TEAMWORKS
EDUCATION LEADERSHIP SOLUTIONS

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SCHOOL BOARD COMMITTEE OF THE WHOLE MEETING

MAY 05, 2026

DISTRICT ANALYTICS
STRATEGY DISCUSSION

Demographic · Housing · Enrollment · Market Share

PREPARED BY TEAMWORKS | EDUCATION LEADERSHIP SOLUTIONS

EXECUTIVE SUMMARY

Realities that must drive every strategic planning conversation

94,884
District Population
+1.4% since 2010

-26.4%
Resident Birth Decline
1,070 → 788 births (2010–2025)

-5.9%
K–12 Enrollment Decline
8,906 → 8,384 (2010–2026)

67.3%
Overall Market Share
Elementary lowest at 63.3%

+8.6%
Combined 10-yr Projection
Development + market share

32.7%
Students Choosing Non-DPS
Private, charter, open enroll

Strategic Bottom Line: Declining births and aging housing stock are structural — they cannot be reversed. Market share is the one variable entirely within district control. A focused market share strategy, alone, has the potential to more than offset every enrollment loss of the past 15 years.

COMMUNITY DEMOGRAPHICS

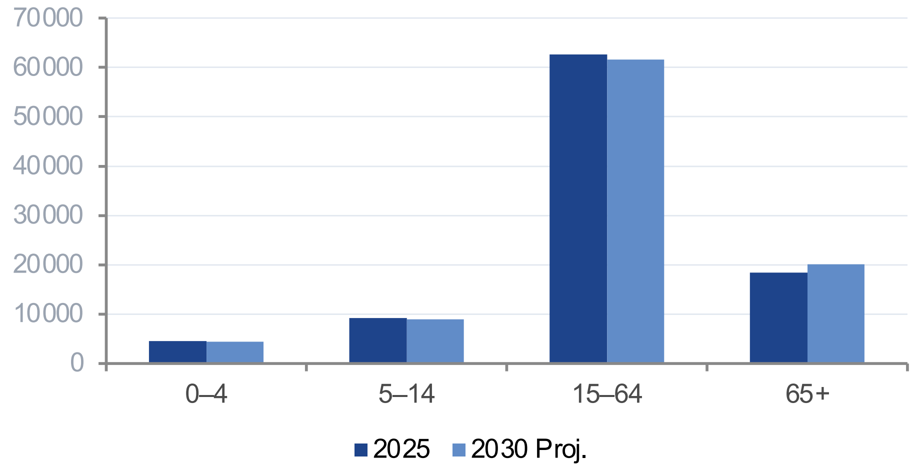
AGE TRENDS — A Community Growing Older

- 65+ cohort: +47.4% since 2010 — fastest-growing segment
- 65+ projected to reach 21.2% of population by 2030
- 0–4 year olds: -11.7% since 2010; projected -2.5% more by 2030
- 5–14 year olds: -0.5% since 2010; projected -3.4% by 2030
- Median age 37.4 today → rising to 38.7 by 2030

RACE & ETHNICITY — Slow But Steady Diversification

- White population: 84.1% (2025), down from 89.9% in 2010
- BIPOC population grew +56.5% (2010–2025): 8.6% → 13.3%
- Hispanic population grew +69.1% (2010–2025): 1.5% → 2.5%
- Student body: White 75.4% | Multi-Racial 10.7% | Black 4.7% | Hispanic 4.4%

POPULATION BY AGE GROUP (2025 vs. 2030 Projected)



INCOME SNAPSHOT

Median HH income: $67,361 (2025) → $72,940 by 2030 | Student HH median: $84,048
43% of student families live in households below $75K | Free/Reduced Lunch: 37.7% | SPED: 22.4%

BIRTH TRENDS — THE UPSTREAM ENROLLMENT SIGNAL

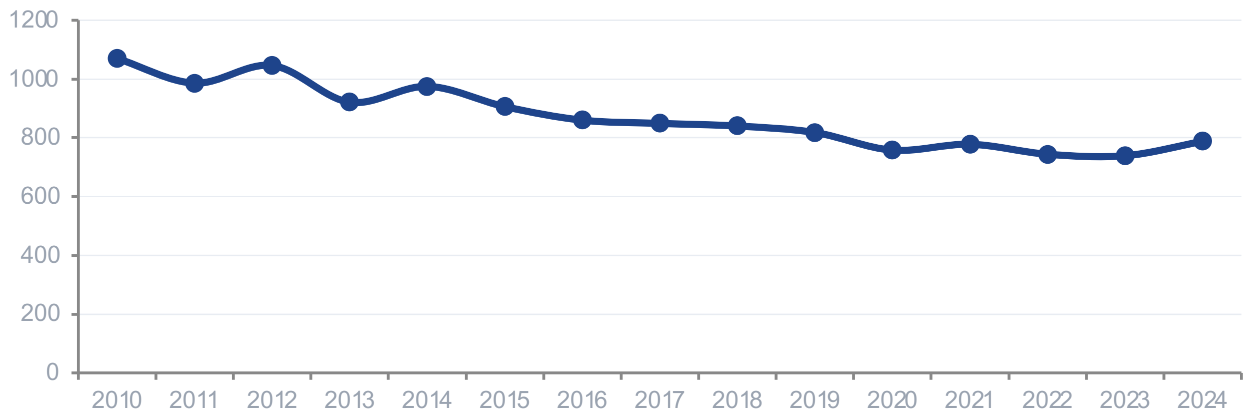
-26.4%

Resident births since 2010
1,070 → 788

Regional Context

Surrounding district births also declined -15.1%. This is a regional trend.

DISTRICT BIRTH TREND (2010–11 to 2024–25)



STEEPEST DECLINES

- Myers-Wilkins: -50.0%
- Congdon: -46.4%
- Piedmont: -45.8%
- Laura MacArthur: -45.2%

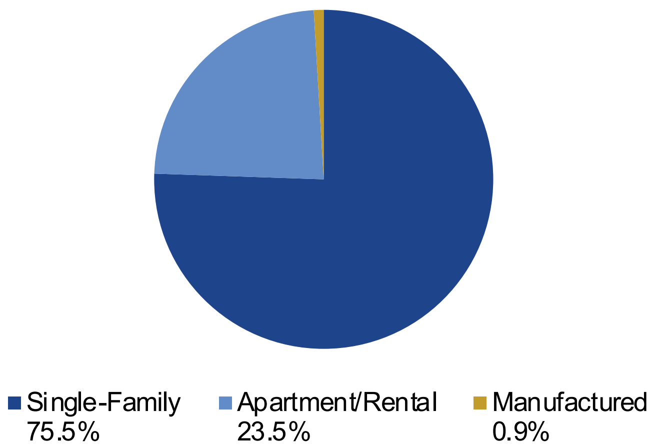
GROWTH AREAS

- Lakewood: +75.8%
- Homecroft: +9.5%
- Lowell: +9.3%

HOUSING CHARACTERISTICS & STUDENT YIELD

Duluth Public Schools

HOUSING STOCK COMPOSITION



$296K
Avg. Home Value
Single-family

75%
Built Pre-1970
Aging housing stock

91%
Students in SFR
Over 7,300 K–12 students

STUDENT YIELD PER HOUSING UNIT

- Single-Family: 0.24 students/unit
- Apartment/Rental: 0.07 students/unit
- Manufactured Home: 0.20 students/unit
- Yield rates must be embedded in all capacity planning as new development is approved

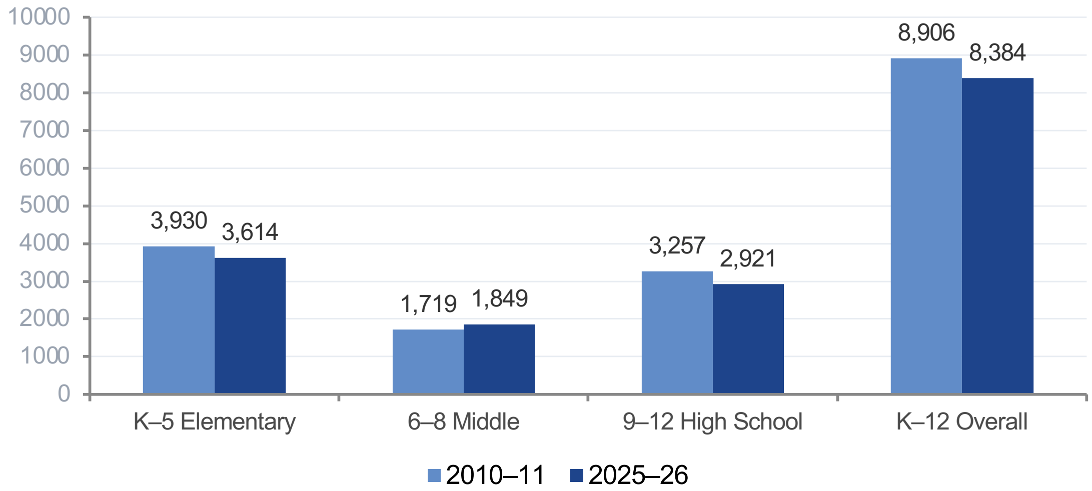
HOME SALES TRENDS & STRATEGIC CONTEXT

- 3,823 sales since 2020 | avg. price $122,749
- District-wide price growth: +13.3% since 2010
- Highest growth: Lakewood (+76.6%), Laura MacArthur (+40.3%), Stowe (+32.5%)
- Only decline: Lester Park (-10.7%)
- Aging stock limits organic family attraction through resale market

Strategic Implication: This is a maintenance housing environment, not a growth engine. Target recruitment in Lakewood, Lowell, and other appreciation zones.

HISTORICAL ENROLLMENT TRENDS

K–12 ENROLLMENT: 2010–11 vs. 2025–26



-8.0%
Elementary (K–5)
3,930 → 3,614

+7.6%
Middle (6–8)
1,719 → 1,849

-10.3%
High School (9–12)
3,257 → 2,921

COHORT SURVIVAL RATES (K–12 AVG: 102.1%)

- Elementary 98.0% | Middle 99.5% | High School 108.3%
- High school cohort > 100% signals strong retention and/or inbound transfers

NEIGHBORHOOD SCHOOL ATTENDANCE (2025–26)

- 84% of all K–12 students attend their neighborhood school
- Elementary 77.7% | Middle 94.0% | High School 85.4%

MARKET SHARE ANALYSIS — WHERE STUDENTS ARE GOING

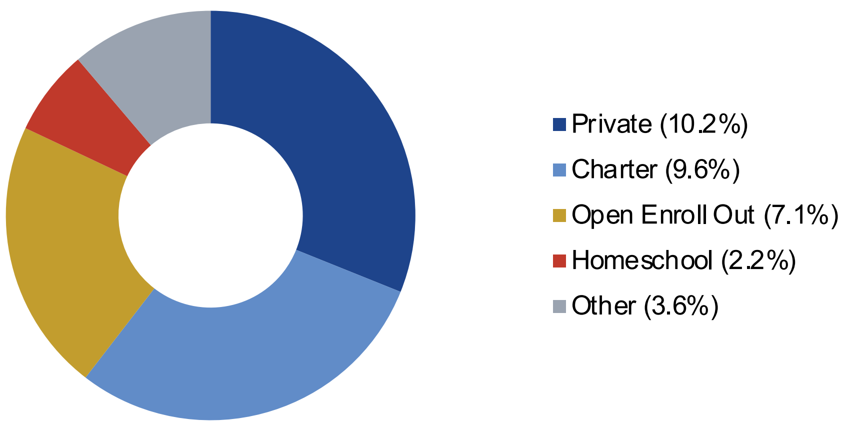
67.3%
Overall K–12 Market Share

63.3%
Elementary (K–5)

65.7%
Middle (6–8)

74.5%
High School (9–12)

WHERE THE OTHER 32.7% ARE GOING



TOP DESTINATIONS — PRIVATE & CHARTER

- Diocese of Duluth: 597 (49.1% of private) | Marshall: 269 (22.1%)
- North Star Academy: 483 (42.0% of charter) | Harbor City: 205 (17.8%)
- Raleigh Primary: 170 (14.9%) | North Shore: 169 (14.7%)

OPEN ENROLLMENT — OUT & IN

- Open Enroll OUT: 844 students | Proctor: 44.9% | Hermantown: 19.9%
- Open Enroll IN: 341 students (4.1% of enrollment)
- Inbound: Lake Superior 33.3% | Proctor 32.1% | Hermantown 22.5%

Strategic Implication: Market share is the most controllable enrollment lever. The district has real regional draw (341 inbound). Strengthening program offerings, communication, and community trust are the highest-leverage actions available.

MARKET SHARE MODELING — THE ACHIEVABLE OPPORTUNITY

+1,219

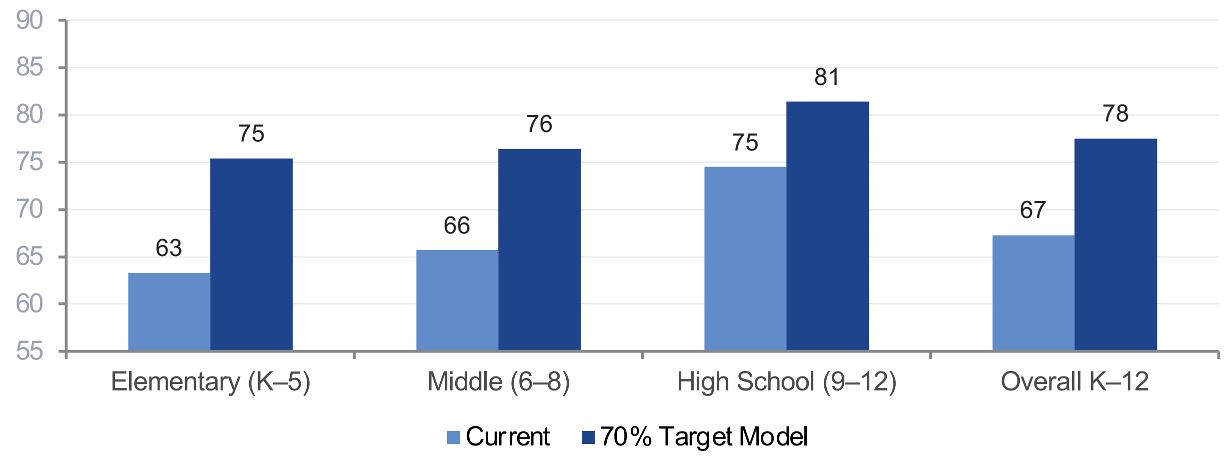
additional students

if the district reaches a
70% market share floor
across all block groups

Resulting overall share: 77.5%

This is not a passive outcome — it requires program investment, strategic communications, and intentional community engagement.

CURRENT MARKET SHARE vs. 70% TARGET



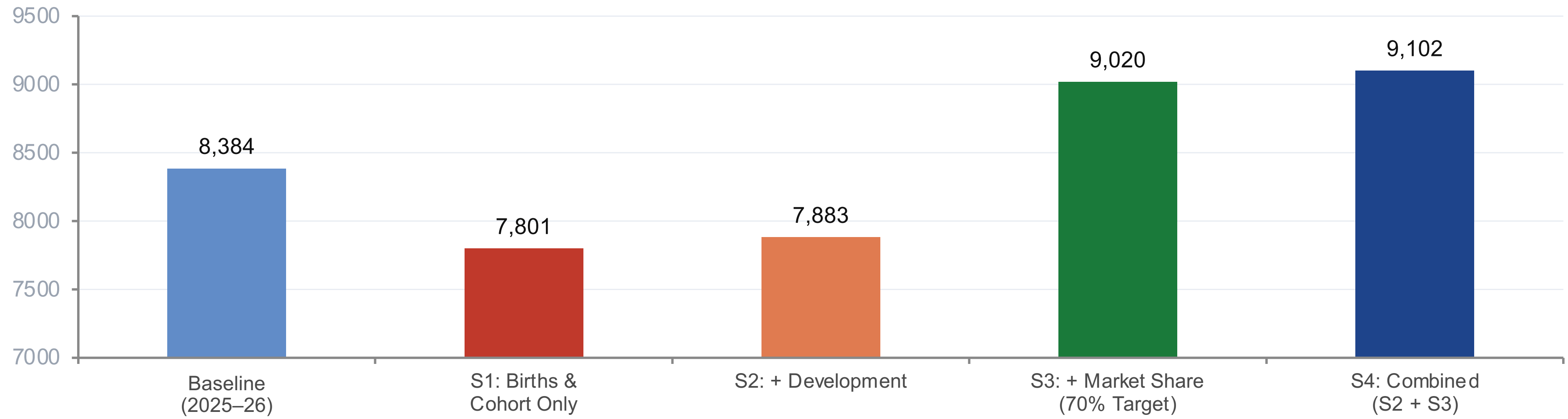
+672
Elementary Gain
K–5 block groups

+293
Middle Gain
6–8 block groups

+254
High School Gain
9–12 block groups

10-YEAR ENROLLMENT PROJECTIONS — FOUR SCENARIOS

K–12 TOTAL ENROLLMENT: 2025–26 BASELINE vs. PROJECTED 2035 SCENARIOS



7,801
S1: Births & Cohort
-7.0%

7,883
S2: + Development
-6.0%

9,020
S3: + Market Share
+7.6%

9,102
S4: Combined
+8.6%

STRATEGIC PRIORITIES

What the data demands from leadership

01
MARKET SHARE RECOVERY

Develop a comprehensive plan to move from 67.3% to 75%+ market share. Identify the specific block groups, grade levels, and competitor alternatives where the district has the most recovery opportunity.

02
BIRTH ZONE STRATEGY

Differentiate capacity, staffing, and programming strategy by attendance area based on birth trends. Growth areas (Lakewood, Lowell, Homecroft) need different investments than areas with 45–50% birth declines.

03
FAMILY RECRUITMENT

Create a proactive family attraction strategy focused on neighborhoods with home price appreciation. This is the one lever that can supplement market share gains with new-resident enrollment.

04
PROGRAM DIFFERENTIATION

Understand why 1,150 resident students choose charter schools and 1,217 choose private schools. Close the program gap and communicate the district's unique value proposition more effectively.

05
CAPACITY PLANNING

Facility utilization data is pending the capacity study. When results arrive, integrate them directly with these projection scenarios — especially the -7% base case — to guide right-sizing decisions.

06
DECIDE WHICH FUTURE TO BUILD

The data presents four scenarios — from -7% to +8.6% over 10 years. The district's future is not fixed. Leadership must choose which scenario to plan and resource toward, then build backward from that goal.