Dear Residents:

It has been an exciting time of transformation for Lower Merion School District. As Lower Merion’s longstanding reputation as one of the finest school systems in the United States continues, our District is experiencing enrollment growth at levels not seen in more than 40 years.

Established as one of Pennsylvania’s first public school districts in 1834, our District enjoys a rich tradition of high achievement, innovation and community partnerships. The District’s six elementary schools, two middle schools and two high schools provide a challenging, multi-disciplinary academic program, and dynamic co-curricular experience to approximately 8,400 students.

All LMSD schools have received recognition for excellence by the Commonwealth. Our high schools rank among the highest in Pennsylvania for SAT and PSAT scores, AP participation rates, total number of National Merit Semifinalists, total number of International Baccalaureate diplomas granted and in numerous publications’ “Top Schools” lists. Approximately 95% of high school graduates attend institutions of higher learning.

Given the District’s track record of success, it should come as no surprise that more families are moving into our community. The District has grown by more than 1,000 students over the past five years. Enrollment is expected to grow by an additional 1,000 students by 2022 according to two new demographic studies.

Decisions regarding the best way to handle this growth cannot be made hastily. As a District, it is our responsibility to perform due diligence on this critical issue. We must weigh a variety of options for accommodating growth, including facilities expansion, new student school assignment procedures, and possible redistricting.

This publication, “Tomorrow’s Students/Today’s Challenges: Planning for Growth and Achievement in Lower Merion School District,” is provided to help educate community stakeholders about the issues we must contemplate as we review options to plan for growth and continuous achievement. We encourage you to read on.

Sincerely,
Robert Copeland, Superintendent of Schools
Dr. Robin Vann Lynch, President of the Board of School Directors
ALL FORWARD: A Strategic Plan that is Best Supported by an Ideal Physical Learning Environment

While some school districts view strategic planning as a mandated exercise required by the Pennsylvania Department of Education, we believe innovative and creative planning is essential to our continued success and evolution as one of the finest public school systems in the nation.

Our strategic plan, All Forward: Strategic Pathways for Lower Merion School District, was developed by a steering committee of 70 community members. It is designed to be inspirational and accessible to all members of our school community.

Five “strategic pathways,” briefly described here, serve as a guide as we transform words into action. Providing students with an ideal physical learning environment is a key part of supporting the success of this strategic plan.

ALL FORWARD: FIVE STRATEGIC PATHWAYS

Redefining Success
Our District’s definition of success incorporates creativity, critical thinking, love of learning, and innovation for each and every child to encourage globally aware and engaged students. We reach far beyond standardized test scores, embracing and celebrating the many ways in which students demonstrate individual growth.

Transformative Curriculum
The District offers a transformative interdisciplinary curriculum that is student-driven and fosters innovation and positive risk-taking. It transcends State Standards, is inquiry-based, and connects the classroom to the world. Our curriculum encompasses diverse perspectives, promotes global awareness, and makes use of culturally responsive teaching and learning practices. This dynamic, adaptable curriculum provides vertically and horizontally aligned curricular experiences, ensuring every student learns from the connections across subject areas and receives a comprehensive and balanced education. Subject material is relevant to the world our children will enter in college and as adults. Innovation is the rule and not the exception.

A Commitment to Professional Learning
Lower Merion School District is a community that values educators and the critical role they play in ensuring our students’ success. We trust our professionals and seek to support their perpetual growth and development through collaborative professional learning opportunities rooted in inquiry. We believe in providing resources to staff that encourage a culture of engagement, innovation, and exploration.

Student-Driven Schools
Our students engage in navigating their own learning and growth in close partnership with our professionals. We create an environment where students value self-reflection and play a central role in identifying their passions and achieving their goals. We nurture and celebrate the individual strengths of our students and help them to develop competencies that ensure their success beyond the LMSD experience.

A Spirit of Community
The District takes pride in being a central part of the community. We value the diverse, dynamic talents of every member of our community and their enduring support for public education. We honor this spirit through consistent outreach and the creation of meaningful relationships to promote experiential learning, ongoing service, and engagement that will strengthen and support the student experience during school years and beyond.

For more information about the District’s strategic plan, visit the “Strategic Plan” section of the LMSD website, www.lmsd.org/all-forward.
LOWER MERION’S GROWTH:
Multiple Factors Bring More Students to Our Schools

LMSD is one of the fastest-growing districts in Pennsylvania. Since 2008, LMSD has had the second-fastest enrollment growth rate in the Commonwealth (see chart below) and the largest growth by total number of students according to the Pennsylvania Department of Education.

As the 2016-2017 school year opened, enrollment in the District was nearly 8,400 students for the first time since the early 1970’s. The last time LMSD enrolled this many students, the District operated 15 schools (ten K-6 elementary schools, three 7-9 junior high schools and two 10-12 senior high schools).

Two Independent Enrollment Studies, One Conclusion: Growth

In November of 2016, community members heard the results of two independently-conducted enrollment studies. One report was presented by Sundance Associates, a demographic consulting firm located in Cherry Hill, New Jersey. The second report updated demographic report from the Montgomery County Planning Commission (MCPC). The District previously received an enrollment study from MCPC in April of 2015.

While there were slight differences in data from report to report, both studies pointed to steady increases in enrollment through 2021 and beyond.

Here are some statistics worth noting from these studies:

- Enrollment is projected to increase by nearly 1000 students over the next six years.
- Middle schools will increase by more than 350 students.
- Growth will impact the high schools the most with the addition of 700 more students.
- The current second grade class of 687 started as a kindergarten class of 454 and will graduate as a 12th grade class of 908 students.

*Student Enrollment Projections by Year*

Factors Contributing to Lower Merion’s Growth

The April 2015 MCPC study found that enrollment growth stemmed first and foremost from “the overall quality, reputation, and appeal of the Lower Merion School District.”

Updates to the 2015 study also attribute growth to the following:

- A decrease of 5% in the number of students in Lower Merion and Narberth enrolling in private schools (a swing of “as many as 600-700 students compared to ten years ago”).
- A greater draw rate (almost double in eight years) of public school students from multi-family homes and rental apartments.
- Increasing home sales and a greater rate of public school students originating from these homes compared to those that have left the District.
- Development of new housing, with 464 units built in the last two years and almost 1800 new units expected over the next six years.
- New data showing rising birth levels.

The chart (above right) illustrates enrollment growth projections over the next six years.
Lower Merion School District has a long history of proactively addressing enrollment growth despite challenges posed by limited space and lack of available land. The District has strived to make the best use out of its existing property. Here is a retrospective of the past twenty years:

**1996** – LMSD experienced a noticeable enrollment increase, surpassing 6,000 students. The District developed a plan to accommodate this growth and utilized a retention model to effectively predict enrollment over the next five years.

**1997-2002** – The District renovated and expanded elementary and middle schools.

**2004** – A decision was made to build two high schools of equal size with equal curricular, co-curricular, and athletic offerings based on a recommendation from a committee of community members.

**2005-06** – New guidelines were established to accommodate larger class sizes in elementary schools and avoid immediate redistricting. The District’s annual budget book outlined changes in enrollment over the past decade (an increase of 894 students) and made predictions about the decade to come.

**2009** – The size of the “choice” area in Ardmore and Narberth was decreased to drive more students to Harriton, thus ensuring parity of educational and non-instructional offerings.

**2012** – The District commissioned DeJong Healy for an enrollment study in May of 2012. The study concluded that the District would experience sustained growth. The study identified schools that would need to be expanded to accommodate growth. The boundaries of the “choice” area were restored to what they were before 2009 to allow more students to attend Lower Merion High School, where more space is available.

**2013** – To address immediate capacity concerns, the District authorized the construction of four classrooms at both Gladwyne and Penn Valley elementary schools, a 12-classroom addition at Welsh Valley, and reconfigured space at Bala Cynwyd Middle School.

**2014** – The Board of School Directors authorized the superintendent to reassign new neighborhood developments from one elementary school to another if the first school was unable to accommodate all the students from that area.

**2015** – Additions at Penn Valley Elementary School, Gladwyne Elementary School, Welsh Valley Middle School, and Bala Cynwyd Middle School were completed or were nearing completion. The District commissioned another study to evaluate the direction of enrollment for future students.

**2016** – As the 2016-17 school year opened, enrollment in LMSD was nearly 8,400 students for the first time since the early 1970’s. To accommodate growth, the District completed renovations of the Administration Building to enable use of classrooms in the “old” LMHS and installed temporary classrooms at Penn Wynne. The District began planning to accommodate pressing capacity needs at Bala Cynwyd Middle School.

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**LMSD Facilities & Enrollment Growth Resources**

Recognizing the impact that enrollment growth in Lower Merion School District is having on its community, the District has developed a comprehensive set of online resources in the “Enrollment Planning” section of www.lmsd.org. Resources include enrollment reports, public presentations, facilities studies, concepts for classroom expansion and demographic data. These resources document the District’s sustained efforts to successfully manage enrollment growth and ensure ongoing educational excellence in the community.
THE CHALLENGES OF ADDRESSING STUDENT GROWTH TODAY

As LMSD balances its commitment to fiscal responsibility with the needs of its students, specific actions have been implemented to address current enrollment growth, as indicated on the previous page.

These actions, however, are “band aid solutions,” not adequate for addressing the continued enrollment growth predicted in the years ahead. The District must plan for long-term solutions.

Key Factors Impacting Proper Facilities Planning
Effective planning for Lower Merion’s future facilities needs is complicated by three key factors:

• Funding Restrictions Imposed by Act 1: Act 1 legislation caps a school district’s ability to raise taxes above an index set annually. Increases above the index are subject to limited exceptions - which do not include facilities-related expenditures to address increased enrollment.

• Site Constraints: Expansion of current facilities is difficult due to the limited footprint of most school sites. Most schools are in densely-populated neighborhoods and buildings have little or no room for growth. There is a trade-off between classroom expansion and recreational space or space for additional parking (which would become necessary to accommodate the expansion).

• Limited Availability of Property: The District has been searching for available property for some time without success. There are few if any parcels of real estate that would be suitable for construction of a new school or school facility in an ideal location. If the District wanted to consider addressing growth by building an additional school, this process would almost certainly require extensive (and costly) demolition and construction and/or extensive renovation on properties that face restraints similar to existing LMSD school sites. Real estate costs in Lower Merion are comparatively high, providing another deterrent to site acquisition.

THE BALANCING ACT:
Fiscal Planning in a Growing School District

Enrollment growth presents a significant fiscal challenge to school boards. Budget planning and facilities planning cannot exist in silos, yet they often seem at odds.

LMSD has been steadfast in its commitment to carefully addressing both needs.

Given the complexities of developing a 2017-2018 budget during a period of historic enrollment growth, Lower Merion School District has created a series of opportunities to help the public to understand the budget planning process. First, the District has created a video which outlines the main issues and challenges which must be considered when developing a budget. The video was produced in a talk show format and can be viewed at http://www.lmsd.org/about-lmsd/newsroom/videos/view/?viewnode=26cf19469dba0

LMSD has also planned a series of Finance Committee meetings, all open to the public, which focus on specific aspects of the budget, such as Facilities and Transportation.

For updated and detailed information on the 2017-2018 budget, visit https://www.lmsd.org/departments/business/budget/
When it comes to addressing Lower Merion School District’s future enrollment needs, there is no such thing as a perfect option, or an easy option to achieve.

Knowing there is no “best choice,” the District is in the midst of an exhaustive process to explore a combination of elementary, middle, and high school options that could encompass the strategies outlined in this section.

Careful and diligent evaluation will determine which strategies are eliminated, modified or pursued moving forward.

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**Elementary School “Neighborhood Stabilization”**

Build on to existing elementary schools and maintain current feeder patterns.

**Advantages:**
- Maintains existing feeder patterns
- Does not require elementary school redistricting
- Controlled (phased) roll-out based on need
- District already owns property

**Challenges:**
- Results in large elementary schools (particularly at PW & GL)
- Requires analysis of possible changes to traffic and parking patterns to minimize impact on neighborhood
- Numerous site restrictions

**Other Considerations:**
- Does not address middle school or high school capacity concerns
- Could create size imbalances among and between schools
- Could still require redistricting if one school grows too large to meet capacity needs after expansion
- Possible greater dependency on modular classrooms
- Projected Costs: $30-35M*

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**Additional (7th) 500-Student Elementary School**

Build an additional elementary school at former St. Justin’s property.

**Advantages:**
- Reduces construction needs at other elementary schools
- Provides greater control in accommodating future enrollment increases
- District already owns St. Justin’s property

**Challenges:**
- Significant redistricting required
- Requires analysis of possible changes to traffic and parking patterns to minimize impact on neighborhood

**Other Considerations:**
- Does not address middle school or high school capacity concerns
- Could create size imbalances among and between schools
- Would likely require a significant tax increase
- Projected Costs: $46-50M*

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**New (3rd) 5-8 Middle School**

Build an additional middle school (for around 1,000 students) and reconfigure grades at middle level to 5-8 and elementary level to K-4.

**Advantages:**
- Maintains existing elementary boundaries
- Relieves expansion needs at elementary schools
- Relieves long-term expansion needs at WVMS and BCMS

**Challenges:**
- Significant middle school redistricting required
- Few suitable sites available in the Township
- Cost of site acquisition, demolition, construction

**Other Considerations:**
- Would likely require a significant tax increase
- Requires immediate modular acquisition at existing middle schools to handle current capacity issues and tabling of expansion plans for Penn Wynne
- Requires reconsideration of middle school programs
- Does not address high school capacity concerns
- Projected Costs: $100-103M* (includes estimated land acquisition costs)

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*All projected costs based on 2016 estimates*
**Conversion of BCMS, WVMS to 5-8 Middle Schools**

Expand capacity at BCMS, WVMS and reconfigure grades at middle level to 5-8 and elementary level to K-4.

Advantages:
- Maintains existing elementary boundaries
- Controlled (phased) roll-out
- Relieves expansion needs at elementary schools

Challenges:
- Significant site challenges at both schools with 1600+ students
- Middle schools almost same size as high schools on smaller sites
- Requires analysis of possible changes to traffic and parking patterns to minimize impact on neighborhood

Other Considerations:
- Would likely require a significant tax increase
- Requires interim modular acquisition at BCMS to handle current capacity issues; would result in tabling of elementary (PW) expansion plans
- Requires reconsideration of middle school programs
- Does not address high school capacity concerns
- Projected Costs: $52-54M*

**Redistricting of Elementary Schools, Expanded Capacity at Some Schools**

Redistrict elementary attendance areas to shift students from schools with greatest capacity concerns/site restrictions to sites with greater capacity and site flexibility. Expand as necessary.

Advantages:
- Reduces current impact of enrollment growth at Penn Wynne
- Relieves expansion needs at some elementary schools
- Results in more balanced elementary populations

Challenges:
- Heightened site challenges at certain schools
- Does not relieve enrollment increases at Gladwyne, Belmont Hills or Cynwyd
- Need to increase capacity of core spaces (auditorium, cafeteria, etc.) in addition to adding classroom space
- Results in larger elementary schools
- Would require a number of concurrent projects

Other Considerations:
- Does not address middle and high school capacity concerns
- Possible greater dependency on modular classrooms
- Would result in tabling of elementary (PW) expansion plans
- Projected Costs: $27-30M*

**Expand Middle Schools**

Expand middle school capacity at BCMS & WVMS and maintain current grade configurations.

Advantages:
- Maintains school feeder patterns
- Addresses middle school capacity issues

Challenges:
- Site challenges on BCMS campus
- Direct impact on densely populated neighborhood

Other Considerations:
- Does not address elementary and high school capacity concerns
- Requires creative planning to align facilities with programming
- Projected Costs: $17-19M*

**Kindergarten Center**

Build a new kindergarten center at former St. Justin’s property and shift kindergarten students from elementary schools to the new center.

Advantages:
- Minimal disruption to educational program
- Alleviates some current elementary school capacity issues
- District already owns site
- Maintains existing elementary boundaries (for the time being)

Challenges:
- Requires analysis of possible changes to traffic and parking patterns to minimize impact on neighborhood
- May not free up enough capacity at elementary schools
- Would require costly transportation solution

Other Considerations:
- Does not address middle school capacity concerns
- Could create size imbalances among and between schools
- Could still require elementary redistricting if any school grows too large to meet (Gr 1-5) capacity needs
- Projected Costs: $19-21M*

**High School Expansion**

Build temporary and/or permanent classroom addition at Harriton High School.

Advantages:
- Maintains existing feeder patterns
- Does not require high school redistricting
- Maintains existing programs and class size levels
- Location of classrooms would cause minimal disruption during construction

Challenges:
- Increases impervious surface and parking requirements on Harriton campus
- High school enrollment trends difficult to predict in long-term

Other Considerations:
- Could still require high school redistricting if one school grows too large to meet capacity needs after expansion
- Scheduling options could be explored to reduce some needs for additional classroom space
- Projected Costs: $2.3M - $7.4M** based on four possible configurations of permanent and temporary options (+ any elementary and middle school solution)

**Ongoing Needs:**

The District must also consider how to balance other ongoing and projected needs, like maintenance of facilities, renovations/upgrades to Arnold Field and additional bus parking. These considerations will be part of any plan moving forward.

**This strategy based on 2013 estimates**
LOOKING AHEAD AND GETTING INVOLVED: Information Supports Understanding

Every planning decision is complex and cannot be made in isolation. These are challenging decisions that are presenting increased urgency because of the enrollment growth our District is experiencing. Lower Merion School District is committed to sharing with the public information it is gathering to make an informed judgment as to the best course it will pursue.

Proactive communication activities will include speaking engagements, an informational video, special publications (such as this one) and updates on our website (under the “Enrollment Planning” section) at www.lmsd.org.

We welcome your input at all stages of the process in person or via communitycomments@lmsd.org.