

Student Membership Forecast

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Board of Education Work Session I March 10, 2026

Goals for This Session

*By the end of today's discussion,
Board members will have had
an opportunity to...*

- *Receive an overview of the purpose of the student membership forecast*
- *Review the process used to develop the forecast for this cycle*
- *Review the student membership forecast for 2026-27 through 2034-35*
- *Share thoughts and questions for staff review and response*

Overview

Strategic Plan Alignment

Equity-focused practices

Aim 14: Differentiate resource allocation to provide PreK-12 students with equitable access to high-quality teachers and principals, and sufficient support services.

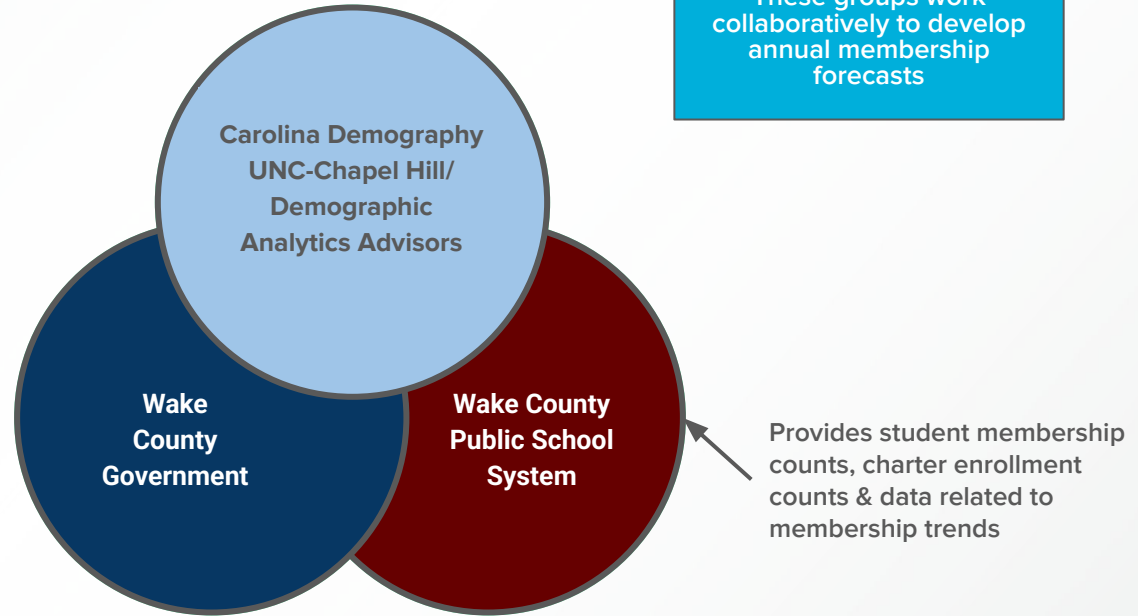
Strategic Plan Alignment

Effective Operations, Services, and Facilities

Aim 17: Ensure that all students and staff have continuous, high-quality, and equitable access to facilities and technology (infrastructure and devices).

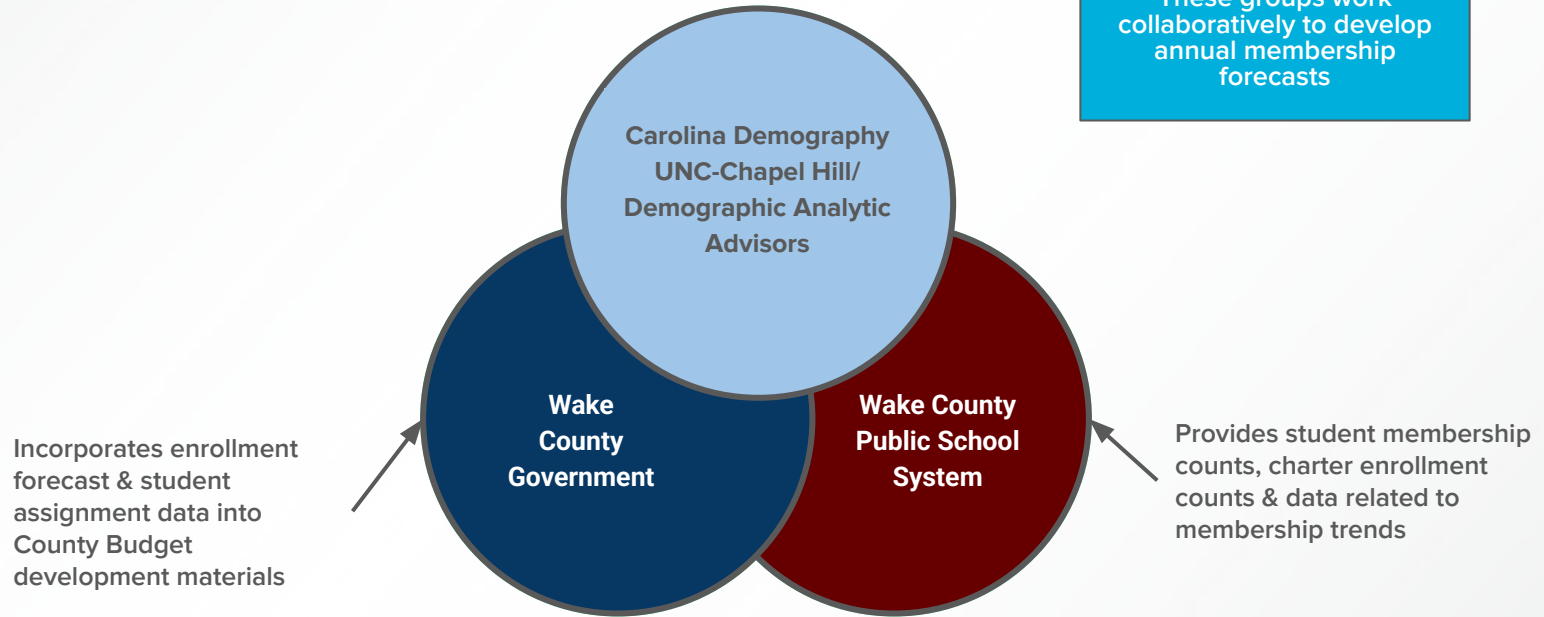
Aim 20: Establish new systemic processes and guidelines balancing operational efficiency, fiscal responsibility, and environmental sustainability.

A Collaborative Effort



A Collaborative Effort

These groups work collaboratively to develop annual membership forecasts



A Collaborative Effort

Collects data from WCPSS, Wake County planning, municipal planning agencies & other regional sources

Carolina Demography
UNC-Chapel Hill/
Demographic Analytic
Advisors

These groups work collaboratively to develop annual membership forecasts

Incorporates enrollment forecast & student assignment data into County Budget development materials

Wake
County
Government

Wake County
Public School
System

Provides student membership counts, charter enrollment counts & data related to membership trends

Presentation of the Annual Membership Forecast (1-year and 10-year projections)

1

Presentation of the Annual Membership Forecast (1-year and 10-year projections)

2

Review of Projected Crowding for the Next School Year

3

Review of Capital Improvement Plan (CIP) Updates (7-year plan)

4

Preparation of the Annual Enrollment Plan

5

Review and Approval of Capped Schools due to Overcrowding Concerns

6

Review of Options to Address Other School Utilization Concerns

Develop the Forecast:

- Data Integration & Trend Assessment
- Predictive Modeling & Stress Testing
- Collaborative Validation

Present & Share the Forecast:

- Capacity Management, CIP Calibration & Budget Development (WCPSS)
- CIP Support & Budget Development (Wake)

How the Forecast Outputs are Used

WCPSS

- Budget Development
- Capacity Management
- CIP Strategy
- Resource Planning

Wake County

- Local Appropriation
- Capital Investment
- Fiscal Context

Forecast Process

Developing the Forecast

Step 1

Report School Data

WCPSS provides membership data at the end of the 2nd month (PMR2) and charter enrollment data for Wake County students from the same time frame.

Step 2

Incorporate Additional Demographic Data

The forecast team combines school data, historic membership data, and educational market share patterns with other indicators such as demographic trends, residential sales, and employment data.

Step 3

Create Forecast

The forecast team develops new projections taking into account all available data sets and analyzes relative to other national, state, and county trends.

Definitions

ADM: Average Daily Membership is the number of membership days for all students not in attendance violation, divided by the number of days in the school month (used for NCDPI funding)

PMR2: Principal's Monthly Report, month 2, ADM for all schools

Enrollment: The actual number of students actively enrolled, regardless of attendance violations

Attendance Violations: When a student accumulates ten consecutive days of unexcused absences, often referred to as the “10-day rule”

What a Forecast Is...

- A scientific “most likely” scenario based on all inputs
- An extremely useful planning tool, if used correctly and questioned

What a Forecast Isn't...

- A magic solution that will tell someone, with complete accuracy, what enrollment will be in 10 years
- A random and wild guess at what enrollment will be in 10 years

WCPSS Enrollment Forecast: Summary

Current membership and enrollment levels decreased slightly year-over-year (-0.4% vs expected 0.8% increase).

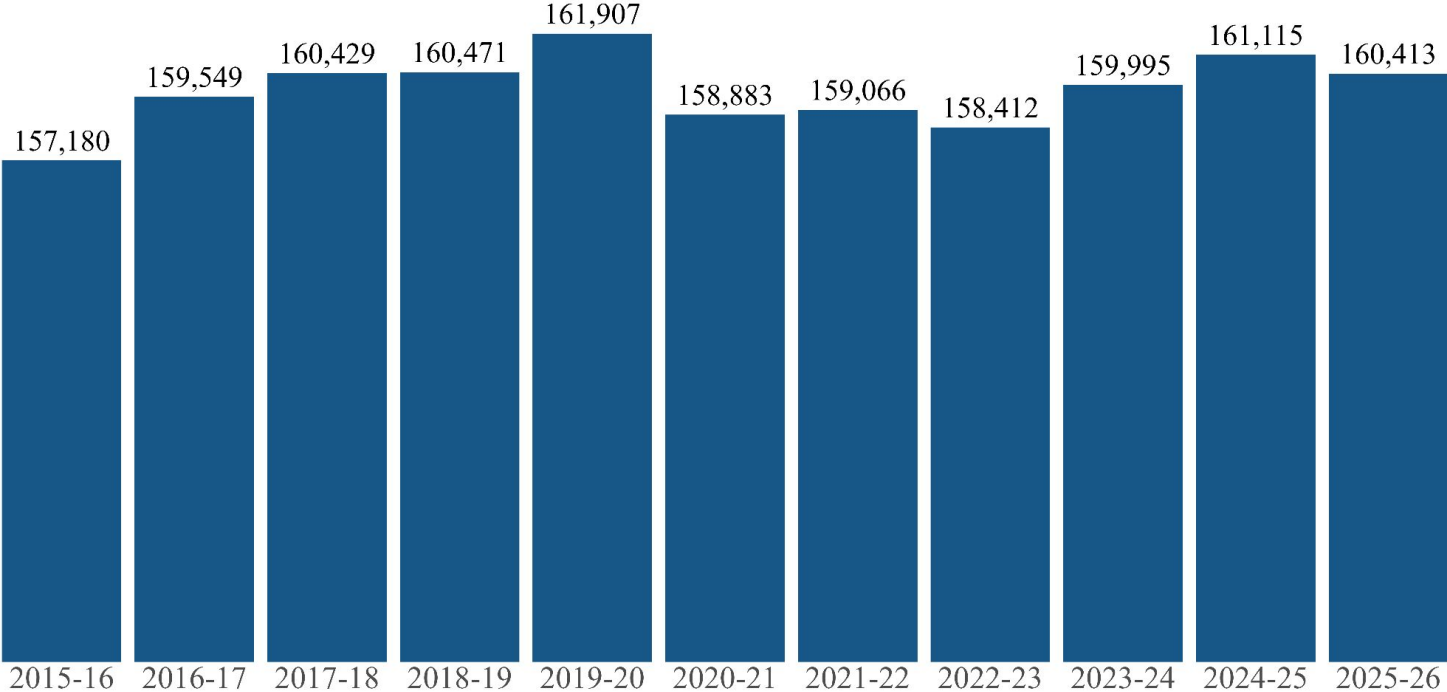
Factors impacting changes in ADM:

- Expansion of the Opportunity Scholarship Program has and will likely continue to impact market share
- Declines in foreign-born migration are directly impacting ADM
- Economic indicators remain strong with no changed impact on ADM
- Live births declined in 2022/2023 - effect visible in SY 2027

Reporting School Data

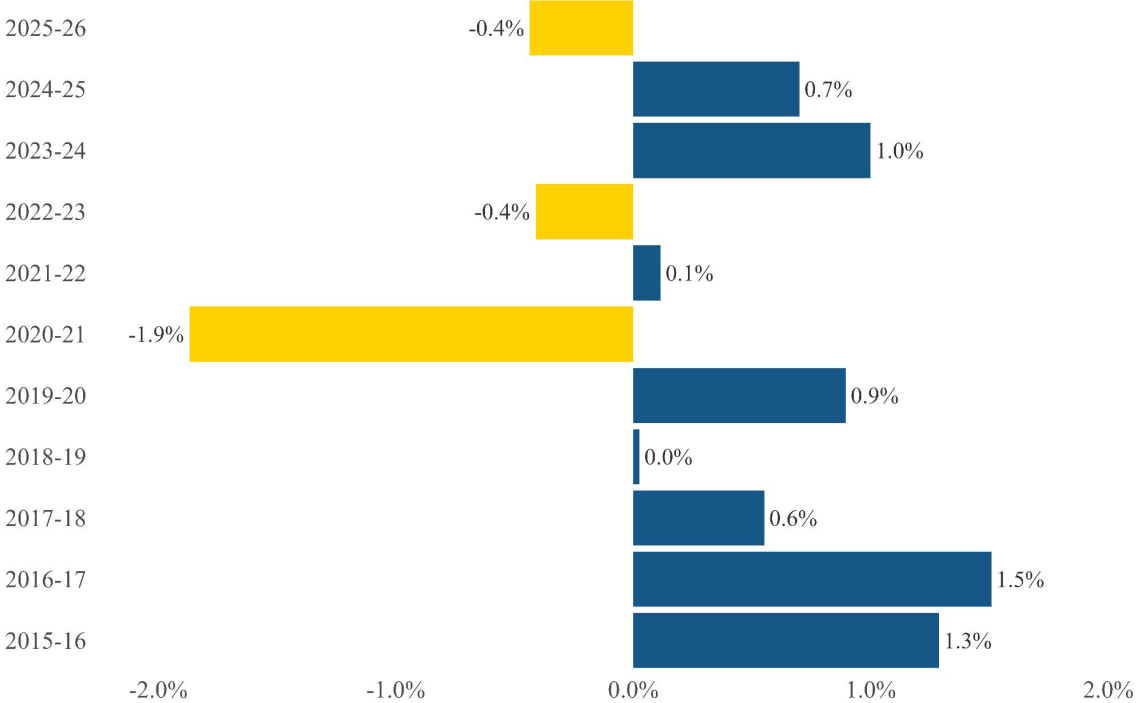
Attendance

Month 2 Average Daily Membership (ADM) Trends



Percentage Month 2 ADM Changes (yoy) 2015-16 to 2025-26

Wake is the 2nd fastest growing county in the state between 2023 and 2024 and among other comparable counties in the nation in terms of numeric population increase*



*2024 Population Estimate between 1.2M- 1.3M.
Source: 2024 Vintage Population Estimates, U.S. Census Bureau

Month 2 ADM Changes 2025-26 vs 2024-25

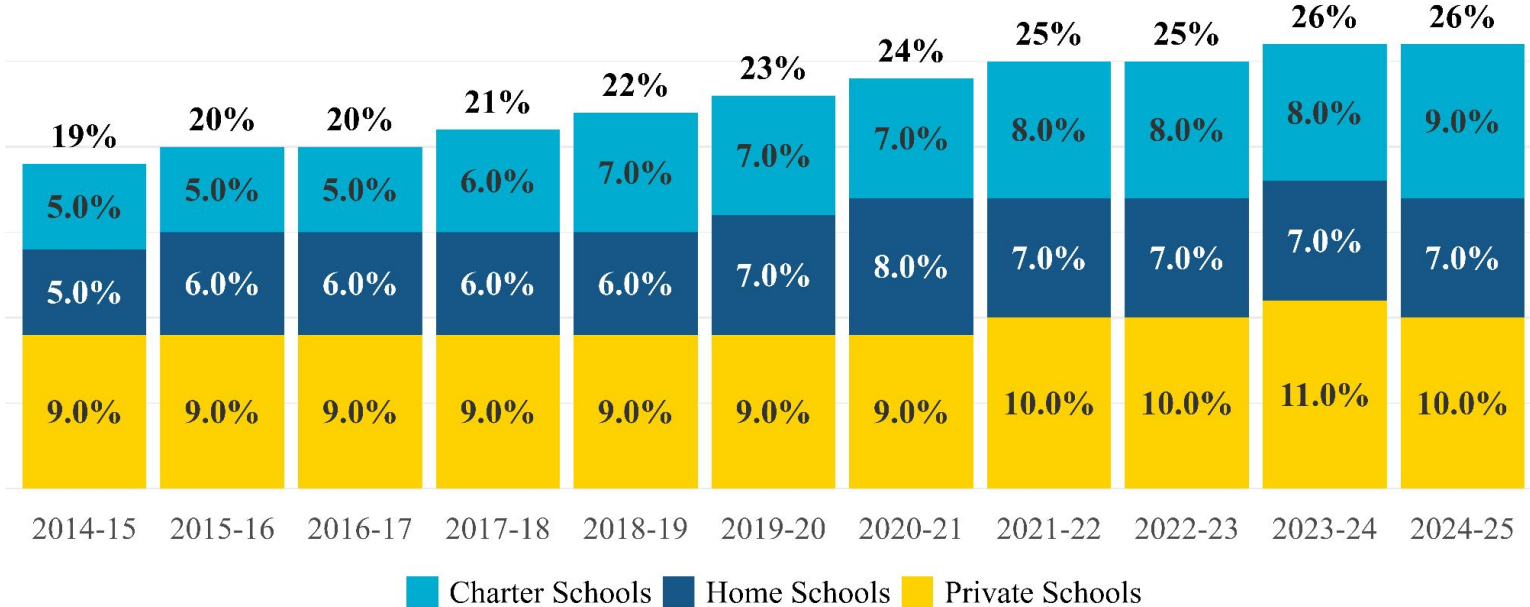
(selected LEAs, sorted by % Change)

	2024-25	2025-26	Change	Percentage Change
North Carolina Total	1,368,531	1,345,078	-23,453	-1.7%
Johnston County Public Schools	37,030	37,031	1	0.0%
Wake County Schools	161,115	160,413	-702	-0.4%
Franklin County Schools	7,855	7,813	-42	-0.5%
Harnett County Schools	19,844	19,669	-175	-0.9%
Nash County Public Schools	12,973	12,758	-215	-1.7%
Charlotte-Mecklenburg Schools	141,726	139,328	-2,398	-1.7%
Chatham County Schools	8,790	8,640	-150	-1.7%
Guilford County Schools	66,055	64,718	-1,337	-2.0%
Cumberland County Schools	48,374	47,107	-1,267	-2.6%
Orange County Schools	6,908	6,716	-192	-2.8%
Chapel Hill-Carrboro City Schools	11,099	10,758	-341	-3.1%
Winston Salem / Forsyth County Schools	50,550	48,985	-1,565	-3.1%
Durham Public Schools	31,024	29,737	-1,287	-4.1%
Granville County Schools	6,273	5,860	-413	-6.6%

Source: Month 2 ADM. Principal's Monthly Report, NC DPI and WCPSS Technology

Market Share Impacts

Market Share of Non-WCPSS Schools*

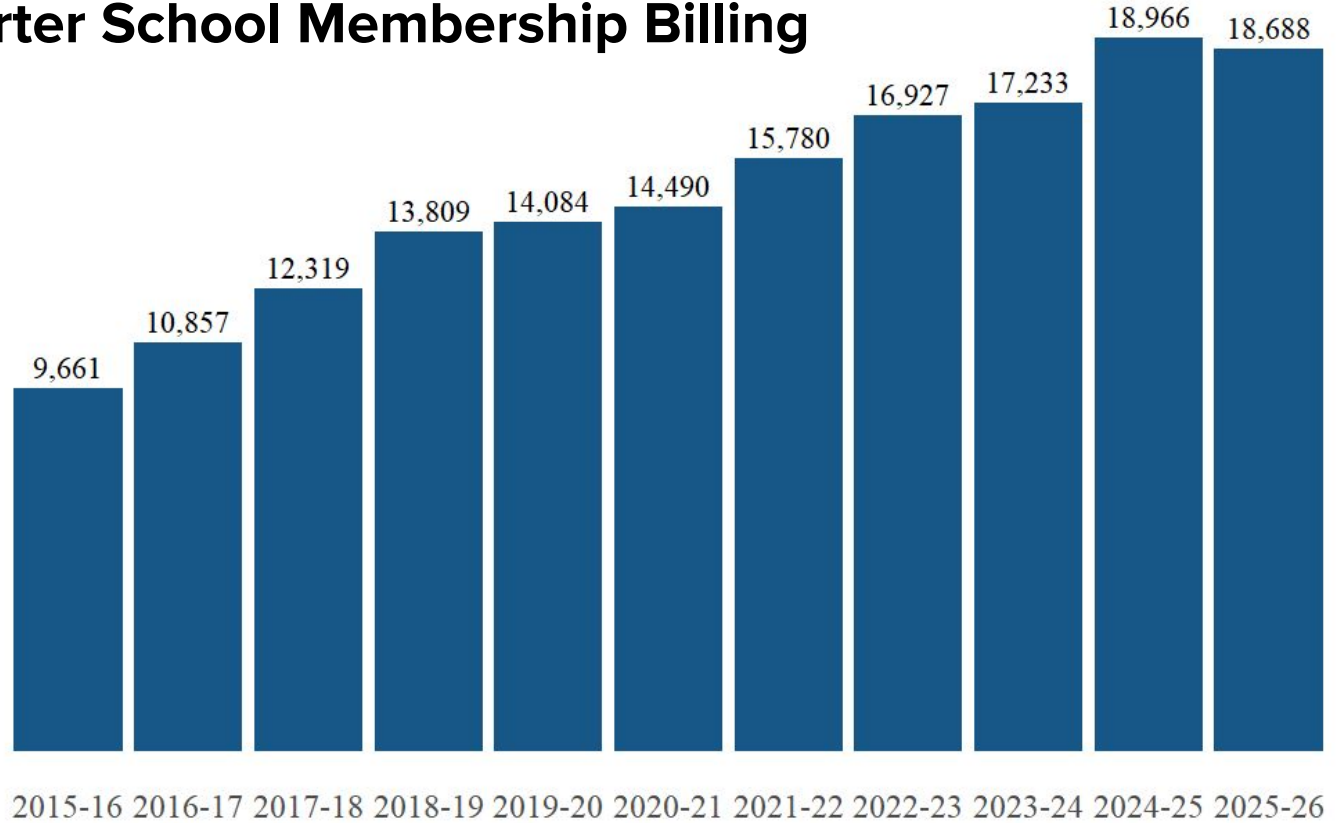


Non-WCPSS
Market Share:
~26% in 2024-25

*Private and Homeschool Data is not reported to DOA until June, so Market Share for 2025-2026 is not reflected in this chart.

Wake County Charter School Membership Billing

No new charter schools opened in 2025-26

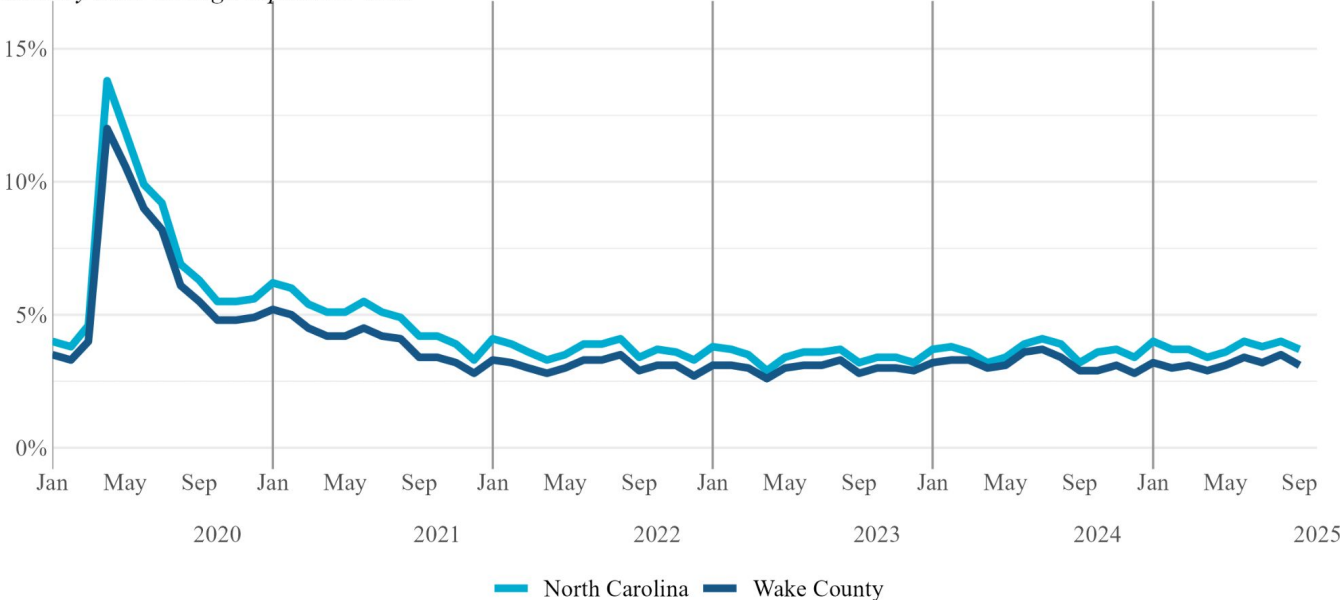


Incorporating Additional Demographic Data

Economic Indicators

Unemployment in Wake County

Unemployment Rate by Month, Wake County vs. NC
January 2020 through September 2025

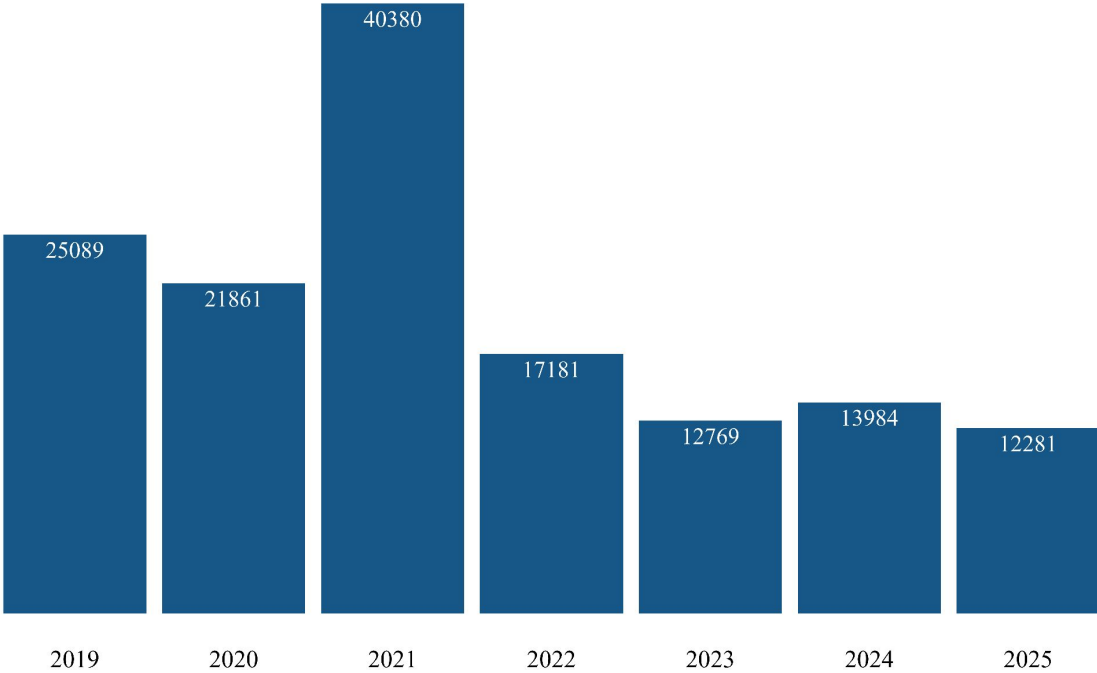


Wake County's unemployment rate has been consistently lower than the state average

Home Sales in Wake County

Home Sales in Wake County: January - September: 2019-2025

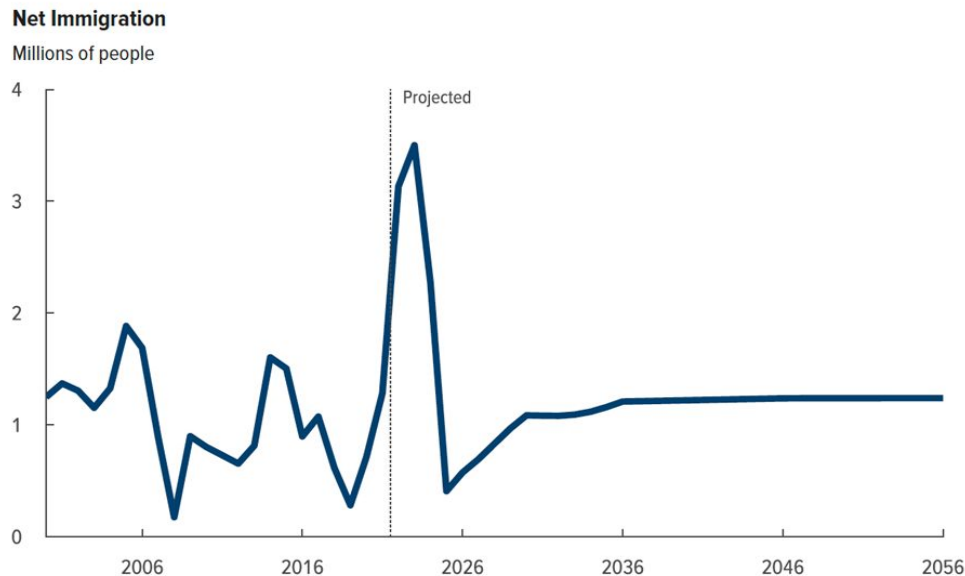
Home sales have been comparable to post pandemic years



Migration

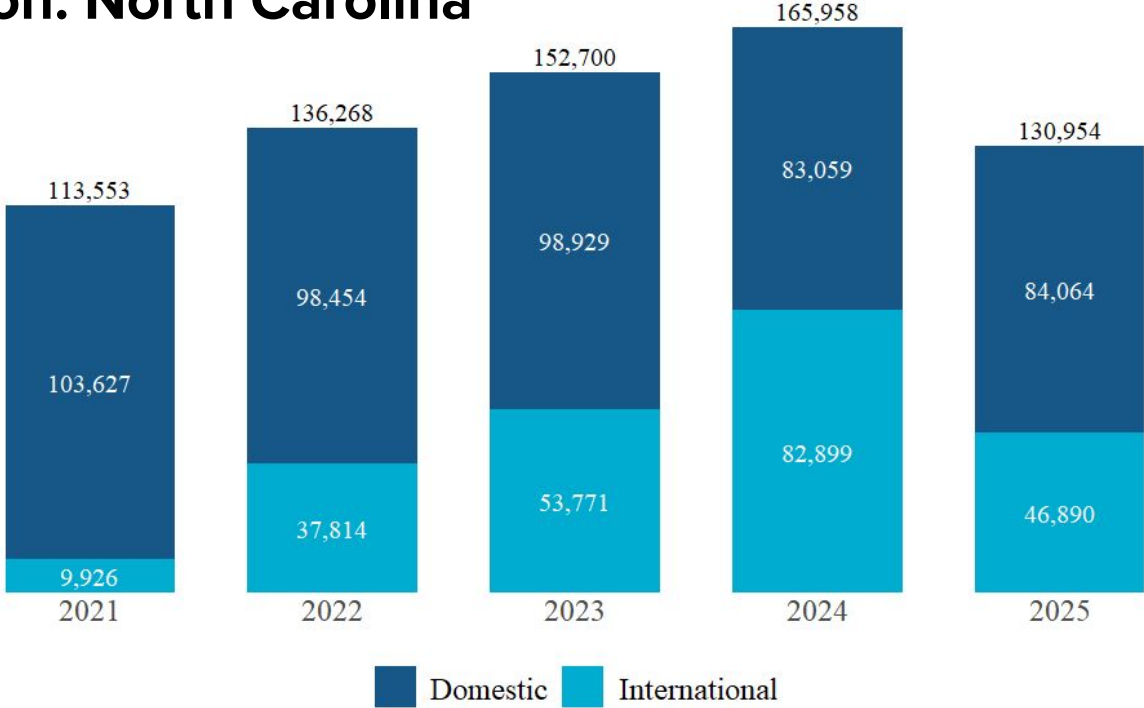
Net Immigration Projections: United States

CBO projects net immigration to increase steadily through 2030 and then expected to grow at a slower pace through 2036



Source: The Demographic Outlook: 2026 to 2056; Congressional Budget Office (CBO); <https://www.cbo.gov/publication/61879>

Net Migration: North Carolina



Source: 2025 Vintage Population Estimates, U.S. Census Bureau

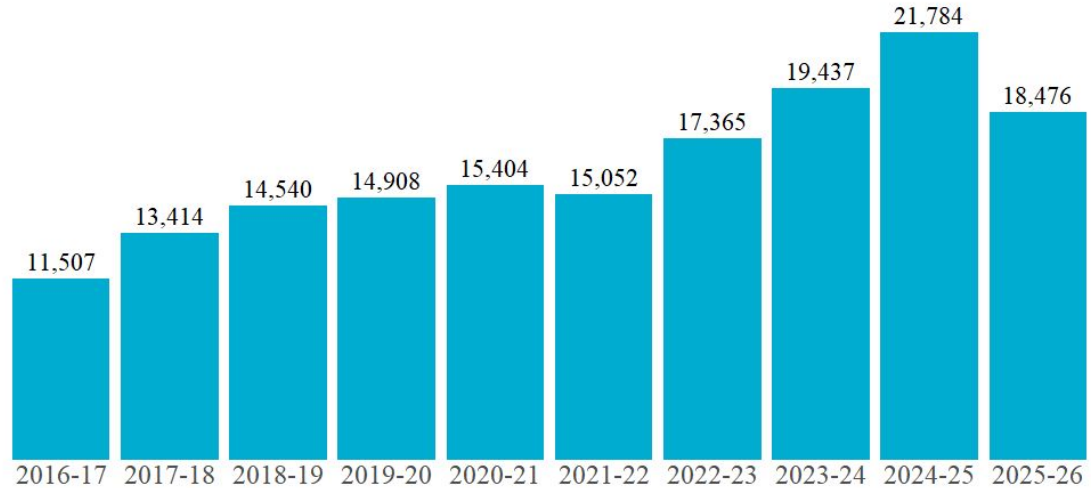
English Language Learners

Headcount of English Language Learners: 2016-17 through 2025-26

ELL is a proxy for changes in foreign-born population.

Wake County Schools' ELL population fell by ~3,000 in 2025–26 to 18,476 — the first large decline in a decade.

Statewide ELL headcount dropped by 15,513 in 2025–26, to 163,715 students.

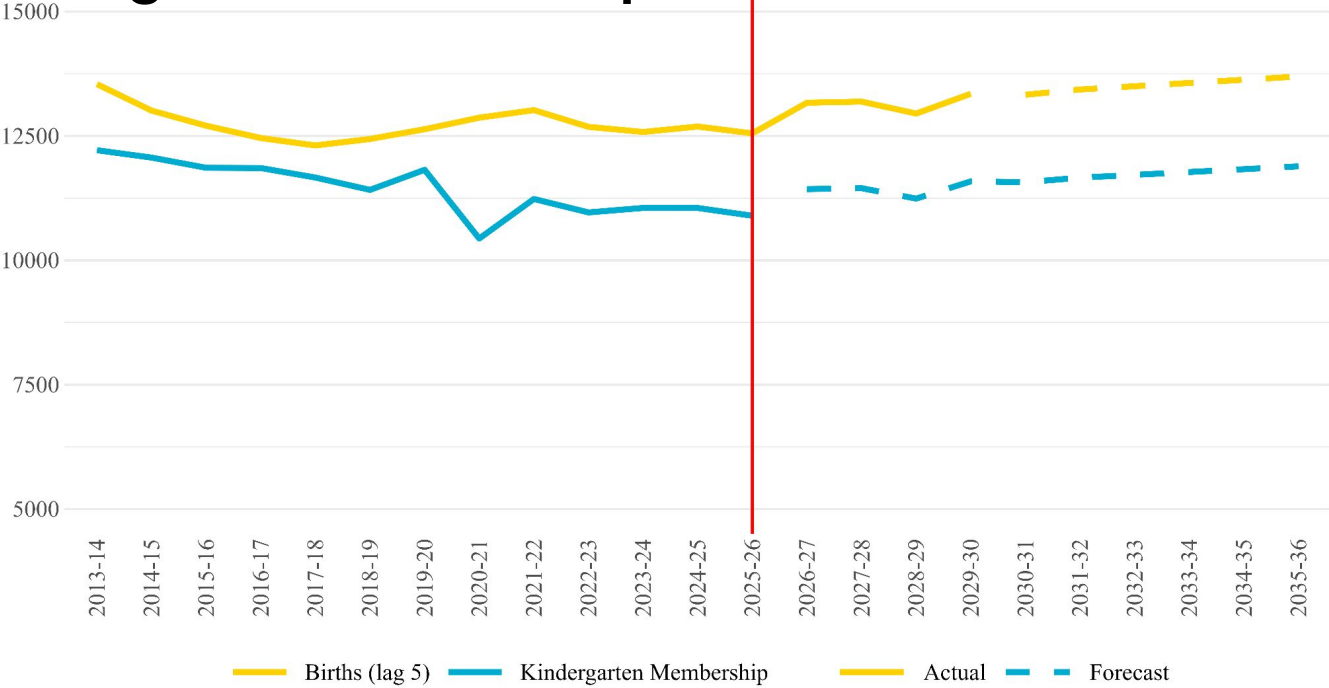


Data Source: Headcount of Limited English Proficient Students, Report to the North Carolina General Assembly, NC DPI

Creating the Forecast

2025-26 Membership Forecast

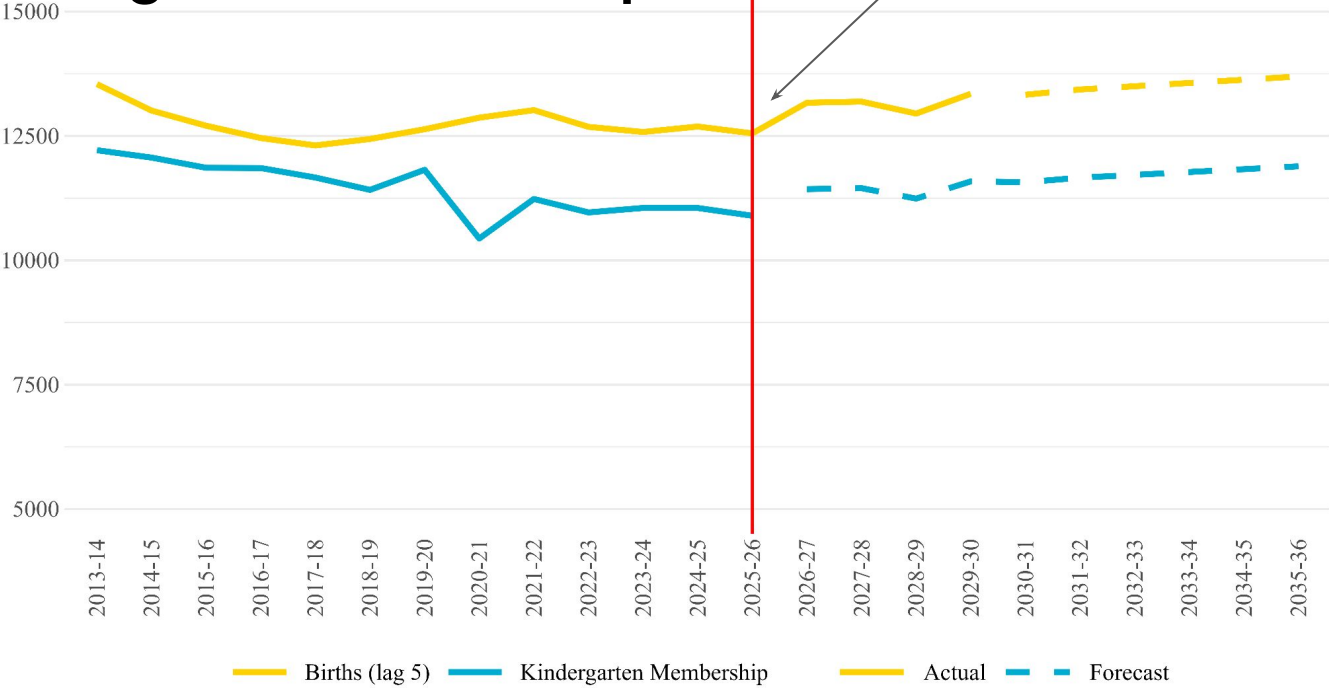
Kindergarten Membership



Birth in year Y typically becomes part of the kindergarten cohort in year Y+5

Source: Demographic Analytics Advisors and Carolina Demography

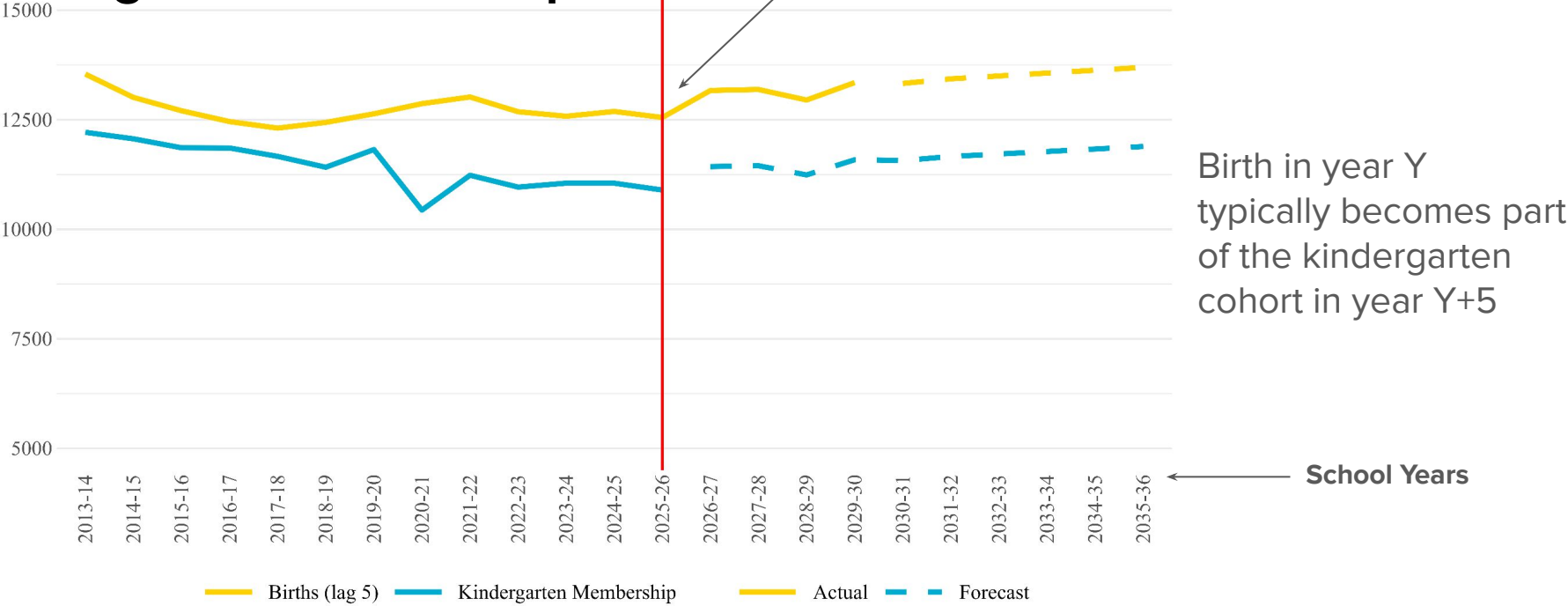
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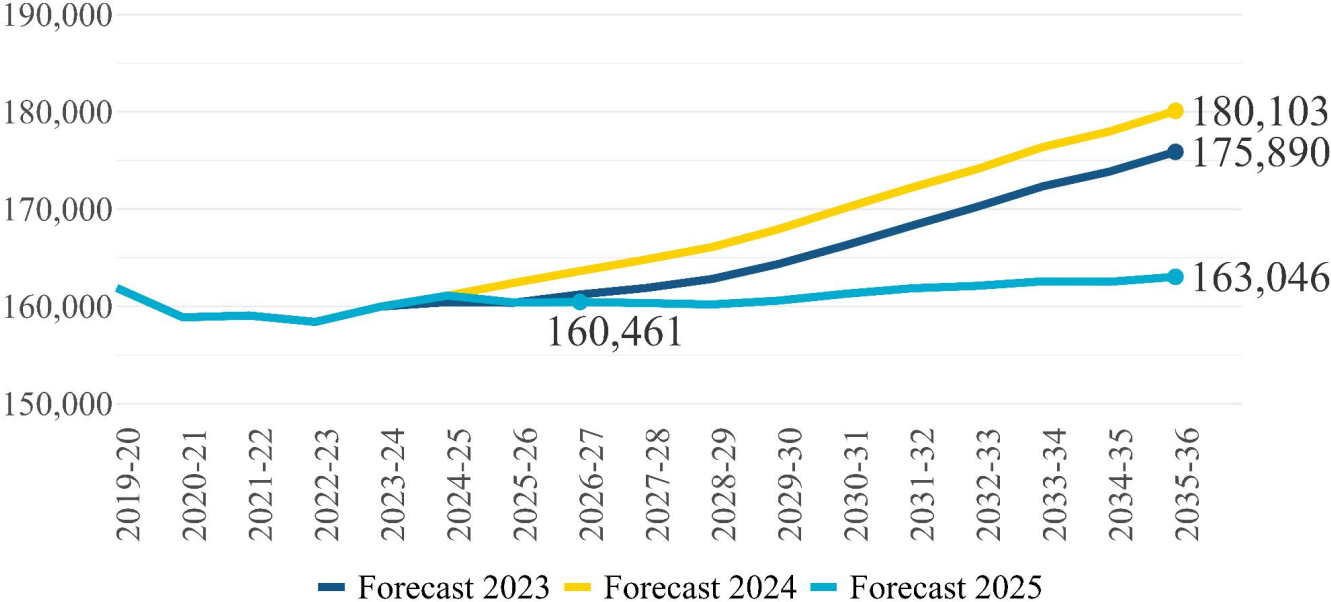
Kindergarten Membership



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Long-Term Forecast

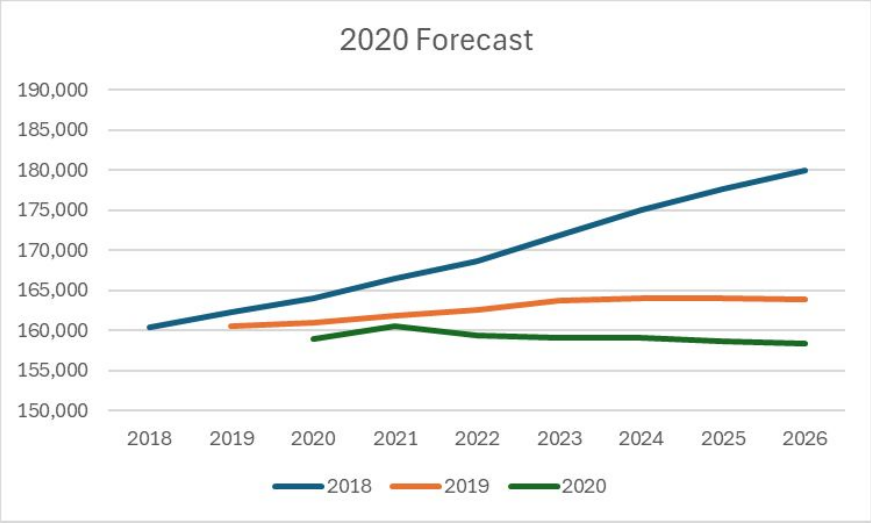
Membership is forecasted to increase at a slower rate starting 2027 due to market share options and decline in net international migration



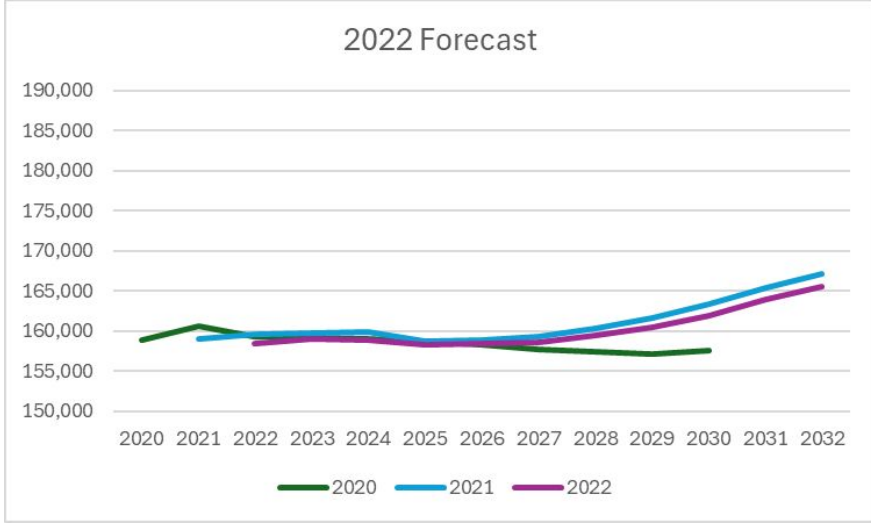
Source: Demographic Analytics Advisors and Carolina Demography

Examples of Prior Forecasts

2020 Forecast

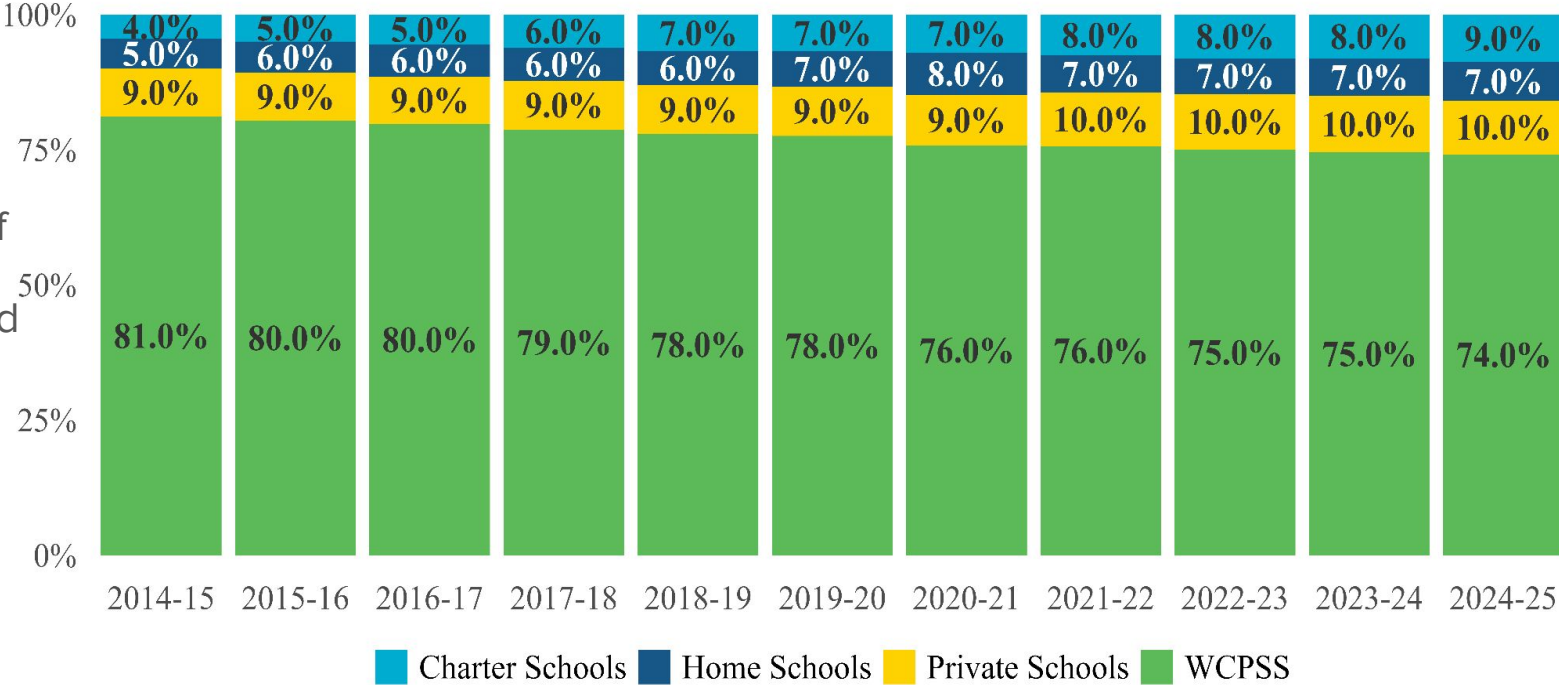


2022 Forecast



Market Share by School Type

The majority of Wake County students attend WCPSS schools



Key Takeaways for Wake County & WCPSS

- Changes in foreign-born migration will continue to impact the district
- Changes in the opportunity scholarship program will likely impact the district
- Distribution of growth throughout the county still highlights the need for some new schools
- Overall forecast supports emphasis on renovations at existing schools

Questions?

Feedback, Thoughts & Ideas...

Additional Information

Included as attachments:

- Membership Forecast Memo
- 10-year Membership Forecast Executive Summary
- 10-year Membership Forecast Projections