

FINAL REPORT

SAN DIEGO JEWISH ACADEMY FEASIBILITY ANALYSIS

Prepared for:

San Diego Jewish Academy

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EPS #9241

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I. EXECUTIVE SUMMARY

PURPOSE AND OVERVIEW

The San Diego Jewish Academy (SDJA) currently provides K-9 education to approximately 520 students coming from a broad geographical base within San Diego County and Tijuana, Mexico. The SDJA is operated out of three campuses: the La Jolla and San Carlos campuses serving K-6 students, and the San Diego Jewish Center campus serving middle school students. The SDJA is proposing the construction of a new school that will consolidate and expand the La Jolla and Jewish Center campuses and add high school grades 10 through 12.

The new school is located at the intersection of Interstate 5 and State Route 56 in the Carmel Valley community, and is planned to open for the 2000/01 school year. **Map 1** shows the location of the existing schools.

The SDJA School Board is considering the use of public bonding to fund a portion of the new school construction cost. As a part of this effort, Economic & Planning Systems (EPS) was retained to evaluate the potential market demand for a Jewish secondary school in the San Diego area. This report presents the findings and EPS's analysis.

CONCLUSION

The successful development of SDJA's Carmel Valley K-12 school site will require a significant increase in student enrollment across all grade levels. SDJA's strategy to accomplish this is through continued growth at the lower and middle school levels, retention of middle school students into the high school, and attraction of new students based on a superior academic program. Based on the findings detailed below and the other analysis provided in this study, EPS believes that the demand for Jewish day school enrollment should support the successful development of the new school; however, the projected demand will not by itself guarantee success. The SDJA must pursue an aggressive marketing program in addition to providing a superior academic environment in order to retain its current students and compete with a variety of well-respected private and public schools vying for the same new SDJA students.

FINDINGS

Based on the analysis presented in this study, EPS has made the following findings regarding the feasibility of SDJA's enrollment goals.

Elementary Schools

- Overall growth within the SDJA's K-5 school has been 6% annually over the last 10 years. Even with a continuation of this growth, SDJA will need to attract an increased number of students to meet its enrollment goals.
- Continuing increases in overall Jewish day school enrollment will be sufficient to meet the SDJA's K-5 enrollment goals if it is successful in capturing nearly all of the projected growth in enrollment demand (see **Figure 7**).

Middle School

- Growth within the Middle School is critical to the long-term success of the proposed High School.
- Over the last 10 years, the SDJA middle school has grown by over 64 percent; however, growth has been minimal in the last six years.
- To meet its projected enrollment targets, the Middle School will need to grow by 50 students per year over the next four years. Increased growth at this level is possible; however, the SDJA must capture twice the number of new students that entered Jewish middle schools on an annual basis over the last 10 years. (see **Figure 7**).
- The proposed tuition levels for the middle school are competitive within the overall private school market and should not impact demand for the school.

High School

- The demand for private high school enrollment at independent schools in the SDJA's market area is strong and stable with an average annual growth of 3% over the last 10 years. In addition, all of the competitive schools are at capacity and do not have current plans for expansion.
- Market demand for the SDJA High School will depend on the following:
 - The ability of SDJA to grow and retain its Middle School Students;
 - The ability to attract Jewish students attending other Jewish middle schools;
 - The ability to attract Jewish students attending independent private schools; and,
 - The ability to attract Jewish students attending public schools.
- The proposed tuition levels for the high school are competitive within the overall private school market and should not impact demand for the school.

Overall Findings

- Establishment of a new Jewish high school is consistent with recent national and regional trends in Jewish education.
- Location of the new school provides excellent access to existing SDJA families and improved access to potential Jewish families in the eastern parts of San Diego County.

APPROACH

This study focuses on the larger market demand related to the proposed SDJA school expansion and does not evaluate SDJA's specific ability to capture this demand. EPS utilized several data sources relevant to the school's market area, competitive supply, and potential demand. These include:

- Historical public and private school enrollment;
- Identification and survey of competitive schools;
- An analysis of tuition levels between competitive schools.

EPS synthesized the above data into a projection of supply and demand for K-8 Jewish school enrollment within the school's market area. In addition, EPS analyzed the potential universe of students from which the SDJA will be able to draw students.

LIMITATIONS OF THE ANALYSIS

Growth in private school enrollment demand within the market area does not guarantee the success of the proposed SDJA school. While most schools within the market area have thrived during the last ten years, there has not been a Jewish high school operating in San Diego County. Key limiting factors in the study are described below:

Jewish School Data. The San Diego Jewish Academy enrolls the greatest number of Jewish day school students in the San Diego area; however, only two other schools serve middle school students, and only three other schools serve elementary students. This small number of competitive schools offers limited historical data on which to predict future demand for a Jewish-oriented high school. Furthermore, there has been no Jewish high school until the addition of the Torah School this year.

Jewish Students in Independent Schools. There is no data on the number of Jewish students attending private independent schools. Such data could provide an indication of potential future SDJA students. Gross estimates and anecdotal information on such enrollment is used in this study to estimate the potential demand from existing schools.

Success of the New SDJA School. The findings presented in this report do not analyze SDJA's ability to successfully attract students. The overall demand for Jewish day school enrollment is considered strong and stable; however, this is no guarantee that the SDJA will be able to attract the number of students required to make the expanded school successful.

ORGANIZATION OF THE REPORT

Chapter II describes the SDJA school, market area, and the competitive schools within the market area. **Chapter III** describes the projections of future demand. Four

appendices are attached that provide detailed tables of the data used in the analysis. Appendix A provides historical enrollment at competitive schools, Appendix B provides historical enrollment for selected public school districts, Appendix C provides general demographic data, and Appendix D is the form used in the competitive school interview.

II. SETTING

SJDA SCHOOL

The San Diego Jewish Academy is located on three campuses: an elementary and middle school in the La Jolla area, and a smaller elementary school in San Carlos. For the 1999/2000 school year, the SDJA had the following enrollment by grade:

**San Diego Jewish Academy
1999/2000 Enrollment**

Grade	Students
K	45
1	64
2	67
3	70
4	70
5	72
6	40
7	43
8	32
9	15
Total	518

¹ Includes enrollment at all three campuses.

The entire SDJA student body has grown by 64 percent over the last ten years, as shown in **Figure 1**. The middle school has increased enrollment from 43 in 1989/90 to 115 in the current school year. This is a drop from the original 1998/99 enrollment of 141. SDJA staff believes that this enrollment decrease is related to the delay in opening the new school for the original target of the 1999/00 school year. The initial increase in middle school enrollment, and the subsequent loss of students, indicates the importance of the middle school expansion in attracting and retaining new students. The middle school enrollment is expected to increase to the 1998/99 level with a 2000/01 opening date for the new campus.

MARKET AREA

The SDJA serves a large geographic area within San Diego County. Six students commute from Tijuana, Mexico each day and over 60 more are bused to the school from the South County and San Carlos areas. **Map 2** shows the location of the current SDJA students. Also shown on this map is the location of the current campuses along with the proposed new school.

Figure 1
San Diego Jewish Academy
Annual Enrollment Change by Grade Level

School Year	K-5	6-8	9	Total	Annual Change	Average Annual
89/90	273	43	-	316		
90/91	277	81	9	367	16.1%	
91/92	305	85	8	398	8.4%	
92/93	330	87	7	424	6.5%	
93/94	316	114	18	448	5.7%	
94/95	308	118	9	435	(2.9%)	
95/96	302	114	13	429	(1.4%)	
96/97	327	104	11	442	3.0%	
97/98	312	116	8	436	(1.4%)	
98/99	369	141	0	510	17.0%	
99/00 [1]	388	115	15	518	1.6%	5.1%
Total Change	115	72	N/A	202	64%	

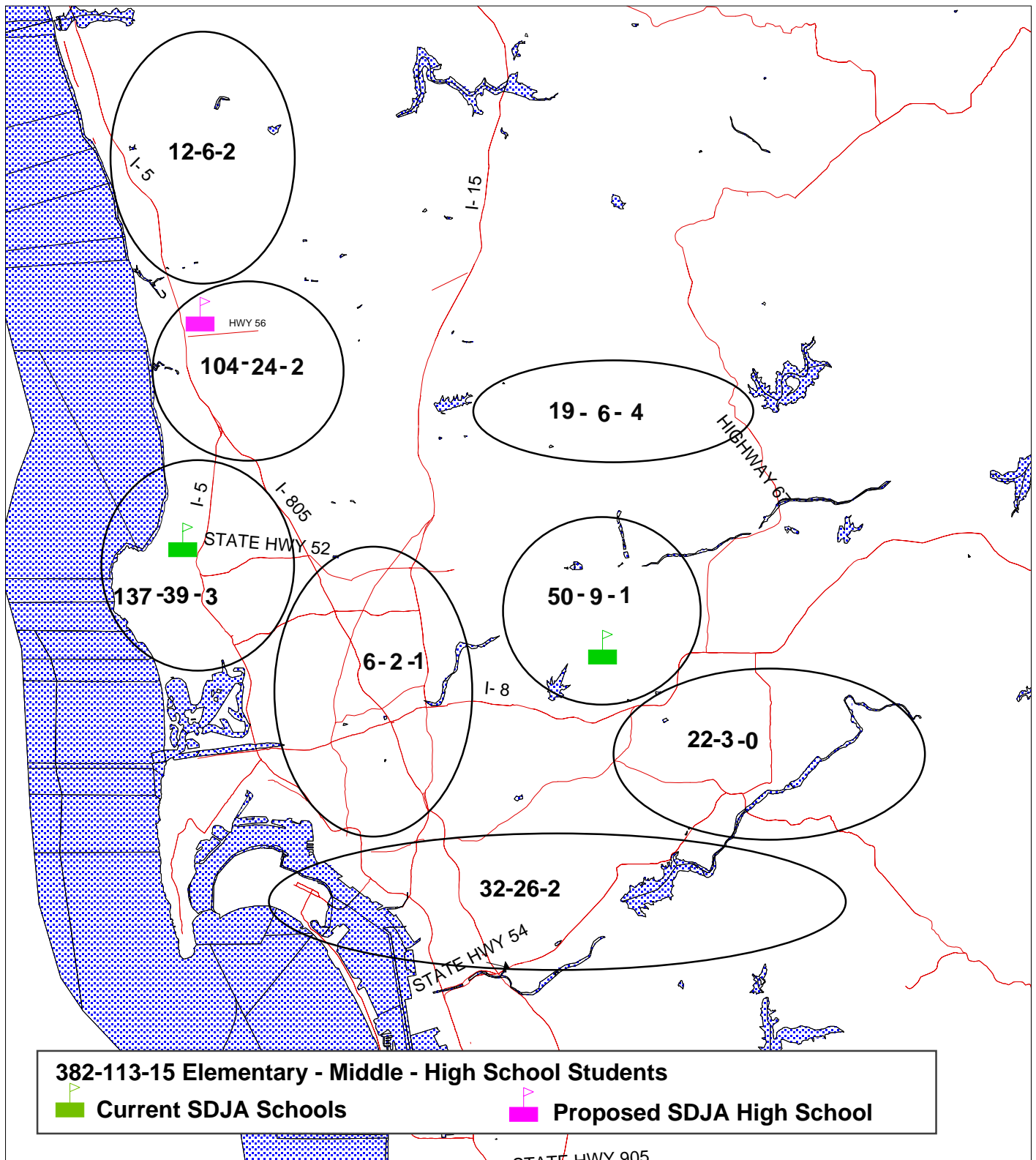
[1] Decrease in middle school students due to uncertainty over middle school location in the 1999/00 school year. Construction of the proposed new school will eliminate this uncertainty.

Source: State of California, SDJA

Map 2

San Diego Jewish Academy Market Study

Location of SDJA Students



Note: Excludes 6 students from Mexico and 2 students from outside the San Diego area.

Development of the new school site will provide greater access to northern San Diego County. In addition, Caltrans has scheduled the completion of State Route 56. This will provide greater access to the school from the inland portions of the County.

COMPETITIVE SCHOOLS

The SDJA competes for students over a wide geographic area. While there are three other Jewish day schools serving the San Diego market, the SDJA also must compete with private independent schools, and to a lesser extent public schools, in attracting Jewish students. Provided below is a brief description of the competitive school environment in which the SDJA operates. **Map 3** shows the location of these schools in relation to the proposed SDJA school. **Appendix A** provides a detailed historical enrollment by grade for each of the competitive schools.

Jewish Schools

San Diego County currently supports four Jewish day schools providing service to grades K-6. Three of these schools serve grades 7-8, and two of these schools include a ninth grade class. In addition, an Orthodox Jewish High School, the Torah School, opened this fall serving 21 ninth graders. The Torah School's class offerings are expected to expand through the twelfth grade.

Private Independent Schools

While there are numerous small & private independent schools in the San Diego area, this study focuses on the four largest private independent schools. Combined, these schools serve the largest segment of the private school population. All four schools are at capacity enrollment levels. Only one school serves grades K-12, the two other schools serve grades 6/7-12, and one school serves grades 9-12. These schools rely on retention of existing students to fill the upper grade levels, and admission at the 9th grade level is extremely competitive.

Christian Schools

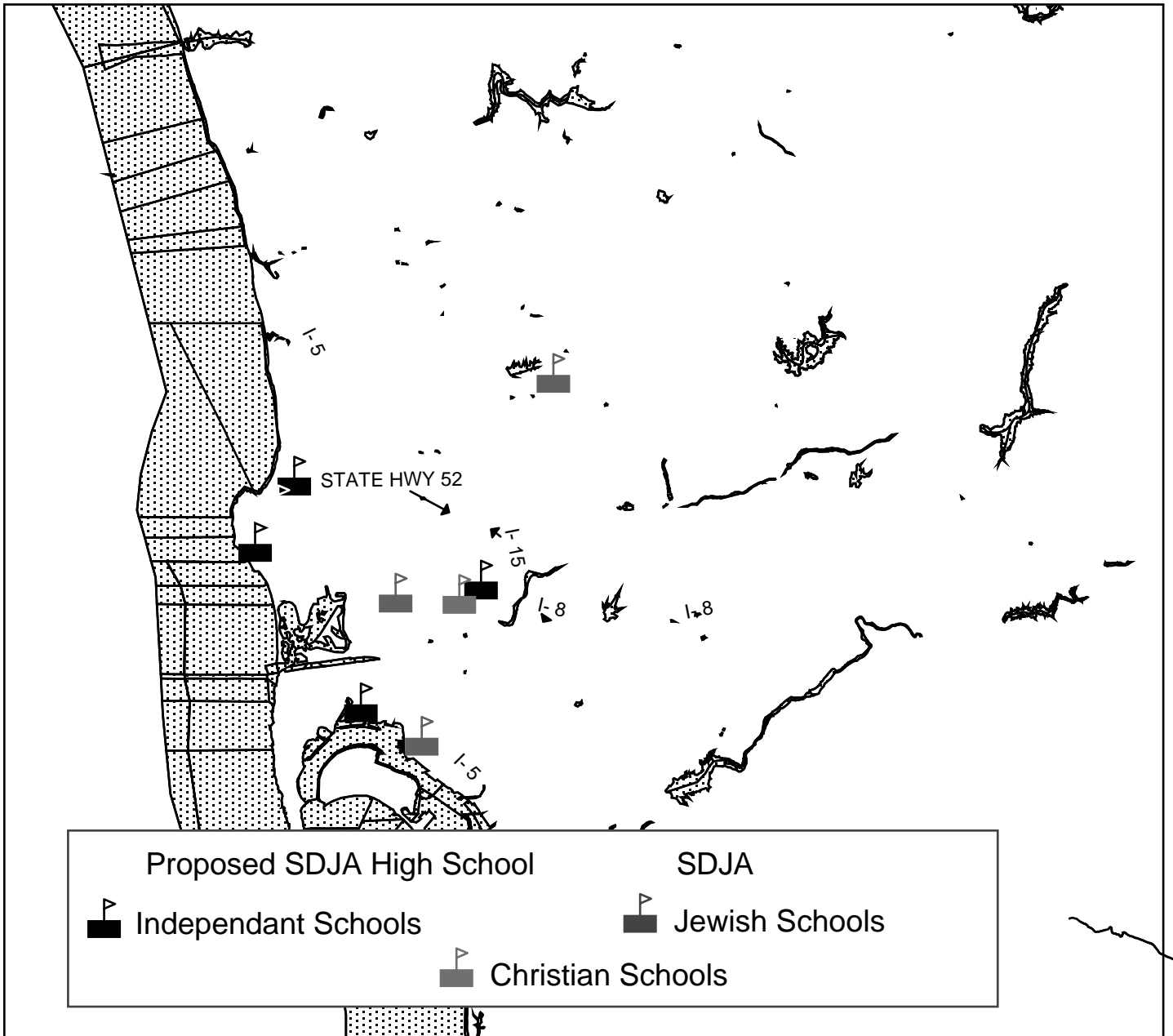
The number of Christian schools throughout the San Diego area greatly outnumbers all other private schools. This study includes enrollment history for some of the Christian schools to provide a perspective on enrollments at other religious private schools; however, it is unlikely that the SDJA will compete with Christian schools for students.

Bishop's School is included because of its reputation and location. It is possible that Jewish students would consider this school as a viable option. The University of San Diego High School is less likely to attract Jewish students; however, it is a large Catholic school and is relocating to a site very near the new SDJA school site.

Public Schools

SDJA operates within the San Dieguito Union High School District. It is also in close proximity to the San Diego City Unified School District. The largest high school in each district, Torrey Pines High and La Jolla High, are commonly attended by former SDJA students; however, these schools are currently experiencing severe overcrowding.

Map 3
San Diego Jewish Academy Market Study
Location of Competitive Schools in the Market Area



COMPETITIVE SCHOOL INTERVIEWS

In order to assess the characteristics of competitive schools, EPS interviewed eight Jewish and independent schools in the SDJA market area. The Torah School declined to respond to the interview questions. **Figure 2** summarizes the results of the interview questions for each school.

Overall, the competitive schools believe that future demand for private school enrollment is strong. In addition, the larger independent schools show a strong demand for current enrollment based on the number of applications received compared to the number of seats available on an annual basis.

**Figure 2
Summary of Competitive School
Survey Results**

Market Area School	Market Area	Plans for Expansion	Avg. # of Applicants		% Students From Private Schools	Applicants From SDJA	Overall Educational Philosophy	Projection of Enrollment Demand
			7th Grade	9th Grade				
Soille San Diego Hebrew Day School	Carlsbad, Tijuana, El Cajon	No	n/a	n/a	Did not respond	Yes	Orthodox Judaism	Very Strong
Beth Israel Day School	San Diego, El Cajon, Chula Vista, Del Mar	No	n/a	n/a	Did not respond	No	Jewish	Very Strong
Chabad Hebrew Day	Entire County	Possibly	18-20	n/a	Some	Yes	Orthodox Judaism	Very Strong
Torah High School	Did Not Respond							
Francis W. Parker	So. County; Linda Vista, Mission Hills, Chula Vista	No	300 apps. for 25 seats	200 apps. for 10 seats	50-60%	Yes, 1-2 per year for 9th grade	Concentration on Individual Student	Very Strong
La Jolla Country Day	Entire County	No	250 apps. for 25 seats	150 apps. for 10-15 seats	90%	A few	College Prep	Very Strong
Bishop's School	Most No. County, Some So. County	No	200 apps. for 95 seats	100 apps. for 20 seats	60% Elem., 40% 7th-9th	Some	College Prep	Very Strong
Coleman Preparatory	Entire County	No	Approx. 200-300 / year			Once	College Prep	Very Strong
University of San Diego High	Entire County	New HS in Carmel Valley Opening 2004, Plan for N. & S. County H. Schools	n/a	600 apps. for 400 seats	80% Catholic Elem., 20% Pub or Other Private	No	Catholic, College Prep	Very Strong

"Survey"

III. INDICATIONS OF FUTURE DEMAND

The potential demand for the San Diego Jewish Academy's expanded K-8 school and the addition of the high school cannot be accurately projected; however, there are several indications that the overall demand for the SDJA school could be strong. The major factors pointing to a strong demand are evaluated below.

EXISTING JEWISH HIGH SCHOOL STUDENTS

The enrollment for the future high school will come primarily from students currently enrolled in a Jewish day school, secondly from Jewish students enrolled in a non-Jewish private school, and finally from Jewish students enrolled in the public school system. While a majority of the high school students will come from the SDJA, the school must also market to students who have been enrolled in other schools. The following analysis indicates the amount of students that may be attracted from each of the student categories within the competitive market area.

SDJA ENROLLMENT

Enrollment at the SDJA has been stable and growing since 1988. The lower school has experienced the greatest stability during this time period. The middle school had a large enrollment increase in the 1998/99 school year, but saw a reduction in enrollment in 1999/00. It is anticipated that construction of the new school will re-capture students from the lost 1998/99 middle school class.

The addition of the new high school anticipates retention of students attending the SDJA middle school. The level of retention is unknown; however, a retention range of 60 to 80 percent is assumed for the purpose of estimating potential demand. This is based upon a survey of current SDJA parents in which 75 percent indicated that they would consider continuing on in the SDJA high school. A graphic comparison of the SDJA's enrollment goal for the high school and the assumed number of students retained from the middle school is shown in **Figure 3**. **Figure 4** shows the number of students required under each retention level on a year-by-year basis.

At the 80 percent retention level, the SDJA will need to attract 99 students from other schools by the fifth year of operation, or approximately 20 new students per year on average. If the SDJA is only able to retain 60 percent of its middle school students, the number of outside students that will need to be attracted increases to 144 by the fifth year of operation, or approximately 29 new students per year on average.

Figure 3
San Diego Jewish Academy Market Study
Potential High School Enrollment from Existing Students

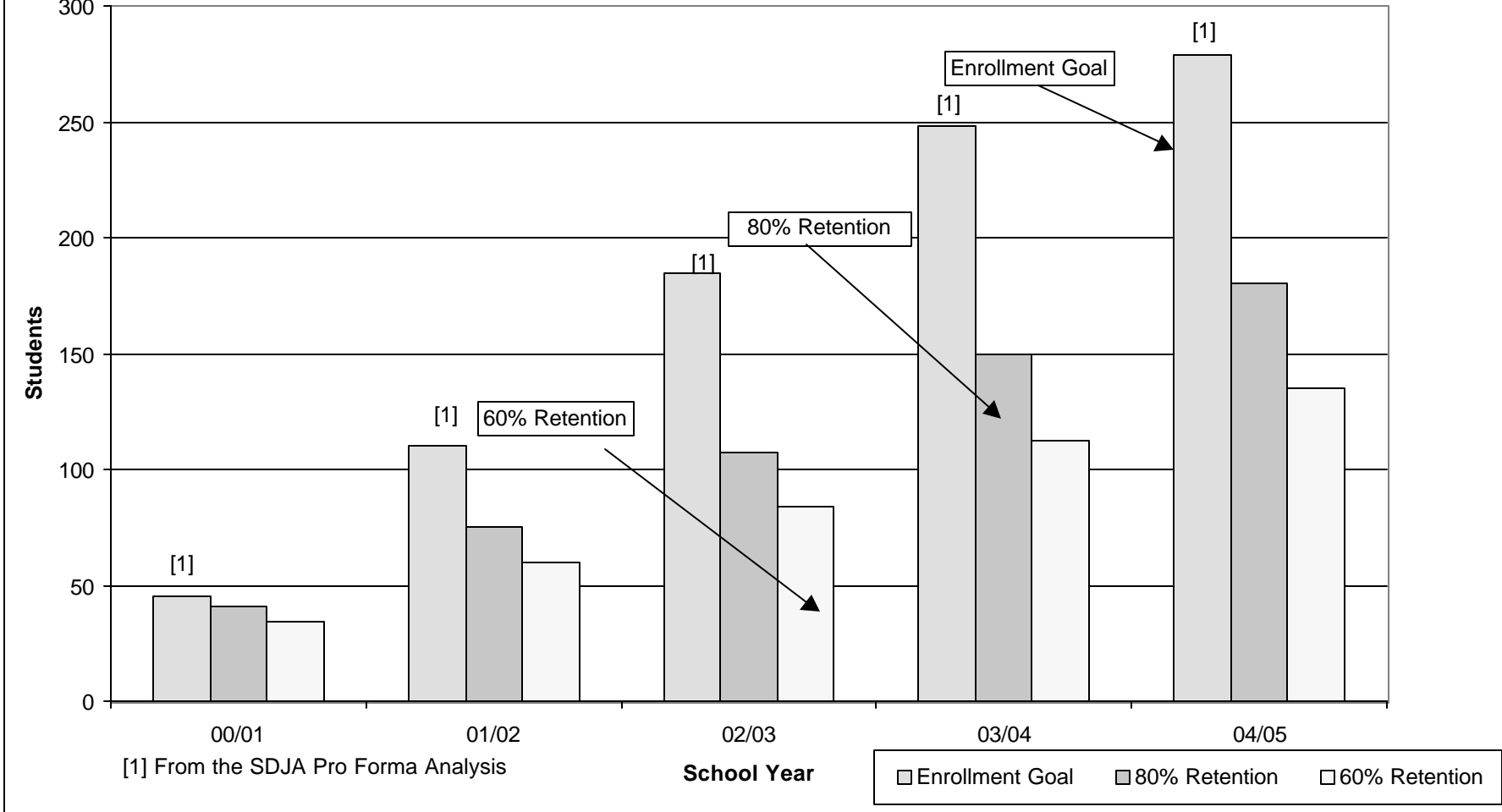


Figure 4
San Diego Jewish Academy Market Study
Potential Retention of Existing Students Into the High School

Item	Year				
	00/01	01/02	02/03	03/04	04/05
High School Capacity	288	288	288	288	288
Enrollment Goal	45	110	185	248	279
Scenario 1: 80% Retention [1]					
SDJA Students [2]	41	75	107	150	180
Non-SDJA Students Needed	4	35	78	98	99
Total Enrollment	45	110	185	248	279
Scenario 2: 60% Retention [1]					
SDJA Students [2]	34	60	84	112	135
Non-SDJA Students Needed	11	50	101	136	144
Total Enrollment	45	110	185	248	279

"retention"

[1] Retention based on the middle school enrollment increase assumed in the SDJA pro forma analysis.

[2] Assumes 100% Retention of the 1999/00 Grade 9 Class

COMPETITIVE JEWISH SCHOOLS

Existing Jewish day schools can serve as feeder schools to the SDJA middle school and high school. The Jewish schools' historical enrollment is shown on **Figure 5**. Over the last five years, the total middle school enrollment in the three competing Jewish day schools has ranged between 108 and 121 students, or roughly 35 to 40 students per grade level. If SDJA was able to attract 25 to 50 percent of the students leaving these middle schools, the SDJA high school could increase its enrollment by 35 to 80 students over a four- to five-year period.

The ability of the SDJA to attract students from these schools is dependent in part on the philosophy of the competitive schools. The **Chabad** School and the **Soille San Diego** School provide an education rooted in Jewish orthodoxy. Students from these schools are less likely to attend the SDJA because of its reformed theological perspective. The newly formed **Torah High School** is likely to serve the needs of students seeking to continue in a school with an orthodox theology.

SDJA recently added a Rabbi to its staff in addition to enhancing its Judaic studies in an effort to attract more Orthodox students to its high school grades. This strategy appears to be working as the SDJA has received 30 requests for 2000/01 school year applications from **Chabad** School and **Soille** School students, and 60 applications for the 2000/01 10th grade class.

COMPETITIVE INDEPENDENT SCHOOLS

Independent schools serve the largest segment of the private school population. EPS has included several independent schools in our list of competitive schools. These include:

- La Jolla Country Day
- Francis W. Parker
- Bishop's School
- University of San Diego High School (USDHS)

These schools have been very successful in attracting and retaining students through twelfth grade. La Jolla County Day is a K-12 school, while Francis W. Parker School serves grades 6-12. Bishop's School serves grades 7-12, and USDHS serves grades 9-12. There are very few openings at either of these schools for ninth grade entries.

The addition of a Jewish high school with high academic standards is likely to attract Jewish students currently attending or likely to attend one of these competitive schools. The 1998/99 enrollment for these schools (excluding the USDHS) was 1,136 9-12 students, as shown on **Figure 6**. SDJA staff estimate that up to 30 percent of these students could be Jewish. Assuming a range of 8 percent (approximate percentage of Jewish families in San Diego County) to 30 percent of Jewish students; these schools represent a potential applicant pool of 91 to 341 high school students.

Figure 5
San Diego Jewish Academy Market Study
Historical Enrollment of Jewish Schools

School Year	Chabad Hebrew Day	Soille Hebrew Day	Beth Israel Day	Subtotal of Competitive Jewish Schools	SDJA	Total All Schools	% SDJA
<u>Grades K-5</u>							
1989/90	88	136	92	316	273	589	46%
1990/91	90	136	114	340	277	617	45%
1991/92	127	87	128	342	305	647	47%
1992/93	108	98	131	337	330	667	49%
1993/94	125	115	122	362	316	678	47%
1994/95	122	130	114	366	308	674	46%
1995/96	152	150	107	409	302	711	42%
1996/97	183	163	107	453	327	780	42%
1997/98	166	173	109	448	312	760	41%
1998/99	177	167	107	451	369	820	45%
<u>Grades 6-8 [1]</u>							
1989/90	11	54	6	71	43	114	38%
1990/91	22	56	0	78	90	168	54%
1991/92	26	53	10	89	93	182	51%
1992/93	30	50	14	94	94	188	50%
1993/94	52	54	10	116	132	248	53%
1994/95	44	66	15	125	127	252	50%
1995/96	55	68	16	139	127	266	48%
1996/97	74	68	10	152	115	267	43%
1997/98	58	62	11	131	124	255	49%
1998/99	55	63	19	137	141	278	51%

"Jewish_hist"

[1] Figures include a 9th grade class for the San Diego Jewish Academy and Soille San Deigo Hebrew Day.
Source: State Department of Education (data only available through 1998/99 for competitive schools).

Figure 6
San Diego Jewish Academy Market Study
Estimated Jewish Student Enrollment at
Competitive Private Schools and Selected Public School Districts

School	1998/99 9-12 Enrollment	Estimated Jewish Population	
		8%	30%
<u>Private Schools</u>			
		[1]	[2]
La Jolla Country Day	329	26	99
Francis W. Parker School	389	31	117
Bishop's School	418	33	125
Private School Total [3]	1,136	91	341
<u>Public Schools</u>			
Selected Districts Total [4]	190,195	15,216	57,059

"Jewish"

[1] Estimated at slightly under the estimated percent of Jewish households in the county.

[2] Estimated percent from SDJA staff.

[3] Excludes USDHS, as this school is not believed to have a significant Jewish student enrollment.

[4] Includes San Diego City, Poway Unified, Carlsbad Unified, San Dieguito Union High, Torrey Pines High, and La Jolla High School. There are an estimated (at 8%) 7,1886 K-5 Jewish students and 3,394 estimated Jewish Students in grades 6-8.

PUBLIC SCHOOLS

There is no data on the number of Jewish students attending public schools or the likelihood of a student transferring from the public schools to a private school. Based on figures from the United Jewish Federation (UJF), approximately 8 percent of San Diego County households are Jewish. Assuming this same percentage for grades K-12 students, there is an estimated 15,000 Jewish students attending public schools in school districts in areas where SDJA currently draws students. Approximately 4,300 of these students could be high school students. This estimated student population represents a potential resource from which to attract new students. (NOTE: the estimates of Jewish households and public school students are very speculative and are meant to be illustrative of a potential student population.)

PROJECTED DEMAND FOR LOWER AND MIDDLE SCHOOLS

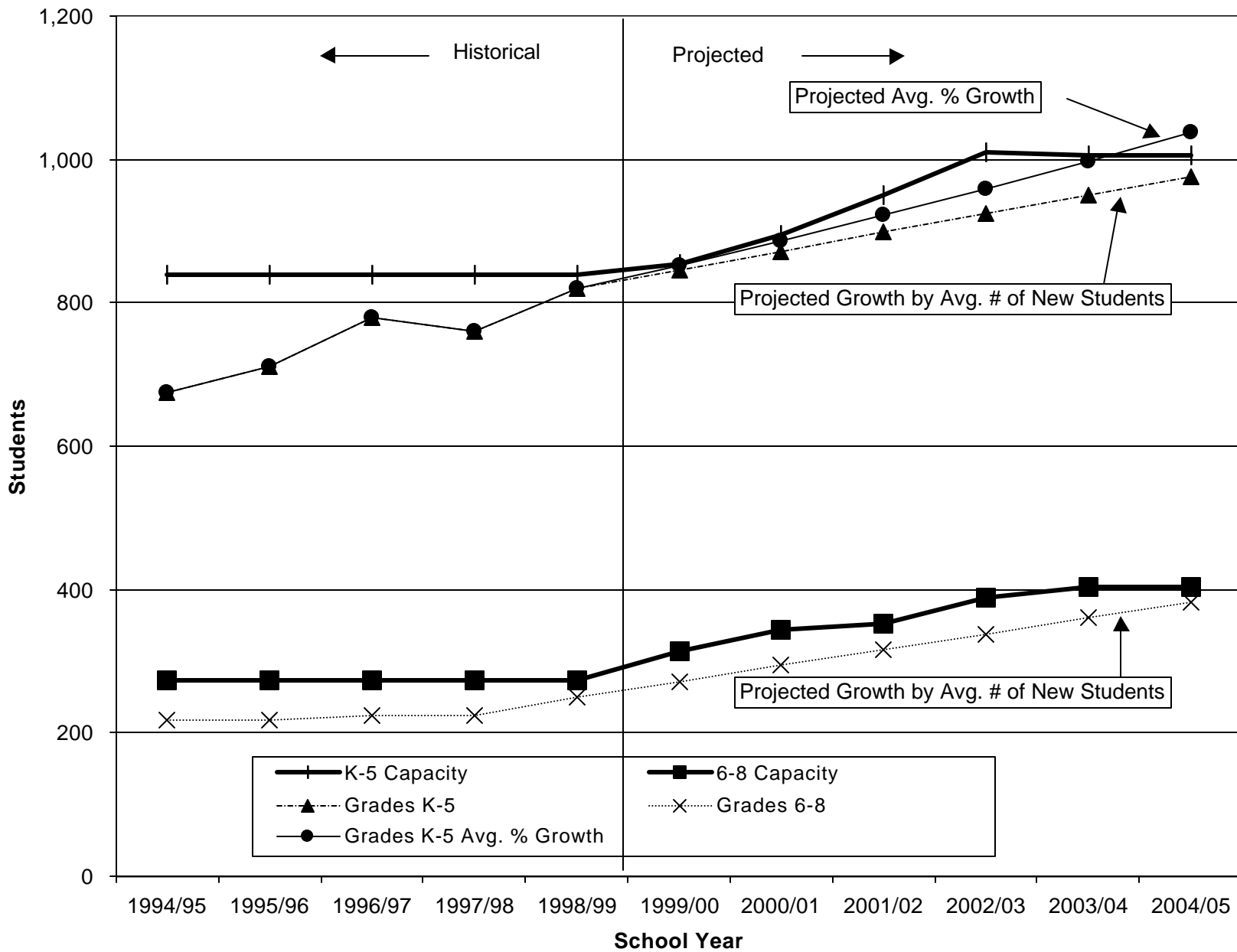
Enrollment increases in Jewish day schools for grades K-8 has been fairly constant over the last 10 years. EPS has projected potential future growth based on the historical growth within the elementary and middle school grades. **Figure 7** shows the five-year enrollment for each of the Jewish day schools in San Diego County and projects future enrollment based upon the 10-year historical growth rates. These projectives are compared to the anticipated elementary and middle school enrollment capacity including the SDJA expansion. Overall, the elementary grades have increased by 4 percent per year over this time period, while middle school growth has increase at nearly 20 percent per year.

For purposes of projecting future demand, EPS used both the percentage increase and average increase in the nominal number of students as growth benchmarks. The lower school growth in demand is likely to fall within these two predictions of growth. The middle school projection is based on the average nominal increase in students alone. Using the annual percentage-rate increase for the middle school is determined to be too aggressive.

LIMITED CAPACITY AT COMPETITIVE SCHOOLS

As indicated above, there is limited capacity at competitive private schools. The only competitive Jewish high school, the Torah School, has just opened this year and cannot be judged in its ability to compete for students other than on the basis of its orthodox theology. Most of the competitive schools receive significantly more applications each year than there are spots available. The following analysis is based on EPS's survey of competitive schools.

Figure 7
Historical and Projected Jewish School Enrollment
and Capacity



School	Annual # of Applicants	Available Spots	% Admitted
La Jolla Country Day	250 MS/150 HS	25 MS/10-15 HS	10% / 7%-10%
Bishop's School	200 MS/150 HS	95 MS/30 HS	48% / 20%
Francis W. Parker	300 MS/200 HS	25 MS/10 HS	<10% / 5%
USDHS	600 HS	400 HS	75%

MS= Middle School HS= High School

As the above table indicates, the overall demand for high-quality private school enrollment appears to far exceed the supply. This indicates that a high degree of success may be achieved by the SDJA if they are able to compete on an academic basis with the competitive private schools.

COMPETITIVE TUITION

The tuition levels proposed by the SDJA are very competitive with the other independent and Jewish schools. **Figures 8 and 9** provide a comparison of tuition levels by number of students from the identified competitive schools for both the middle school and high school levels. As these charts show, the proposed SDJA tuition levels are in the mid-range of the competitive schools. The high school tuition levels are well below the three most competitive private high schools. The middle school tuition levels are competitive with other Jewish Schools and well below the independent private schools.

GROWING JEWISH POPULATION

There is no accurate estimate of the current Jewish population in San Diego County; however, the UJF estimates that there are 80,000 Jewish households out of an estimated 981,000 total households, or approximately 8 percent of households. One indication of an increasing Jewish population is the increase that the UJF has experienced in its mailing list between 1988 and 1997. The UJF mailing list has increased from 12,048 to 19,701, or 64 percent. **Map 4** shows where the location of UJF households in relation to the SDJA schools. As this map indicates, the new school location will be closer to a significant number of Jewish households that are not currently served by a Jewish day school.

A source of the increasing Jewish population is in-migration from Mexico. Approximately 25 percent of the SDJA's student body is comprised of students whose country of origin is Mexico. This percentage has remained constant for the number of students entering the SDJA's Kindergarten over the last few years. It is estimated that approximately 600 Jewish families migrate into San Diego on an annual basis.

Figure 8
San Diego Jewish Academy
Middle School Enrollment by Tuition Level

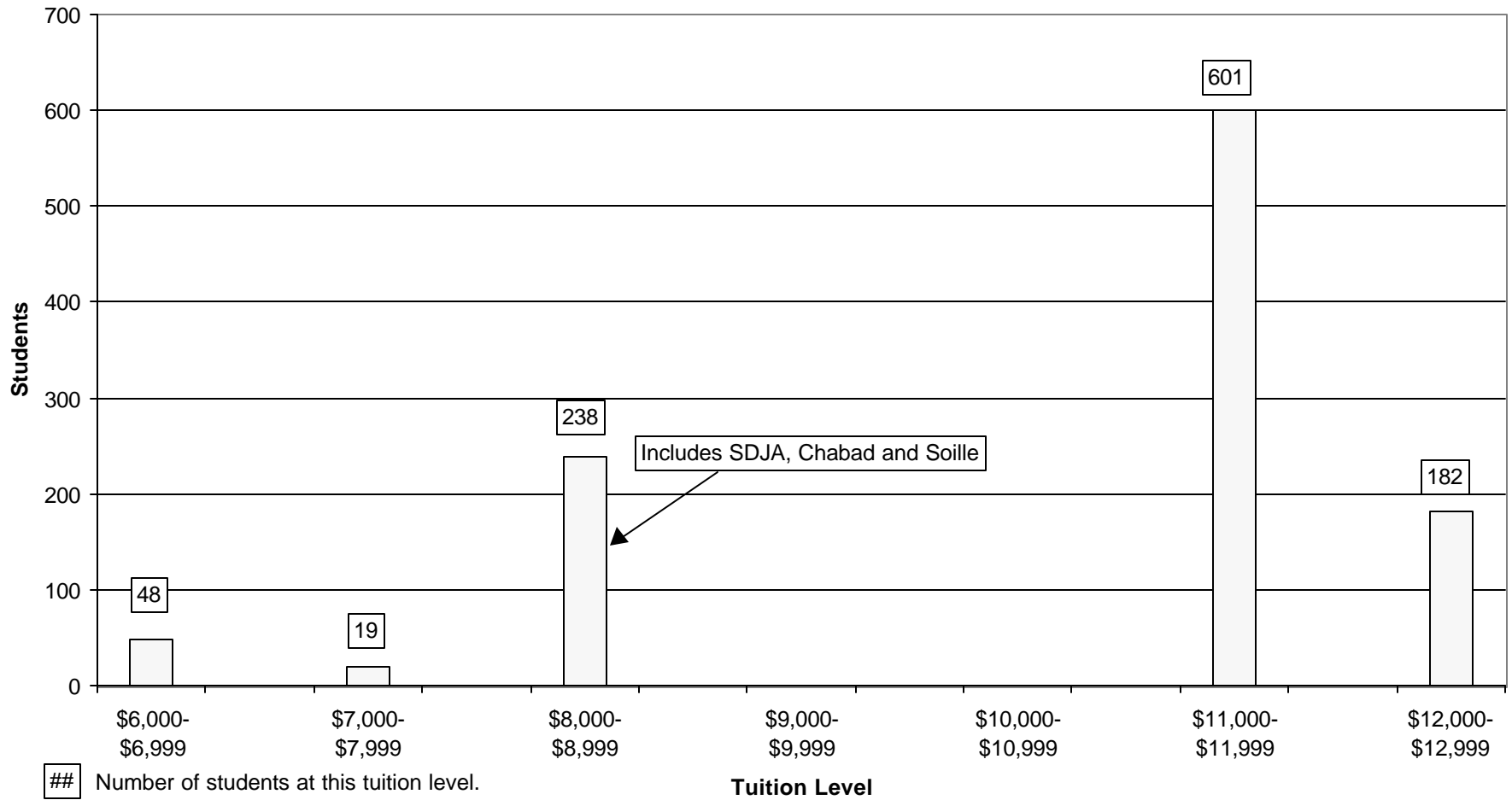
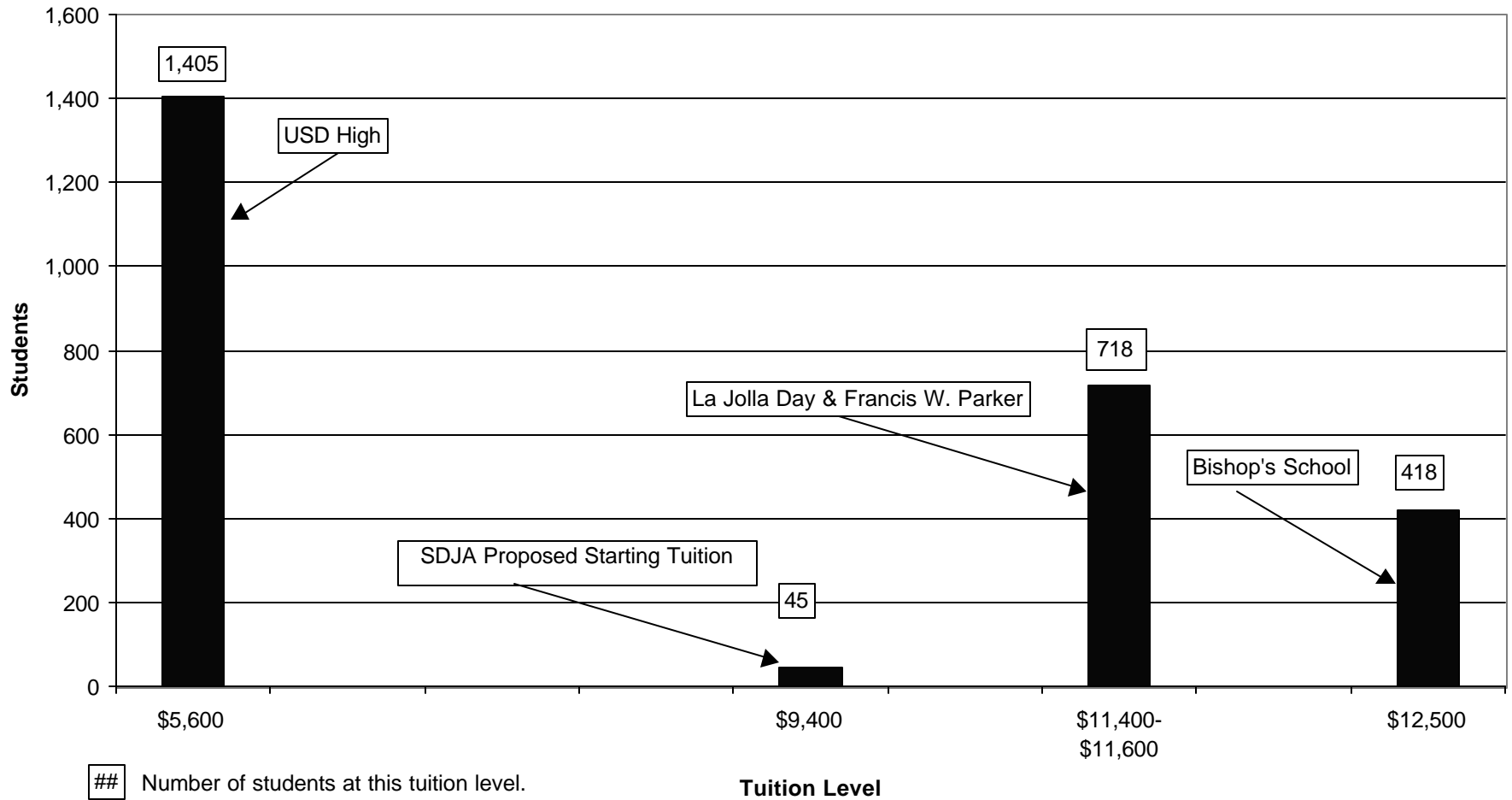


Figure 9
San Diego Jewish Academy Market Study
High School Enrollment by Tuition Level



LOCATION OF PROPOSED SCHOOL

The proposed SDJA school is located at the intersection of Interstate 5 and State Route 56 in the Carmel Valley. This location provides convenient access to the school from the existing student body and places the school in a prime location to attract students from the eastern portions of the County with the completion of the SR 56 freeway within the next three years. According to the 1990 Census, Carmel Valley is a high-income location, with a median income of \$80,877. Housing units in the area have grown by 90 percent since 1990; population has grown by 103 percent, increasing to 23,263 in 1999. Several master planned communities have recently been approved for development in the eastern portion of this community including the Pacific Highlands Ranch community, which will add another 4,974 housing units to the area.

Map 2 shows the proposed location of the SDJA school in relation to its current student body, and **Map 3** shows the new school's geographical relationship to competitive schools. The location is approximately a ten minute drive north of the current SDJA elementary school. This distance should not materially affect existing student enrollment, and it makes the school more accessible to the northern and eastern areas of the County. It is likely that the size, location, and visibility of the school will all contribute to its ability to attract students.

NATIONAL AND REGIONAL TRENDS

According to the **Task Force on Jewish Day Schools**, Jewish private schools are becoming an attractive alternative for parents who do not wish to enroll their children in the public school system. The number of day schools across the US has increased from 600 in 1989 to 810 today, a growth of 35%. The Task Force estimates that there are currently 212,000 students enrolled in Jewish day schools.

Evidence of the national trend is apparent in southern California. Two Jewish high schools, the **Miliken Community** School in Los Angeles and the **Tarbut V'Torah** School in Orange County, have experienced high growth in their enrollments. The Tarbut School opened to only grades K-5 in 1991 and moved into a K-12 facility for the 1997/98 school year. Tarbut currently offers classes through 11th grade with 140 students in grades 9-11. They will add the 12th grade for the 2000/01 school year. The Miliken School is beginning to plan for expansion of their current campus, as they receive approximately 120 applications for a ninth grade class with only 30 available seats.

APPENDICES:

**APPENDIX A – COMPETITIVE SCHOOLS HISTORICAL
INFORMATION**

APPENDIX B – PUBLIC SCHOOL ENROLLMENT

APPENDIX C – DEMOGRAPHIC INFORMATION

APPENDIX D – INTERVIEW FORM

APPENDIX A

COMPETITIVE SCHOOLS HISTORICAL ENROLLMENT

The competitive school data is divided into Jewish day schools, independent schools, and Christian schools. The Christian schools are included as an overall indication of the continuing demand for religious private school enrollment even though it is unlikely that the SDJA will be competitive with these schools. **Figure A-1** provides a comparison of total enrollment by grade level for each of the school categories. Overall, Jewish and Christian schools have increased at essentially the same annual rate. This rate is higher than the selected independent schools; however, the independent schools have had limited ability to increase enrollment capacity.

The historical student enrollment is included for the following schools:

JEWISH SCHOOLS

- Figure A-2**—San Diego Jewish Academy
- Figure A-3**—Soille San Diego Hebrew Day School
- Figure A-4**—Chabad Hebrew Day School
- Figure A-5**—Beth Israel Day School

INDEPENDENT SCHOOLS (including large Catholic High Schools)

- Figure A-6**—La Jolla Country Day
- Figure A-7**—Francis W. Parker School
- Figure A-8**—Bishop's School
- Figure A-9**—University of San Diego High School
- Figure A-10**—Coleman Preparatory
- Figure A-11**—Children's Creative and Performing Arts Academy

CHRISTIAN SCHOOLS

- Figure A-12**—Santa Fe Christian Community School
- Figure A-13**—School of the Madeleine
- Figure A-14**—Horizon Christian School
- Figure A-15**—Academy of Our Lady of Peace
- Figure A-16**—Maria Montessori Elementary

Figure A-1
San Diego Jewish Academy Market Study
Historical Enrollment For Selected Competitive Schools by Grade Level and School Type

Item	School Year										Average Annual Change	Annual % Change
	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95	1995/96	1996/97	1997/98	1998/99		
Jewish Schools												
K-5	589	617	647	667	678	674	711	780	760	820	26	3.74%
6-8	49	151	154	156	207	218	217	225	224	250	22	19.85%
9-12	11	17	10	18	31	19	33	32	20	9	n/a	n/a
Total	649	785	811	841	916	911	961	1,037	1,004	1,079	48	5.81%
% Change	N/A	20.96%	3.31%	3.70%	8.92%	(0.55%)	5.49%	7.91%	(3.18%)	7.47%		
Independent Schools												
K-5	486	533	547	613	616	569	597	639	655	658	19	3.42%
6-8	702	761	776	817	838	815	798	704	843	868	18	2.39%
9-12	2,144	2,153	2,274	2,247	2,312	2,323	2,391	2,448	2,552	2,598	50	2.16%
Total	3,332	3,447	3,597	3,677	3,766	3,707	3,786	3,791	4,050	4,124	87	2.40%
% Change	N/A	3.45%	4.35%	2.22%	2.42%	(1.57%)	2.13%	0.13%	6.83%	1.83%		
Christian Schools												
K-5	887	894	1,007	989	1,059	1,115	1,171	1,216	1,221	1,263	85	4.00%
6-8	325	330	386	431	536	590	604	629	645	648	57	7.97%
9-12	778	770	842	929	1,051	1,110	1,175	1,279	1,334	1,368	78	6.47%
Total	1,990	1,994	2,235	2,349	2,646	2,815	2,950	3,124	3,200	3,279	220	5.71%
% Change	N/A	0.20%	12.09%	5.10%	12.64%	6.39%	4.80%	5.90%	2.43%	2.47%		

"summary"

Figure A-2
San Diego Jewish Academy Market Study
Historical Enrollment

San Diego Jewish Academy

Year	Grades												Other Elem.	Other Sec.	Total	
	K	1	2	3	4	5	6	7	8	9	10	11				12
1989/90	57	60	42	31	52	31	43	-	-	-	-	-	-	0	0	316
1990/91	47	55	55	41	29	50	34	21	26	9	-	-	-	0	0	367
1991/92 [1]	53	58	56	48	41	49	35	25	25	8	-	-	-	0	0	398
1992/93	58	60	57	55	52	48	35	28	24	7	-	-	-	0	0	424
1993/94	51	54	57	51	54	49	55	32	27	18	-	-	-	0	0	448
1994/95	54	49	50	56	43	56	44	35	39	9	-	-	-	0	0	435
1995/96	57	55	52	44	55	39	52	30	32	13	-	-	-	0	0	429
1996/97	50	64	61	50	46	56	39	38	27	11	-	-	-	0	0	442
1997/98	51	53	58	61	44	45	50	33	33	8	-	-	-	0	0	436
1998/99	55	60	67	69	69	49	47	56	38	0	-	-	-	0	0	510
1990/00	45	64	67	70	70	72	40	43	32	15	-	-	-	0	0	518

"SDJA"

[1] 1991/92 Enrollment is the average of 1990/91 and 1992/93 figures

Source: State Department of Education

Figure A-3
San Diego Jewish Academy Market Study
Historical Enrollment

Soille San Diego Hebrew Day School

Year	Grades													Other Elem.	Other Sec.	Total
	K	1	2	3	4	5	6	7	8	9	10	11	12			
1989/90	33	30	18	15	20	20	16	16	11	11	-	-	-	0	0	190
1990/91	26	21	29	20	18	22	18	15	15	8	-	-	-	0	0	192
1991/92	10	16	14	21	16	10	13	18	12	10	-	-	-	0	0	140
1992/93	11	16	17	17	23	14	11	11	17	11	-	-	-	0	0	148
1993/94	17	17	17	21	17	26	15	20	9	10	-	-	-	0	0	169
1994/95	24	23	22	17	24	20	24	13	19	10	-	-	-	0	0	196
1995/96	26	30	24	28	19	23	20	24	12	12	-	-	-	0	0	218
1996/97	32	32	32	22	24	21	20	20	22	6	-	-	-	0	0	231
1997/98	34	30	29	36	22	22	19	14	17	12	-	-	-	0	0	235
1998/99	29	31	26	30	33	18	21	17	16	9	-	-	-	0	0	230

"Soille"

Source: State Department of Education

Figure A-4
San Diego Jewish Academy Market Study
Historical Enrollment

Chabad Hebrew Day School

Year	Grades													Other Elem.	Other Sec.	Total
	K	1	2	3	4	5	6	7	8	9	10	11	12			
1989/90	17	16	17	16	10	12	6	5	-	-	-	-	-	0	0	99
1990/91	17	17	15	15	16	10	13	6	3	-	-	-	-	0	0	112
1991/92	21	28	27	17	18	16	11	10	5	-	-	-	-	0	0	153
1992/93	18	17	20	21	16	16	11	10	9	-	-	-	-	0	0	138
1993/94	21	22	19	20	21	22	20	14	15	3	-	-	-	0	0	177
1994/95	21	20	20	21	19	21	19	13	12	-	-	-	-	0	0	166
1995/96	23	36	24	22	24	23	22	12	13	8	-	-	-	0	0	207
1996/97	38	38	38	23	23	23	23	20	16	15	-	-	-	0	0	257
1997/98	20	41	20	44	21	20	21	21	16	-	-	-	-	0	0	224
1998/99	38	21	39	20	39	20	21	13	21	-	-	-	-	0	0	232

"Chabad"

Source: State Department of Education

Figure A-5
San Diego Jewish Academy Market Study
Historical Enrollment

Beth Israel Day School

Year	Grades													Other Elem.	Other Sec.	Total
	K	1	2	3	4	5	6	7	8	9	10	11	12			
1989/90	23	20	20	12	14	3	6	-	-	-	-	-	-	0	0	98
1990/91	25	25	20	18	12	14	0	-	-	-	-	-	-	0	0	114
1991/92	19	26	21	25	22	15	10	-	-	-	-	-	-	0	0	138
1992/93	22	16	24	23	25	21	14	-	-	-	-	-	-	0	0	145
1993/94	27	19	15	21	20	20	10	-	-	-	-	-	-	0	0	132
1994/95	18	18	20	16	20	22	15	-	-	-	-	-	-	0	0	129
1995/96	22	20	17	18	14	16	16	-	-	-	-	-	-	0	0	123
1996/97	20	21	20	15	18	13	10	-	-	-	-	-	-	0	0	117
1997/98	22	17	20	19	13	18	11	-	-	-	-	-	-	0	0	120
1998/99	19	21	18	20	18	11	19	-	-	-	-	-	-	0	0	126

"Israel"

Source: State Department of Education

Figure A-6
San Diego Jewish Academy Market Study
Historical Enrollment

La Jolla Country Day School

Year	Grades												Other Elem.	Other Sec.	Total	
	K	1	2	3	4	5	6	7	8	9	10	11				12
1989/90	45	42	42	40	39	53	49	82	70	68	71	64	58	0	0	723
1990/91	62	43	44	41	43	54	62	74	81	58	62	70	60	0	0	754
1991/92	59	60	57	55	39	55	66	93	82	82	69	65	69	0	0	851
1992/93	59	54	59	55	54	47	61	86	91	80	94	70	61	0	0	871
1993/94	54	61	56	59	58	60	60	85	91	83	76	89	69	0	0	901
1994/95	51	54	60	51	59	61	75	85	88	85	79	73	88	0	0	909
1995/96	55	52	59	61	56	71	73	89	87	87	82	81	74	0	0	927
1996/97	56	60	54	60	63	66	78	82	90	83	85	80	83	0	0	940
1997/98	60	56	57	58	60	69	72	103	80	85	85	82	80	0	0	947
1998/99	52	59	59	57	59	68	75	89	106	88	81	81	79	0	0	953

"La_Jolla"

Source: State Department of Education

Figure A-7
San Diego Jewish Academy Market Study
Historical Enrollment

Francis W. Parker School

Year	Grades													Other Elem.	Other Sec.	Total
	K	1	2	3	4	5	6	7	8	9	10	11	12			
1989/90	0	0	0	0	0	0	72	87	75	63	59	45	57	0	0	458
1990/91	0	0	0	0	0	0	73	93	91	67	63	63	44	0	0	494
1991/92	0	0	0	0	0	0	80	101	93	71	69	65	67	0	0	546
1992/93	0	0	0	0	0	0	84	100	96	68	66	70	61	0	0	545
1993/94	0	0	0	0	0	0	81	102	100	92	77	74	73	0	0	599
1994/95	0	0	0	0	0	0	79	106	94	87	79	70	73	0	0	588
1995/96	0	0	0	0	0	0	89	112	103	84	78	81	73	0	0	620
1996/97	0	0	0	0	0	0	84	121	122	102	82	90	82	0	0	683
1997/98	0	0	0	0	0	0	85	115	119	107	106	81	86	0	0	699
1998/99	0	0	0	0	0	0	88	114	116	108	105	93	83	0	0	707

"Francis"

Source: State Department of Education

Figure A-8
San Diego Jewish Academy Market Study
Historical Enrollment

Bishop' s School

Year	Grades												Other Elem.	Other Sec.	Total	
	K	1	2	3	4	5	6	7	8	9	10	11				12
1989/90	-	-	-	-	-	-	-	120	92	112	95	83	78	0	0	580
1990/91	-	-	-	-	-	-	-	112	119	103	98	93	84	0	0	609
1991/92	-	-	-	-	-	-	-	110	111	108	100	96	92	0	0	617
1992/93	-	-	-	-	-	-	-	106	107	110	97	90	90	0	0	600
1993/94	-	-	-	-	-	-	-	116	110	99	101	91	94	0	0	611
1994/95	-	-	-	-	-	-	-	89	124	113	100	90	84	0	0	600
1995/96	-	-	-	-	-	-	-	90	99	102	114	97	98	0	0	600
1996/97	-	-	-	-	-	-	-	85	100	103	115	107	90	0	0	600
1997/98	-	-	-	-	-	-	-	85	88	111	100	116	100	0	0	600
1998/99	-	-	-	-	-	-	-	88	94	105	99	102	112	0	0	600

"Bishops"

Source: State Department of Education

Figure A-9
San Diego Jewish Academy Market Study
Historical Enrollment

University of San Diego High

Year	Grades													Other Elem.	Other Sec.	Total	
	K	1	2	3	4	5	6	7	8	9	10	11	12				
1989/90	-	-	-	-	-	-	-	-	-	-	350	355	283	300	0	0	1,288
1990/91	-	-	-	-	-	-	-	-	-	-	328	339	343	269	0	0	1,279
1991/92	-	-	-	-	-	-	-	-	-	-	347	320	320	330	0	0	1,317
1992/93	-	-	-	-	-	-	-	-	-	-	355	331	303	298	0	0	1,287
1993/94	-	-	-	-	-	-	-	-	-	-	352	340	316	278	0	0	1,286
1994/95	-	-	-	-	-	-	-	-	-	-	370	317	315	289	0	0	1,291
1995/96	-	-	-	-	-	-	-	-	-	-	385	340	303	292	0	0	1,320
1996/97	-	-	-	-	-	-	-	-	-	-	361	353	317	288	0	0	1,319
1997/98	-	-	-	-	-	-	-	-	-	-	387	337	327	310	0	0	1,361
1998/99	-	-	-	-	-	-	-	-	-	-	389	371	319	326	0	0	1,405

"USDHigh"

Source: State Department of Education

Figure A-10
San Diego Jewish Academy Market Study
Historical Enrollment

Coleman Preparatory

Year	Grades													Other Elem.	Other Sec.	Total
	K	1	2	3	4	5	6	7	8	9	10	11	12			
1989/90	17	15	8	11	7	19	12	13	7	-	-	-	-	0	0	109
1990/91	20	12	16	8	13	8	15	10	8	-	-	-	-	0	0	110
1991/92	14	17	9	15	4	11	8	0	0	-	-	-	-	0	0	78
1992/93	20	20	17	17	17	8	19	11	7	-	-	-	-	0	0	136
1993/94	20	17	18	18	17	19	9	15	10	4	4	1	1	0	0	153
1994/95	14	14	14	10	18	11	15	5	7	6	1	2	0	0	0	117
1995/96	27	26	20	16	17	11	7	9	4	0	0	0	0	0	0	137
1996/97	15	30	31	20	12	22	14	9	11	0	0	0	0	0	0	164
1997/98	31	26	29	27	19	17	18	10	9	0	0	0	0	0	0	186
1998/99	23	29	26	27	27	19	20	19	9	0	0	0	0	0	0	199

"Coleman"

Source: State Department of Education

Figure A-11
San Diego Jewish Academy Market Study
Historical Enrollment

Children's Creative and Performing Arts Academy

Year	Grades												Other Elem.	Other Sec.	Total		
	K	1	2	3	4	5	6	7	8	9	10	11				12	
1989/90	33	37	39	15	15	9	11	5	7	3	0	0	0	0	0	0	174
1990/91	39	35	27	26	22	20	7	10	6	5	4	0	0	0	0	0	201
1991/92	36	31	29	22	16	18	17	9	6	3	1	0	0	0	0	0	188
1992/93	30	39	24	21	20	16	17	19	13	2	1	0	0	0	0	0	202
1993/94	33	27	34	21	24	20	16	24	19	4	0	4	0	0	0	0	226
1994/95	33	30	23	26	17	23	22	16	10	4	4	2	1	0	0	0	211
1995/96	29	30	24	17	17	9	15	15	6	6	5	4	5	0	0	0	182
1996/97	33	27	32	23	14	21	12	16	23	9	5	9	4	0	0	0	228
1997/98	21	35	28	24	22	16	25	14	20	16	11	14	11	0	0	0	257
1998/99	28	29	27	27	22	20	15	29	6	14	15	12	16	0	0	0	260

"Arts"

Source: State Department of Education

Figure A-12
San Diego Jewish Academy Market Study
Historical Enrollment

Santa Fe Christian Community School

Year	Grades													Other Elem.	Other Sec.	Total
	K	1	2	3	4	5	6	7	8	9	10	11	12			
1989/90	37	40	34	25	37	25	36	49	53	69	69	35	41	-	-	550
1990/91	40	42	41	31	23	39	25	46	51	43	56	63	33	-	-	533
1991/92	41	37	45	35	36	28	39	45	55	59	44	50	45	-	-	559
1992/93	32	41	38	40	41	35	39	55	46	67	60	54	45	-	-	593
1993/94	39	37	41	40	43	50	48	66	62	58	62	57	45	-	-	648
1994/95	44	50	38	51	52	50	62	73	68	64	54	41	42	-	-	689
1995/96	54	44	56	47	51	70	58	86	71	74	53	52	43	-	-	759
1996/97	54	58	42	54	49	61	62	72	82	58	60	44	45	-	-	741
1997/98	47	53	52	43	61	46	64	83	73	71	47	56	44	-	-	740
1998/99	38	54	54	60	43	64	58	74	80	62	65	49	51	-	-	752

"Sanra_Fe"

Source: State Department of Education

Figure A-13
San Diego Jewish Academy Market Study
Historical Enrollment

School of The Madeleine

Year	Grades													Other Elem.	Other Sec.	Total
	K	1	2	3	4	5	6	7	8	9	10	11	12			
1989/90	68	54	45	39	34	39	53	29	29	-	-	-	-	0	0	390
1990/91	72	57	55	58	41	42	44	58	27	-	-	-	-	0	0	454
1991/92	68	59	52	46	53	41	42	47	50	-	-	-	-	0	0	458
1992/93	66	53	55	53	48	52	43	57	54	-	-	-	-	0	0	481
1993/94	62	58	50	56	52	46	56	56	53	-	-	-	-	0	0	489
1994/95	63	58	60	55	51	50	58	57	53	-	-	-	-	0	0	505
1995/96	65	60	60	59	56	58	60	57	55	-	-	-	-	0	0	530
1996/97	64	59	60	62	57	55	60	57	54	-	-	-	-	0	0	528
1997/98	59	58	55	60	57	60	57	60	57	-	-	-	-	0	0	523
1998/99	64	54	58	59	60	60	60	59	56	-	-	-	-	0	0	530

"Madeleine"

Source: State Department of Education

Figure A-14
San Diego Jewish Academy Market Study
Historical Enrollment

Horizon Christian School

Year	Grades												Other Elem.	Other Sec.	Total		
	K	1	2	3	4	5	6	7	8	9	10	11				12	
1989/90	50	52	49	28	42	36	29	28	19	0	0	0	0	0	0	0	333
1990/91	48	46	37	29	28	29	30	25	23	0	0	0	0	0	0	0	295
1991/92	65	49	45	36	25	24	39	44	25	22	8	3	0	0	0	0	385
1992/93	71	52	49	44	36	27	27	58	52	29	27	9	6	0	0	0	487
1993/94	80	62	52	49	50	42	35	91	68	75	51	40	12	0	0	0	707
1994/95	87	48	59	50	49	49	45	91	83	81	60	51	38	0	0	0	791
1995/96	77	73	47	54	45	46	43	83	91	69	83	55	54	0	0	0	820
1996/97	89	60	73	46	54	48	55	90	97	107	81	88	57	0	0	0	945
1997/98	90	75	52	80	47	54	54	104	93	119	106	91	76	0	0	0	1,041
1998/99	95	74	77	54	77	54	67	88	106	113	117	119	80	0	0	0	1,121

"Horizon"

Source: State Department of Education

Figure A-15
San Diego Jewish Academy Market Study
Historical Enrollment

Academy Of Our Lady Of Peace

Year	Grades													Other Elem.	Other Sec.	Total
	K	1	2	3	4	5	6	7	8	9	10	11	12			
1989/90	-	-	-	-	-	-	-	-	-	181	141	110	132	0	0	564
1990/91	-	-	-	-	-	-	-	-	-	174	163	135	103	0	0	575
1991/92	-	-	-	-	-	-	-	-	-	182	153	151	125	0	0	611
1992/93	-	-	-	-	-	-	-	-	-	179	173	138	142	0	0	632
1993/94	-	-	-	-	-	-	-	-	-	219	161	144	127	0	0	651
1994/95	-	-	-	-	-	-	-	-	-	213	185	143	138	0	0	679
1995/96	-	-	-	-	-	-	-	-	-	201	191	167	133	0	0	692
1996/97	-	-	-	-	-	-	-	-	-	220	178	174	160	0	0	732
1997/98	-	-	-	-	-	-	-	-	-	189	206	160	169	0	0	724
1998/99	-	-	-	-	-	-	-	-	-	201	163	193	155	0	0	712

"Peace"

Source: State Department of Education

Figure A-16
San Diego Jewish Academy Market Study
Historical Enrollment

Maria Montessori Elementary

Year	Grades												Other Elem.	Other Sec.	Total	
	K	1	2	3	4	5	6	7	8	9	10	11				12
1989/90	34	30	29	23	16	21	7	-	-	-	-	-	-	0	0	160
1990/91	36	24	24	21	22	9	15	-	-	-	-	-	-	0	0	151
1991/92	33	24	25	17	25	18	11	-	-	-	-	-	-	0	0	153
1992/93	39	28	27	24	13	25	12	-	-	-	-	-	-	0	0	168
1993/94	44	28	23	21	27	7	18	1	-	-	-	-	-	0	0	169
1994/95	30	33	24	25	26	13	12	-	-	-	-	-	-	0	0	163
1995/96	40	18	20	32	18	21	12	-	-	-	-	-	-	0	0	161
1996/97	50	28	23	24	28	18	13	-	-	-	-	-	-	0	0	184
1997/98	34	45	27	20	19	27	13	-	-	-	-	-	-	0	0	185
1998/99	34	32	41	23	15	19	24	-	-	-	-	-	-	0	0	188

"Maria"

Source: State Department of Education

APPENDIX B

PUBLIC SCHOOL ENROLLMENT

Student enrollment has increase steadily in the school districts serving the areas from which the SDJA draws students. The attached tables provide the historical enrollment for four school districts and two individual high schools. The first table also summarizes the total public and private school enrollment for San Diego County over the last 10 years.

Figure B-1—Shows historical public and private school enrollment for a 10-year period. Overall private school enrollment has increased as a percentage of public school enrollment during this time period.

Figure B-2—Historical enrollment for the San Diego City Unified School District.

Figure B-3—Historical enrollment for the Carlsbad Unified School District.

Figure B-4—Historical enrollment for the Poway Unified School District.

Figure B-5—Historical enrollment for the San Dieguito Union School District.

Figure B-6—Historical enrollment for La Jolla High School.

Figure B-7—Historical enrollment for Torrey Pines High School.

Figure B-1
San Diego Jewish Academy Market Study
Historical Public and Private School Enrollment in San Diego County

Item	Year										Annual Change
	1989/90	1990/91	1991/92	1992/93	1993/94	1994/95	1995/96	1996/97	1997/98	1998/99	
Private Schools	32,671	32,438	33,879	34,161	35,863	37,069	37,771	39,657	40,852	42,177	2.88%
% Change	n/a	(0.71%)	4.44%	0.83%	4.98%	3.36%	1.89%	4.99%	3.01%	3.24%	
Public Schools	375,441	387,881	400,916	406,826	416,132	421,920	431,465	442,121	453,995	462,931	2.35%
% Change	n/a	3.31%	3.36%	1.47%	2.29%	1.39%	2.26%	2.47%	2.69%	1.97%	
Private School as % of Public School	8.70%	8.36%	8.45%	8.40%	8.62%	8.79%	8.75%	8.97%	9.00%	9.11%	

"9241_County"

Figure B-2
Historical Enrollment for San Diego City Unified School District

Year	Grades												Other Elem.	Other Sec.	Total	
	K	1	2	3	4	5	6	7	8	9	10	11				12
1989/90	10,967	11,159	10,660	10,339	9,812	9,226	8,712	8,748	8,119	6,062	8,579	8,115	7,647	949	220	119,314
1990/91	10,939	11,440	10,835	10,534	10,240	9,723	9,103	8,747	8,351	5,760	8,492	8,134	7,747	979	128	121,152
1991/92	11,108	11,399	11,163	10,800	10,487	10,145	9,483	8,955	8,462	5,994	8,711	7,972	7,846	871	195	123,591
1992/93	11,428	11,433	11,134	10,925	10,637	10,163	9,852	9,177	8,641	6,074	8,652	8,118	7,709	964	209	125,116
1993/94	11,688	11,638	11,251	10,890	10,834	10,373	9,888	9,609	8,864	9,140	8,127	7,828	5,930	864	334	127,258
1994/95	12,046	11,777	11,281	10,999	10,591	10,495	10,006	9,642	9,233	9,241	8,377	7,623	5,931	985	328	128,555
1995/96	12,460	12,234	11,458	10,996	10,680	10,277	10,112	9,749	9,353	9,340	8,554	7,893	5,971	967	316	130,360
1996/97	12,186	12,653	12,011	11,230	10,807	10,569	9,987	9,986	9,637	9,651	9,034	8,028	6,233	1,283	392	133,687
1997/98	12,037	12,617	12,378	11,645	11,092	10,644	10,230	9,935	9,785	10,091	9,279	8,527	6,303	1,285	435	136,283
1998/99	12,092	12,408	12,402	12,175	11,502	10,901	10,371	10,246	9,762	10,441	9,315	8,464	6,544	1,335	475	138,433

"San_Diego"

Source: State Department of Education

Figure B-3
Historical Enrollment for Carlsbad Unified School Distric

Year	Grades													Other Elem.	Other Sec.	Total
	K	1	2	3	4	5	6	7	8	9	10	11	12			
1989/90	510	532	519	498	469	463	411	436	447	540	462	432	363	117	35	6,234
1990/91	541	553	553	550	524	506	490	439	472	575	535	413	373	0	0	6,524
1991/92	535	555	561	536	519	547	502	511	475	569	559	464	373	0	0	6,706
1992/93	545	500	526	549	510	528	530	505	492	574	512	446	405	114	55	6,791
1993/94	584	544	512	530	554	505	514	557	524	598	518	490	418	112	51	7,011
1994/95	570	609	526	519	545	582	518	526	554	626	557	461	428	109	52	7,182
1995/96	555	593	593	547	533	543	590	542	525	710	591	523	391	106	42	7,384
1996/97	559	609	611	619	564	558	584	621	564	708	691	536	452	103	37	7,816
1997/98	580	623	630	620	643	595	592	580	606	633	680	631	469	121	52	8,055
1998/99	598	643	624	658	628	626	607	609	612	678	678	581	546	111	54	8,253

"Carlsbad"

Source: State Department of Education

Figure B-4
Historical Enrollment for Poway Unified School District

Year	Grades												Other Elem.	Other Sec.	Total	
	K	1	2	3	4	5	6	7	8	9	10	11				12
1989/90	1,863	2,010	1,927	1,828	1,870	1,774	1,839	1,730	1,706	1,708	1,787	1,807	1,497	27	29	23,402
1990/91	1,949	2,008	2,077	2,044	1,959	1,977	1,943	1,935	1,810	1,767	1,768	1,943	1,482	0	0	24,662
1991/92	1,874	2,144	2,049	2,162	2,147	2,032	2,049	1,977	2,000	1,883	1,837	1,983	1,677	258	85	26,157
1992/93	1,975	2,060	2,179	2,120	2,219	2,252	2,088	2,160	2,013	2,059	1,936	2,098	1,524	283	128	27,094
1993/94	2,056	2,083	2,188	2,267	2,173	2,287	2,364	2,161	2,189	2,069	2,054	2,122	1,637	317	139	28,106
1994/95	2,164	2,189	2,168	2,256	2,328	2,273	2,328	2,418	2,212	2,266	2,060	2,321	1,691	337	141	29,152
1995/96	2,267	2,283	2,264	2,203	2,306	2,357	2,328	2,425	2,462	2,263	2,257	2,299	1,803	364	162	30,043
1996/97	2,082	2,442	2,339	2,299	2,253	2,330	2,417	2,411	2,442	2,526	2,301	2,455	1,811	369	149	30,626
1997/98	2,183	2,242	2,514	2,359	2,355	2,256	2,392	2,482	2,433	2,501	2,521	2,546	2,001	376	178	31,339
1998/99	2,163	2,346	2,319	2,522	2,461	2,393	2,294	2,433	2,520	2,498	2,530	2,817	1,985	367	197	31,845

"Poway"

Source: State Department of Education

Figure B-5
Historical Enrollment for San Dieguito Union High

Year	Grades												Other Elem.	Other Sec.	Total	
	K	1	2	3	4	5	6	7	8	9	10	11				12
1989/90	-	-	-	-	-	-	-	1,074	1,053	1,168	1,249	1,229	1,002	0	0	6,775
1990/91	-	-	-	-	-	-	-	1,115	1,104	1,208	1,269	1,349	884	0	0	6,929
1991/92	-	-	-	-	-	-	-	1,170	1,072	1,214	1,283	1,362	907	0	0	7,008
1992/93	-	-	-	-	-	-	-	1,270	1,178	1,168	1,280	1,275	1,132	0	0	7,303
1993/94	-	-	-	-	-	-	-	1,284	1,239	1,249	1,195	1,314	1,136	0	0	7,417
1994/95	-	-	-	-	-	-	-	1,299	1,257	1,379	1,323	1,261	1,182	0	0	7,701
1995/96	-	-	-	-	-	-	-	1,335	1,317	1,412	1,462	1,389	1,148	0	0	8,063
1996/97	-	-	-	-	-	-	-	1,434	1,382	1,645	1,508	1,517	1,321	0	0	8,807
1997/98	-	-	-	-	-	-	-	1,450	1,467	1,613	1,698	1,639	1,353	0	0	9,220
1998/99	-	-	-	-	-	-	1	1,495	1,474	1,695	1,675	1,736	1,483	0	0	9,559

"San_Dieguito"

Source: State Department of Education

Figure B-6
Historical Enrollment for La Jolla High School

Year	Grade				Other Sec.	Total
	9	10	11	12		
1989/90	0	378	382	350	0	1,110
1990/91	385	372	365	327	0	1,449
1991/92	304	412	387	305	0	1,408
1992/93	365	322	382	356	0	1,425
1993/94	393	401	324	347	0	1,465
1994/95	372	404	377	304	0	1,457
1995/96	428	371	373	348	3	1,523
1996/97	402	430	351	343	5	1,531
1997/98	464	406	419	342	6	1,637
1998/99	430	460	404	395	4	1,693

"La_Jolla_Pub"

Source: State Department of Education

Figure B-7
Historical Enrollment for Torrey Pines High School

Year	Grade				Other Sec.	Total
	9	10	11	12		
1989/90	426	515	516	400	0	1,857
1990/91	452	452	556	391	0	1,851
1991/92	466	464	507	429	0	1,866
1992/93	476	491	495	391	0	1,853
1993/94	506	469	524	388	0	1,887
1994/95	574	533	514	414	0	2,035
1995/96	577	605	565	423	0	2,174
1996/97	615	564	597	454	0	2,230
1997/98	593	635	612	500	0	2,340
1998/99	605	598	681	502	0	2,387

"Torrey"

Source: State Department of Education

APPENDIX C

DEMOGRAPHIC INFORMATION

The following demographic data shows that overall growth is anticipated in the San Diego region over the next twenty years. **Figure C-1** provides a summary of the San Diego Association of Governments (SANDAG) population, housing, and income projections through 2020. **Figure C-2** shows the increase in school-aged children from 1990 to 1998. Overall, school-aged children increased at rates higher than the overall population increases.

Figure C-1
San Diego Jewish Academy Market Study
San Diego Region Population, Housing Units, Median Income Level and Employment

Item	1990	1995	2005	2010	2020
Population	2,498,016	2,669,200	3,223,474	3,437,697	3,853,297
Percent Change					
Period Total	-	7%	21%	7%	12%
Average Annual	-	1%	4%	1%	2%
Housing Units	946,240	996,684	1,153,736	1,245,057	1,404,231
Percent Change					
Period Total	-	5%	16%	8%	13%
Average Annual	-	1%	3%	2%	2%

"proj_SD"

[1] Median Income is per Household and in 1995 \$

Source: San Diego Association of Governments

Figure C-2
Change in San Diego Population
Through Age 19

Age	1990	1998	Total Change
Under 5	195,338	234,317	20%
5-9	175,210	215,553	23%
10-14	152,183	191,772	26%
15-19	173,461	181,646	5%

"SD_age19"

Source: San Diego Association of Governments

APPENDIX D

INTERVIEW FORM

As a part of EPS's analysis, phone interviews were conducted with eight private schools that are considered to be competitive with the SDJA. A summary of the interview responses is provided in the main body of the report. This appendix contains the interview form developed by EPS.

EXHIBIT --
 SAN DIEGO JEWISH ACADEMY MARKET STUDY--
 QUESTIONNAIRE

School: _____

Contact: _____ Phone #: _____

Base Data	<u>Capacity</u>	<u>Enrollment</u>		<u>Tuition/Fees</u>	
		<u>98/99</u>	<u>99/00</u>	<u>98/99</u>	<u>99/00</u>
K-6	_____	_____	_____	_____	_____
7-8	_____	_____	_____	_____	_____
9-12	_____	_____	_____	_____	_____
Total	_____	_____	_____	_____	_____

- Plans for capacity expansion? _____ If yes, when and how much? _____
 - Average number of applicants per year for 7th grade? ____ 9th grade? ____
 - Geographical Area Served? _____
 - For high school, percentage of students from private elementary schools? _____
 - What is your overall educational philosophy? _____
 (e.g., developmental, fundamental, etc.)
 - Do you know of San Diego Jewish Academy? _____ If yes, do you believe you will compete with them for middle and high school students?

 - Do you get applicants from San Diego Jewish Academy? _____
 - What is your opinion of the private middle and high school market over the next several years? _____

-

For Hebrew Schools Only

- What is your opinion of the need for a Jewish high school? _____

- Would students from your elementary or middle school attend the SJDA high school? _____. Why or why not? _____

- Would you recommend parents to consider SDJA for their child's continuing education?
