# Enrollment Projection

## User Guide for School District Users

**Massachusetts School Building Authority**
Application User Guide

MSBA © 2012

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# 2: Disclaimer

Information gathered through the Enrollment Projection application is not an application for funding. Submission of this information in no way commits the MSBA to accept an application, approve an application, provide a grant or any other type of funding, or places any other obligation or requirement upon the MSBA.

Only authorized users should have access to this application. All users must ensure the security of their user ID and password and should not share their user ID and/or password with others.  All data entered using an MSBA-authorized user ID will be the responsibility of the user to whom the user ID was originally assigned.  Unauthorized access to the MSBA Enrollment Projection application may result in processing delays.

# 3: Overview

The Enrollment Projection Application was created to improve the way that the public school districts of Massachusetts provide information to the Massachusetts School Building Authority (MSBA) in order to generate K-12 student enrollment projections. This application replaces the previous methods of providing this information, which consisted of several paper forms as well as the previous version of the Enrollment Projection application.

The new application has been designed so that school districts have an improved experience. The information that is being requested has been streamlined, allowing school districts to save time as well as print and mailing costs. The methodology underlying the enrollment projections has not changed from the MSBA's previous version of the Enrollment Projection application.

## *When a District Will Need to Provide the MSBA with Enrollment Information*

There are two times that a district will need to provide the MSBA with Enrollment information.

- Every district has to fill out the Enrollment Questionnaire if it intends to file a Statement of Interest (SOI) during the open SOI period. It only has to be filled out once per district. The Questionnaire is different for Vocational Technical and Agricultural districts.

- During the Eligibility Period districts may be asked to provide additional information to the MSBA so that we can create a more refined projection. Most of this information can be provided through the Enrollment Projection Application.

## *How Enrollment Projections are Created*

Enrollment projections in the MSBA Enrollment Projection application are created using a modified **cohort survival methodology**. It is one of the most widely-used projection methodologies.

The primary assumption underlying this method is that the past is a reasonable predictor of the future. It calculates the ratio of the number of children in one grade in one year compared to the number of children who "survive" to enroll in the next grade the following year. When several years of information are reviewed a pattern emerges which can be used to project enrollment in the future.

For example, if over five or ten years an average of 95% of the students in second grade go on to the third grade, and 100 children are currently in second grade, if there are no other factors present the method will predict that there will be 95 students in the third grade next year.

When working on a projection with a district during the Eligibility Period the MSBA may also ask for more detailed information on recent births, housing sales, residential development, and out of district enrollment.

The MSBA also partnered with the Metropolitan Area Planning Council (MAPC) to study the impact of school construction on grade-to-grade survival ratios. Data was compiled from many school projects in Massachusetts, and a small but measurable improvement in grade-to-grade survival ratios was found. This is also taken into consideration by the MSBA when creating a projection during the Eligibility Period.

## Types of Projections in the Application

A **Baseline Projection** is created for the district when the district fills out an Enrollment Questionnaire. This projection uses Census data, DPH birth data, population estimates, and the historical enrollment in the district in order to generate a projection for K-12 enrollment. If the district chooses to enter Housing Permit information the application will apply an additional adjustment based on any major changes in how many permits are issued in a year in the towns in the district.

To see a Baseline Projection, enter the application and open up an Enrollment Questionnaire. Once the district has entered its most recent Enrollment Data, the projection will be available.

A more robust **Eligibility Period Enrollment Projection** is created later on in collaboration with the district. The process will more closely examine the individual nature of each municipality in the school district, including births, population changes, housing construction and turnover, and the impact of the potential project that is under discussion.

Eligibility Period Enrollment Projections will be provided to the district by the MSBA as a part of the official MSBA Enrollment Projection process. They will also be available within the application as a PDF.

## Vocational Technical and Agricultural School Districts

Vocational Technical and Agricultural School districts do not have the same population-driven Enrollment Projections as other school districts. The Enrollment Questionnaire for these districts is focused on projected and actual ninth grade enrollment, and the MSBA will work in partnership with Vocational Technical and Agricultural districts to analyze the enrollment trends in each district's member municipalities.

For more information about the Vocational Technical and Agricultural-specific form, see the section with that name later in this guide.

## *Getting Help*

If the district needs help with this application and cannot find the answers to its questions in this user guide, please contact Diane Sullivan or the district's field coordinator at the MSBA at 617-720-4466.

**Help as you go**: Keep an eye out for the question mark symbol in the application. That denotes a helping tip for that question which can be accessed by clicking on the question mark.

## Images in this User Guide

The images in this User Guide were created by visiting the MSBA website using Chrome and Internet Explorer. There may be some visual differences for users of Firefox or other browsers.

# 4: Getting Started

district users should follow the procedures in this section to gain access to the Enrollment Projection Application.

## *Getting Access to the Application*

To get access to this or any other MSBA Application, please fill out an Access Request Form, located here:

http://www.massschoolbuildings.org/guidelines/guides

Access Request Forms are in PDF and/or Word format, and will need to be printed, signed, and returned to the MSBA before access will be granted to any applications. Please allow enough time to get the appropriate signature(s) on the access forms. Most applications require the superintendent of the district's approval for new users.

The district should use either the Statement of Interest Access Request form, if they are using the enrollment application as part of submitting an SOI, or the Eligibility Period Access Request form, if they have been invited into the Eligibility Period.

## *Sharing User Names and Passwords*

Use of MSBA applications requires that each individual user in a district have their own unique user name and password. The district must request separate access for each individual who will be using the application.

It is recommended that the district request access for the following people in advance:

- the district Superintendent

- any administrative staff who may be responsible for data entry

- any staff members who have filled out Enrollment Projection forms in previous years

User access is reset every year for security reasons. If it has been more than a year since the district last filled out an Enrollment Projection record, the district may have to fill out a new Access Request Form.
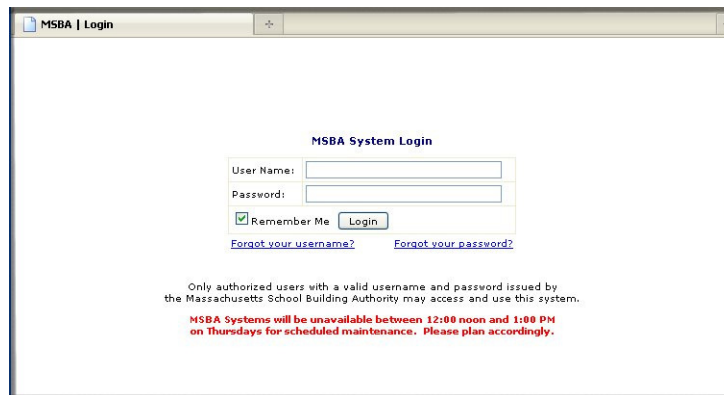
## *Logging On*

To log on to the Enrollment Projection Application, begin by going to

http://www.massschoolbuildings.org/

Click on the link to the Enrollment Projection application on the left side of the page.



This will bring up a log-in screen.



If a user has forgotten either their username or password, that user can click on the links on this page to have it sent in an email.

Once a user has logged on they will see the list of all the MSBA Applications they have access to on the left.

Select Enrollment Projection from the list on the left to begin.

## *Application Entry*

Clicking on the Enrollment Projection application name will cause the application home page to appear.
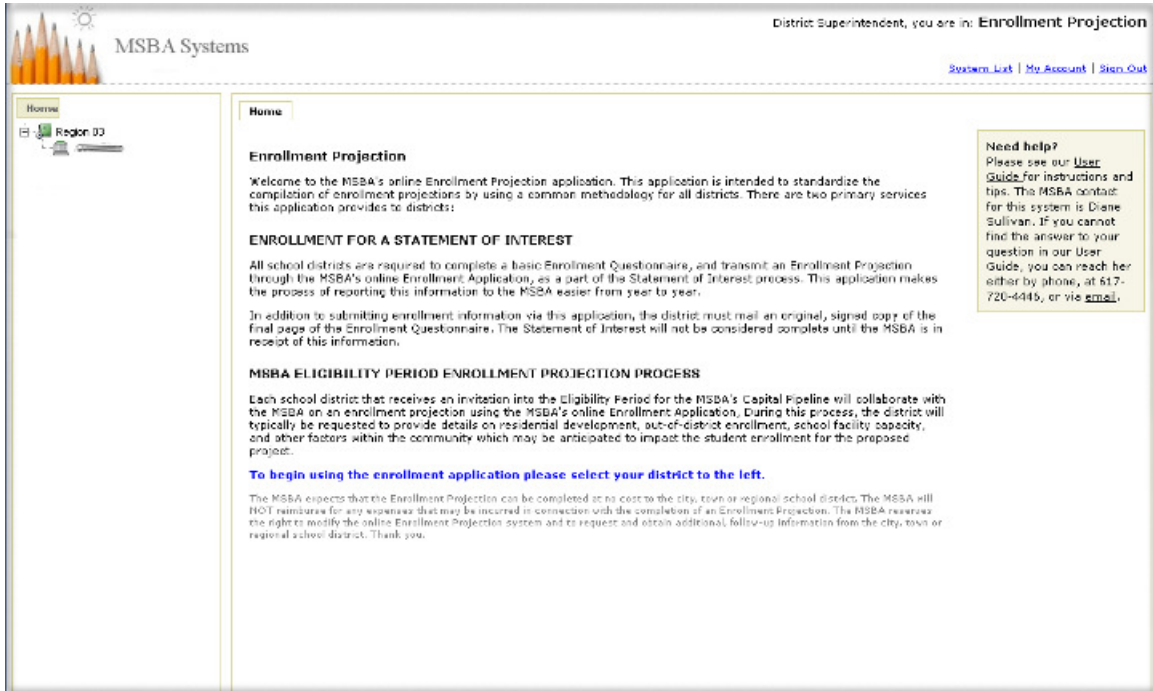


Select a region and a district from the left to continue. The planning regions used by the MSBA correspond to the following areas:



Map of Massachusetts School District Planning Regions
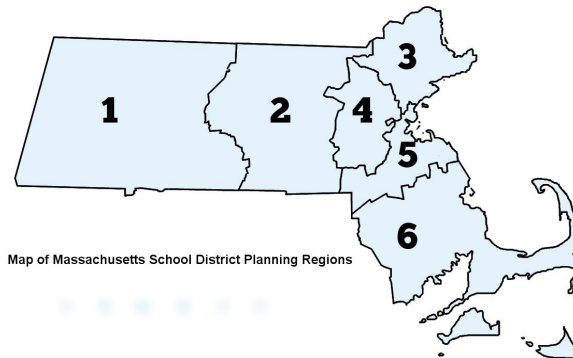
Once in the district there will be two tabs available. The second tab, "District Information," contains contact information for various people involved in district administration. This information is shared across MSBA applications. district users can review this information at their convenience and contact their Field Coordinator or Project Manager at the MSBA if changes need to be made.

# 5: Entering Enrollment Projection Data

## *Enrollment Home*

Any forms that are currently in need of work will be listed on the district's Enrollment Home under a section titled "Active Forms." Users can click on the name of any form in order to begin working on it.

Forms can also be printed at any time. Prior to submitting it to the MSBA, a form will be marked "Draft" but will still display any data the district has already entered for easy review.

Also on that page there may be a section called "Current Enrollment Projection." This will usually contain one record for each potential project that the district is interested in exploring with the MSBA. Any enrollment forms related to the potential project as well as projections that have been generated for the district will be found there. To see them, click on the + sign next to the record ID in order to expand the record.



There will also be a section called "History," but this will be empty the first time a district visits this application. As the district transmit forms to the MSBA this section will fill.

To see the district's history click on the + sign to expand that section.

## *Enter and Save Data*

Once the district has clicked on the name of a form in the Enrollment Application the next step will be to enter data or confirm that the district has reviewed data on each page.

Users do not have to complete every field on a page in order to save what they have entered. The application allows for the saving of partial data on every page. Users will have to fill in all required fields in order to submit a form to the MSBA, however. Required fields are usually designated with a red asterisk (*).

**Make sure that you press the "Save" button at the bottom of every page** in order to save your changes. If you navigate away from the page before saving, your data will not be preserved.

## *Enrollment and the Statement of Interest*

The district will be asked to fill out an Enrollment Questionnaire as a part of the Statement of Interest process. A district has to fill out only one Enrollment Questionnaire during the SOI season, no matter how many SOI's are being worked on. Note the tabs at the top: these tabs are the easiest way to navigate from one page of the form to another.

**No Statements of Interest will be processed by the MSBA without an accompanying Enrollment Questionnaire for that district.**

The Enrollment Questionnaire is due before the close of the Statement of Interest open period.

## Filling out the Enrollment Questionnaire

The district is asked to fill in information on each page, **save each page**, and then, using the final "submit" tab, send the Enrollment Questionnaire to the MSBA.

In order to fill out the Enrollment Questionnaire information on the following topics is needed:

- Enrollment Page: Actual current enrollment at all schools in the district. The district will not need to provide this on a school-by-school basis. Just the district totals will be asked for.

    o The historical student enrollment data are obtained annually from the Massachusetts Department of Elementary & Secondary Education (DOE), as reported by individual districts each October 1. Data are compiled and made available by the DOE during the early part of the calendar year for the then-current school year. For the purposes of the MSBA enrollment projection, Question 1 requests a restatement of the district's current school year enrollment as reported to the Massachusetts Department of Elementary & Secondary Education. Enter total enrollment figures by grade in the available fields for Question 1; for districts having no students in any grade, enter zero (0). Note that the TOTAL enrollment amount is automatically calculated when the data are saved.

- Population Page: Birth data for the last few years for all municipalities that are members of the school district.

    o Historical birth data are obtained annually from the Massachusetts Department of Public Health (DPH). Data are compiled from the Massachusetts Certificate of Live Birth, which is filed with the Registry of Vital Records and Statistics and made available by the DPH. The district will be asked to fill in any gaps in MSBA data.

- (Optional) Building Permits page: Permit and housing development information. Entering information on building permits is optional during SOI season. The district may provide some or no information on this page.

The district will also be asked to confirm that it has reviewed the information that the MSBA has collected regarding housing sales in the district and some other information. If the information appears incorrect, please confirm that the district has reviewed it and note any discrepancies in the comments fields that are available throughout the application.

All information does not need to be entered at the same time. If the person filling in the form does not have access to pre-school enrollment, for example, that person can fill in all the other grades, save, and return to the page later.

**Make sure that you press the "Save" button at the bottom of every page** in order to save your changes. If you navigate away from the page before saving, your data will not be preserved.

## Navigating the Enrollment Questionnaire

The tabs at the top of the page are how users move from page to page in the Questionnaire and also provide an overview of what information is requested.



The sections are: Enrollment, Population, Building Permits (which is optional as a part of SOI), Housing Sales, Baseline Projection, and Submit.

In the image above, the MSBA has gathered information from the DESE and other sources so that the district does not have to re-enter it. Above, enrollment from 2002 through the 2010-11 school year has been provided, and the district must enter only the 2011-12 school year.

If there are any discrepancies with the historic data which the MSBA is displaying, please note that in any of the comments fields throughout the application.

## Baseline Projection

As a part of the Enrollment Questionnaire the district will be provided with a baseline projection for their school district. This is a projection created using the default assumptions that are a part of the MSBA's Enrollment Projection process.
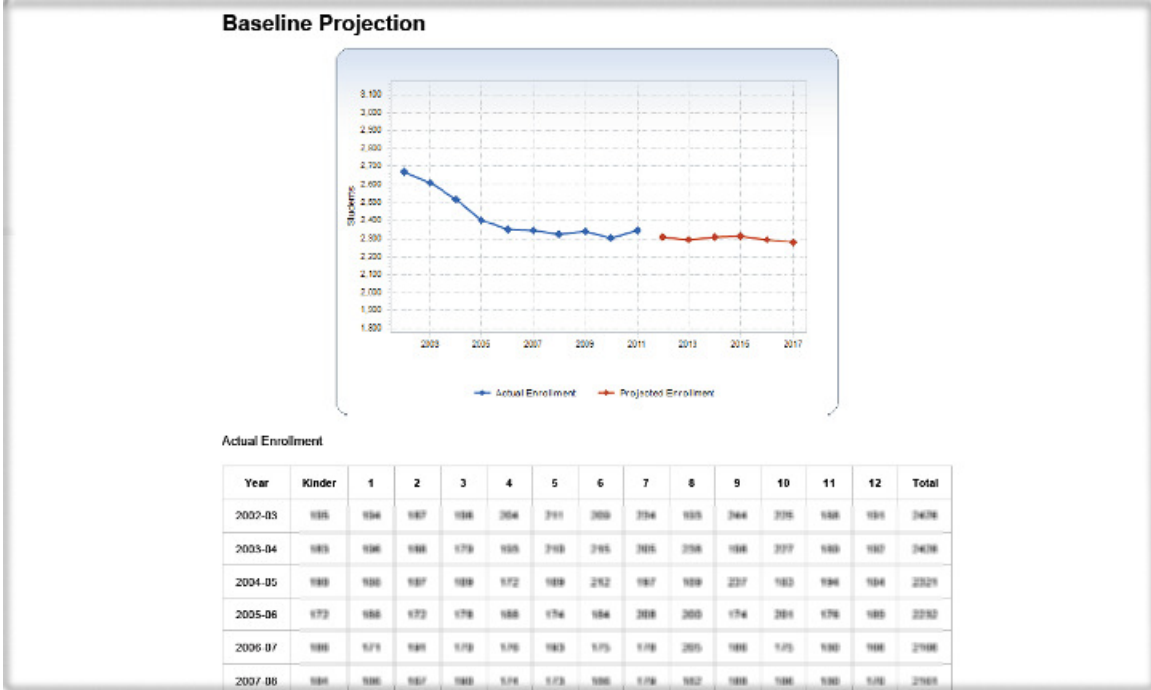


The above graph and table will be provided as a part of the printable report that can be created at any time.

For more about how the projection is created, please see the MSBA website.

The district will be asked to confirm that it has reviewed the baseline projection. If the district feels that this projection does not match anticipated enrollment, please provide an explanation in the comments section.

## Check My Data and Submit

On the Submit page, if the form is missing any information on previous pages a "Check My Data" button will appear. This will create a pop-up window that will list the names of any fields that are empty that must be filled in prior to submission.



If all required fields have been filled in, the Check My Data button will no longer appear.

Once all required fields have been filled in the application will request that the district verify its understanding of the process prior to submitting. By clicking these check boxes the district is committing to the data that has been entered and to the MSBA's evaluation of the district's data. Please read them carefully before submitting.

## Final Steps

To complete the Enrollment Questionnaire during the SOI Season the district must print and mail back a **signed copy** of the final page. The image below is of a form that has not yet been submitted – the correct form will not say "This form has not yet been submitted" on it.



The district can always log into our Enrollment Application and print a copy of any information that has been submitted. Just look for the blue print button to the right of the name of the form (underlined below in pink).

## *Enrollment and the Eligibility Period*

During the Eligibility Period the district will be asked to enter the MSBA's Enrollment Projection application and provide additional information regarding the district and the municipalities that belong to it as a part of creating an official Enrollment Projection.

### Filling Out Forms

- Enrollment Questionnaire: The district may be asked to fill out the Enrollment Questionnaire again. For example, if the optional section on Building Permits was not completed the district will be asked to provide that information. As part of the enrollment projection process for the Eligibility Period that data is no longer optional, it is required.

    o For information on how to fill out this form in particular, see the previous section, Enrollment and the Statement of Interest.

    o This form will still require the **signature** of a district Superintendent or the local CEO of a municipality associated with the district. For regional districts, the Superintendent's signature is required.

- Follow-up Enrollment Questionnaire: This form asks for data regarding the following subjects in order to inform the Eligibility Period enrollment projection.

    o Grade Reconfigurations

    o Redistricting

    o School Attending Children Report (out of district enrollment)

    o Special Education

    o Pre-Kindergarten and Kindergarten classroom spaces

- School Classroom Use: the district may be asked to fill out a form that details the number of classrooms and what each one is used for at some or all schools in the district.

Users from the district will receive specific invitations via email to fill out individual forms as they become necessary. The MSBA will be in communication with the district to keep the district informed of the information due and associated deadlines.

Unless otherwise directed by the MSBA, all fields are required to have full and accurate information in them during the Eligibility Period.

### Finalizing Forms

The forms will use the Check My Data and Submit buttons in the same way as the Enrollment Questionnaire did during the SOI Season.

The only form that requires signatures is the Enrollment Questionnaire. The Follow-up Questionnaire and the School Classroom Use form do not require signatures.

## *Vocational Technical and Agricultural Districts*

Vocational Technical and Agricultural districts are also requested to fill out some basic enrollment information during the SOI period and, later, during the Eligibility Period.

These districts will primarily be asked for ninth grade application and enrollment data, both actual and projected.



**Make sure that you press the "Save" button at the bottom of every page** in order to save your changes. If you navigate away from the page before saving, your data will not be preserved.

Once that information has been provided, the Enrollment Application will provide the district with an **Enrollment Report** that illustrates the enrollment trends of the member municipalities.

There are several charts on the printable report that help demonstrate this, including the one pictured below, which illustrates the number of applications and acceptances in the district over the last ten years.

### Enrollment Report

This report was created from the historical enrollment data of the member municipalities in your district. It displays the percentage of eight grade students that have historically enrolled in the District for the 9th grade and the percentage you intend to capture with your projected enrollment. This report is only intended to help the District see general trends. A more robust enrollment projection taking more factors into account is created whenever a district enters the project pipeline.

The table below shows the ten most recent years of data. Years will not display if some of the data was unavailable.

| Year | Member Municipalities Total Students | Member Municipalities Eight Grade Students | Ninth Grade Applications from Within District | Applications as a % of total students | Applications as a % of eighth grade students | Ninth Grade Acceptances from Within District | Acceptances as a % of total students | Acceptances as a % of eighth grade students |
|---|---|---|---|---|---|---|---|---|
| 2002-03 | 28406 | 2165 | 555 | 1.95 % | 25.64 % | 444 | 1.56 % | 20.51 % |
| 2003-04 | 28203 | 2053 | 555 | 1.97 % | 27.03 % | 444 | 1.57 % | 21.63 % |
| 2004-05 | 28021 | 2011 | 555 | 1.98 % | 27.60 % | 444 | 1.58 % | 22.08 % |
| 2005-06 | 27762 | 2030 | 666 | 2.40 % | 32.81 % | 500 | 1.80 % | 24.63 % |
| 2006-07 | 27636 | 1944 | 666 | 2.41 % | 34.26 % | 500 | 1.81 % | 25.72 % |
| 2007-08 | 27328 | 1820 | 666 | 2.44 % | 36.59 % | 500 | 1.83 % | 27.47 % |
| 2008-09 | 26963 | 1893 | 666 | 2.47 % | 35.18 % | 500 | 1.86 % | 26.41 % |
| 2009-10 | 26964 | 1862 | 555 | 2.06 % | 29.81 % | 444 | 1.65 % | 23.85 % |
| 2010-11 | 26717 | 1943 | 555 | 2.08 % | 28.56 % | 444 | 1.66 % | 22.85 % |

Vocational Technical and Agricultural districts are also asked to submit their report electronically, and then **print and mail a signed copy** to the MSBA.

# 6: Appendix: Glossary

| | |
|---|---|
| **Access Request Form** | This is a form that must be filled out and signed by district users in order to gain access to MSBA Applications, including the Enrollment Projection Application, MCP Application, the Statement of Interest (SOI) Application, and others. |
| **DESE** | Abbreviation: The Department of Elementary and Secondary Education (of Massachusetts). Information that has been given to this agency by school districts is displayed in MSBA Applications. |
| **Eligibility Period** | The Eligibility Period is a 270 day period at the beginning of the MSBA project process in which districts are asked to complete certain preliminary requirements, such as forming a School Building Committee and providing information on their maintenance practices and enrollment. |
| **MSBA** | Massachusetts School Building Authority. See massschoolbuildings.org for more information about the Authority. |
| **PDF** | Portable Document Format. This is a commonly used document format that can be accessed with a free download of Adobe Reader from Adobe.com. |
| **Save** or **Partial Save** | The Enrollment Application allows for the saving of partial data. This means that users do not have to fill in every answer on a page in order to save process. |
| **Submit** | The process by which a user can finalize and transmit information to the MSBA for evaluation. |

# 7: Appendix: Frequently Asked Questions

- **How do I know my information is saved?**

  - Next to the save button you will see a blue message that says "Save Successful".

- **What if I am missing some information?**

  - You do not have to fill in all information at once. If you do not have your enrollment for preschool at hand when you are first filling out the form, leave that field blank. You can save your other work and come back and fill that in at a later time. It must be filled in prior to submitting the final copy of your form to the MSBA.

- **How do I know what I am missing?**

  - On the Submit page you will see a "Check My Data" button that will allow you to see what data you are missing.

- **What if I make a mistake?**

  - Prior to submitting your form to the MSBA you can edit any field at any time.

  - After you submit your form to the MSBA you cannot edit your information. If there is a typo in your record, please inform your field coordinator. If there are larger mistakes, such as entering all of the enrollment data one grade over from where you meant to put it, you can be sent a new form.