# Idaho Charter Market Analysis

## Exploring Growth Opportunities for Idaho Charter Schools

## ACKNOWLEDGEMENTS

At Bluum we are often asked "when will you stop supporting the opening of new schools in Idaho?" Our answer is always along the lines of "when we know there is no longer a need for more seats." To help inform our answer we asked the expert team at Public Impact to provide a market analysis for the next decade of possible new school growth and need. They provided us with this excellent analysis, which suggests we should keep working.

Thanks greatly to Public Impact's Co-President Bryan Hassel, Vice President for Data Analytics Lyria Boast, and Analyst Jenna Quistorff who conducted and authored this report, and to vice presidents Sharon Kebschull Barrett and Beverley Tyndall for copyediting and design and production. At Bluum, thanks greatly to the leadership and efforts of Chief Innovation Officer Ray Crowell, Communications Manager Kristen McCarver, Communications Assistant Lindsay Trombly, and Director of Federal Grants and Support Amy Felton-Toth.

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## ABOUT BLUUM

Bluum is a Boise-based education nonprofit committed to ensuring Idaho's children reach their fullest potential by cultivating great leaders, replicating high-performing school models and taking risks to develop new approaches so all Idaho students have access to great education. We believe a robust choice of learning opportunities helps children, families and educators achieve more and do better.

## ABOUT PUBLIC IMPACT

Public Impact's mission is to improve education dramatically for all students, especially low-income students, students of color, and other students whose needs historically have not been well met. We are a team of professionals from many backgrounds, including former teachers. We are researchers, thought leaders, tool-builders, and on-the-ground consultants who work with leading education reformers. For more on Public Impact, please visit www.publicimpact.com.

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PUBLIC IMPACT

BLUUM
LET LEARNING GROW

Cover photo: Compass School

Forge International School, Middleton

# Introduction

Idaho faces a twin challenge in the market for public school students. First, the state needs higher-quality schools to give all its students access to great educational options. Despite the hard work of Idaho educators and many years of policy progress, Idaho students still struggle, with only 40 percent of students proficient in math and 55 percent in reading across all grades statewide, and only 29 percent of Idaho's high schoolers are meeting college readiness benchmarks.[1]

Second, Idaho simply needs more public school seats due to population growth. According to the 2020 U.S. Census, Idaho was the second-fastest-growing state over the past decade, with a 17.3 percent growth rate—adding more than 270,000 residents[2]. From just July 2020 to July 2021, Idaho, the fastest-growing state over this time, saw its population grow by 2.9 percent,[3] far outpacing the estimated U.S. rate of 0.1 percent. Residents of other states who made Idaho their new home accounted for an influx of nearly 49,000 residents during this time. This dramatic growth highlights an opportunity to explore the market for new, high-quality charter schools across Idaho.

[1] Idaho State Department of Education. 2021 State Report Card. Retrieved from https://idahoschools.org/state/ID

[2] U.S. Census Bureau. (2021, August 25.) Idaho was the second-fastest growing state last decade. Retrieved from https://www.census.gov/library/stories/state-by-state/idaho-population-change-between-census-decade.html

[3] U.S. Census Bureau. (2021, December 21.) New vintage 2021 population estimates available for the nation, states and Puerto Rico. Retrieved from https://www.census.gov/newsroom/press-releases/2021/2021-population-estimates.html

This statewide analysis seeks to understand the market opportunity for new Idaho charter schools in two ways:

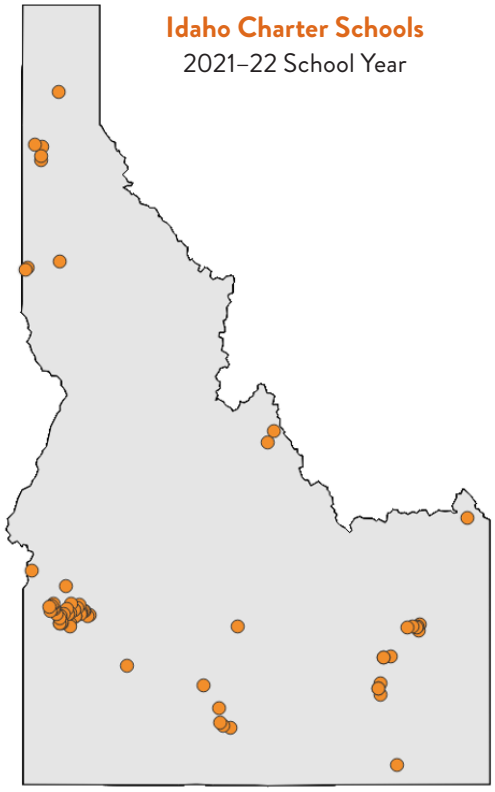
- A **population growth projection analysis** to estimate future growth in school-age populations in each county and the state overall, and
- A **quality seats analysis** to identify areas in Idaho with the greatest need for high-quality school options.

## Charter Schools Serve 9 Percent of Idaho Students

In the 2021–22 school year, Idaho has 68 charter schools, nine of which are virtual charter schools.[4] These schools serve roughly 29,600 students, making up 9.3 percent of all public school enrollment in Idaho (see map).[5]

Four new charter schools opened in the 2021–22 school year:

- Alturas Preparatory Academy in Idaho Falls, serving grades 6-10
- Cardinal Academy in Boise, serving grades 9-12
- RISE Charter School in Kimberly, serving grades 4-8
- Gem Prep: Meridian North in Meridian, serving grades K-5




[4] This number excludes the ARTEC and ARTEI charter schools, which closed during the 2021–22 school year.
[5] Idaho State Department of Education. (2021.) Enrollment by district and charter school. Retrieved from https://www.sde.idaho.gov/finance/#attendance

## Key Findings: Higher K–8 Growth Rates; Highest Needs in Boise, Along I-15

This analysis focused on two questions crucial for anticipating and understanding students' needs statewide:

- **Where in Idaho is the largest growth in school-age populations expected to occur?**
  - The highest growth rate overall is projected in Ada, Canyon, and Kootenai counties.
  - In general, projected growth rates are higher in K–8 age populations than in high school age populations.

- **Which areas demonstrate the greatest need for high-quality school options?**
  - Our analysis found 119 Idaho schools that were consistently underperforming based on 2018–2021 assessment results.
  - Particularly high concentrations of consistently underperforming schools reside in the Boise area and along highway I-15 in southeastern Idaho.


Forge International School, Middleton

Forge International School, Middleton

ANALYSIS 1

# Projected Population Growth

**Where in Idaho is the largest growth in school-age populations expected to occur?**

## Methodology

This analysis uses newly released population data from the U.S. Census Bureau to determine 2020 Idaho demographic makeup and population by county.[6] We also use projections by demographic, county, and age group from a Nature dataset[7] to make informed predictions of the future Idaho population. It is important to note that these population projections are based on pre-Covid population trends and may not fully reflect the pattern of steep growth in Idaho's population seen since the onset of the pandemic.

- The Nature dataset uses historical census data to make population projections in five-year intervals from the years 2020 to 2100 by four racial/ethnic categories, two gender categories, and all census age groups, for all U.S. counties.
- The analysis uses 2020 census population figures and statewide 2030 projected population figures for four racial/ethnic groups: white non-Hispanic/Latino, Black non-Hispanic/Latino, other non-Hispanic/Latino, and Hispanic/Latino of any race. These groups are mutually exclusive, representing 100 percent of the Idaho population.

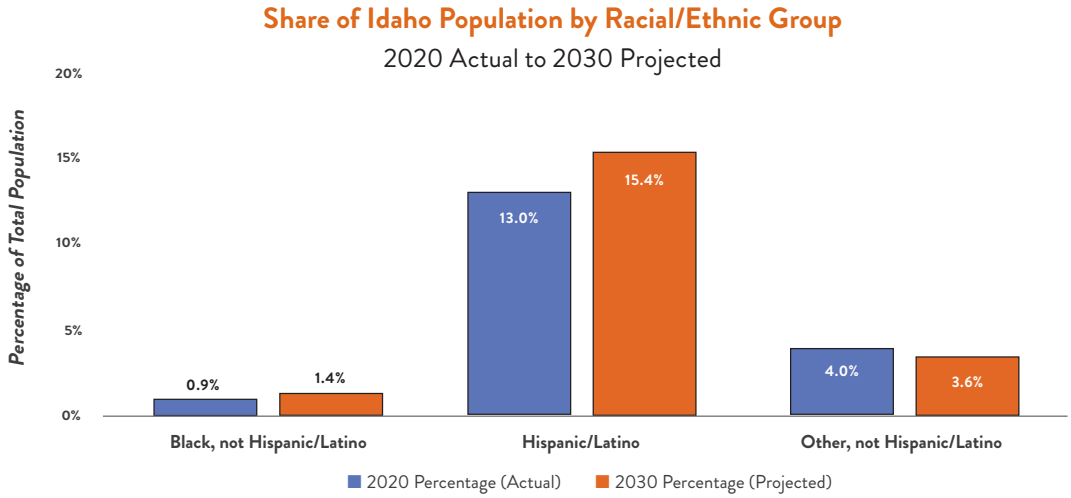
[6] U.S. Census Bureau. (2021, August 25.) Idaho was the second-fastest growing state last decade. Retrieved from https://www.census.gov/library/stories/state-by-state/idaho-population-change-between-census-decade.html .

[7] Hauer, M. (2019, February 5.) Population projections for U.S. counties by age, sex, and race controlled to shared socioeconomic pathway. *Scientific Data* 6, article 190005. Retrieved from https://www.nature.com/articles/sdata20195

- To obtain projections for 2020–2030 growth by county, we applied the Nature 2020–2030 projected growth rate by county and age group to actual 2020 census population counts. For example, if a county age group (such as 5–14-year-olds) had 10,000 residents in 2020 and a projected growth rate of 10 percent from 2020–2025 and 20 percent from 2025–2030, we would project its 2030 population to be 13,200, with a 10-year growth rate of 32 percent.
- The analysis runs county-level population projections for all age groups, kindergarten through eighth-grade age groups (ages 5–14), and a high school age group (ages 15–19).[9]

## Results: Statewide Demographics

Over the next decade, slight shifts in Idaho's racial and ethnic makeup are expected (see bar chart). The share of Black non-Hispanic/Latino residents is projected to increase by 36 percent, from 0.9 percent of the population to 1.4 percent. Hispanic/Latino residents of any race are projected to increase from 13.0 percent of the population to 15.4 percent. The proportion of white, non-Hispanic/Latino residents is expected to decrease by 2030, from 82.1 to 79.7 percent of the population. The share of other non-Hispanic/Latino residents is also projected to decrease slightly, from 4.0 percent of the population to 3.6 percent.




[8]The U.S. Census and Nature population projection data uses four-year age groups. The 5–9 and 10–14 age groups are used as a proxy for the K–8 population..

[9] The U.S. Census and Nature population projection data uses four-year age groups. The 15–19 age group is used as a proxy for the high school population.

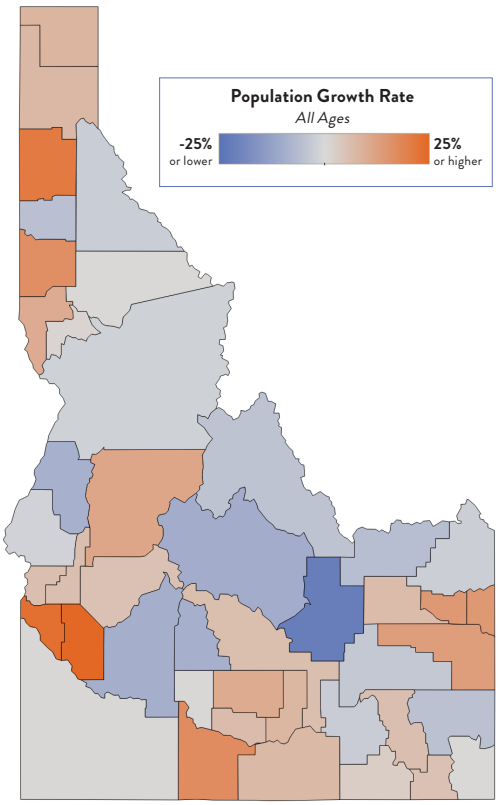
## Results: All Ages

Across all age groups combined, Idaho's population is expected to grow in 29 of its 44 counties over the next 10 years (see heatmap below left). Of these 29 counties, those with the highest 2020–2030 projected growth rates are Ada County (26.1%), Canyon County (23.6%), Kootenai County (21.2%), Twin Falls County (17.1%), Latah County (16.7%), Teton County (14.4%), and Madison County (14.4%).

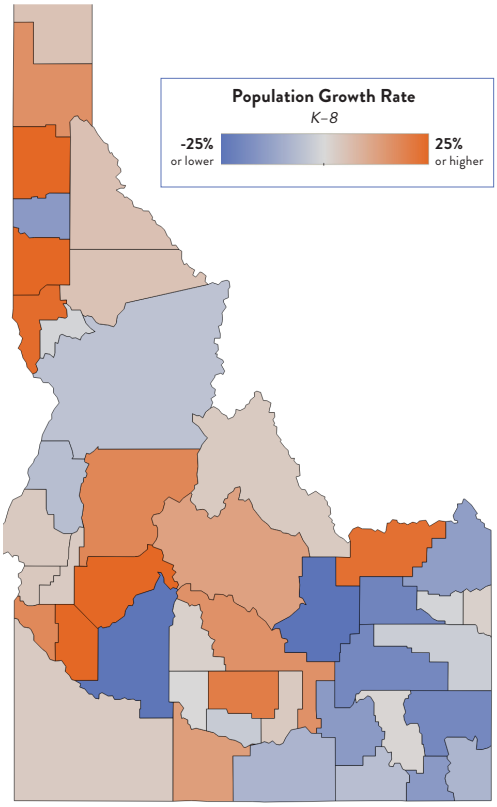
## Results: Kindergarten–8th Grade

Idaho K–8 populations (5- to 14-year-olds) are expected to grow at a high rate in many counties over the next 10 years, with many K–8 projected growth rates exceeding overall county projected growth rates (see heatmap below right). The counties with the highest projected 2020–2030 K–8 population growth rates are Latah County (53.6%), Boise County (40.2%), Ada County (37.2%), Kootenai County (25.5%), Nez Perce County (24.1%), Clark County (23.4%), and Lincoln County (20.4%).

**2020 to 2030 Population Growth Rates**
Idaho, all ages, by County




**2020 to 2030 K–8 Population Growth Rates**
Idaho, ages 5–14, by County




[10]While we are focusing the analysis on growing counties, the statewide heatmap shows that some counties (15 out of 44) are projected to decline in population between 2020 and 2030.

[10] National Center for Education Statistics. (n.d.) Public elementary schools, by grade span, average school enrollment, and state or jurisdiction: 2018–19. Retrieved from https://nces.ed.gov/programs/digest/d20/tables/dt20_216.75.asp

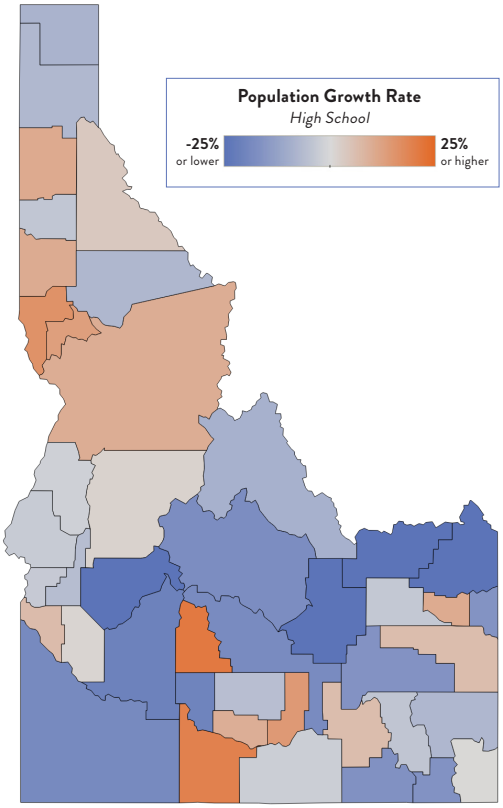
Statewide, this rate of growth translates into 39,480 more K–8 students than in 2020. At an average Idaho elementary school size of 403 students, that means Idaho will need about 98 schools' worth of new seats by 2030.

## Results: High School

Idaho high school age populations (ages 15 to 19) are expected to grow at a slower rate than K–8 populations, though 17 of 44 counties still have projected high school growth (see heatmap, below). The largest high school growth is expected to occur in a relatively different group of Idaho counties than K–8 populations, including Camas County (21.3%), Twin Falls County (19.6%), Nez Perce County (16.0%), Minidoka County (14.3%), Lewis County (13.1%), Kootenai County (10.6%), and Madison County (10.5%).

Overall, the growth rate across all counties translates into a net increase of 2,998 high school students from 2020 to 2030. At an average secondary school size of 533 students[12], that means Idaho will need about 6 schools' worth of new high school seats by 2030, far fewer than K-8 schools.

**2020 to 2030 High School Population Growth Rates**
Idaho, ages 15–19, by County




[12]National Center for Education Statistics. (n.d.) Public secondary schools, by grade span, average school enrollment, and state or jurisdiction: 2018–19. Retrieved from https://nces.ed.gov/programs/digest/d20/tables/dt20_216.80.asp

Idaho Arts Charter School, Nampa

ANALYSIS 2

# Quality Seats

**Which areas demonstrate the greatest need for high-quality school options?**

## Methodology

Our quality seats analysis uses a statistical model to identify schools with proficiency levels (that is, the percentage of students at grade level) far below the level we would expect based on the school's demographics and size.[13] Using assessment results from the Idaho State Department of Education Report Card,[14] the model evaluates proficiency rates for 664 Idaho K–12 schools[15] across three school years (2017–18, 2018–19, and 2020–21) and two subjects (English language arts and math). In order to gain an accurate estimate of each school's expected performance, the model accounts for the following school characteristics in each school year and subject:

- Demographics (percentage of white, Black, Hispanic, economically disadvantaged, English learner, and special education students)
- School size (total enrollment by school year)

[12]National Center for Education Statistics. (n.d.) Public secondary schools, by grade span, average school enrollment, and state or jurisdiction: 2018–19. Retrieved from https://nces.ed.gov/programs/digest/d20/tables/dt20_216.80.asp

[13]The statistical model is linear regression, which predicts each school's performance based on typical performance of schools with the school's demographics and school size, allowing identification of schools that are far below (or above) this predicted level.

[14]Idaho State Department of Education. (n.d.) 2018, 2019, 2021 Underlying report card performance. Retrieved from https://www.sde.idaho.gov/assessment/accountability/explainers.html

[15]This number includes only schools with at least one year of proficiency results in at least one subject.

For the purposes of our analysis, a school is defined as performing far below the expected level if its performance is in the bottom 25 percent of all schools in a given school year and subject when accounting for school characteristics. Each school then earns a number between zero and six, which represents the number of times the school is flagged as underperforming each year for three school years, in ELA and math, controlling for school characteristics. Schools that underperform on three or more subject-year combinations are flagged as "consistently underperforming."

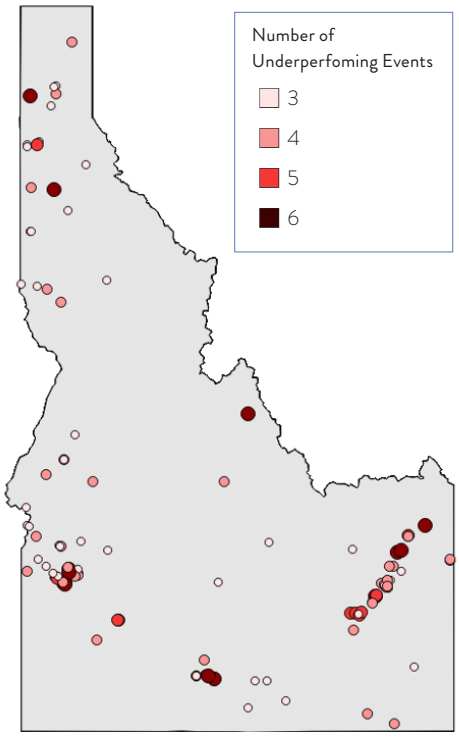
## Results

From the regression model, 119 of 664 K–12 schools are flagged as consistently underperforming. Of these 119 schools, 26 are flagged as underperforming on five or six of the six total subject-year combinations. The table below shows the number of schools with each number of underperforming subject-years. The 119 schools serve about 60,500 students. So even without the population growth described above, Idaho already faces a need for that many high-quality seats in new or improved schools.

All consistently underperforming schools are marked on the map below. Several areas of Idaho have a high concentration of underperforming schools: the greater Boise area (particularly Meridian, Nampa, and Kuna), a stretch along highway I-15 (particularly Blackfoot, Idaho Falls, Shelley, Ammon, Rexburg, St. Anthony, and Ashton), and the Twin Falls/Kimberly area.

| Number of underperforming subject-year combinations | Number of schools |
|---|---|
| 6 | 13 |
| 5 | 13 |
| 4 | 34 |
| 3 | 59 |
| 2 | 86 |
| 1 | 118 |
| 0 | 341 |

**Consistently Underperforming Schools**
Idaho K-12 Schools, 2018-2021



## Needed Now: More High-Quality Seats—and 100+ Schools

Even without any population growth, Idaho today needs 60,500 high-quality seats in new or improved schools to address the chronic underperformance of 119 existing schools. In addition, population growth will create the need for 39,480 additional K–8 seats and 2,998 additional high school seats, which translates into about 98 new K–8 schools and six new high schools.

Meeting this challenge will require a concerted effort across sectors, likely involving creating new charter schools, opening new traditional public schools, and taking steps to boost performance in chronically underperforming schools. Fortunately, these projections cover the next decade. If Idaho policymakers, philanthropy, and education leaders act now, they can provide students with the high-quality school options they deserve in the coming years.

Idaho Arts Charter School, Nampa