

Sources, Notes

• Contact pbransberger@wiche.edu for author’s unpublished analysis of NCES Private School Survey data, prepared for this Enrollment Management Association National Conference, Sept. 2018, presentation.


• Annie E. Casey KidsCount data at datacenter.kidscount.org, and author calculations from NCES Digest of Education Statistics, 2015, Table 104.70, “Children under age 18, by parents' highest level of educational attainment” (slide 10, top).


THE CHANGING EDUCATIONAL LANDSCAPE

Barbara Eghan
Georgetown Day School
WHAT NOW?

1. How will changing demography affect independent schools?

2. How can we use this data to position our schools to address these emerging trends?

3. Where do we start — and who else is involved?
HOW WILL CHANGING DEMOGRAPHY AFFECT INDEPENDENT SCHOOLS?

- Admissions practices will need to evolve.
  - Are we thinking of diversity as an added value — or as the value — of an independent school education?
  - In selling our schools’ value proposition, are we exceeding the “worth-it” line*?
  - What about all the children under age 5 who were never born — how will we attract and enroll them?
  - How much money do our schools cost?! 
  - How do we caution against replicating systems of privilege as independent schools?

*From EAB Independent School Executive Forum interviews and analysis for 2018 presentation on Expanding the Enrollment Funnel.
HOW WILL CHANGING DEMOGRAPHY AFFECT INDEPENDENT SCHOOLS?

- School program, culture, and instructional practices will need to evolve.
  - Are we supporting an equitable learning environment for a growing diversity of students?
  - How are faculty trained and supported with training in implicit bias and diversity issues related to equity and inclusion?
  - How are we navigating the school-home partnership with a growing number of “non-traditional” independent school families?
HOW CAN WE USE THIS DATA TO ADDRESS THESE TRENDS?

- Understand the challenges you are trying to solve.
  - Case study — A demographic and psychographic market study to identify mission-fit families
HOW CAN WE USE THIS DATA TO ADDRESS THESE TRENDS?

- Recognize opportunity in the challenges.
  - Case study — Building for enrollment and financial sustainability
WHERE TO START — AND WHO’S INVOLVED

➤ **School-specific data analysis** to educate your school leadership and board

➤ **Faculty engagement** in selling the school

➤ **Focus groups/surveys** to understand the needs, desires, expectations and emotions of your current mission-fit families

➤ **External market analysis** to understand the opportunities and threats you are competing among

➤ **Regional consortia/associations** with whom to network, collaborate, market, and support applicant families
Contact Barbara Eghan at beghan@gds.org for more information regarding this presentation, including the resources below, prepared for the EMA Annual Conference 2018.

➤ EAB (www.eab.com)

➤ Connor Associates (www.connor-associates.com)