WORK SESSION

Tuesday, October 6, 2026 6:00 PM
Educational Services Center (ESC), 401 E. Hancock Street, Lansdale, PA 19446

1.	**Opening of Meeting**	
1.A.	*Call to Order*	
1.B.	*Pledge of Allegiance*	
2.	**Audience of Citizens**	
3.	**Superintendent's Report - Dr. Bauer - Non Consent Items**	**Speaker(s):** Dr. Todd Bauer
3.A.	*Student Agreements*	
3.B.	*Contract for PERKINS SCHOOL FOR THE BLIND*	
4.	**Demographic Study Report Presentation**	**Speaker(s):** Director of Facilities & Operations
5.	**Adjournment**	

North Penn School District Enrollment Forecast

Enrollment Projections, Demographic Context, And Special-Population Forecasts, 2025–2035

Demographic Analytics Advisors

October 6, 2026

About Demographic Analytics Advisors

WHAT WE DO

Demographic Analytics Advisors is a firm of demographers and data scientists working with public school districts on **enrollment forecasting, capacity and utilization analysis, and redistricting**. We bring demographic method to questions where local knowledge is the other half of the answer.

HOW WE WORK

Primary sources

State enrollment counts, the Census Bureau, county parcel and permit records, municipal development pipelines, and the District's own geocoded roster.

Reproducible code

Every number in this deck comes from code we can re-run and a source we can show you.

We measure, you decide

We do not decide what the District values. We measure the trade-offs so the Board can.

RECENT SCHOOL DISTRICT WORK

Olathe Public Schools (KS) · St. Louis Public Schools (MO) · Wake County Public School System (NC) · Brunswick County Schools (NC) · Bedford County Public Schools (VA)

YOUR PROJECT LEAD

Christopher Dick

President and Founder

Former statistician and demographer at the U.S. Census Bureau. Project lead and the District's primary contact.

THIS ENGAGEMENT

2025–2035

A ten-year enrollment forecast, the demographic analysis behind it, and a utilization analysis of every elementary and middle school against the District's September 2026 capacity study.

Agenda

The district first, then the forecast, then what it means for buildings.

1 Executive Summary

The headline forecast and the one dynamic that explains it.

2 The Demographic Engine

Births, migration, residential development, and aging in place — the four forces behind the number.

3 The Forecast

How we project enrollment, the district total and its scenarios, grade bands, and where growth lands.

4 Special Education

The fastest-moving population in the district, and what it asks of space.

5 Facility Utilization

Enrollment against the District's September 2026 capacity study, building by building.

6 Recommendations

What follows from the forecast, and what we would watch next.

Executive Summary

12,940
K-12 students by 2035 (central)

+0.5%
change vs. today

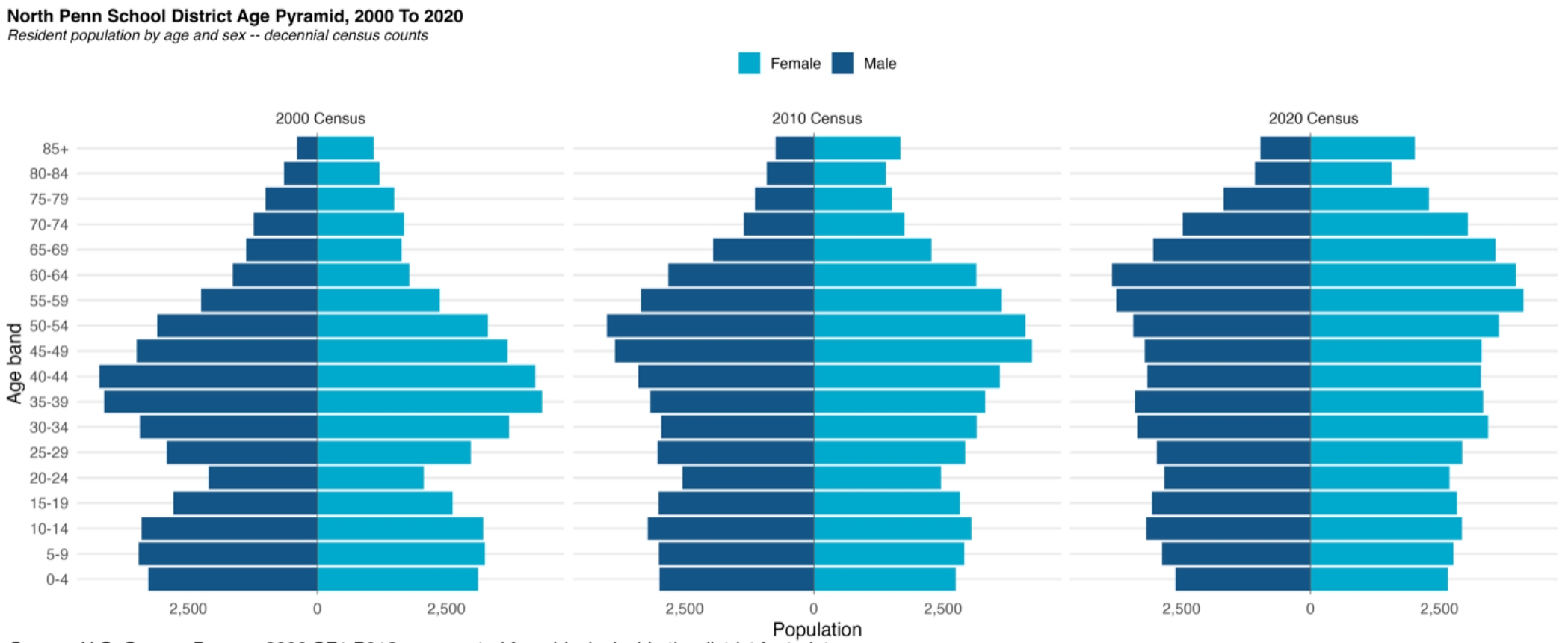
12,257–13,357
low–high planning band

North Penn holds **roughly flat** over the decade, while the state projection shows decline. The flat total comes from a housing balance: new construction adds about **58 students a year**, the aging existing stock sheds about **57 a year**, and the two nearly cancel. Demand still shifts substantially between attendance zones.

Base year is the October 2025 enrollment snapshot from district records.

The Demographic Engine

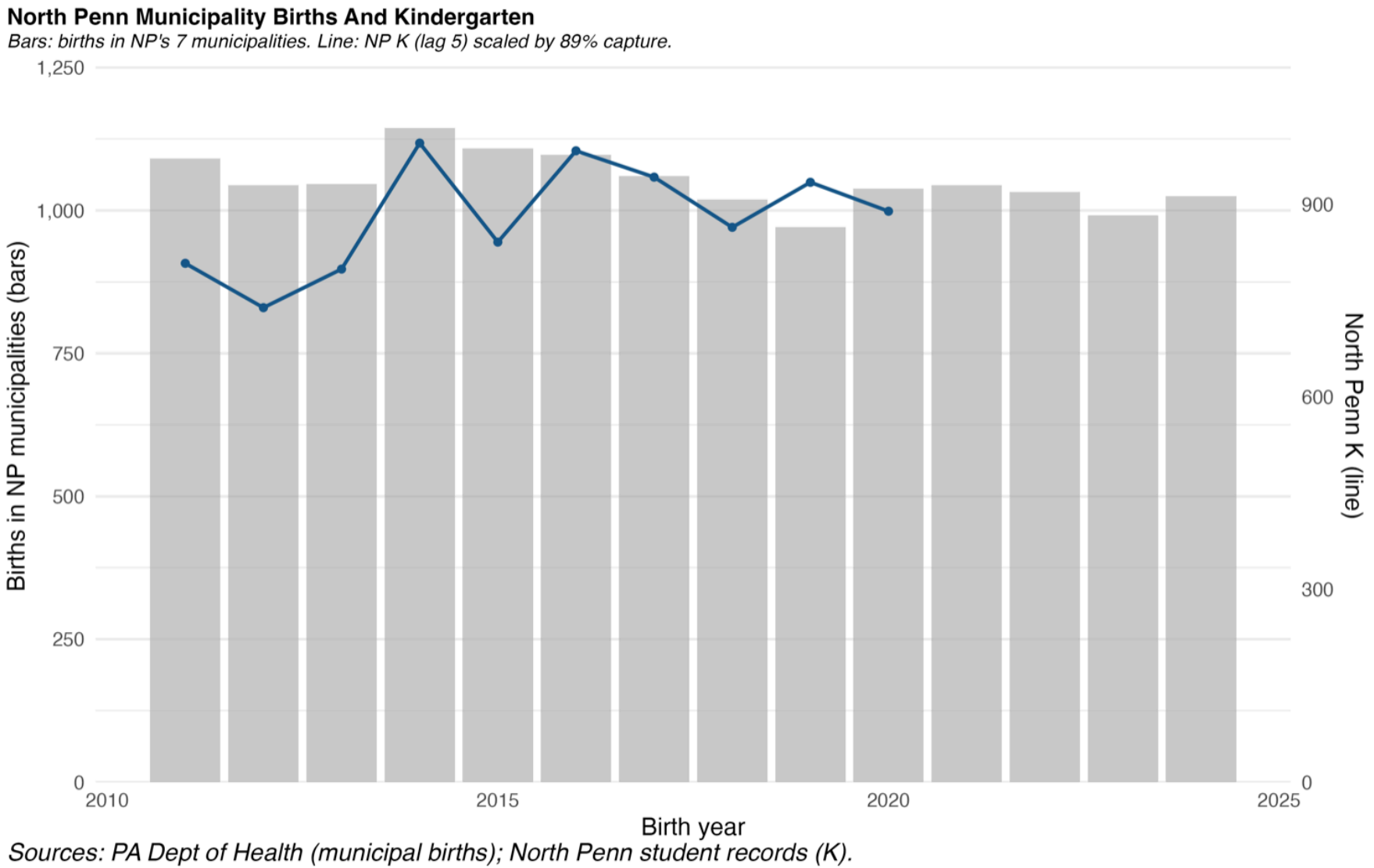
North Penn In Context



Source: U.S. Census Bureau. 2000 SF1 P012, aggregated from blocks inside the district footprint; 2010 SF1 P012 and 2020 DHC P12, published for the school district.

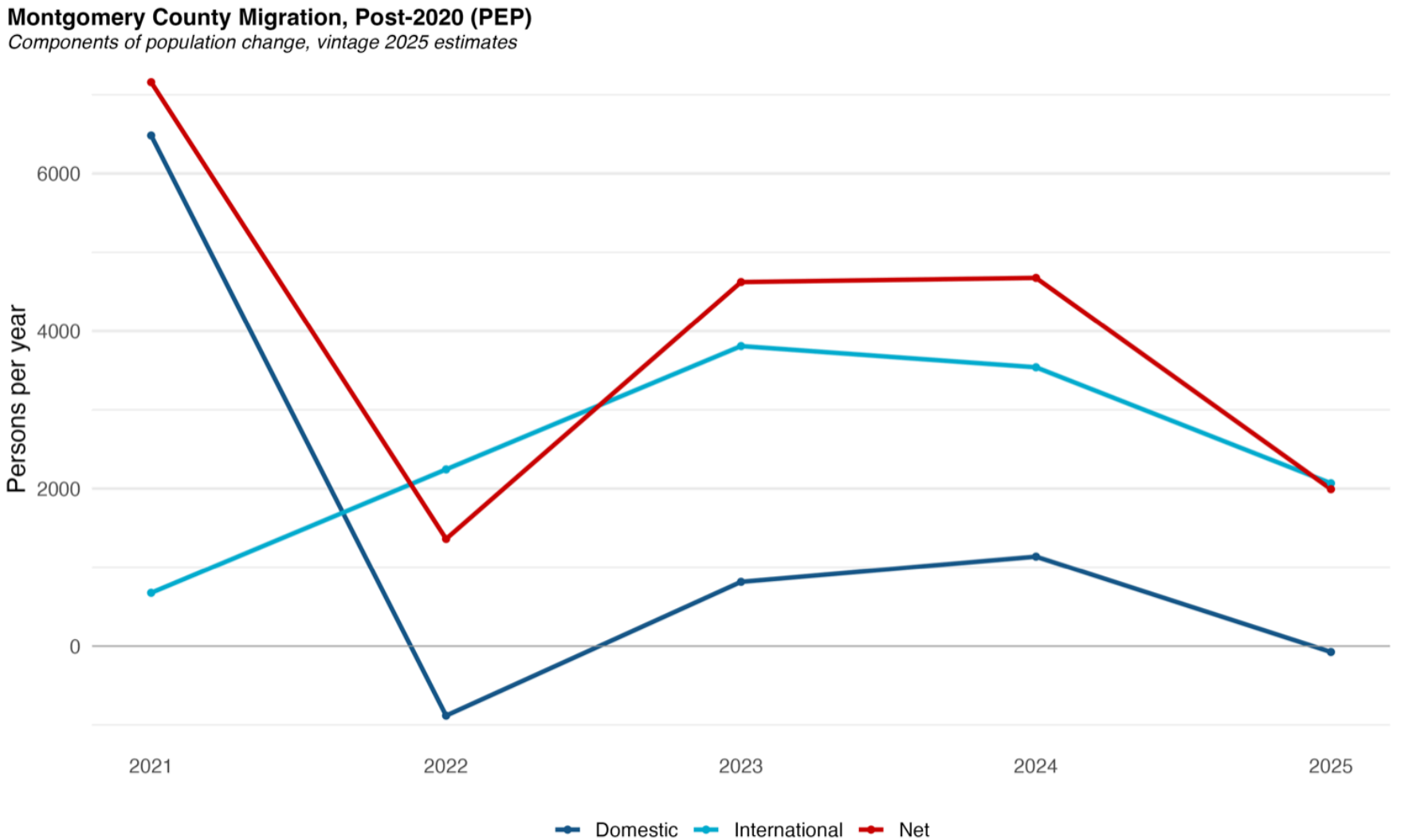
Three census counts, left to right: the wide 35–44 bars of 2000 have moved up into the 55–64 bands, which grew +95% — aging in place. The resident child base thinned over the same span (under-5 -17%), yet enrollment held roughly flat. In-migration is the difference.

Births And The Kindergarten Pipeline



*Resident births are flat-to-declining, yet kindergarten holds up: the birth-to-K **capture ratio has risen**, which points to in-migrating young families.*

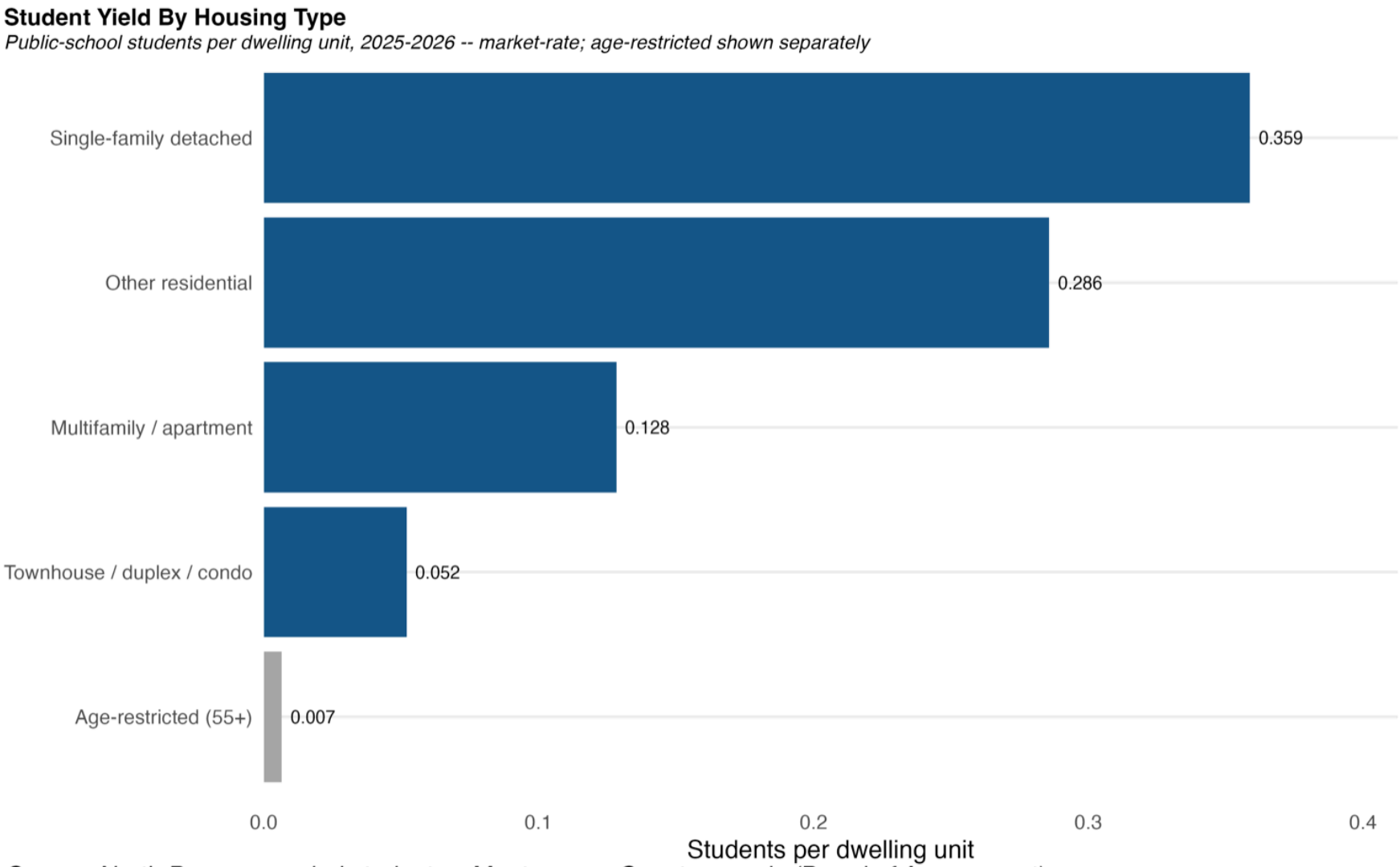
Migration



Source: U.S. Census Bureau, Population Estimates Program.

*The in-migration is recent. Montgomery County has gained migrants in every Census estimate year since 2020, roughly **3,764 residents a year** over 2023–2025.*

Residential Development



Source: North Penn geocoded students x Montgomery County parcels (Board of Assessment).

*Single-family homes yield about 1 student per 3 units; age-restricted housing almost none. Building permits show a steady pace of about **154 single-family units a year** across the seven municipalities.*

The Development Pipeline

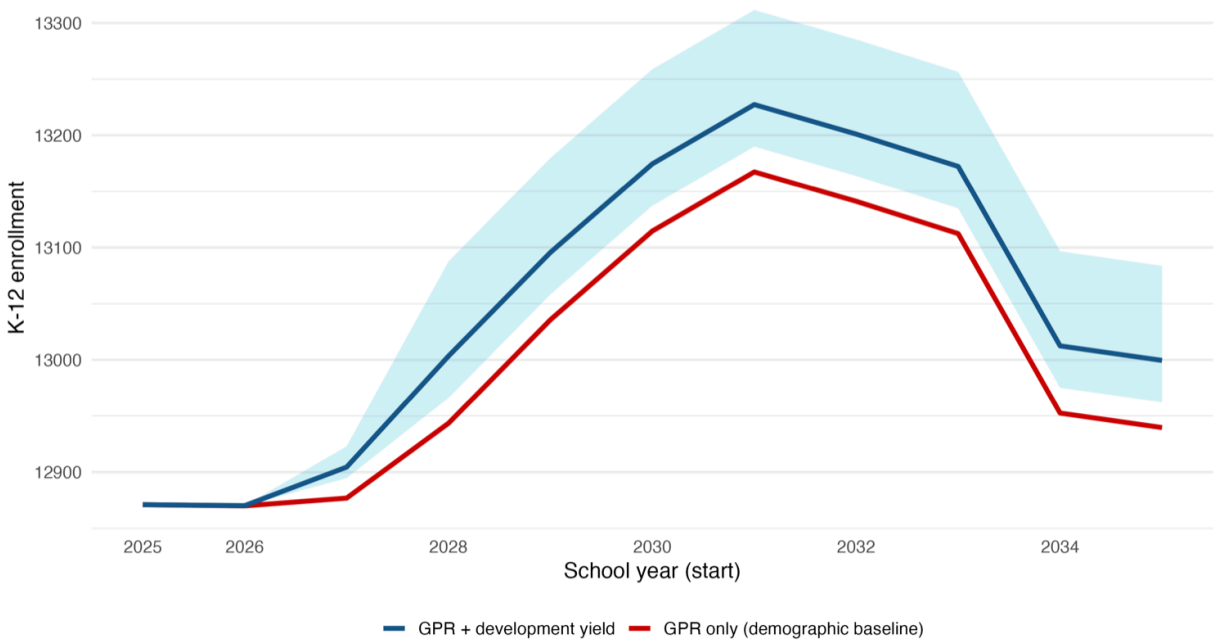
7 of 7
municipal pipelines returned

1,011
units not yet built

+60
students by 2035 (central)

Enrollment Forecast: Demographic Baseline Vs Development-Driven

K-12 total. Shaded band = development-completion uncertainty (proposed projects excluded at low, full at high). Coverage: Hatfield Borough; Hatfield Township; Lansdale Borough; Montgomery Township; North Wales Borough; Towamencin Township; Upper Gwynedd Township (7 of 7 municipalities -- complete).



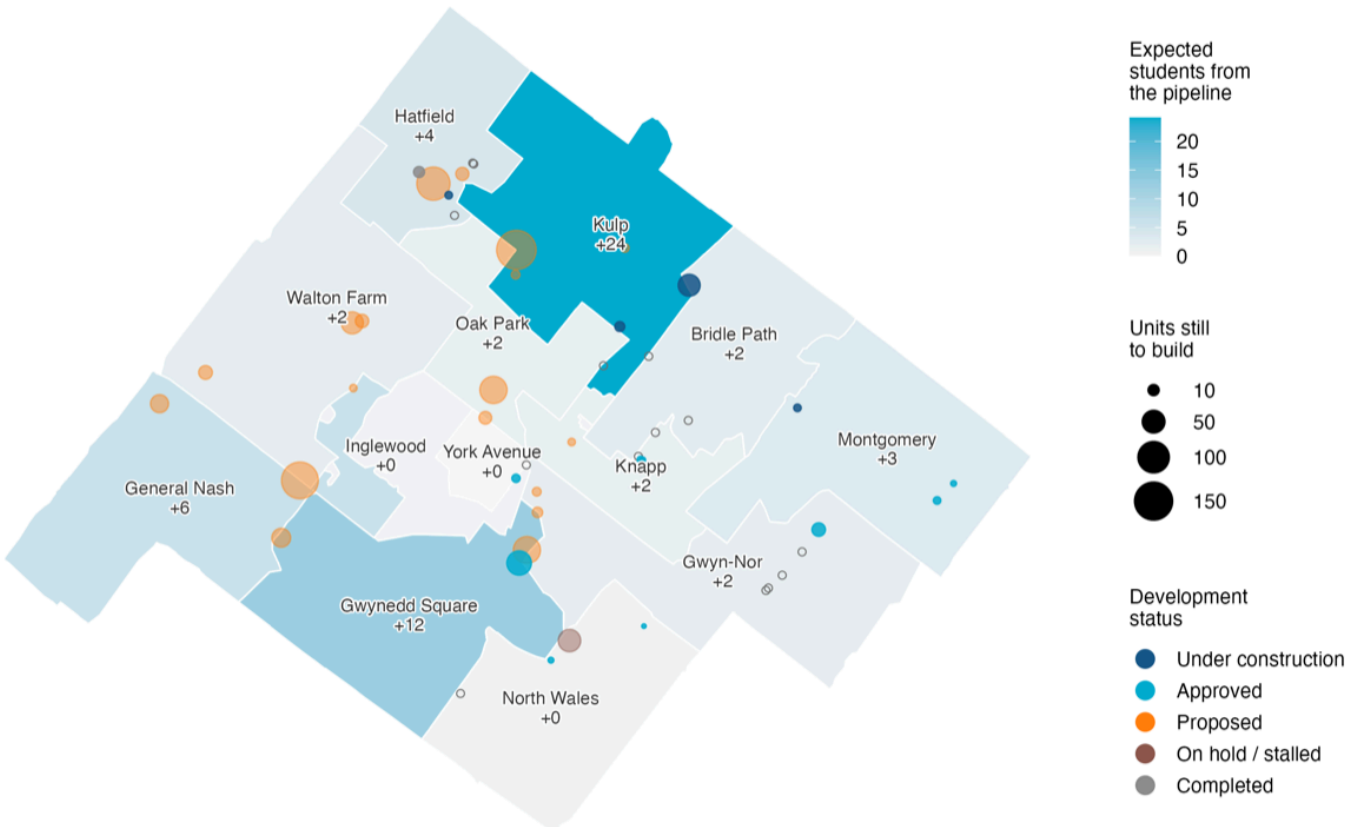
Source: DAA cohort-survival forecast; empirical student yields applied to the municipal development pipeline.

Every municipality answered our data request. The known pipeline adds modestly on top of the demographic forecast because the forecast already carries the district's recent development pace.

Where The Pipeline Sits

Where The Development Pipeline Sits Relative To Elementary Boundaries

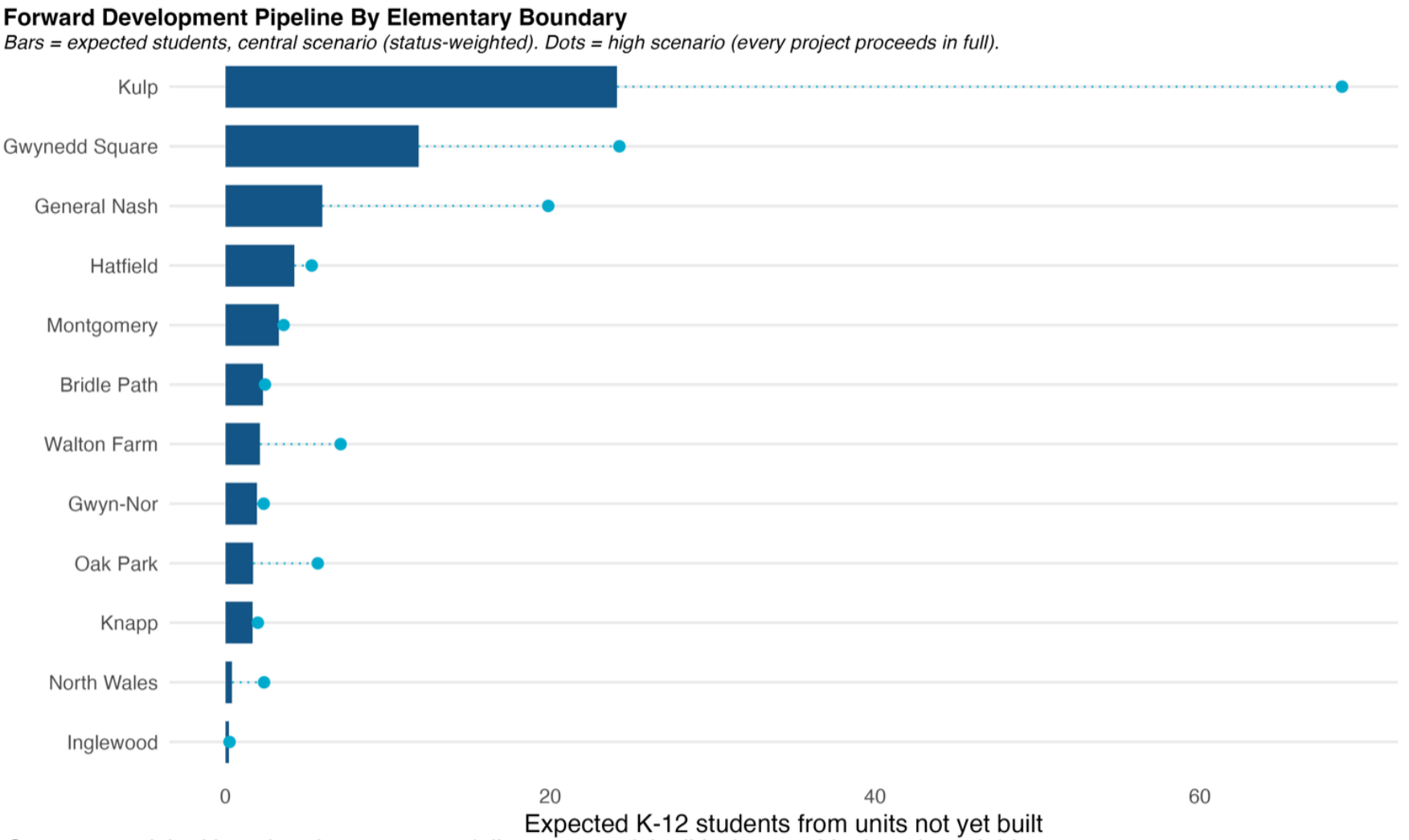
Every project reported by the seven municipalities (50 geocoded; 36 with units still to build, 14 built out). Point size = units remaining; zone shading and the number under each zone name = expected students from those units, central scenario.



Source: returned municipal housing data-requests x empirical student yield, on the reconstructed 2020-21 attendance boundaries. Projects assigned to the zone containing them; hollow points are completed projects with no units left to build.

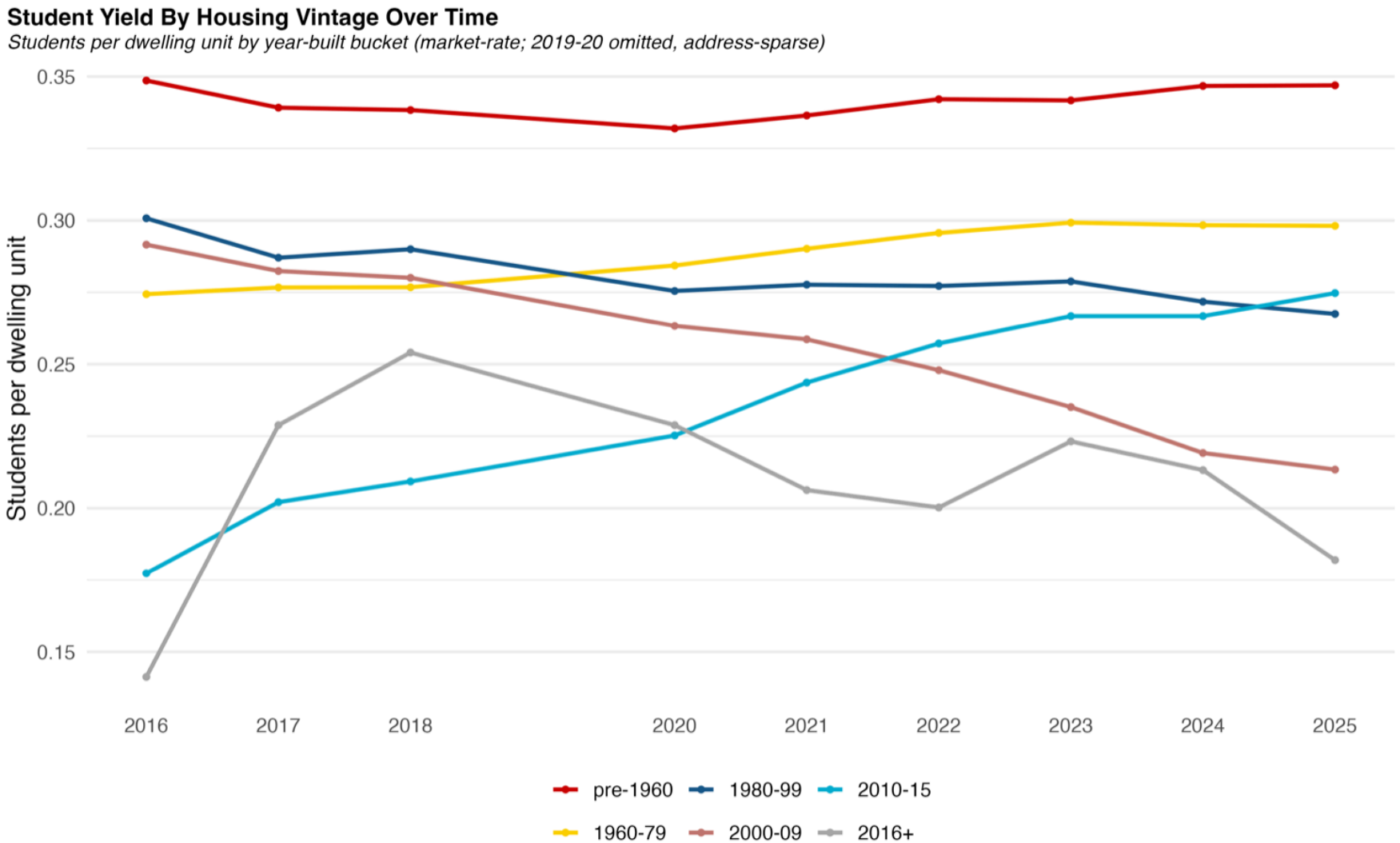
Every reported project on the elementary boundaries. Point size = units still to build, color = status; zone shading = expected students from those units.

Development Impact By School



Kulp *carries about 24 of the 60 expected students, and up to 69 if every project proceeds. The same 60 students spread across all 13 elementary zones would not affect capacity anywhere; concentrated in two or three, they affect those buildings.*

Aging In Place



Source: North Penn geocoded student panel x Montgomery County parcels (YEAR_BUILT).

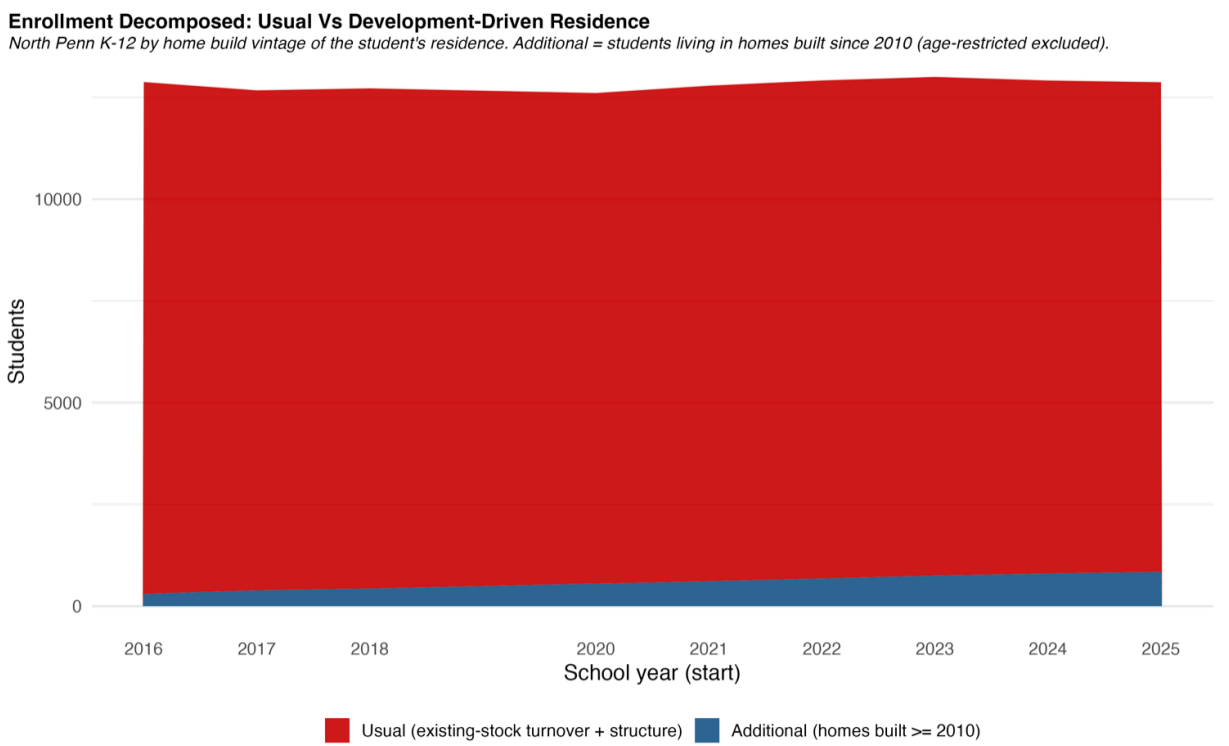
The 1980s–2000s single-family vintages are in their aging-in-place trough: student yield falls as the original buyers' children age out and turnover stays low.

Usual Versus Development-Driven Growth

+58/yr
new development

−57/yr
aging existing stock

≈ flat
net district total



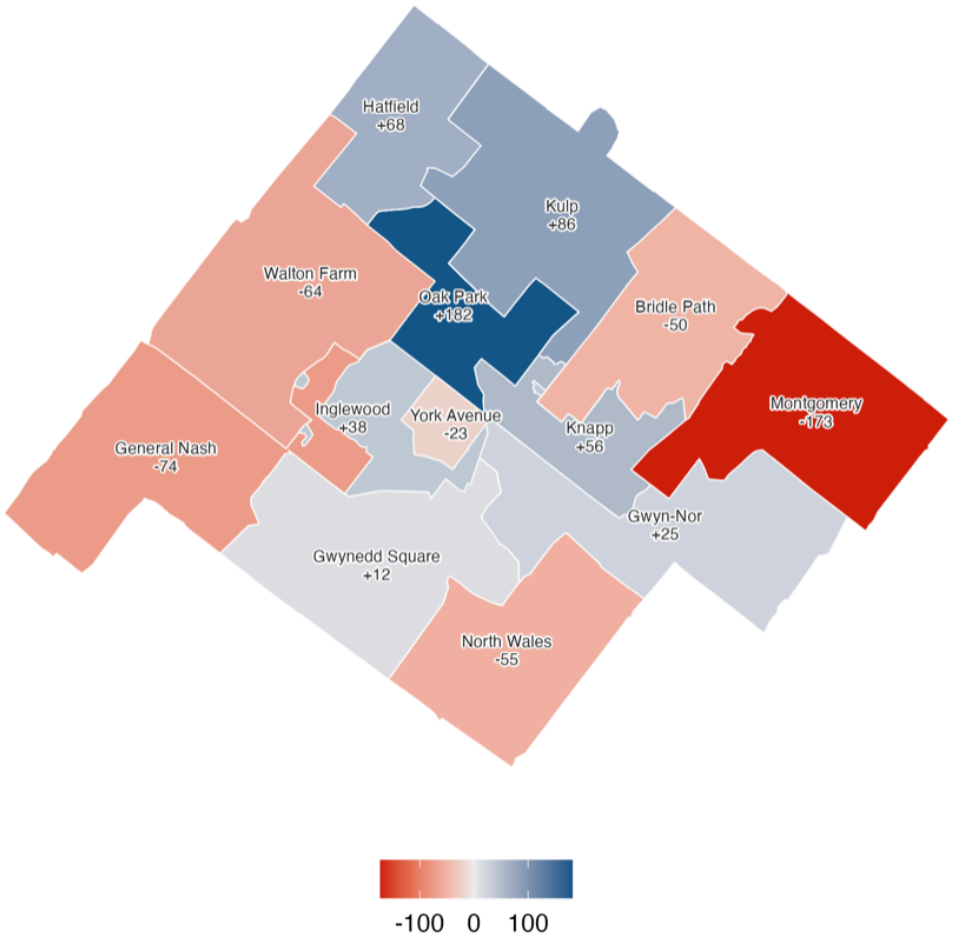
Source: North Penn student records geocoded to residence, joined to Montgomery County assessment year-built. 2019-20 omi

About 72% of students moving into newly built homes were not enrolled in North Penn the year before. New construction brings net new enrollment; the aging stock takes almost all of it back out.

Where Growth Lands

Spatial Concentration Of Residential Enrollment Change

Net change in resident students by elementary zone, 2016-2025. Blue = growth (development outpaces aging); red = decline (aging stock outpaces new building).



Source: geocoded student panel x Montgomery County parcel YEAR_BUILT. Age-restricted excluded.

*Zone-level change is much larger than the district total suggests: **Oak Park** gained 182 resident students since 2016 and **Montgomery** lost 173. This is the pattern that drives building use and any future boundary work.*

The Forecast

How We Project Enrollment

The projection ages each grade forward, following students as they move through school.

1 Start With Today

Actual enrollment in every grade, K–12, from the District's October count.

2 Advance By Ratio

Move each grade to the next at the rate observed for that step over recent non-pandemic years. A ratio above 1 means net in-migration or retention; below 1 means loss.

3 Seed K From Births

Resident births five years earlier, multiplied by a birth-to-kindergarten capture ratio, set each entering class — not the grade below it.

4 Roll Forward & Sum

Repeat year by year and total across grades. Low, central and high move the progression ratios and the capture ratio together, along one migration-intensity axis.

5 Check It Twice

Two implementations run independently — **top-down**, a district model allocated to buildings by attendance share, and **bottom-up**, each building's cohorts survived and summed back to the district. Agreement between them is the method check.

Student residences were geocoded to assign residence attendance zones, measure out-of-zone attendance, and track year-over-year residential mobility. Horizon is 2025 through 2035.

Adding The Development Pipeline

New housing does not add a student per home. Four steps take the pipeline to what it actually changes.

1 Measure Yield, Don't Assume It

Every geocoded student matched to their parcel, giving the *actual* students per dwelling unit by housing type — single-family detached about one student per three units, age-restricted housing almost none.

2 Count The Pipeline

The development pipeline returned by all seven municipalities, units not yet built, placed by parcel to its attendance zone.

3 Value At Measured Yield

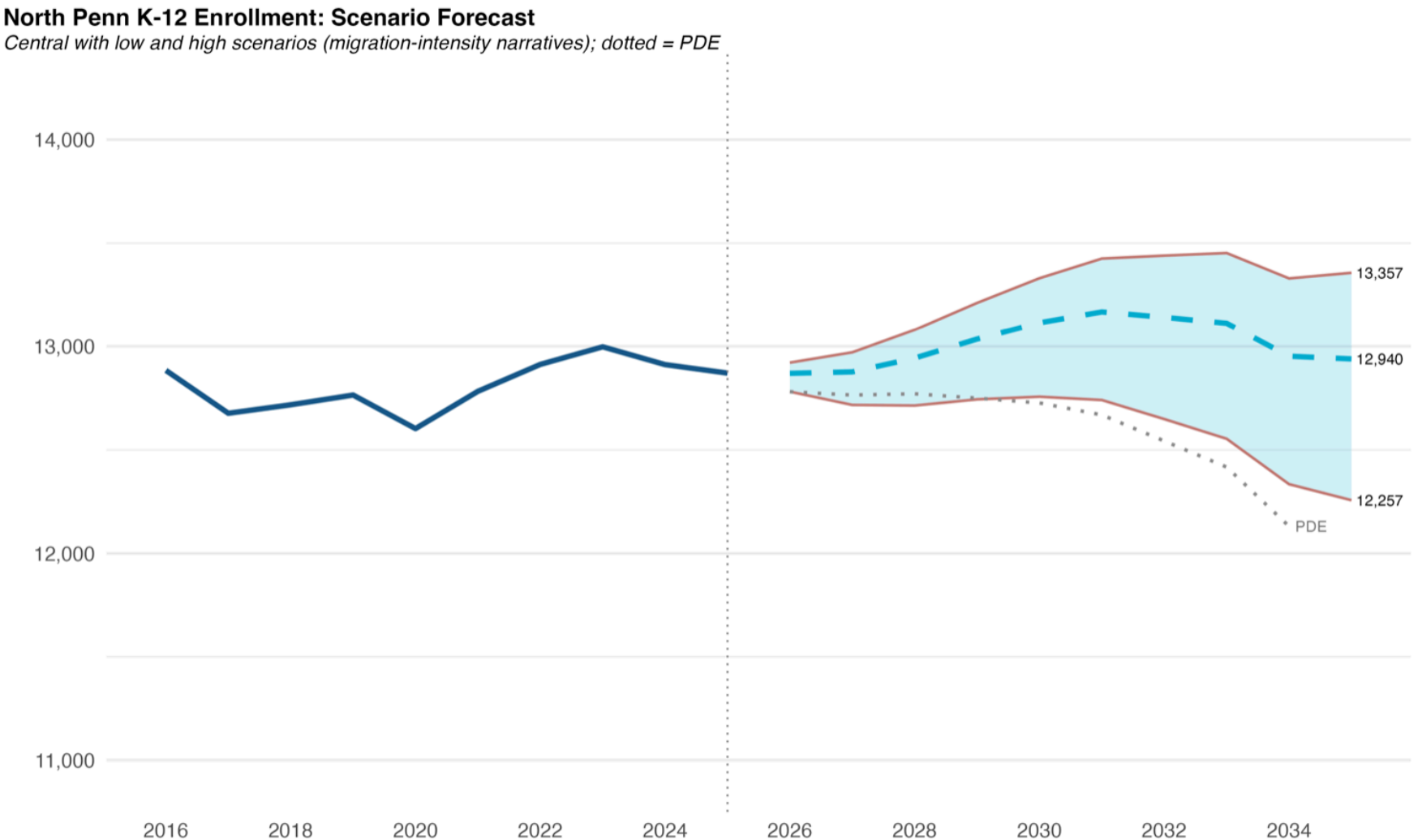
Each unit valued at the measured yield for its housing type, producing a development-driven layer alongside the cohort-survival projection.

4 Net Out The Double Count

A progression-ratio forecast already carries development forward at its recent pace. Matching each student to their home's year built shows how much growth new housing already supplied, so the pipeline adds only what the projection does not already contain.

The two tracks are shown together in The Development Pipeline; new construction netted against the aging existing stock is in Usual Versus Development-Driven Growth.

Enrollment Forecast



Source: North Penn records; PA DPH births; PDE projection. DAA cohort-survival scenarios (v2).

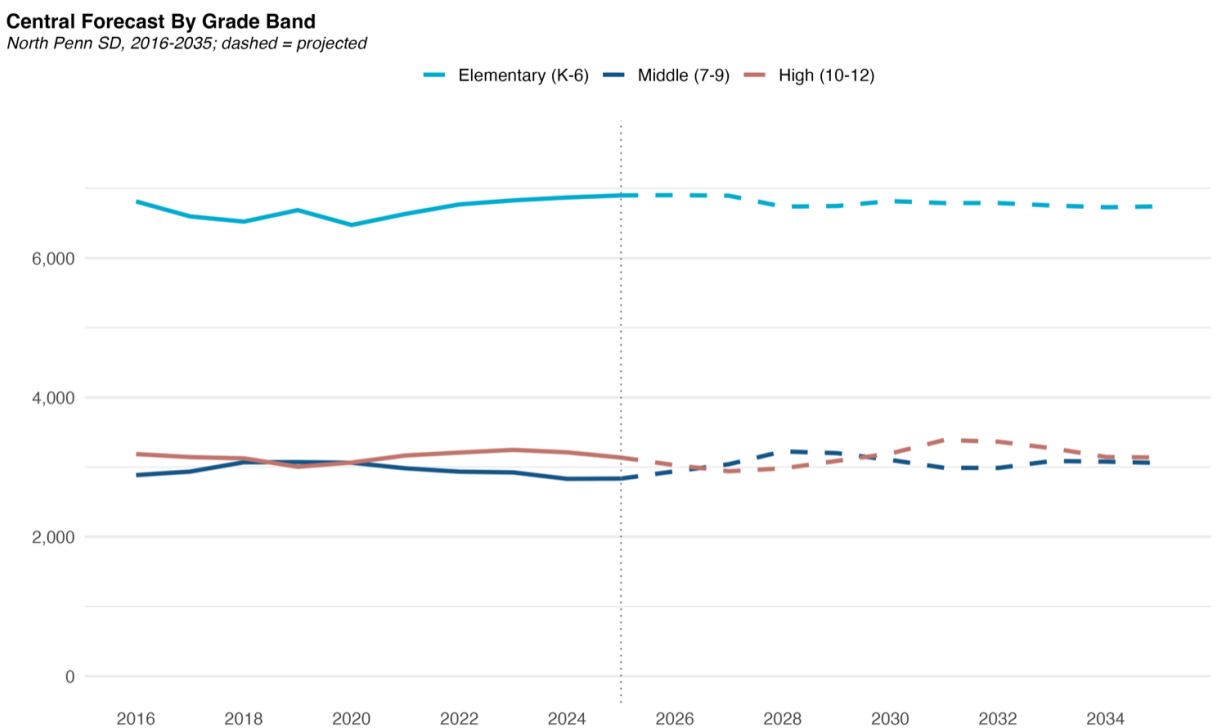
*Three scenarios on a single migration-intensity axis. The **low** runs just above the state (PDE) projection; the **central** holds steady; the **high** carries continued in-migration.*

Growth By Grade Band

+224
middle school (7–9), +7.9%

−157
elementary (K–6), −2.3%

+2
high school (10–12)



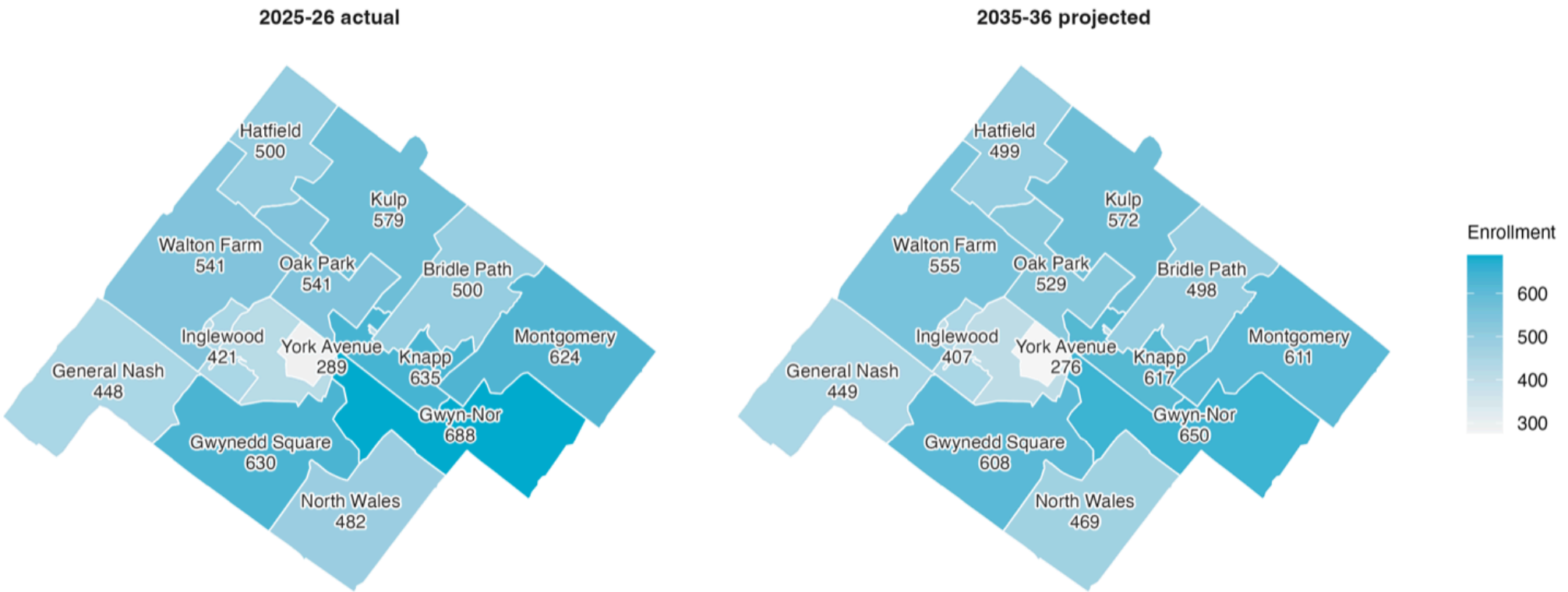
Source: DAA reconciled cohort-survival forecast (central scenario).

Middle school absorbs nearly all of the growth by 2035. Elementary declines slightly and the high school ends within a few students of where it is now.

Elementary Enrollment By Building

Elementary Enrollment By Building, 2025 And 2035

Central forecast. District elementary enrollment 6,878 to 6,740 (-2.0%); building changes run -38 to +14.



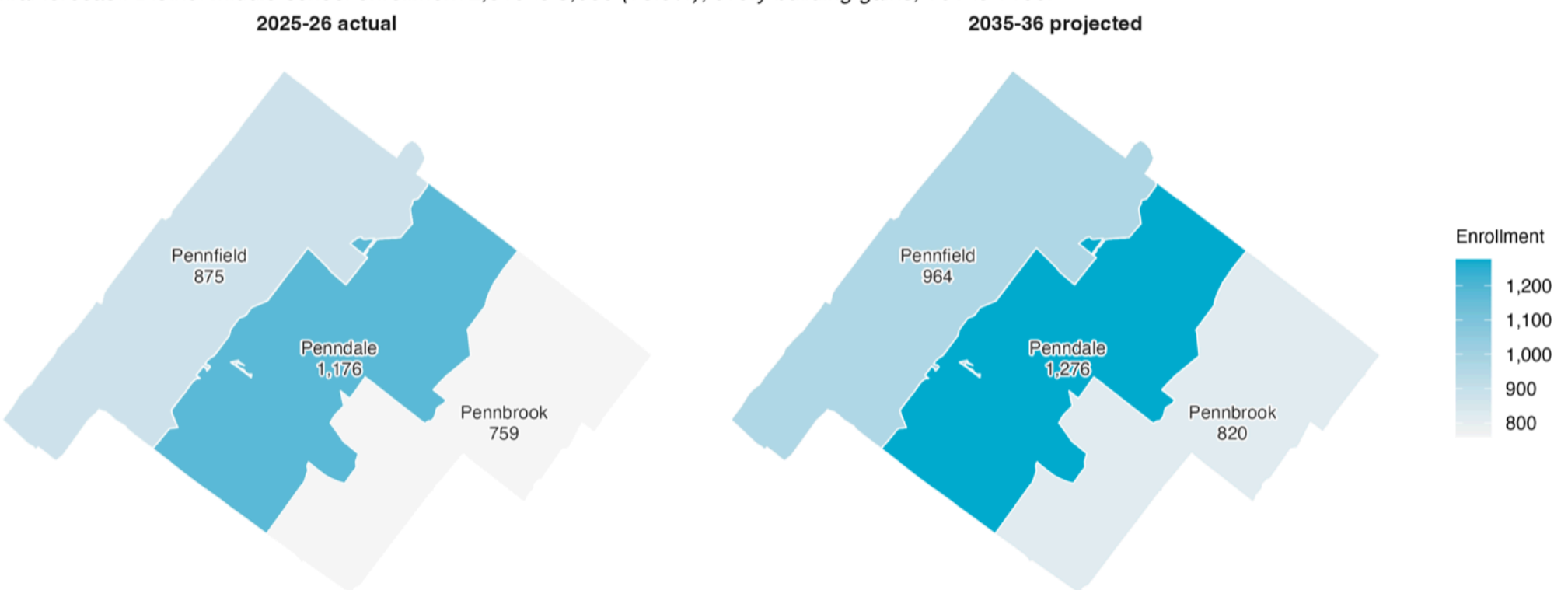
Source: North Penn records (actual); DAA central forecast allocated to buildings (projected). Enrollment at each school, on its boundary.

Only General Nash and Walton Farm end higher, and no building moves by more than 38 students. Elementary settles slowly and broadly rather than shifting between buildings.

Middle School Enrollment By Building

Middle School Enrollment By Building, 2025 And 2035

Central forecast. District middle-school enrollment 2,810 to 3,060 (+8.9%); every building gains, +61 to +100.



Source: North Penn records (actual); DAA central forecast allocated to buildings (projected). Enrollment at each school, on its boundary.

All three middle schools gain, from +61 to +100 students. ***Penndale*** *is the largest today at 1,176 and stays the largest at 1,276, but it also has the most permanent room; the space shortfall is at Pennfield and Pennbrook (see Facility Utilization).*

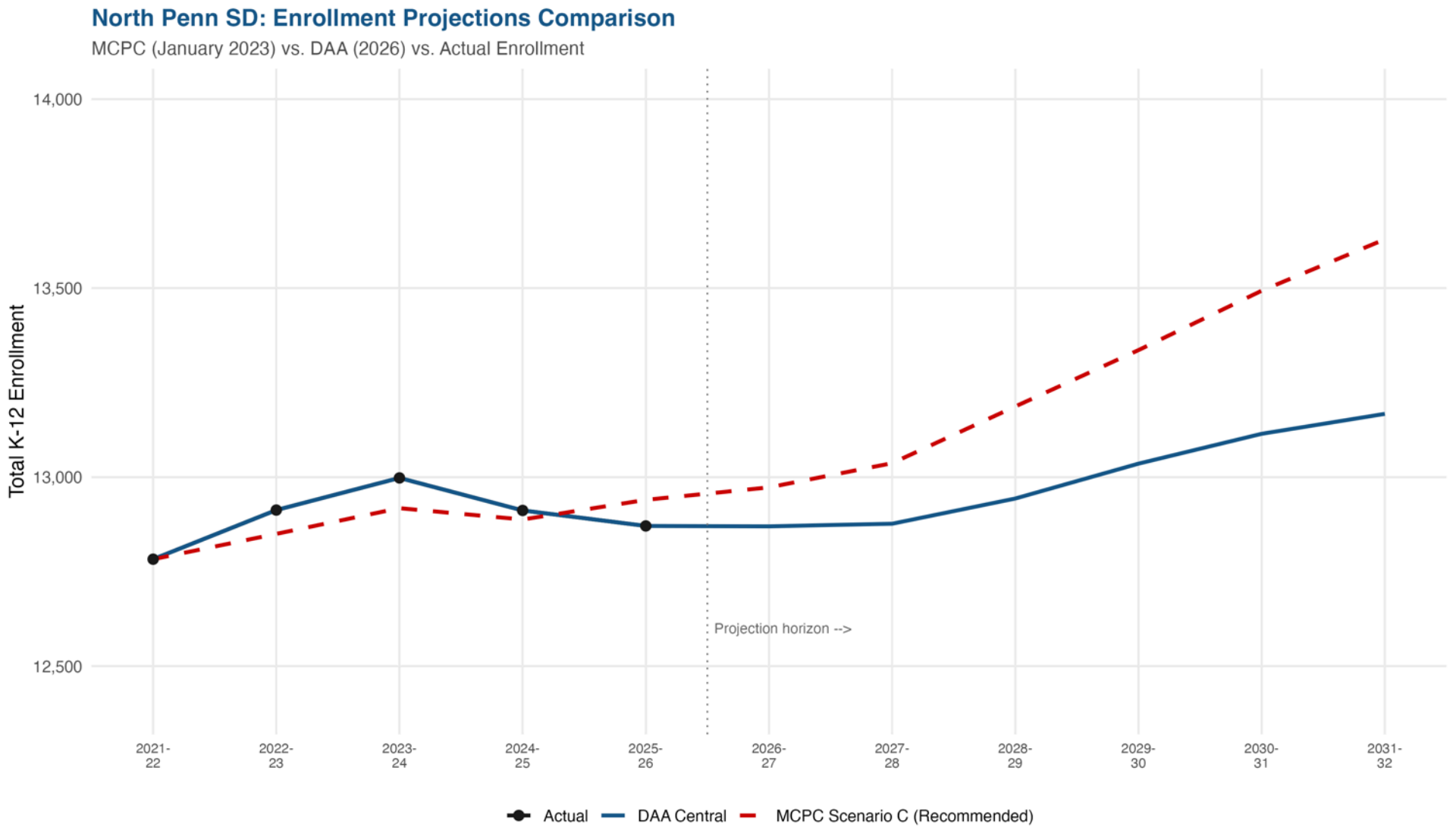
Why We Differ From The State Projection

12,953	11,768	12,131
DAA central, 2034	DAA with PDE's trimming rule	PDE official, 2034

PDE's method trims away grade-progression ratios above 1.0, which removes the net in-migration North Penn has recorded for ten straight years. Re-running **our own model with that one change** lands *below* PDE's projection. Births, kindergarten capture, and model mechanics are identical in both.

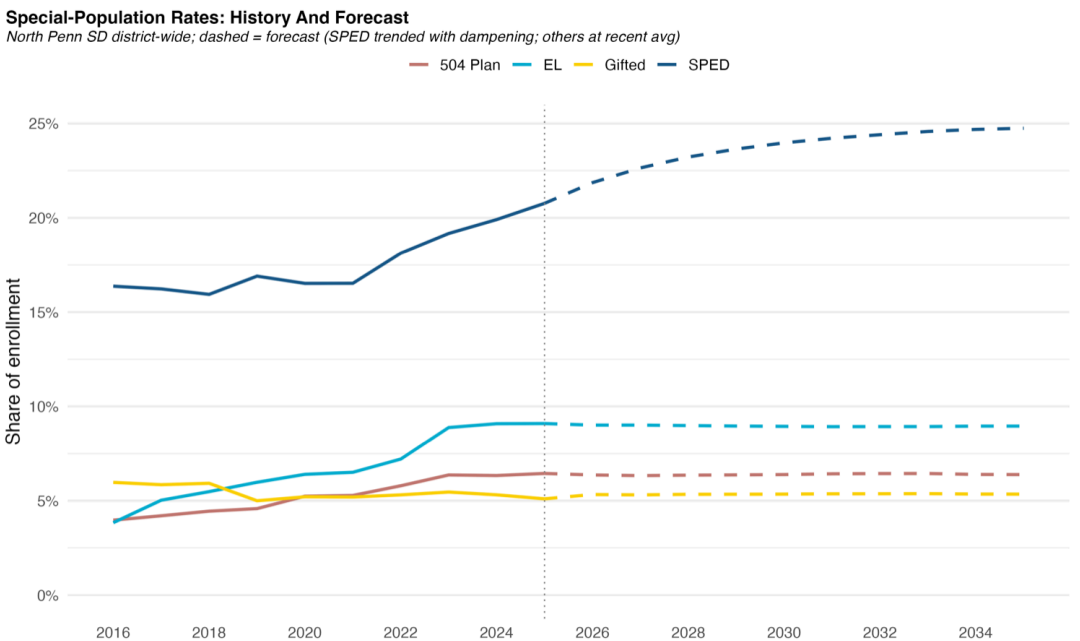
The in-migration PDE removes is directly observed: students in newly built homes, county migration estimates, and the rising birth-to-K capture all corroborate it.

Prior Forecast Performance

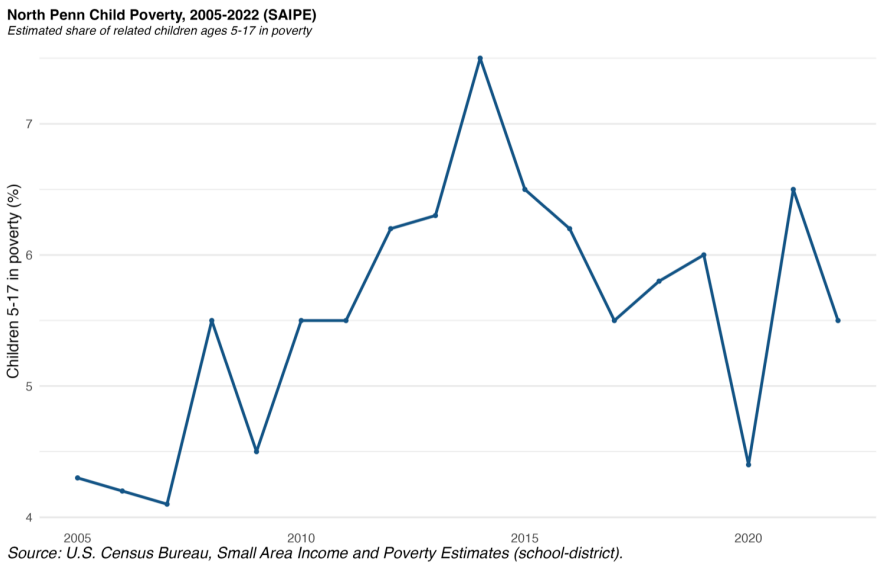


The 2023 MCPC forecast came within 1% at the district level, with an elementary over-projection offsetting a secondary under-projection. This study's updated capture and progression ratios address both.

Student Characteristics



Source: North Penn student records; rates applied to DAA reconciled enrollment forecast.



Source: U.S. Census Bureau, Small Area Income and Poverty Estimates (school-district).

*Special education continues its recent climb, reaching about **25% of enrollment by 2035** under a dampened trend; EL, 504, and gifted shares hold near recent levels. Child poverty is low and stable at about **5.5%** of children ages 5–17.*

Special Education

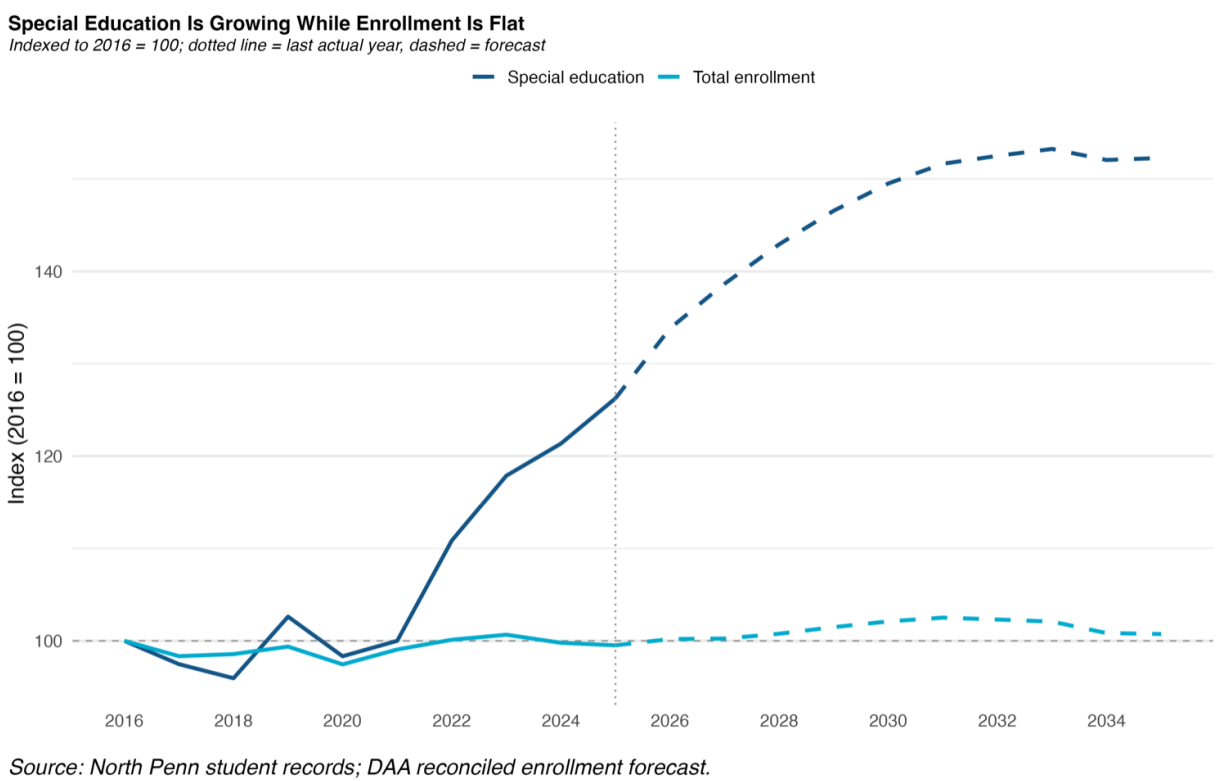
The district total is close to flat. The special-education population is not.

Special Education Is Growing While Enrollment Is Flat

+52%
special education, 2016–2035

+0.7%
total enrollment, same span

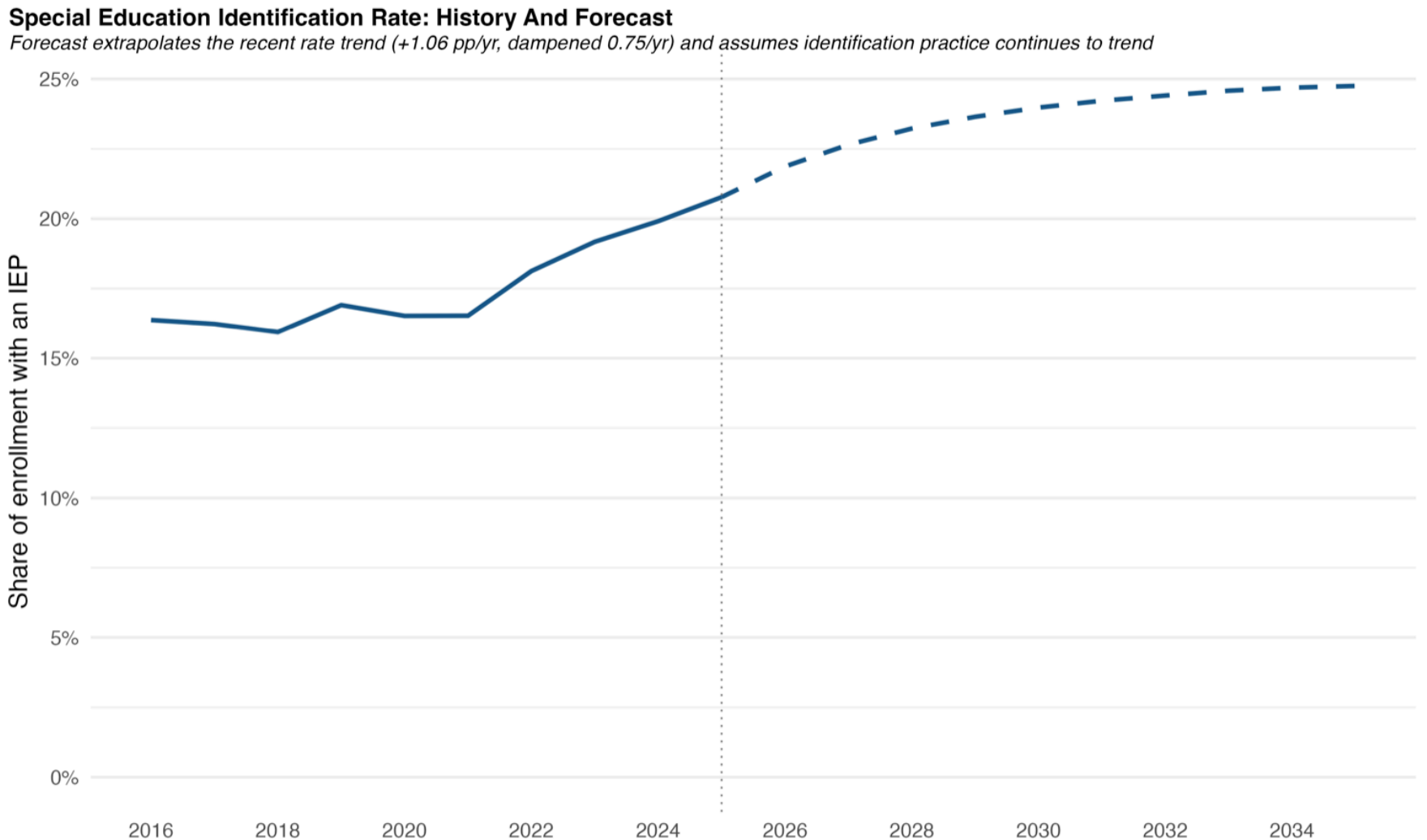
+1099
students with an IEP



Source: North Penn student records; DAA reconciled enrollment forecast.

*Special education has grown from **2,103** students in 2016 to a projected **3,202** in 2035, while total enrollment moves +0.7%. Planning to the district total alone understates what the buildings have to absorb.*

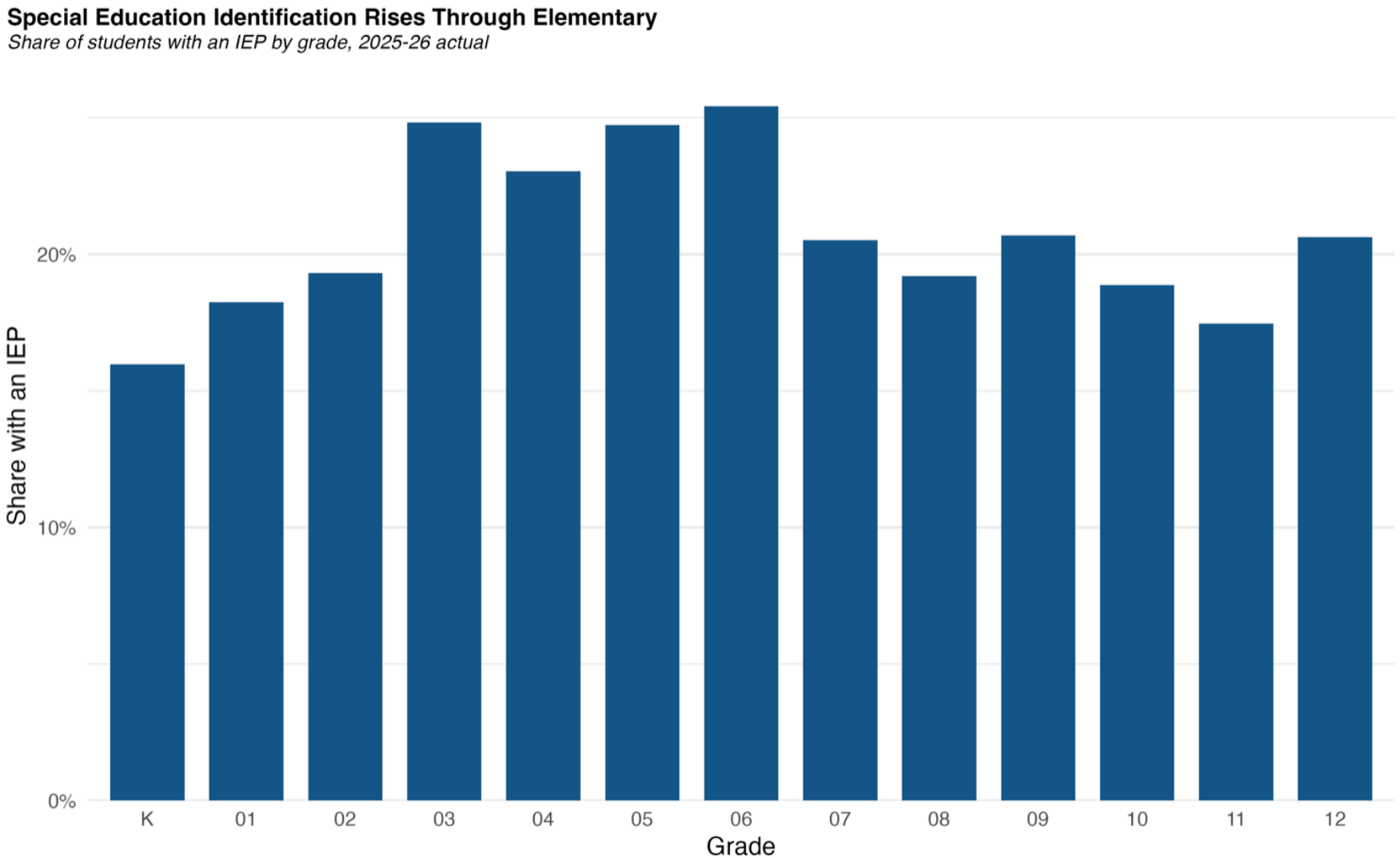
The Identification Rate Is Still Climbing



Source: North Penn student records. Rate trend is an assumption, not a demographic projection.

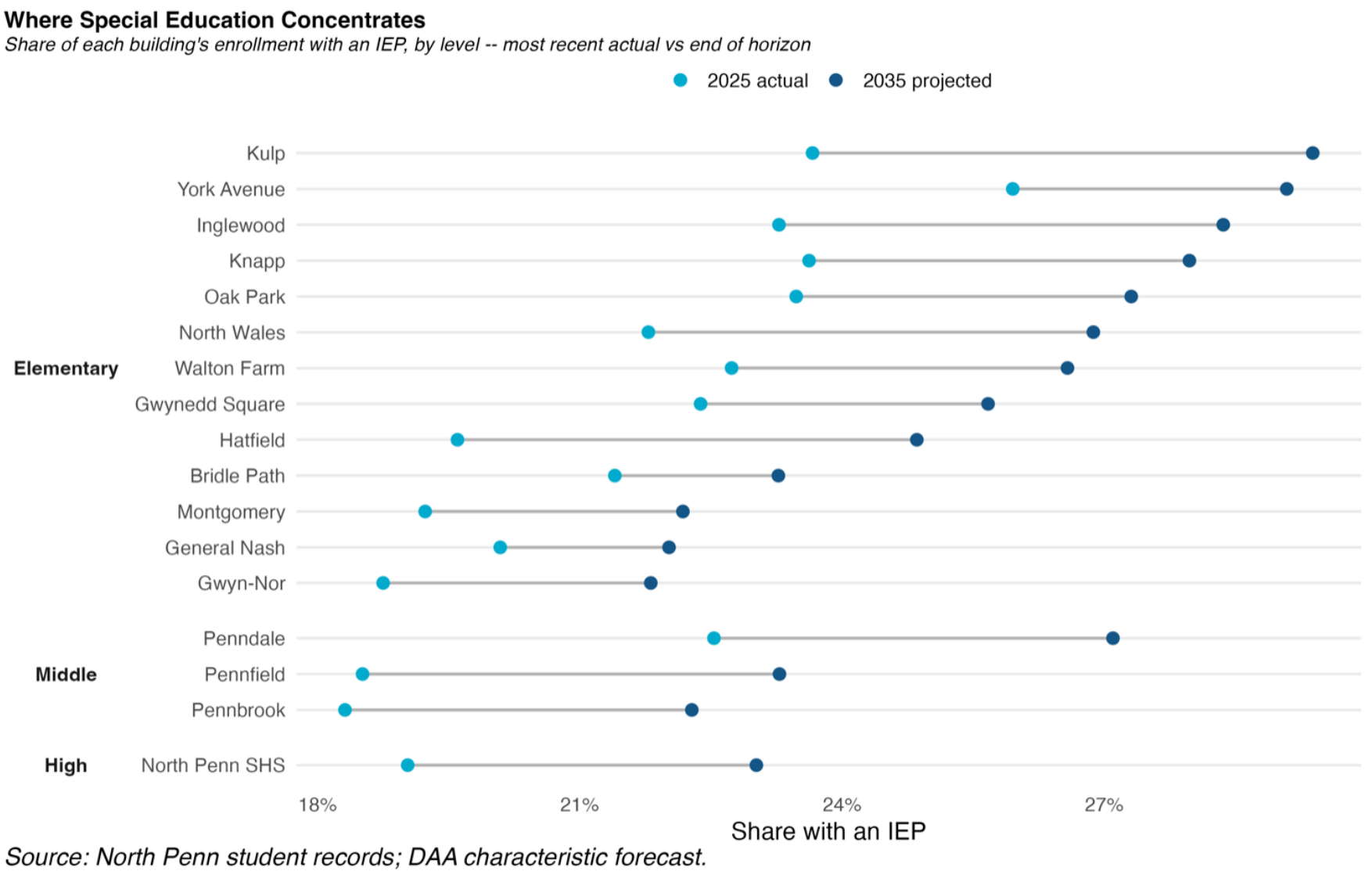
*The share of students with an IEP rose from **16.4%** in 2016 to **20.8%** in 2025, and reaches about **25%** by 2035 on a dampened trend. This is an assumption about identification practice, not a demographic projection — if identification levels off, the count follows enrollment instead.*

Identification Rises Through Elementary



*Kindergarten enters at about **16%**; the rate peaks near **25%** at grade 6. Students are identified after they arrive, so elementary buildings absorb the growth first and carry it upward through the grades.*

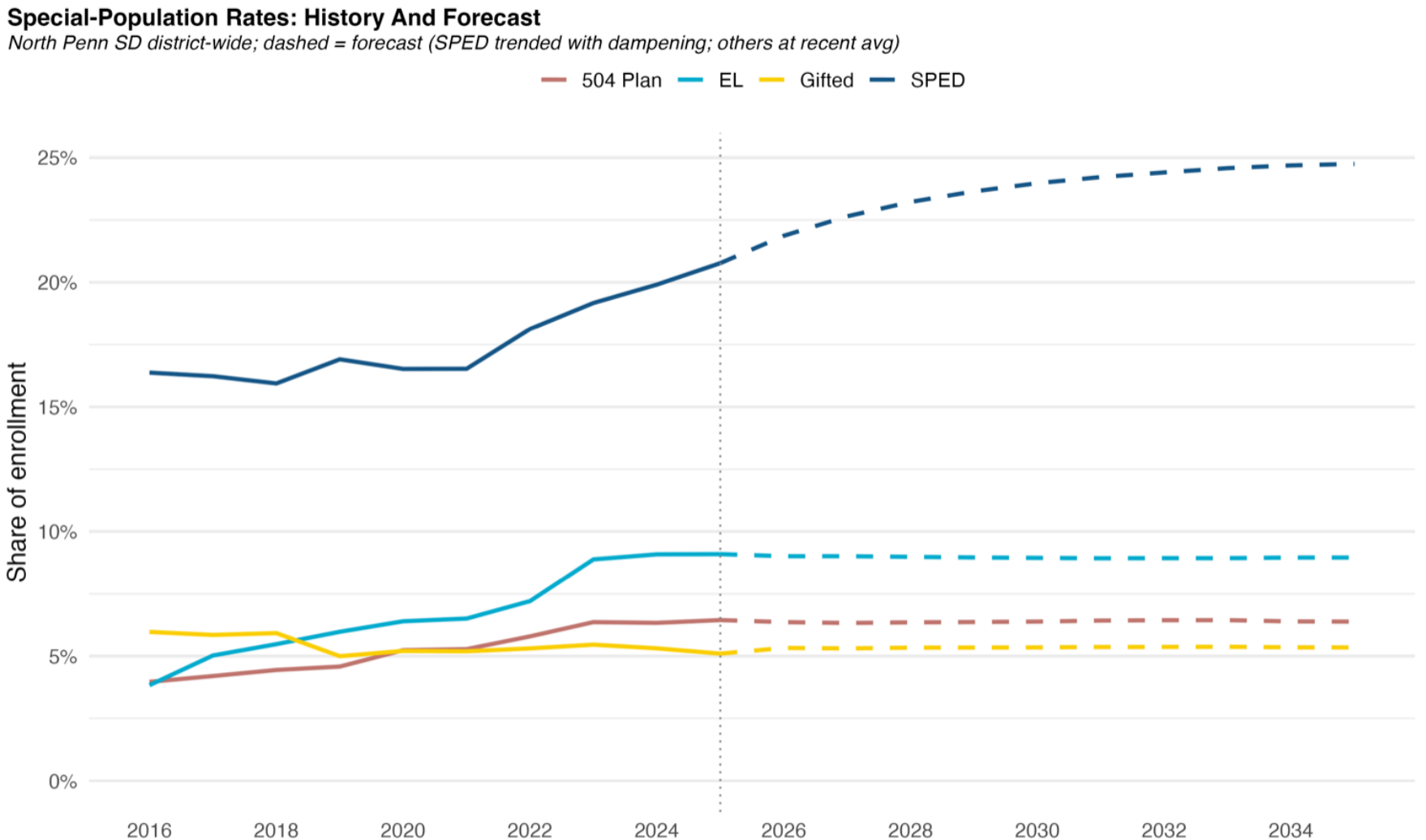
Where Special Education Concentrates



Source: North Penn student records; DAA characteristic forecast.

*The spread across buildings is wide: **York Avenue** at about **26%** against **Pennbrook** at about **18%**. Service demand is not distributed like enrollment, so staffing and room needs do not follow head-count alone.*

Special Education Alongside The Other Programs



Source: North Penn student records; rates applied to DAA reconciled enrollment forecast.

Special education is not moving alone. EL has grown steadily over the same period, 504 plans continue to rise, and gifted holds near a constant share. The combined services load is growing faster than the enrollment that carries it.

Special Education And Capacity

24
elementary specialized classrooms

3
buildings suitable for more

What the district's own documentation shows. Twenty-four elementary specialized classrooms operate across the 13 elementary buildings, three of them added for 2026–27. The special-education siting review identifies only **three** elementary buildings suitable for additional specialized rooms.

Where that meets capacity. The facility study counts rooms at their 2026–27 use, so specialized classrooms are already out of general-education seats. Two of the three buildings suitable for more rooms are already at or above the 90% target on permanent space: Gwyn-Nor (101% today) and North Wales (91%). Kulp has room (81% in 2030–31) but also the largest development-pipeline impact.

Every specialized room added at Gwyn-Nor or North Wales comes out of a building with few general-education seats to spare.

Facility Utilization

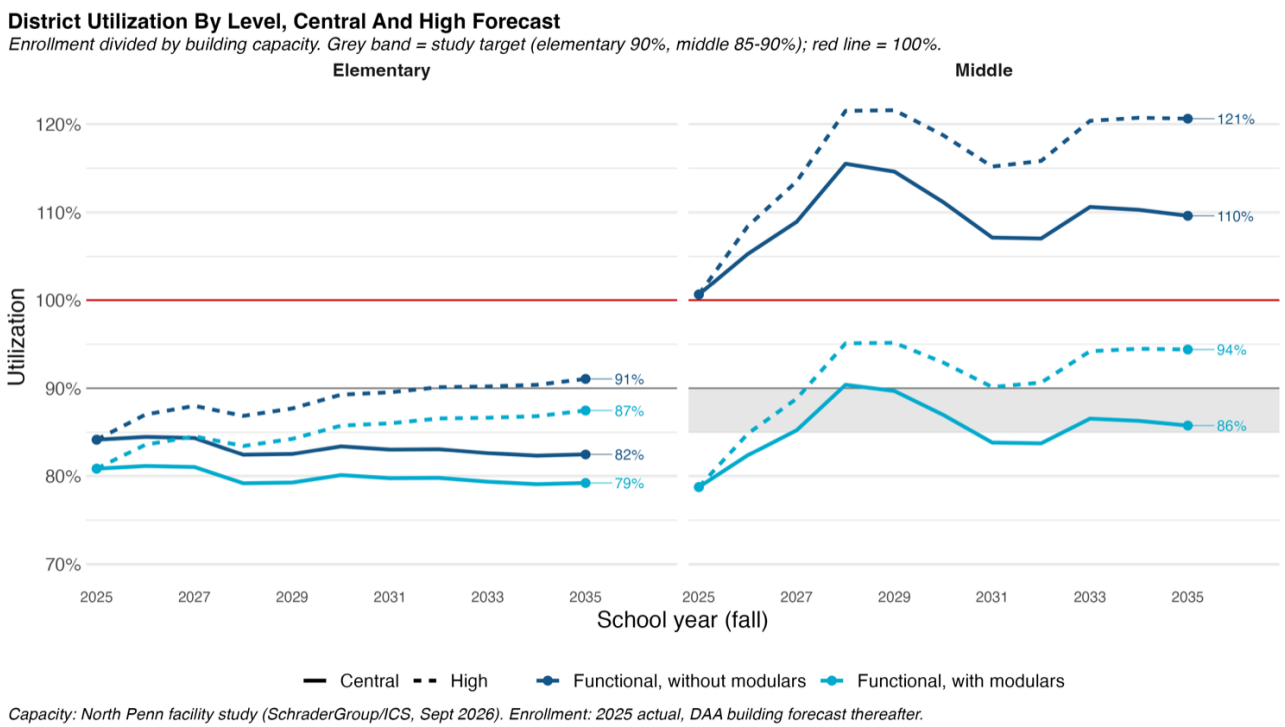
Enrollment against the capacities in the district’s September 2026 facility study, every elementary and middle school, every year through 2035.

Utilization By Level

83%
elementary, 2030–31 central (89% high)

116%
middle-school peak, 2028–29 central (122% high)

776
middle-school seats in modulars



Functional capacity without modulars. With the modulars counted, middle school peaks at 90%: the middle grades depend on the modular units for the whole forecast period.

Relation To The District's Facility Study

The facility study's 2030–31 projections are our **high** forecast for every building. The district chose the high band to show the most aggressive plausible impact; we report both.

- **Middle school, 2030–31, without modulars:** 119% high (the study's figure), 111% central.
- **Elementary, 2030–31, without modulars:** 89% high, 83% central.
- **Either way, the conclusion holds:** middle school exceeds permanent capacity in every year, and the shortfall is at Pennfield and Pennbrook while Penndale has room.

North Penn High School is newly built and outside the scope of this utilization analysis.

Recommendations

- **Plan level by level.** Middle school gains 224 students (+7.9%) across three buildings while elementary declines by 157 across 13.
- **Plan zone by zone.** Oak Park gained 182 resident students since 2016; Montgomery lost 173. Growth and decline are happening at the same time in different places.
- **Address middle-school space first.** Pennfield and Pennbrook exceed permanent capacity every year through 2035 while Penndale has room; the modulars are carrying the level.
- **Check the pipeline against building capacity.** 1,011 units remain to be built, the largest share in the Kulp boundary.
- **Monitor in-migration and birth-to-K capture.** In-migration drives most of the gap with PDE's projection; both can be checked against each fall's enrollment.

Plan For Differential Growth

K–12 enrollment stays near **12,940** through 2035, but the change is distributed unevenly across grade levels and attendance zones. The tightest space is in the middle grades: **Pennfield and Pennbrook exceed permanent capacity in every year** through 2035, while Penndale and most elementary buildings have room.