



REPORT TO

CORPORATE SERVICES, STRATEGIC
PLANNING AND PROPERTY
COMMITTEE

2023-24 TO 2025-26 CONSENSUS ENROLMENT
PROJECTIONS

An intelligent mind acquires knowledge, and the ear of the wise seeks knowledge. Proverbs 18:15

| Drafted | Meeting Date |
|---|----------------|
| March 7, 2023 | March 22, 2023 |
| K. Rajasooriar. Supervisor/Demographer, Planning Services T. Oltarzewski. Supervisor, Municipal Planning, Planning Services A. Brutto, Senior Manager, Planning Services B. Leporati, Senior Coordinator, Planning Services M. Loberto, Superintendent, Planning and Development Services | |
| <p>INFORMATION REPORT</p> | |

Vision: *IN GOD'S IMAGE: Growing in Knowledge, with Justice and Hope.*

Mission: *Nurturing the faith development and academic excellence of our Catholic learning community through the love of God, neighbour, and self.*



MULTI-YEAR STRATEGIC PLAN
2022 - 2025

IN GOD'S IMAGE: Growing in Knowledge, with Justice and Hope



Brendan Browne
Director of Education

Adrian Della Mora
Associate Director of Academic
Affairs & Chief Operating Officer

Derek Boyce
Associate Director of Corporate
Services and Chief Commercial Officer

Ryan Putnam
Chief Financial Officer and Treasurer

A. EXECUTIVE SUMMARY

This report provides consensus enrolment projections for the 2023-24, 2024-25 and 2025-26 school years. Enrolment projections form the basis of budget and staffing estimates which are collectively submitted to the Ministry of Education on an annual basis.

Enrolment projections for October 31, 2023 are based on October 31, 2022 pupil counts. Several key variables inform the projection model including but not limited to, residential development data, historical retention rates and census data.

| TCDSB Current & Projected Enrolment (ADE) | | | | | |
|--|--------------------------|---------------------------|---------------|---------------|---------------|
| Year | *2022 (Proj.) | 2022 (Current) | 2023 | 2024 | 2025 |
| Elem. | 56,686 | 57,727 | 57,032 | 56,228 | 55,862 |
| Sec. | 26,803 | 26,619 | 26,527 | 26,515 | 26,236 |
| Total | 83,489 | 84,346 | 83,559 | 82,743 | 82,098 |
| Annual Change | - | 857 | -787 | -816 | -645 |

**2022 Projected Numbers were approved by the Board and are displayed for comparison purposes as staffing for the 2023-2024 school was originally based on these numbers.*

Projected enrolment for the 2023-2024 school year indicates a decrease of -1.2% in the elementary panel and a decrease of -0.3% in the secondary panel when compared to actual enrolment for the 2022-23 school year. Later in the decade, strong residential development is forecasted to mitigate further enrolment decline in the elementary panel. Secondary panel enrolment is expected to gradually decrease until the end of the decade when it is expected to plateau and stabilize over the long-term outlook.

B. BACKGROUND

1. *Preliminary projections (Appendix A and B) were reviewed and validated by all Area Superintendents and School Principals to form the Consensus Enrolment Projections.* This validation process occurred throughout January and February 2023 and where appropriate, changes were incorporated into the projection model resulting in a consensus enrolment projection. *Staff have implemented a conservative projection model as enrolment trends from the COVID-19 pandemic continue to be monitored and are impacted by issues of housing affordability in Toronto.*
2. *Elementary enrolment (figure 1) is projected to be 57,032 students (ADE) for the 2023-24 school year.* This represents a forecasted decrease of approximately 695 students or -1.2%. Elementary enrolment has experienced declines over the past two school years, however, is projected to stabilize near the end of the decade due strong residential development trends.

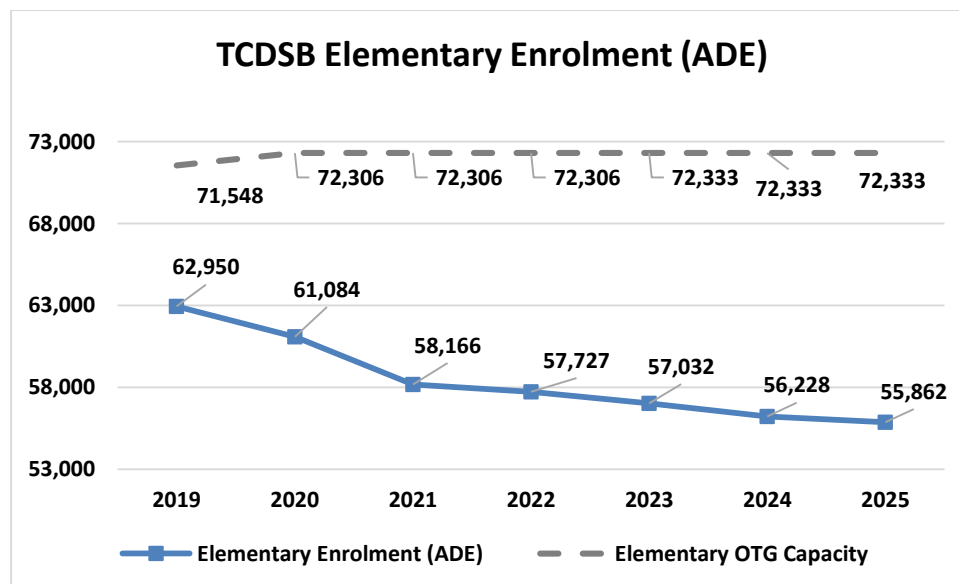


Figure 1

3. *Secondary enrolment (figure 2) is projected to be 26,527 students (ADE) for the 2023-24 school year.* This represents a forecasted decrease of approximately 92 students or -0.3%. Like the elementary panel, the secondary panel has experienced declines in enrolment over the course of the pandemic however, enrolment is projected to stabilize through the rest of the decade International student enrolment has not recovered to pre-pandemic numbers.
4. Both elementary and secondary enrolment panels have accommodated an *influx of over 900 Ukrainian students* through the 2022-23 school year.

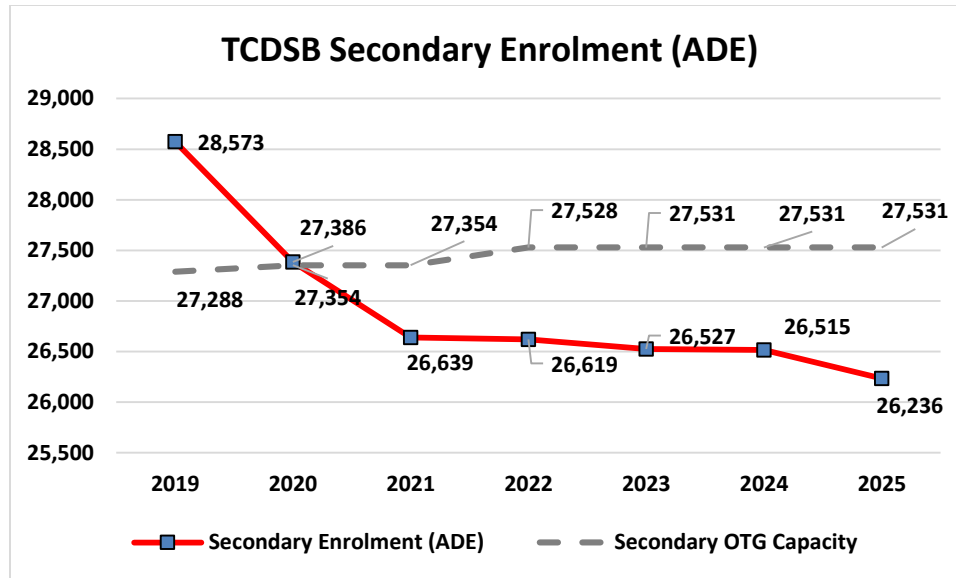


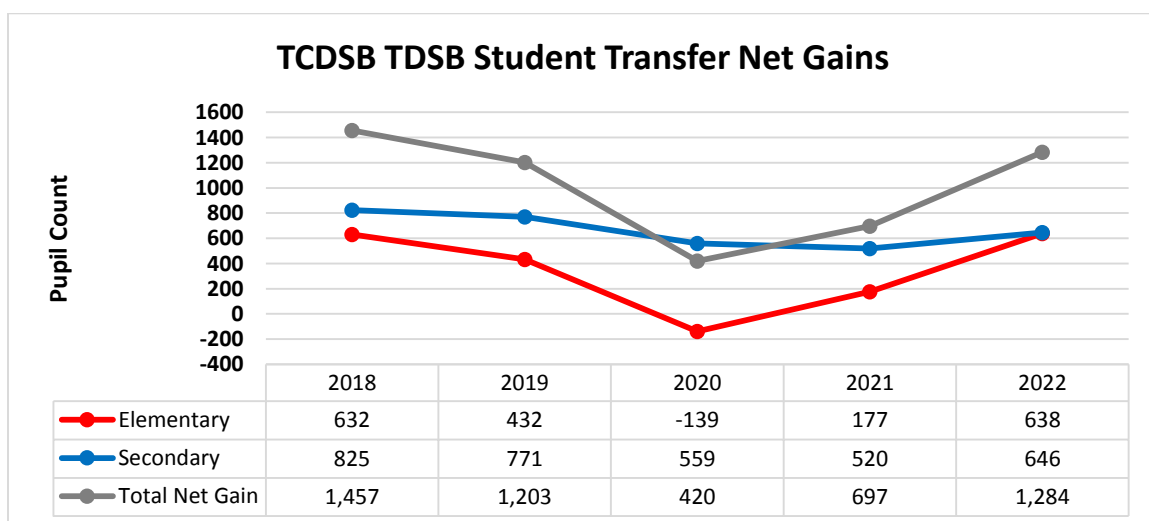
Figure 2

C. EVIDENCE/RESEARCH/ANALYSIS

1. ***Less JK students are enrolling in the school system GTA wide.*** This can be partially attributed to young families who have migrated away from the region for affordability reasons as well declining birth rates nationwide. This decline is expected to normalize in Toronto as the residential development pipeline is built out and added to with the submission of new development proposals.
2. ***The housing affordability crisis in the Greater Toronto Area is affecting enrolment numbers across all GTA school boards.*** Families are seeking more affordable real estate and relief from soaring rental costs in the city. Enrolment trends currently indicate modest enrolment increases at both rural and suburban school boards while urban school boards have seen a decline. StatsCan reports that in 2022, the Toronto CMA lost approximately 78,100 people to intra-provincial migration (*Appendix 'C'*). While the average home sold price in the city has decreased to approximately \$1,051,000, rising interest rates and inflation have eroded purchasing power. As a result, home affordability in Toronto remains an issue. In addition to rising interest rates and inflation, rent costs rose by 22.7% between 2021 and 2022, bringing the average rent within the City of Toronto to \$2,775/month.
3. ***Increased immigration has a limited effect on enrolment in the TCDSB school system.*** Canada has seen declining birth rates since 2008. Recently, the Federal Government increased immigration targets to 401,000 immigrants per year with 159,679 newcomers settling in the GTA in 2022. Many of these

newcomers to Canada are impacted by housing affordability issues and must seek housing in the more affordable neighbourhoods of the city upon arrival. In addition, many immigrants arrive from traditionally non-Catholic countries which limits their eligibility for enrolment.

4. ***An influx of Ukrainian refugees to Toronto was observed over the course of 2022 as the Federal government granted all Ukrainians 3-year temporary resident permits.*** This enrolment influx is localized in the western portion of the city, predominantly within Eastern Rite schools. Pending current events in the Ukraine, it is unclear as to how many Ukrainian families will choose to remain in Toronto over the long-term.
5. ***International Student enrolment has not recovered to pre-pandemic levels.*** Lower than usual International Student enrolment can be attributed to uncertainty caused by the pandemic. Current international student enrolment, projected at 500 students, represents approximately half of the number of students enrolled prior to the pandemic.
6. ***The number of student transfers between the TCDSB and TDSB has recovered to pre-pandemic levels.*** The TCDSB, from 2018-2019 net gained approximately 1,200 to 1,450 students per year from the TDSB. This number declined commensurate with the pandemic however, for the 2022-2023 school year, the TCDSB net gained 1,284 students from the TDSB, which is in line with pre-pandemic trending. Grade 9 students represent approximately 500-600 pupils within this cohort. **(Data collected from internal software)*



7. ***Data gathered from the tracking of development applications is used in the Board's annual enrolment projection process to estimate future student populations.*** The development database is updated as applications are

received, to reflect key changes, build timelines and completion of development proposals across the City. Maps exhibiting the location and intensity of development are included in *Appendix 'D'*. ***Additional information on development applications can be found in Appendix 'E'***.

D. METRICS AND ACCOUNTABILITY

1. ***Following this report, the consensus projections for 2023-24 will be operationalized.*** Staffing models are driven by these projections through collaboration between the Human Resources, Financial Services, Information Technology and Planning departments along with the Academic team.

E. CONCLUDING STATEMENT

This report is for the information of the Board of Trustees.