| **Material Revision - Enrollment**  ***Narrative*** |
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**Provide a clear explanation of the reason for the enrollment revision.**

Urban Montessori Charter School’s (“UMCS” or the “Charter School”) current enrollment projections were most recently approved by the Alameda County Board of Education (“ACBOE”) in UMCS’ June 2022 material revision, which was specific to our enrollment change at that time. Since then, we experienced an enrollment drop for the 2022-23 school year that exceeds the 10% threshold in UMCS’ Memorandum of Understanding (“MOU”) with ACBOE, due to the ongoing effects of the COVID-19 pandemic. An enrollment decline from our prior forecast requires us to seek this material revision with updated enrollment projections for the current school year, and the final year of our current charter term, which was extended through June 2024 by operation of law.

Our enrollment was most impacted in our Primary classrooms, which serve Transitional Kindergarten and Kindergarten students (TK & K). These are the school-aged children who lacked access to vaccines the longest. Had we had a normal enrollment into our Primary classrooms, and a greater number of students returning in 1st grade, we expect that the Charter School likely would not have fallen outside 10% enrollment buffer described in the MOU.

This material revision for enrollment seeks to update the UMCS charter with accurate enrollment for the current 2022- 23 school year, and provide enrollment forecasts for the final year of the extended charter term, 2023-24. UMCS does not seek to materially grow the Charter School beyond what was approved in the past—but we now plan to be more balanced across grade levels and will also respond to California’s new expansion of TK eligibility by balancing our TK and K enrollment. Previously, students were eligible for TK if they turned 5 between September 2nd and December 1st. Now that the birthdate range has expanded and is continuing to expand, we are able to enroll an equal number of TK students and K students in our primary classrooms.

UMCS currently approved and actual enrollments:

| School Year | Approved Enrollment in Charter | Actual Enrollment |
| --- | --- | --- |
| 2017-18 | 408 | 448 |
| 2018-19 | 441 | 432 |
| 2019-20 | 390 | 393 |
| 2020-21 | 403 | 395 |
| 2021-22 | 407 | 351 |
| 2022-23 | 406 | 326 |
| 2023-24 | 445 | TBD |

UMCS requested material revision proposal:

| School Year | Approved Enrollment in Charter | Material Revision Proposal | # & % from prior approval |
| --- | --- | --- | --- |
| 2022-2023 | 406 | 326 | (80) / 20% |
| 2023-2024 | 445 | 384 | (61) / 14% |

As reflected in the table above, UMCS proposes to serve 326 students in the 2022-23 school year, which is 77 fewer students than previously projected for this year. We thereafter forecast an increase in 2023-24 to serve a total of 384 students. Based on the uncertainty brought about by the pandemic, combined with the statewide expansion of transitional kindergarten eligibility, we are intentionally taking a conservative approach to projecting student enrollment in the next few years. We have already secured enough applications for TK & K the 2023-24 school year, to reasonably forecast our return to expected numbers at the Primary level.

Each year, the Charter School plans five school years out into the future. At this time, five years out is beyond the scope of this Material Revision proposal. What we share below beyond the 2023-24 school year is simply to provide more information about future planning, and does not reflect a commitment to any projected enrollment numbers beyond the years impacted by this material revision.

Ultimately, UMCS plans for balanced enrollment numbers across grade levels, and projects to balance out at approximately 424 students by 2026-27. The following chart shows planned enrollment projections for each grade level from 2022-23 through 2026-27. As stated above, only the projected enrollment for the remainder of this charter term (June 30, 2024) is formally being submitted to ACBOE for review and approval as part of this material revision. The future projections for 2024-25 through 2026-27 are included to show planning for future years, which may be adjusted as needed, and will ultimately be reflected in UMCS’ next charter renewal petition.

The difference between the projection of 326 students in 2022-23 and the estimated future projection of 424 students in 2026-27 accounts for the expansion of TK eligibility and our middle school maturation.

| School Year | Enrollment | TK | K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 2022-23 | **326** | 33 | 37 | 37 | 30 | 46 | 45 | 35 | 27 | 21 | 15 |
| 2023-24 | **384** | 36 | 49 | 42 | 41 | 37 | 45 | 45 | 42 | 26 | 21 |
| 2024-25 | 396 | 44 | 44 | 44 | 41 | 41 | 36 | 41 | 41 | 38 | 26 |
| 2025-26 | 417 | 44 | 44 | 42 | 41 | 41 | 42 | 41 | 41 | 43 | 38 |
| 2026-27 | **424** | 44 | 44 | 42 | 41 | 41 | 42 | 41 | 41 | 44 | 44 |
| Difference between 2022-23 current actual and 2026-27 projection | 98 | 11 | 7 | 5 | 11 | -4 | -3 | 6 | 14 | 23 | 29 |
| Difference between 2022-23 last approved and 2026-27 projection | 18 |  | | | | | | | | | |
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**Explain any staffing and programmatic changes that will take place as a result of the proposed enrollment revisions.**

During the remainder of this charter term, UMCS predicts no staffing changes as a result of the proposed enrollment revisions. Programmatically, in school year 2023-24, one Lower Elementary classroom will be consolidated but the number of positions will remain the same with the growth of our middle school and staff coaching programs.

**Explain changes to student recruitment that will take place as a result of the proposed enrollment revisions.**

The Charter School does not expect any changes to student recruitment as a result of the proposed enrollment revisions. UMCS will continue to accept applications for students each year in all ten grade levels we serve—TK through 8th grade. UMCS partners with Oakland Enrolls for the student application process, which includes recruitment efforts. Because of the pandemic, we have hosted virtual-only enrollment events and campus tours at a variety of days and times and in more than one language.

**Provide a detailed description of any changes to your facility due to the enrollment decline.**

UMCS will not experience any changes to its facility due to the enrollment decline.

**Provide an overall description of how the proposed enrollment change will impact the budget for the remainder of the petition period.**

The proposed enrollment impacts our budget but we have adjusted our projections accordingly. When UMCS looks to the future, for the years in our Material Revision proposal, we conservatively forecast modest operating incomes and a healthy fund balance.

| School Year | Public Revenue | Operating Income | Percent |
| --- | --- | --- | --- |
| 2022-23 | $5,198,033 | $179,450 | 3.4% |
| 2023-24 | $5,080,582 | $92,837 | 1.8% |

UMCS’ return to its prior-approved enrollment is supported by California’s expansion of Transitional Kindergarten, completing the natural growth in the middle school, and the number of applications received, to date, for the 2023-2024 school year.