

**MAKING CHOICES:  
DIVERSITY, STUDENT ASSIGNMENT AND  
QUALITY IN WAKE'S PUBLIC SCHOOLS**

A Report by  
Wake Education Partnership

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Dear Friend:

For more than 100 years, public education has helped to shape the backbone of growth and progress in North Carolina. Our public schools have tackled some of the greatest challenges of a state successfully making the transition from a farm and manufacturing economy to one based on technology, services and education.

A major accomplishment that may be attributed to the public schools is the successful desegregation of our society and the civility we enjoy every day. The public schools, and especially our classroom teachers, served on the front line as we marched through the barriers of races and class to overcome a history of separate and unequal educational systems.

Today, public schools thrive in our state as academic standards continue to increase and more students achieve proficiency than ever before. Our public schools continue to serve a unique role in fostering unity and strength within communities. The choice before us now is whether we will renew a commitment to diverse public schools for the benefit of all children and the larger community.

I urge that each of us become actively involved in understanding the value of healthy and diverse public schools that succeed with all children. Our commitment to diverse public schools is a commitment to each other and to the future of North Carolina.

Cordially,

William C. Friday  
President Emeritus  
University of North Carolina

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*“Parents are the primary advocates for their children. When they face a student assignment choice or a change that’s really not their choice, their first reaction is they ask why and why were we picked and then ask what are the policies behind student assignment.”*

*Paula Lipford  
Wake County PTA Council president  
“Making Choices”  
Triangle TV, January 2003*

## **○ 1. INTRODUCTION**

Sustained growth in Wake County’s public schools and the resulting need to reassign students to populate new schools and to ensure full utilization of existing schools often leaves parents perplexed and frustrated. At the same time, issues surrounding student assignment in Wake County have taken on the weight of urban legend, where tales told and retold often have less to do with fact or policy than with politics and a general lack of knowledge. As well-intended parents organize in opposition to one or more aspects of current policies aimed at ensuring full utilization of schools while also balancing enrollment and as some elected officials seek to capitalize on this unrest, gaining clarity about the facts and a sense of perspective about our past becomes ever more important.

Further heightening the sense of urgency about these issues is a new period of uncertainty in which time-honored structures supporting the will of the local community and policies to sustain balanced enrollment in the public school have all but evaporated. Recent court decisions, rising political unrest and constrained budgets in an era of unprecedented accountability for performance by the public schools make the task of setting coherent policy more challenging than ever before.

Against this backdrop, the role of the community takes on even greater weight. As school leaders, parents and those invested in the economic well-being of Wake County — ultimately all of us — wrestle with answering fundamental questions about the choices we make for our children and our public schools, we are in the end defining the fate of our community and our children. The choices we make, the choice parents make about where they enroll their children and the choice for how schools will be populated in response to growth and diversity will determine if some children get left behind or if some neighborhoods are relegated to second-rate status as isolated enclaves of poverty and crime.

However, an expectation for a larger role for the community is fraught with traps. Recent history suggests that citizens possess an alarming lack of knowledge about public education in Wake

County as demonstrated by the 2002 Wake Public Education Community Assessment released by Wake Education Partnership.<sup>1</sup> It is against this backdrop that Wake Education Partnership, an independent advocate for excellence in the public schools, seeks to inform and engage the community in seeking clarity about the complex issues of student assignment and diversity.

This report seeks to:

- 1) Clarify facts about policies and practices by the public schools to address growth and to maintain balanced enrollment across the district;
- 2) Summarize research about the effects of school segregation on academic, economic and community trends in Wake County;
- 3) Introduce likely consequences to the calls for total choice or free market approaches to school enrollment; and
- 4) Pose key questions to be addressed by school and community leaders in identifying a long-term mechanism to address reassignment of students to accommodate growth and racial and economic balance.

## **DEFINITIONS OF KEY TERMS**

Throughout this report, a series of terms used to clarify the current environment and the decisions before the community and the public schools can, at times, have vague or context-specific meaning. Therefore, these terms and their intended meaning are explained below:

*Diversity:* Students enrolled in a school populated with all white, middle class children could easily look around and recognize that differences of faith, ancestry or even values might define their school as diverse. Diversity can also mean differences of race or ethnicity. For this report, the term also implies economic differences such as pronounced variance in family income as defined by the access to free or subsidized lunches in the public schools. At this time, this designation serves as the best available marker for poverty in the public schools.

*School choice:* Defined as the ability to select among alternatives within the public school system, especially when those alternatives are determined to each be of desirable value or quality. Differences in meaning are found in the concept of “total choice,” in which a parent may select from all available alternatives, or “modified, partial or controlled choice,” in which some parameters are imposed such that the choice may be available only within a geographic region or between the family’s base assignment to a traditional school and the choice of magnet school. For the purposes of this paper, choice does not include home, private and parochial school choices, although those are considered options for some parents.

*Segregated:* Within a continuum, an absolute definition of this term can only be found in the experience of other communities. Generally accepted definitions of segregation include schools that are 75 percent or more either white or nonwhite, as well as schools where more than 75 percent of students are considered poor according to the federal free-and-reduced-price lunch

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<sup>1</sup> 2002 Wake Public Education Community Assessment, available at [www.WakeEdPartnership.org](http://www.WakeEdPartnership.org).

(FRPL) program.<sup>2</sup> Issues surrounding in-school segregation, such as the makeup of individual classrooms, are outside of the scope of this report.

*Poverty:* The Wake County Public School System uses qualification for the federal FRPL program as an indicator of poverty. This measure is generally accepted across the United States as the most reliable indicator of poverty.

*Achievement:* Since the mid 1990s, student achievement has been increasingly measured by standardized tests. North Carolina has been recognized nationally for the quality of its testing program, usually known as the ABCs program. The federal No Child Left Behind legislation also relies on standardized test scores as a measure of student achievement.

## LEGAL RULINGS FOSTER UNCERTAINTY

A string of recent court cases has eroded a national commitment to school integration evident in the 1954 *Brown v. Board* decision. Although these decisions seem to roll back a national commitment to integrated, diverse schools, the technical nature of recent rulings do very little to provide educational leaders with direction or guidelines.

Since 1954, the spirit of the United States Supreme Court's *Brown* decision has driven the policies of school districts across the nation. *Brown's* statement that "separate educational facilities are inherently unequal" has held sway in the educational policy community for decades.<sup>3</sup> Recently, a series of court decisions has presented a significant challenge to the idea of using student assignment as a tool to provide racial or other kinds of balance to school systems. As one observer put it, "Educators who believe in diversity...may find it difficult and painful to accept the court's view that their actions are now to be treated with great suspicion and may even be deemed to be evil."<sup>4</sup> However, the courts as a whole have not struck down in other cases any part of the Wake system of student assignment and diversity. A review of legal cases on issues of student assignment is listed below. This list focuses prominently on the United States 4<sup>th</sup> Circuit Court of Appeals – the district, which contains Wake County, North Carolina.

- *Brown v. Board I:* This United States Supreme Court decision set the standard for school integration.
- *Brown v. Board II:* This 1955 decision allowed school desegregation to occur "with all deliberate speed," thus allowing Southern school systems to drag their feet on school integration well into the 1970s.
- *Swann v. Charlotte-Mecklenburg:* In this 1969 case, the United States Supreme Court ruled, based on the economic and racial disparities between Charlotte neighborhoods, that busing was a legitimate strategy to achieve court ordered school desegregation.

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<sup>2</sup> Although researchers, including Richard Kahlenberg who is cited later in this paper, suggest that the tipping point for concentrations of poverty is around 50 percent, many school districts use the 75 percent mark to designate schools that receive additional funding.

<sup>3</sup> *Brown v. Board*. 348 U.S. 886; 1954 U.S. LEXIS 1467.

<sup>4</sup> Ann McColl, "A Different Age in Race Based Classifications for Student Assignment Decisions," [www.ncasa.net/janmccoll.htm](http://www.ncasa.net/janmccoll.htm).

- *Eisenberg v. Montgomery County Public Schools*: In Eisenberg, the 4<sup>th</sup> Circuit Court of Appeals struck down the race-based aspects of Montgomery County, MD’s student transfer policy (see gray box below).<sup>5</sup>
- *Capacchione v. Charlotte-Mecklenburg Schools*: The 4<sup>th</sup> Circuit Court of Appeals ruled that the Charlotte-Mecklenburg Schools were released from their court order to integrate their school system and ordered that the schools begin operating without regard to desegregation by the 2002-2003 school year. Charlotte now has a choice plan that has led to significant resegregation and underutilization of schools.<sup>6</sup>

This string of cases points to a high level of judicial uncertainty. Although the courts have retreated dramatically from the use of race as a marker of school diversity, the notion of school diversity itself as a compelling reason to assign or reassign students has been left unclear. The courts have only been willing to rule on very specific aspects of particular cases. None of the cases referenced above directly relates to Wake County – Wake County is not under court order and does not use race as a factor in its student assignment policies. What these cases mean is that, absent a specific direction from our courts, local decision making will be more important now than ever for the health of our community and our schools.

Our decision is very narrow. We feel that we should point out what was not decided... We have not enjoined any aspect of the transfer policy on Montgomery County except that it may not consider the race of the applicant in granting or denying the transfer. *We have not decided that diversity, as the term is used here, either is or is not a compelling governmental interest....* Nothing in this record would indicate that the other aspects of the transfer policy – stability, utilization, enrollment and personal hardship – are race based, and we do not disturb them.

*4<sup>th</sup> Circuit Court of Appeals,  
Eisenberg*

## HISTORY AND POLICY OF STUDENT ASSIGNMENT IN THE WAKE COUNTY PUBLIC SCHOOL SYSTEM

Since 1981, the Wake County Board of Education has had a policy specifically relating to student diversity and student assignment. Until recently, that policy was known as “15/45,” which set the range of percentages for minority (specifically, African-American) populations at a given school. The goal of the board was to have no school with less than 15 percent or more than 45 percent of its student body population to be minority.

In 2000, in response to court decisions affecting the student assignment policies of Charlotte-Mecklenburg and other school systems, the Wake County Public School

**New Public Schools Built in  
Wake County Since 1990**

Year	New Schools
1989-1990	Brassfield Elementary Fox Road Elementary Penny Road Elementary Wake Forest Middle East Wake Middle
1990-1991	Leadmine Elementary Rand Road Elementary
1991-1992	Morrisville Elementary Westlake Elementary Leesville Road Middle

*Table continued on next page...*

<sup>5</sup> Eisenberg v. Montgomery County Schools, 197 F.3d 123; 1999 U.S. App. LEXIS 24913.

<sup>6</sup> Capacchione v. Charlotte-Mecklenburg Schools (57 Supp. 2d 228, 1999).

Year	New Schools
1992-1993	Creech Road Elementary Durant Road Elementary Leesville Road Elementary Pleasant Union Elementary West Lake Middle
1993-1994	Leesville High
1994-1995	Davis Drive Elementary
1995-1996	Oak Grove Elementary Weatherstone Elementary Hodge Road Elementary Hilburn Drive Elementary Davis Drive Middle Durant Road Middle
1996-1997	Jones Dairy Elementary Holly Springs Elementary Baileywick Elementary
1997-1998	Olive Chapel Elementary Timber Drive Elementary Southeast Raleigh High
1998-1999	Carver Elementary Dillard Drive Elementary Dillard Drive Middle
1999-2000	Reedy Creek Elementary Wakefield Elementary Wildwood Forest Elementary Wakefield Middle Lufkin Road Middle Green Hope High Wakefield High
2000-2001	Green Hope Elementary Salem Elementary Yates Mill Elementary Middle Creek Elementary Centennial Campus Middle
2001-2002	Museum Magnet Middle Middle Creek High
2002-2003	Heritage Elementary Ballentine Elementary Holly Ridge Elementary Holly Ridge Middle Reedy Creek Middle
2003-2004	Cedar Forks Elementary Salem Middle

System abandoned race-based diversity policies and adopted policies that focused on the socio-economic diversity of students as markers for the system's diversity efforts. According to board policy 6200, the thresholds for this diversity were set at no higher than 25 percent of any student body to be low-performing (averaged across two academic years) and no higher than 40 percent of any student body to be eligible for free or reduced price lunch. Policy 6200 lists seven factors for reassignment. These seven factors are given no priority order. In addition to the two listed above, the other five factors are:

- Instructional program;
- Adherence to K-5, 6-8 and 9-12 grade patterns;
- Facility utilization, which is set at between 85 percent and 115 percent of capacity;
- Stability; and,
- Proximity.<sup>7</sup>

The Wake County Board of Education further elaborates upon these policies in the accompanying rules and procedures (R&P) for Policy 6200. In board policy 6200 R&P, the goals of the student assignment process are listed as follows:

- Preserve the integrity of the instructional program at all schools;
- Adhere to appropriate grade structures;
- Achieve student diversity in all schools; and,
- Utilize facilities as efficiently as practicable.<sup>8</sup>

Policy 6200 R&P addresses issues of base school assignments, magnet school application and assignments, and year-round school application and assignments.

### Student Assignment Process

Board Policy 6202 governs the process by which the school system and Board of Education gather community input on student assignment decisions. Since the student

assignment plan has to be in place by May 1 of each year, the policy calls for a "pre-assignment" plan to be presented for public comment before consideration by the Board of Education.

<sup>7</sup> Available: <http://www.wcpss.net/policy-files/series/policies/6200-bp.html>

<sup>8</sup> Available: <http://www.wcpss.net/policy-files/series/policies/6200-rp.html>

Since the 2001-2002 school year, Wake County Public Schools have begun to release proposed student assignment plans early in the academic year in order to give parents and concerned citizens enough time to study and understand any proposed shift of students. These plans are available for public comments before being officially presented to the Board of Education. In effect, this process gives the public two opportunities for input on student assignment – one to school administrators and one to elected school leaders.

**Enrollment Growth from 1990-2003**

Year	Total	Annual Growth	Yearly Increase
1990-91	64,243	2.85%	1,781
1991-92	66,915	4.16%	2,672
1992-93	70,052	4.69%	3,137
1993-94	73,192	4.48%	3,140
1994-95	76,731	4.84%	3,539
1995-96	81,203	5.83%	4,472
1996-97	84,932	4.59%	3,729
1997-98	89,423	5.29%	4,491
1998-99	91,411	2.22%	1,988
1999-00	94,782	3.69%	3,371
2000-01	97,581	2.95%	2,799
2001-02	101,397	3.91%	3,816
2002-03	104,373	2.93%	2,976

### **Moving Toward Stability**

The Wake County Board of Education has provided evidence that it is working to make student assignment a more transparent and stable process. One example of this effort is grandfathering.<sup>9</sup> Each student assignment policy since 2002 has had a grandfathering provision written into it; students in grades 5, 7, 8, 10, 11 and 12 are able to request transfers back to their original schools on the condition that they provide their own transportation.

Another example of the board's work to increase stability is capping. Capping allows the school system to restrict the number of new residents who can attend a given school, with the purpose of allowing families that already attend that school to stay, while newcomers are assigned to alternative sites.<sup>10</sup> Some capping also involves controlling out-migration from schools; it is this policy that caused parental uproar in 2002 when students at Swift Creek and five other schools were blocked from applying to the magnet program.<sup>11</sup>

Grandfathering and capping are not school board policy. By being specifically written into each year's plan, the school system maintains that it can be more flexible than if the Board of Education had set these strategies as policies.

### **The Reality**

Research suggests that the policies of the Wake County Public School System to limit the number of poor children being served in any one school are sound. That has not prevented, however, annual controversies over student assignment in Wake County.<sup>12</sup> In 2000, controversy arose over proposed conversion of Stough Elementary School and Carroll Middle School to year-round status. In 2002, the capping of out-migration from Swift Creek and other schools drew public ire. In each of these cases, the Board of Education rescinded policies that were developed and proposed by school system staff. This seeming pattern reinforces perceived

<sup>9</sup> [http://www.wcpss.net/2002\\_student\\_assign/definitions.html](http://www.wcpss.net/2002_student_assign/definitions.html).

<sup>10</sup> Ibid.

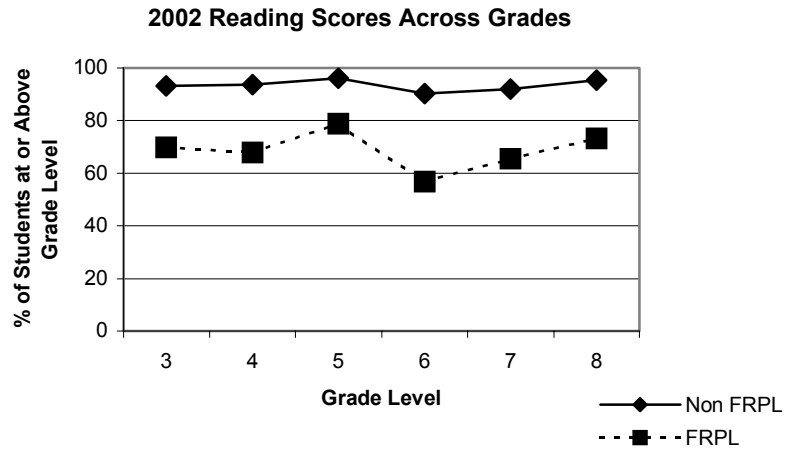
<sup>11</sup> See, for example, "Parent Group Pressures Schools." *The (Raleigh) News & Observer*. November 5, 2002. See also McNeal, Bill. "Tempoart Status." *The (Raleigh) News & Observer*. September 8, 2002. See also Todd Silberman. "Westward growing pains." *The (Raleigh) News & Observer*, Feb. 13, 2003.

<sup>12</sup> See, for example, "Politics of Year Round Schools." *The (Raleigh) News and Observer*. January 24, 2002.

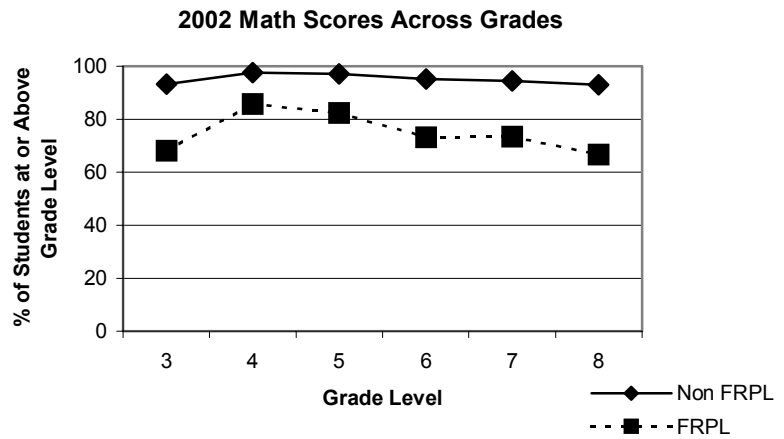
conflicts between the staff and elected officials on student assignment issues. Further, this pattern reduces confidence among school administrators as they develop student assignment plans, as well as community confidence in the school system itself.

Another reality is that Wake County, as school systems across the nation, faces persistent racial and economic achievement gaps. The charts below illustrate the economic achievement gap in math and reading across grade levels in 2002. The table describes the economic achievement gap for third- through eighth-graders in 2000 and 2001.

A final reality of the student assignment process also presents itself – Wake County is a national model for sustained student academic achievement as well as the closing of persistent achievement gaps between poor students and the student body at large and minority students and the student body at large.



Despite these realities, few groups have worked to put the Wake County experience in a state, national or international context. The sections below illustrate the experiences of schools in Forsyth and Mecklenburg counties in North Carolina and the national school system of New Zealand.



**Economic Achievement Gap for Grades 3-8 in 2000 and 2001**

Category of Students	Percent of Students Performing At or Above Grade Level	
	Spring 2000	Spring 2001
All students in grades 3-8	79.2%	82.2%
Students receiving FRPL	48.3%	54.5%
Students not receiving FRPL	87.2%	89.4%

## ○ 2. CASE STUDIES

### **“From One Extreme to the Other” *Winston-Salem/Forsyth County Schools***

In the early 1990s, Winston-Salem/Forsyth County Schools (WS/FCS) was the most integrated district because of cross-district busing, according to Dr. Don Martin, WS/FCS superintendent. Inner-city minority students were bused out to suburban elementary schools and white suburban students were bused in to urban middle schools in an effort to keep schools racially balanced. However, when Martin was hired in 1994, six new board members were elected to the Board of Education, after campaigning on a neighborhood schools platform, and WS/FCS began looking at alternatives.<sup>13</sup>

In the fall of 1995, the Winston Salem/Forsyth Board of Education introduced the first zone of a “Schools of Choice” plan, which divides the county into eight elementary zones of five schools each and six middle school zones of two or three schools each, adding zones each year until the entire plan was in place by fall of 1998. High school attendance lines were adjusted to better use existing facilities, but the high school attendance plan remained largely the same. Students can attend their “residential school” (geographically closest) or another school in the zone – parents list their top three choices and students are guaranteed a space at their residential school. Each elementary and middle school has a theme designed to attract students from other areas in the zone. New countywide magnet schools were added for the 2002-2003 school year, offering special arts and International Baccalaureate programs.<sup>14</sup> When the plan began, the Board added a racial isolation rule, guaranteeing a first-choice request if a student was of the minority race for that school, in an effort to encourage white students to attend predominately minority schools and minorities to attend predominately white schools. The rule was removed when parents challenged it and the United States Office of Civil Rights supported their claim.<sup>15</sup>

Because both white and black parents have tended to choose their neighborhood school as their first choice, more schools are racially identifiable today than they were in 1994, said Board of Education chairman Donny Lambeth. As a result of these choices, many inner-city schools are under-capacity and suburban schools have exceeded capacity. But no schools have enough empty seats to cause the Board to force students to move from their residential school, said Lambeth. “I would love to think that the themes would work,” said Lambeth, “but there’s not enough difference between the schools to make parents move.”<sup>16</sup>

Although some minority students are choosing to attend schools other than their residential school, very few white students are choosing schools in African-American areas. “We hoped the movement would be uniform across the county, but it’s not,” Martin said. “Minority students seem more willing to move, which creates academic challenges.”<sup>17</sup>

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<sup>13</sup> Interview, Dr. Don Martin, Oct. 29, 2002.

<sup>14</sup> From the WS/FCS Web site at <http://mts.admin.wsfcs.k12.nc.us/about/welcome.html>.

<sup>15</sup> Interview, Donny Lambeth, Oct. 25, 2002.

<sup>16</sup> Ibid.

<sup>17</sup> Interview, Dr. Don Martin, Oct. 29, 2002.

According to an article in *The News & Observer*, some white parents in Forsyth County think their choices are limited by the resegregation that school choice has helped to create. One parent interviewed said that although there are downtown magnet choices that would be a perfect fit for her daughter, she did not consider those options because she did not want her child to be the only white student in the school. Principal Terry Whitlach saw the same pattern when he was at an elementary school where minority enrollment started rising and white parents began moving their children. “I don’t know of a white parent who left that school because they didn’t like the school,” Whitlach said. “They left because they didn’t feel comfortable with their child being one of only a few white children left in the classroom.”

Creating the controlled choice plan has not been cheap. In an effort to help schools develop attractive themes, WS/FCS gives each school \$50,000 a year for six years and \$35,000 a year after that to support the cost of supplies, training, extra positions and specialists. Additional money is used to help Equity Plus schools, those with 75 percent of student qualifying for free and reduced lunch. At these high-poverty schools, WS/FCS offers a 20 percent bonus on the local supplement for teachers, smaller class size, additional resources and extra staff. There are also higher numbers of inexperienced teachers at Equity Plus schools, although “not as much as you would think,” according to Martin.<sup>18</sup>

While WS/FCS spends as much as 40 percent more per student in high-poverty schools, the extra money has bought limited academic success. Fifteen of the county’s 18 poorest schools are the bottom of its academic rankings. Success stories do exist, but usually due to “the extraordinary efforts of an outstanding principal” – and that success is often fleeting. “It is a challenge we have yet to figure out,” said Martin. “I don’t think most parents appreciate how much more is spent on those schools.”<sup>19</sup>

Many of the WS/FCS are meeting expected growth and succeeding on state tests. The system is also narrowing the achievement gap between white and minority students. However, despite his pride in these successes, Martin does have concerns about the lack of diversity in the schools. “Kids are achieving, but they’re not receiving the socialization we’d like them to have. The socialization mission of public education is one we’re not accomplishing.”<sup>20</sup>

### **“Experimenting with Choice and Children” Charlotte-Mecklenburg Schools**

Charlotte-Mecklenburg Schools (CMS) became forever tied to student assignment beginning in 1965, when Vera and Darius Swann sued the school system for not allowing their son, James, to attend the primarily all-white school that was closest to their home. The Swann case, decided in 1969, set the precedent for school desegregation cases across the nation when U.S. District Court Judge James McMillan ordered that CMS use “all known ways of desegregating, including

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<sup>18</sup> Ibid.

<sup>19</sup> Tim Simmons, “When parents choose schools,” *The News & Observer*, March 2, 2003.

<sup>20</sup> Interview, Dr. Don Martin, Oct. 29, 2002.

busing.”<sup>21</sup> Over the next 30 years, Charlotte became known as “the city that made busing work.”<sup>22</sup>

The issue of student assignment resurfaced in September 1997, when parent William Capacchione sued CMS, claiming that his daughter was denied enrollment to a magnet school because she was not black. In 1998, U.S. District County Judge Robert Potter reactivated the Swann case, and a group of six white parents joined the Capacchione suit while two African-American families joined the Swann plaintiffs. In 1999, Potter mandated that a new student assignment plan be in place for the 2000-2001 school year. After a series of appeals, motions and delays, CMS launched its new Family Choice plan in December 2001 and students enrolled under the new plan for the 2002-2003 school year.

“Our goal was to create a student assignment plan that would provide choice, utilize buildings and maintain diversity,” said Dr. Eric Becoats, CMS assistant superintendent for planning and development. The new plan, which divides the county into four zones, allows parents to select a first, second and third choice school. Students may apply to schools and magnet programs outside their assigned zone, although transportation will not be provided. “We felt as though we could maintain some diversity by giving parents choices within the zones,” said Becoats.<sup>23</sup>

Board of Education member and former chairman Arthur Griffin understands that parents like to have choices, but not all choices are meaningful choices. “The plan guarantees the closest school, but not all schools are equal,” Griffin said. “If you choose to go to the school closest to you, it may be older and not have the same resources.”<sup>24</sup>

Griffin has also expressed concern about the population shifts that have occurred in CMS schools as a result of the new plan. One accepted definition of school segregation is a school that is 75 percent or more either white or nonwhite. Of the 141 schools in CMS during the 2002-2003 school year, 52 are racially segregated nonwhite and 17 are racially segregated white – that is, almost half the schools in the system are racially identifiable.<sup>25</sup> More than 40 percent of the schools have student populations where more than half receive free and reduced lunch, the accepted standard for student poverty.<sup>26</sup> Projected enrollment for fall 2003 indicates that that figure will jump to 63 percent of schools in the 2003-2004 school year.<sup>27</sup>

“Racially and economically isolated schools do not provide the quality social education necessary for a great democracy. It is harmful to everyone,” Griffin said. “If we truly believe a quality education incorporates lessons in citizenship, we must have diversity in our schools. It is very difficult to teach kids to be leaders and great citizens without diversity.”

The new plan has also created financial concerns for CMS. According to *The Charlotte Observer*, some new center-city schools are “dramatically underfilled,” while numerous mobile

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<sup>21</sup> “CMS History,” [www.cms.k12.nc.us/discover/history.asp](http://www.cms.k12.nc.us/discover/history.asp).

<sup>22</sup> Tim Simmons, “School choice is resegregating,” *The News & Observer*, Nov. 3, 2002.

<sup>23</sup> Interview with Dr. Eric Becoats, Nov. 1, 2002.

<sup>24</sup> Interview with Arthur Griffin, Oct. 30, 2002.

<sup>25</sup> “The Face of Choice,” *Educate!*, The Swann Fellowship, Sept. 26, 2002.

<sup>26</sup> “CMS releases school enrollment, lunch numbers,” *Educate!*, The Swann Fellowship, Nov. 7, 2002.

<sup>27</sup> “The Poverty Line,” *Educate!*, The Swann Fellowship, Feb. 27, 2003.

classrooms “are stretching new suburban schools far past their original capacity.” Even with help from the recently passed \$224 million bond, no new high schools will open before 2006.<sup>28</sup> Griffin says the new plan is “phenomenally more expensive,” creating the need for more mobiles, more buses and more resources.<sup>29</sup> Although the student population is up 3 percent from the 2001-2002 school year, total daily bus mileage is up 22 percent and the number of buses is up 11 percent.<sup>30</sup>

In December, Superintendent Jim Pughsley put forth the first restrictions on the new choice plan, proposing that, when a school reaches 90 percent capacity, the administration would declare the school closed to any parents seeking transfer or reassignment to the school.<sup>31</sup> According to the latest numbers, that would have included 85 schools – more than half the schools in the system. However, the school board asked Pughsley to limit the cap to only the most severely overcrowded schools. Nine schools are now capped for the 2003-2004 school year, preventing families living outside the home-school zones for those schools from transferring their children there.<sup>32</sup>

Under the new plan, not all students are attending their school of choice. After conducting the assignment lottery for the 2003-2004 school year, 74 percent of CMS students who participated got their first choice school, 11 percent got their second choice and 4 percent got their third choice. The final 11 percent were denied their requests and were assigned to their current or home schools.<sup>33</sup>

### **“The Consequences of Free Market Approaches to School Choice” New Zealand<sup>34</sup>**

Perhaps no better example exists to demonstrate the consequences of school choice for children, teachers, schools and communities than that of New Zealand. As part of a large scale decentralization of educational services, New Zealand launched “Tomorrow’s Schools” beginning in 1989 that resulted in downsizing the state education ministry, removing intermediary governance structures such as districts and turning decisions about school enrollment over to parents. With a new market-place of school competition in which parents were to choose their child’s school, presumably schools that could not succeed in attracting adequate enrollment would either reform or cease to exist.

Within a short period after the imposition of free market approaches, startling changes occurred in the public schools and in the communities that serve them. The move to the choice program included the following results:

- Parental choice was replaced by school choice as the “better” students became more desired by schools. As some schools became more popular, decisions to protect the

<sup>28</sup> Ann Doss Helms, “Will school bonds produce results?,” *The Charlotte Observer*, Oct. 20, 2002.

<sup>29</sup> Interview, Oct. 30, 2002.

<sup>30</sup> “The busing load,” *Educate!*, The Swann Fellowship, Nov. 14, 2002; Ann Doss Helms, “How much does ‘busing for choice’ cost CMS?” *The Charlotte Observer*, March 17, 2003.

<sup>31</sup> “Pughsley seeks first curbs on parent choice,” *Educate!* Dec. 5, 2002, p. 2.

<sup>32</sup> Ann Doss Helms, “CMS closes off 9 schools from outside transfers,” *The Charlotte Observer*, March 6, 2003.

<sup>33</sup> Ann Doss Helms, “CMS overstated school lottery statistics,” *The Charlotte Observer*, March 16, 2003.

<sup>34</sup> See Edward B. Fiske and Helen F. Ladd, *When Schools Compete*, Brookings Institution Press, 2000.

school from oversubscription by parents enabled more desirable students to gain entry. Therefore the most popular schools positioned themselves to educate academically capable students relegating others to uncertainty. In one extreme example, a poor child was reported to be excluded from entry to all available schools and the government ultimately had to intervene.

- Stratification of groups by income and race began immediately and within five years of choice program implementation, school demographic changes greatly exceeded any that could be explained by mobility of subgroups or general societal trends.
- Equity funding of schools, intended to provide additional support for schools serving poor children, ultimately resulted in further segregation of poor and middle class children as the rating instrument used to determine the prevalence of poverty became a guide for parents in how to avoid schools serving the poor.
- Despite attempts at equity funding, schools serving the poor lacked access to parents capable of subsidizing needs within the school through fund raising and direct financial support. Worse yet, schools attracting a wealthier population launched annual fund raising appeals of their parents and gifts to the schools were all but demanded. The use of private funds to enhance school technology, athletics and other amenities often made these schools comparable to well heeled private schools.
- Local economies surrounding schools relegated to serving the poor quickly declined with the choice program as high concentrations of poor children were accompanied by increases in crime and greater transience of the local population.
- Finally, taxpayer-funded schools serving the poor went largely under utilized and with fewer dollars to maintain them many quickly fell into decline. Exacerbating the cost to taxpayers, schools overwhelmed with enrollment petitioned for funding to expand their campuses while empty classrooms existed just across town.

## **CONCLUSIONS ABOUT CASE STUDIES**

In case after case, both at home and abroad, choice models for student assignment result in either the stratification of communities across racial and/or economic lines or the infusion of millions of extra dollars to support lower performing schools that occur as a direct result of the choices made by parents. Recent data from Charlotte, in fact, suggests that Charlotte schools do more busing under their choice plan than they did before they went to court.<sup>35</sup> When making choices about student assignment policies, community members should be aware of the academic and economic implications of those choices for students, teachers, parents and municipalities. The next two sections begin to chart some of these implications.

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<sup>35</sup> “How much does ‘busing for choice’ cost CMS?” *The Charlotte Observer*. March 17, 2003.

### ○ 3. ACADEMIC CONCERNS: WHO WINS, WHO LOSES?

*“Creating middle class schools won’t just more evenly spread discipline problems or anti-achievement cultures, it will reduce them altogether, and raise overall achievement. Integration is not a zero sum game where the benefits to the disadvantaged students come at the expense of more advantaged students.”*

*Richard Kahlenberg  
“The Whys and Hows of  
Socioeconomic School Integration”  
The Term Paper, May 2002*

Few would argue in favor of creating high-poverty schools in Wake County. Research has shown that schools with high concentrations of poverty are less likely than other schools to recruit and retain highly-qualified teachers and that all students – including below average, average and above average students – have lower academic achievement in high-poverty schools.<sup>36</sup>

Much attention has been paid to low-income students, who begin school at a clear disadvantage that affects their achievement through high school. The average twelfth-grade low-income student reads at the same level as the average eighth-grade middle class student. Students in the lowest income quintile drop out of high school 25 percent of the time, compared with 2 percent of students in the highest quintile. While 76 percent of high-income students complete bachelor’s degrees, only 4 percent of low-income students do.<sup>37</sup>

However, high-poverty schools, those with more than half of students eligible for federally funded free or reduced-cost school lunch, hurt the academic achievement of all students, both poor and non-poor. According to the United States Department of Education, “middle class children attending high poverty schools perform worse, on average, than low income children attending middle class schools.”<sup>38</sup> High-poverty schools are not only harmful to poor students, they are also damaging to middle-class students. Research suggests that by focusing on the success of middle-class students, we could improve the experience and the achievement of all students. More important than per capita expenditure or classmates’ skin color is “the presence of a middle-class culture. The people in a school community – the students, parents and teachers – drive school quality.”<sup>39</sup>

### FAILED EFFORTS

Although many view public education in America as a great equalizer, others see that schools often reinforce the correlation between socioeconomic background and life opportunity when low-income students account for more than half the population in a school. According to Economic Policy Institute researcher Douglas Harris, “high poverty schools are 24 times less

<sup>36</sup> “The Effect of School Poverty Concentration in WCPSS,” *Research Watch*, Evaluation and Research Department Report No. 01.21, March 2001, p.1.

<sup>37</sup> Richard D. Kahlenberg, “Economic School Integration,” The Century Foundation, Idea Brief No. 2, Feb. 2000, p.1. Available at [www.policyideas.org/issues/Education/School\\_Integration.pdf](http://www.policyideas.org/issues/Education/School_Integration.pdf).

<sup>38</sup> Richard D. Kahlenberg, “Economic School Integration: An Update,” The Century Foundation Issue Brief Series, Sept. 2002, p. 2. Available at [www.equaleducation.org/publications/economicschoolintegration.pdf](http://www.equaleducation.org/publications/economicschoolintegration.pdf).

<sup>39</sup> Kahlenberg, “Economic School Integration,” p.4.

likely to be consistently successful than low poverty schools.”<sup>40</sup> Major efforts over the past 40 years to create equal educational opportunities for high-poverty schools have not succeeded.

Compensatory spending, begun in 1965 with Title I of the federal Elementary and Secondary Education Act, authorized extra federal funds for schools with high numbers of low-income students. This funding has not created equal educational opportunity because inadequate funding is only part of the problem facing low-income schools. According to a 1997 congressionally authorized review of Title I, “the expenditure of extra funding, in the context of isolated poverty, yields few achievement gains.”<sup>41</sup>

More recent efforts have also been disappointing. Setting higher standards can have positive effects for some schools, but standards are unlikely to make a difference without quality teachers. Reducing class sizes also has benefits, but can lead to more unqualified teachers in low-income schools during the nationwide teacher shortage. Private school vouchers, often touted as an opportunity for disadvantaged students, are likely to create more economic segregation in schools, with the private schools selecting the best students and leaving those who are poor and unmotivated behind.<sup>42</sup>

## **STUDENT ACHIEVEMENT**

Many recent local and national studies have found that all students, regardless of socioeconomic status, perform better in majority middle-class schools than they do in high-poverty schools. The following results from studies in North Carolina, Wisconsin, Maryland and Colorado school districts demonstrate the effect of school poverty on student achievement:

- In a 2002 report, the North Carolina Public School Forum observed a strong relationship between poverty and student performance for the sixth year. Based on analysis of data from almost 1,600 K-8 schools, the Forum found that schools with fewer than 10 percent of students in the free-and-reduced-price lunch (FRPL) program had almost 90 percent of students at or above grade level, while schools at 90 percent or higher FRPL had fewer than 60 percent of students at or above grade level.<sup>43</sup>
- A July 2002 study of fourth-grade students in Madison Metropolitan School District (Wisconsin) found that for every 1% increase in middle class classmates, low-income students improved 0.64 percentage points in reading and 0.72 percentage points in math. For a given low-income student attending a low-poverty school, this translated into a 20 to 32 percentage point improvement in test scores over a low-income student attending a high-poverty school. Once schools passed a 60% low-income threshold, both low income and middle class scores declined significantly.<sup>44</sup>
- A September 2001 study of 50,000 students in third- through eighth-grade in Montgomery County (Maryland) schools published in *The Washington Post* found that

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<sup>40</sup> Kahlenberg, “Economic School Integration: An Update,” p. 4.

<sup>41</sup> Kahlenberg, “Economic School Integration,” p.2.

<sup>42</sup> Ibid.

<sup>43</sup> “Strong Relationship Between Poverty and Performance,” *The Public School Forum’s Friday Report*, Nov. 15, 2002. Available at <http://www.ncforum.org/archives.htm>.

<sup>44</sup> David Rusk, “Classmates Count: A study of the interrelationship between socioeconomic background and standardized test scores of 4<sup>th</sup> grade pupils in the Madison-Dane County public schools,” July 5, 2002.

“when lower-income students attended schools where most of the students were more affluent, they achieved higher scores – matching or exceeding the county average.”<sup>45</sup>

- The Piton Foundation’s May 2002 study of third-, fourth- and fifth-grade students in Denver (Colorado) schools found that middle-class children in high-poverty schools had lower passing rates (49%) than low-income children in middle-class schools (53%).<sup>46</sup>
- A recent Connecticut study found that 4-year olds from low-income families who are in preschool with children from more affluent families learn vocabulary and language skills six times faster than low-income peers in classrooms without that economic diversity. Research suggests that larger vocabularies lead to more success with reading, and that children without those large vocabularies by the age of 3 or 4 find it difficult to catch up when they enter kindergarten.<sup>47</sup>

One factor related to student achievement is the “hidden curriculum,” the lessons that children teach each other. In high-poverty schools, students tend to have lower aspirations and academic achievement may actually be an embarrassment. Low-income students are also more likely to be disruptive and cut class than middle-class students.<sup>48</sup> Conversely, in a study of Texas students, Harvard professor Caroline Hoxby found “a positive peer influence associated with being in classes with high achievers.” Attending school with peers who score one point higher raises an individual student’s score by between .10 and .55 points.<sup>49</sup>

Socioeconomic factors have also been shown to affect students’ perceptions of their school and their experiences at their school. According to the 2002 MetLife Survey of the American Teacher, low-income students are less likely than high-income students “to feel extremely or very successful in school” (49% vs. 58%), “to describe their life in school as extremely or very happy” (24% vs. 39%), or “to believe that their school is preparing them extremely well to go to college” (10% vs. 18%). Conversely, low-income students are more likely than high-income students “to worry a great deal about being safe at school” (30% vs. 17%), “to have considered dropping out of school” (224% vs. 18%) and “to have never spoken individually with a teacher about their plans for college or work after high school (54% vs. 44%).<sup>50</sup>

## PARENTAL INVOLVEMENT

Although student achievement is not dependent on parental involvement, parents are an important part of the larger school community. They can provide human and financial resources, while also holding schools accountable to high expectations. Parental involvement is often

<sup>45</sup> Brigid Schultz and Dan Keating, “Pupils’ poverty drives achievement gap,” *The Washington Post*, Sept. 2, 2002. p. A1.

<sup>46</sup> Alan Gottlieb, “Economically Segregated Schools Hurt Poor Kids, Study Shows.” *The Term Paper*, The Piton Foundation, May 2002, p.5.

<sup>47</sup> Carolyn Moreau, “Learning in Mixed Company,” *The Hartford Courant*, Oct. 19, 2002. Available at <http://www.ctnow.com/news/education/hc-preschool.artoct19,0,7740497.story?coll=hc-headlines-education>.

<sup>48</sup> Kahlenberg, “Economic School Integration,” p.4.

<sup>49</sup> Caroline M. Hoxby, “The Power of Peers,” *Education Next*, Summer 2002, pp. 57-63.

<sup>50</sup> Dana Markow and Marc Scheer, “The MetLife Survey of the American Teacher 2002,” p. 192-193. In this study, family income was measured by parents’ education as a proxy for family income. Low-income students are those whose parents have no more than a high school education. High-income students are those whose parents have a college degree or more.

lacking in high-poverty schools because low-income parents, for a variety of reasons, are four times less likely to be members of the PTA and are less likely to volunteer in class and make contributions to the school.<sup>51</sup> Therefore, in high-poverty schools, an unequal burden is placed on the minority of middle- and upper-income parents to provide support for the school.

Although some would argue that school choice or neighborhood assignment would increase parents' ability to be involved with their child's school, studies suggest that parents may not always make school choices based on school quality. A 1990 study of enrollment patterns in Montgomery County (Maryland) magnet schools found that race and class concerns were central to parental choices. According to the researchers "white families were most likely to request transfer into schools with low proportions of minorities (these schools were also located in higher income neighborhoods), while minority families were more likely to opt for schools with higher proportions of minority students (which tended to be in low-income neighborhoods)."<sup>52</sup> In a 2000 study of parents using the Internet to research schools in Washington, D.C., researchers found that student body demographics and location were the school attributes parents looked at most, above test scores, programs and faculty/staff information. According to the researchers, "although parents will almost always say that academics matter in their choices of schools for their children and almost never admit to caring about student demographics, our data show that race is fundamentally important to them."<sup>53</sup>

## TEACHER QUALITY

Teachers in high-poverty schools are likely to be less qualified, leave teaching earlier and have lower expectations than those in low-poverty schools. They are also faced with greater numbers of high-needs students, making it more difficult to be effective in the classroom. While teachers can have the greatest impact on a student's performance in school, they are less likely to be a factor for success in schools where students most need their help.

Teachers in high-poverty schools are, on average, less qualified than teachers in middle-class schools and four times as likely to teach out of their field of expertise. A study conducted for the Education Trust found that 34 percent of teachers in American secondary schools teach out of their field of expertise in high-poverty schools, compared to 19 percent in low-poverty schools.<sup>54</sup> A 2002 study of New York state teachers found that poor students have lower quality teachers than non-poor students – in New York City, 22 percent of poor students have uncertified teachers, compared to 17 percent of non-poor students; 30 percent of poor students have teachers who failed the certification exam, compared to 21 percent of non-poor students.<sup>55</sup> Teachers in low-income schools also tend to have lower expectations; a national study of Title I found that a grade of A in a high poverty school is the equivalent of a grade of C in a middle class school.<sup>56</sup>

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<sup>51</sup> Kahlenberg, "Economic School Integration," p.4.

<sup>52</sup> Mark Schnieder and Jack Buckley, "What Do Parents Want From Schools? Evidence From the Internet," *Educational Evaluation and Policy Analysis*, Summer 2002, Vol. 24, No. 2, p. 135.

<sup>53</sup> Schnieder and Buckley, "What Do Parents Want From Schools? Evidence From the Internet," p. 142.

<sup>54</sup> Craig D. Jerald, "All Talk, No Action: Putting an End to Out-of-Field Teaching," *Education Trust*, August 2002.

<sup>55</sup> Hamilton Lankford, Susanna Loeb and James Wyckoff. "Teacher Sorting and the Plight of Urban Schools: A Descriptive Analysis." *Educational Evaluation and Policy Analysis*, Spring 2002, Vol. 24, No. 1, p. 45.

<sup>56</sup> Kahlenberg, "Economic School Integration," p.4.

Although teaching experience does not necessarily equal teaching quality, students at high poverty schools are more likely to be taught by inexperienced teachers. According to *Quality Counts 2003*, fewer than 9 percent of teachers in low poverty elementary schools have less than three years' experience, compared with more than 13 percent of teachers in high poverty schools. In high minority elementary schools, that figure moves to nearly 15 percent.<sup>57</sup> Students in high poverty and high minority schools also are more likely to be taught by novice teachers with no practice-teacher training. In low minority schools, fewer than 6 percent of novice teachers never student-taught, compared with nearly 17 percent at high minority schools. In low poverty vs. high poverty schools, those figures are 7 percent and 15 percent, respectively.<sup>58</sup>

In addition to being less qualified, teachers also leave high poverty schools at much higher rates than they do middle class schools. Research shows that as teachers switch jobs, they systematically move to schools with fewer poor, minority and low achieving students – studies suggest that these teachers are not seeking wealthier students, but are looking for schools where there is a culture of success.<sup>59</sup> According to a University of Pennsylvania study, 20 percent of teachers left high-poverty schools in 1999, while 12.9 percent of teachers left low-poverty schools.<sup>60</sup> A New York study adds that those teachers who leave high-poverty schools are likely to have greater skills than those who stay.<sup>61</sup> A November 2001 study found that “teachers tend to move to schools with fewer minority and low-income students.” Attracting teachers to high-poverty and high-minority schools would require a salary premium of 20-50%, the study estimates. Commenting on the study, Harvard’s Richard Murnane said even such premiums may be unsuccessful: ‘Paying people extra money to do an impossible job doesn’t work.’<sup>62</sup>

The poverty level of a school affects not only the quality of the teachers, but also teachers’ perceptions of the quality of the school. According to the 2002 MetLife Survey of the American Teacher, teachers whose schools have more than two-thirds low-income students are less likely than those who have one-third or fewer low-income students to believe that their school is “preparing students extremely well” to go to college (19% vs. 37%), to get a good job (7% vs. 20%), to know how to learn (13% vs. 23%), to be good citizens (17% vs. 26%) and to get along with others (17% vs. 22%).<sup>63</sup> These numbers are similar for teachers whose schools have more than two-thirds minority students compared with those whose schools have one-third or fewer minority students, with the exception of preparing students to get along with others (30% vs. 20%).<sup>64</sup>

<sup>57</sup> Lynn Olson, “The Great Divide,” *Education Week*, Jan. 9, 2003, p.13.

<sup>58</sup> Lynn Olson, “The Great Divide,” *Education Week*, Jan. 9, 2003, p.14.

<sup>59</sup> Ibid.

<sup>60</sup> Jay Matthews, “Top Teachers Rare in Poor Schools,” *Washington Post*, Sept. 10, 2002, p. A5.

<sup>61</sup> Lankford, Loeb and Wyckoff, “Teacher Sorting and the Plight of Urban Schools,” p. 55.

<sup>62</sup> Debra Viadero, “Study: Teachers Seek Better Working Conditions,” *Education Week*, Jan. 9, 2002, p.5; Eric A. Hanushek, John F. Kain and Steven Rivkin, “Why Public Schools Lose Teachers,” NBER Working Paper No. W8599, National Bureau of Economic Research, Cambridge, Mass. Nov. 2001.

<sup>63</sup> Dana Markow and Marc Scheer, “The MetLife Survey of the American Teacher 2002,” p. 21-22.

<sup>64</sup> Ibid.

## ○ 4. ECONOMIC CONSIDERATIONS: THE NUMBERS AND BEYOND

*“The people of Tupelo say their prosperous economy has been the result of community development; their economic strategies have been essentially public-building strategies.”*

*David Matthews*

*Is There a Public for Public Schools?*

*1996*

The economics of public education is not just a balance sheet of revenue and expenditures. In the public schools, school finance, student achievement, and public opinion are all part of the economics of maintaining high quality. This section will examine some of the more explicit costs involved with high quality public schools, and will then examine some issues that go beyond the balance sheet.

### EFFICIENCY

Currently, 66 percent of Wake County households do not have children under age 18.<sup>65</sup> It is important to them, as well as to other citizens, that the school system’s resources are used in an effective and efficient manner. Audits continue to find that the Wake County Public School System is a good steward of the public’s investment, spending less money per pupil with greater results than other comparable sized school systems in the state and region.<sup>66</sup>

Balanced enrollment at schools across the county is one reason for Wake school’s efficient use of taxpayer funds.<sup>67</sup> Specifically, balanced enrollment within schools and across schools saves taxpayer money in the following ways:

- *Facilities:* Last year, Charlotte-Mecklenburg shifted to a choice plan that allows parents to choose their student’s schools. This experiment is a valuable example of the advantages and disadvantages of such a student assignment system. Recent data shows that many of Charlotte’s schools’ are now significantly under-utilized while other schools are dramatically over-enrolled.<sup>68</sup> In addition, the number of schools that are racially unbalanced has risen dramatically. Neither of these situations is acceptable to taxpayers who provide their dollars for the operation of the public schools. Under enrolled schools do not provide an appropriate return on taxpayer investment in school facilities. Students in over-enrolled schools face significant challenges in finding individualized attention for their teachers and administrators. In addition, overenrolled schools wear down faster and require greater maintenance costs.

Wake County schools, by contrast, are well utilized. Data from the Wake County Public Schools’ Facilities and Planning Department presented to the Board of Education on

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<sup>65</sup> U.S. Census Bureau, Census 2000.

<sup>66</sup> *Quality Matters 2001* and *Quality Matters 2002*. Available at [www.wakeedpartnership.org/Pdfs/quality\\_matters\\_2001.pdf](http://www.wakeedpartnership.org/Pdfs/quality_matters_2001.pdf).

<sup>67</sup> Bill McNeal, *Facing Tomorrow’s Challenge Today*, presentation to the Wake County PTA Council, Sept. 30, 2002.

<sup>68</sup> *Educate!* The Swann Fellowship. Sept. 26, 2002.

October 8, 2002, shows that Wake County schools are well used and resourced.<sup>69</sup> This provides value to our community and ensures that our tax dollars are spent appropriately.

- *Teachers*: Recent research has focused on the relationship between well-trained, qualified teachers and student success in the classroom.<sup>70</sup> Additional studies have noted that high poverty schools have lower concentrations of qualified teachers as more economically balanced schools.<sup>71</sup> In a system of diverse schools, the pool of quality teachers is more evenly distributed than a system with high wealth and low wealth schools. School climate has an impact on such issues as teacher burnout and teachers leaving the profession. Because teachers tend to leave schools with high concentrations of students in poverty, balanced school systems save money on teacher hiring and retraining.<sup>72</sup>
- *Compensatory Spending*: Experts have argued that spending large amounts of money on failing schools (called compensatory spending) does not yield great results for the investment.<sup>73</sup> Indeed, researchers are finding out that money alone is not the answer in turning high-poverty schools around.<sup>74</sup> One way to effectively teach poor students in an efficient manner is to economically balance schools. Economically balanced schools need far fewer resources to support under-performing students, because the culture of the school itself promotes academic achievement. Students who seek to achieve at high levels have a positive effect on lower performing students. This effect is termed the “hidden curriculum.”<sup>75</sup>

## BEYOND EFFICIENCY

The economics of balanced public schooling are not only measured on a balance sheet, however. Excellent schools provide benefits beyond taxpayer dollars. Key among these intangibles is this: diverse schools build strong neighborhoods and businesses. The Raleigh/Wake Board of realtors says it best on their web page: Regional consolidation of services significantly reduces costs, thus reducing the taxpayer burden.<sup>76</sup> Since 1975, our strong schools have helped to drive the expansion of the Wake County economy – to everyone’s benefit.<sup>77</sup> Businesses who relocate to do business in Wake County can be assured that, no matter where within Wake County’s 800 square miles they decide to relocate, their employees will have strong school options to meet their employee’s children’s needs.<sup>78</sup>

<sup>69</sup> Wake County Board of Education meeting. Oct. 8, 2002. MGT audit, Fall 2002.

<sup>70</sup> *All for All: Teacher Excellence for Every Child*. Available at [www.wakeedpartnership.org/Research&Reports/all\\_for\\_all.html](http://www.wakeedpartnership.org/Research&Reports/all_for_all.html).

<sup>71</sup> Linda Darling-Hammond, “Teacher Quality and Student Achievement: A Review of State Policy Evidence.” Center for the Study of Teaching and Policy, University of Washington, 1999.

<sup>72</sup> Debra Viadero, “Study: Teachers Seek Better Working Conditions.” *Education Week*. 1/9/2002, p.5, Lankford and Wyckoff, above.

<sup>73</sup> Eric Hanushek, “School Resources and Student Performance.” In Burtless, Gary, ed. *Does Money Matter? The Effect of School Resources on Student Achievement and Adult Success*. Washington: The Brookings Institute Press, 1996.

<sup>74</sup> Century Foundation. Idea Brief Number 2.

<sup>75</sup> Ibid.

<sup>76</sup> <http://www.trianglemls.com/r rar-2001policypositions.htm>.

<sup>77</sup> Harvey Schmitt, “Making Choices,” Triangle TV, Dec. 2002; Bill McNeal, above.

<sup>78</sup> Harvey Schmitt, “Making Choices,” Triangle TV, Dec. 2002.

Another intangible benefit for the community is that diverse schools offer important opportunities for students to learn life skills. “Dangerous stereotypes break down as students student, and play ball, and just talk with one another,” according to parent and research Eileen Gale Kugler. “The seeds of tolerance and respect are planted and bred in schools with students from all over the world.” As our nation’s population and workforce become more diverse, students must learn to interact with people who are different from them.<sup>79</sup>

## ○ 5. COMMUNITY ISSUES: FROM CONFLICT TO CONSENSUS

*“Education not only brings into existence a population with an understanding of the public tasks; it also creates their demand to be heard.”*

*John Kenneth Galbraith  
The Good Society  
1996*

The history of the Wake County Public School System as reviewed above offers important insight into the current political landscape around issues of student assignment and public education. Although many Wake County citizens have relocated from other areas of the country, it is important to note that the legacy of segregated schooling is every Wake citizen’s inheritance. One of the vestiges of these battles in the southern United States is the formation of countywide, comprehensive school systems. But the very reason for the creation of large comprehensive school districts—increased efficiency by administering educational services across a geographic region and unifying communities and resources to meet the educational needs of all children — may in the end be its undoing. Can the Wake County Public School System, for example, remain actively at the table with so many constituencies, especially in light of the inordinate amount of time and energy dedicated to student assignment?

### FRAGILE UNITY

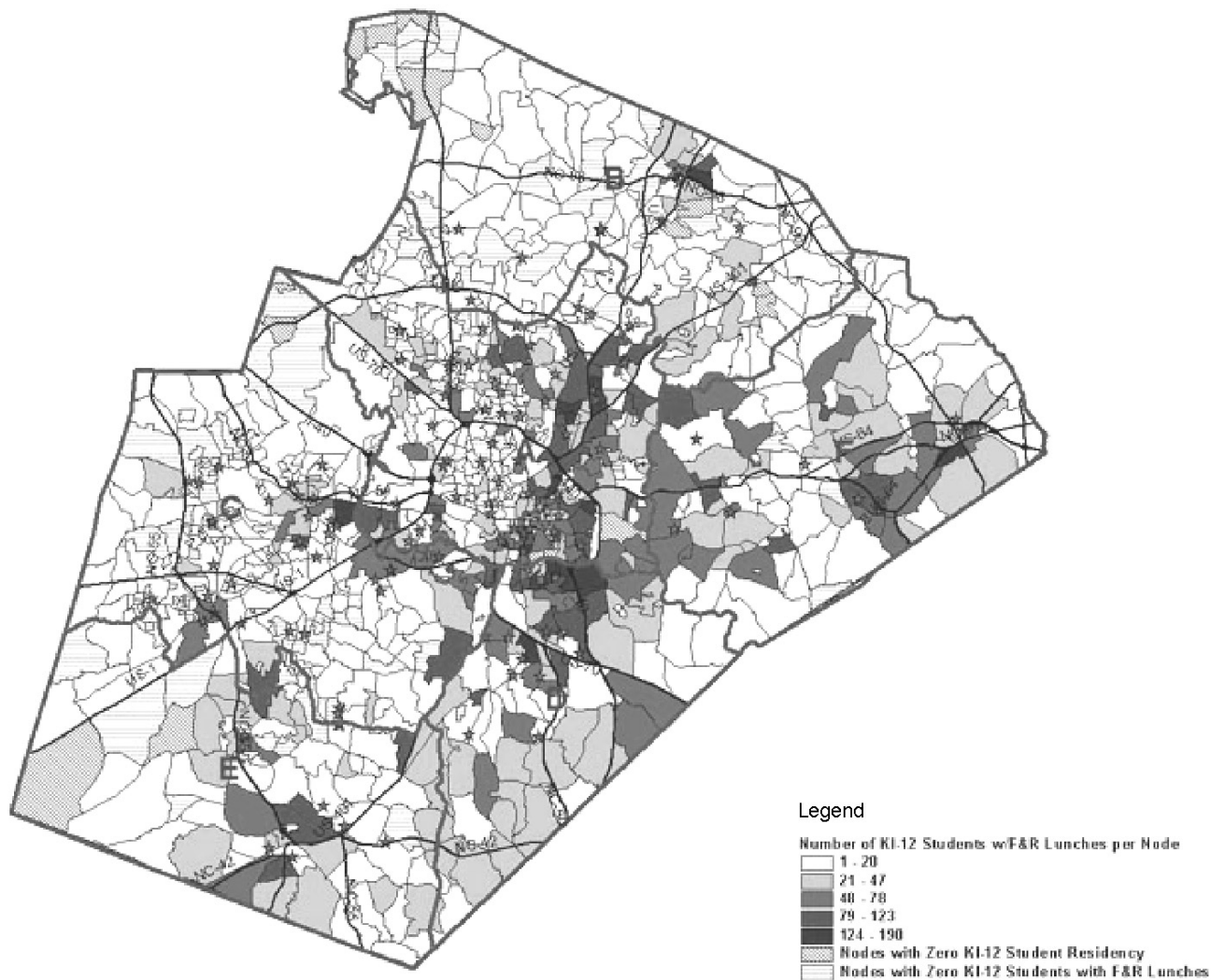
Some have called for breaking the Wake County Public School System into smaller units so that parents and municipalities might have greater control over the public schools. The challenge is that Wake County is made up of multiple communities, each with individual personalities and needs. Eastern Wake County, for example, has higher percentages of minority and low-income students than western Wake County (see table) so the needs of Zebulon stand in stark contrast to those of Cary in western Wake. A review of the distribution of wealth and poverty across the county (see map) demonstrates that a return to more localized school districts would likely pit one section of the county against another and significantly threaten the stability and academic gains realized with one united district serving the county.

**Comparing West to East**

<b>Demographic</b>	<b>Cary</b>	<b>Zebulon</b>
White	82.20%	53.70%
African-American	6.10%	39.70%
Families with children	41.70%	35.20%
High school graduates	95.10%	75.20%
Bachelor’s degree	60.70%	15.70%
Per capita income	\$32,974	\$17,026
Families in poverty	2.10%	12.80%
Population	94,536	4,046

<sup>79</sup> Eileen Gale Kugler, *Debunking the Middle Class Myth: Why diverse schools are good for all kids*. Lanham, Maryland: The Scarecrow Press, 2002. Introduction and selected excerpts available at <http://www.embracediverseschools.com/debunk.htm>.

## Distribution of K-12 Grade Students with FRPLs per Node (School Year 2002-03)



Source:

WCPSS Student 02 Oracle Table of 10/15/2002

Prepared by: Office of Growth Management MV November 15, 2002

But where does the leadership for unifying the county rest? With parents and taxpayers understandably viewing the public schools through the lens of their neighborhood, town or crossroad, who speaks for the balanced interests of all sections of the county? The Board of Education is specifically charged with representing the interests of all sections of Wake County. But as noted earlier, despite changes in recent years to ensure greater stability and even greater participation by parents, the school board has contributed to the frustration over assignment. The most recent example, noted earlier, is denying the choice for magnet schools from parents at Swift Creek while the school was experiencing declining enrollment. Parents' reaction to this choice by the Board of Education underscores the increased expectations of parents to have options about where they enroll their children. Short-term thinking by the Board of Education can have explosive consequences. In the end, the Board of Education must accept responsibility for its own contributions to parents' frustrations.

### **ACTIONS, REACTIONS AND LEADERSHIP**

Confronted with organized opposition, school leaders have historically circled the wagons and sought to hold on to an increasingly fragile commitment to balanced schools. In the past, beginning even with the decision to merge the former city and county schools to create the Wake County Public School System over the objections of popular opinion, parents were largely compliant after some predictable demonstrations at public meetings. Today, with the advent of the Internet, an increasingly well-educated and empowered population means that citizens respond with greater force than ever before and organized groups become more cohesive more quickly.

How long will this trend continue before, like other North Carolina communities, a political change on the Wake County Board of Education results in a shift away from a commitment to balanced enrollment? If the school board should walk away from its commitment to diversity, a larger question looms. As schools re-segregate and as additional funds are required for schools with disproportionate levels of poverty, how long will taxpayers be willing to make the additional investment in these schools? Can an investment in equity funding be sustained throughout political cycles?

University of North Carolina at Chapel Hill law professor Dr. Jack Boger underscored Wake County's position:

The capacity of the Wake school board to sustain broad public support for its enlightened policies will be seriously tested in the coming few years, and other school districts may not find leaders with foresight to follow Wake's lead. Construction of student assignment patterns under controlled choice plans such as those adopted by Winston-Salem/Forsyth and Charlotte school systems — however attractive to their district's white political majorities — have demonstrated a strong tendency to drift toward irrecoverable levels of racial polarization.<sup>80</sup>

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<sup>80</sup> John Charles Boger, "Education's Perfect Storm? Racial Resegregation, 'High Stakes' Testing and School Inequities: The Case of North Carolina." Paper submitted for Aug., 30, 2002, Conference in Chapel Hill. p. 54.

Recent experience in other communities suggest that despite the early pledges of equity funding to compensate for the inequalities of choice, even after a short period superintendents and school board members seem unable to maintain the commitment. Funding for magnet-type schools intended to foster greater balance seem destined for the same fate. For example, the superintendent of the WS/FCS recently recommended cutting funding for the theme schools intended to foster racial balance through parental choice. Some school board members recommended elimination of the funding entirely, but retreated in the face of public pressure.<sup>81</sup>

The ability to sustain funding to compensate for schools serving the poor or to foster parent choices that would result in greater balance also promises to test the will of the Wake County Board of Commissioners. As the elected body charged with determining local taxation in support of the Wake County Public School System, how long could County Commissioners sustain efforts to provide additional funding to aid poor children, especially if taxpayer funded schools go under-utilized, as noted earlier? At the same time, how might the public's willingness to back bonds for new school construction be affected by the open seats in less desirable schools?

Ultimately, a decision to revert to a policy of open parent choice in the Wake County Public Schools will likely result in unprecedented levels of fragmentation and divisiveness as one neighborhood or community competes with other for resources, students and control over decision making. Further evidence exists, as indicated in the case studies of Winston-Salem/Forsyth, Charlotte-Mecklenburg and New Zealand schools, that changes by other school systems for a controlled or modified choice program also results in undesirable outcomes for many children and neighborhoods.<sup>82</sup>

## ○ 6. CONCLUSIONS: A CHOICE FOR CIVIC ENGAGEMENT

With sustained growth in student enrollment and the requisite opening of new schools in ever more outlying sections of the county, populating new schools and maintaining balanced enrollment will continue to present challenges to school leaders and to elicit anger and frustration among parents. Understandably parents view changes in assignment through the lens of their family and the needs of their own children. School administrators and the Board of Education seem at odds with the very community they are charged with serving and in the absence of court rulings or other external pressures, they too often stand alone in making decisions to protect a fragile commitment to the needs of all children.

In light of the conditions noted earlier, it is vitally important that a broad spectrum of citizens — parents, teachers, business and government leaders—become knowledgeable of the facts of the impact of pervasive poverty on the ability to retain top teachers and to ensure that all children are presented with the opportunity to achieve at high levels. Parents also need to understand that growth and the prosperity enjoyed in Wake County are the major drivers of student assignment. Evidence abounds that unfettered choice *will* result in high concentrations of poor children at specific schools. Despite the best intentions, proposed funding schemes to provide

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<sup>81</sup> Deirdre Fernandes, "School-system budget debate continues." *The Winston Salem Journal*, March 4, 2003.

<sup>82</sup> In addition to case studies, see also research by Roslyn Arlin Mickelson at the University of North Carolina at Charlotte and information from The Resegregation of Southern Schools Conference at the University of North Carolina at Chapel Hill on August 30, 2002.

disproportionate funding for schools serving poor children cannot likely be sustained and cannot compensate for other mitigating factors such as the absence of other support systems from the school. In sheer economic terms, a choice program for Wake County would be an affront to taxpayers as under-utilized schools in one section of the county would be balanced against over-subscribed schools in another.

But the voices of parents calling for stability, certainty and greater options for their children must be heard. With the formation of the Healthy Schools Task Force in October 2002, the Wake County Board of Education took the first step toward changes in how parents and the community meaningfully address and minimize confusion and frustration with student assignment. What remains to be seen is the will within the public schools to sustain the involvement of the community and to continue to stretch to consider new strategies to extend choice and stability while also maintaining a healthy balance at every school.

As the community and the Wake County Public School System consider the choices that lie ahead, this report offers a call to action for the entire community to become informed and involved in deciding how Wake County populates its public schools while also remaining focused on the best possible education for all children. The facts identified in this report go directly to the heart of our values as a community. Therefore, community and faith-based organizations, civic groups, businesses and educators need to set aside time to discuss the implications of the choices made in populating our schools. Second, this report challenges the Board of Education, school administrators and community members to address key questions listed below.

### **BOARD OF EDUCATION AND ELECTED OFFICIALS**

- What steps can be taken to authentically sustain the involvement of parents and others with the public schools in finding solutions to the growth, student assignment conundrum?
- Is the Board of Education committed to preventing the creation of high-poverty schools in Wake County?
- Can Wake County afford to supplement high-poverty schools created when parents choose their children's school? Is it realistic to think this funding can be sustained over time?
- What steps might the Board of Education take to prevent a recurrence of the strong reaction parents had to being forced to remain at their base school because of falling enrollment and a high concentration of low-income students?
- What responsibility do the county and its municipalities have to ensure stable and balanced growth across the county, such as planning for mixed-income housing and development patterns?
- Should capping of schools — a strategy that places the burden on incoming students by forcing newcomers to less burdened campuses — be considered more deeply as a viable strategy for student assignment?

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## **SUPERINTENDENT AND STAFF**

- How can our school system respond to customer demands while also making sound decisions based on educational research and practical experience?
- What steps must the system take to ensure that every school possesses strong leadership that provides the high quality education that is purported by the system, especially as the quality of the principal is the most significant factor in shaping school climate and teacher and parent satisfaction?
- What steps can be taken to consider longer-term implications for short-term reassignment decisions?
- What would it take for the system to offer a concise explanation of their student assignment philosophy and provide a five-year projection of their student assignment proposals?
- How does today's political and economic climate, combined with the availability of information online and the multitude of private, charter and home school choices, affect the decisions the school system makes today (versus in the 1970s)?
- What can the system do to ensure even greater stability for families and school communities and how can they communicate those efforts to the community?

## **PARENTS AND COMMUNITY**

- Should public school leaders base decisions on research and experience or on customer demand?
- What sacrifices are we willing to make? Are we willing to pay increased taxes to supplement high-poverty schools created when parents choose their children's school? Are we willing to place students in overcrowded schools and classrooms in exchange for greater stability? Are we willing to trade a longer bus ride for a higher quality education?
- How can we best balance a desire for proximity with the need to provide a quality education for all students?
- What changes are necessary to keep the public involved as partners in the future success of our schools and not just in times of conflict?
- How can we move from issues-based confrontation to long-term, productive relationships between the community and the school system?
- How do we define "choice"?

## **AFTERWORD: WAKE EDUCATION PARTNERSHIP'S COMMITMENT**

Public education is vital to the success of our community both historically and in the future. As a change agent for excellence in our public schools, Wake Education Partnership seeks to bridge the knowledge gap that exists among members of our community and school administrators and policy makers. The Partnership seeks to meaningfully engage our community in a thoughtful dialogue about expectations for the future success of our public schools.

“It is vitally important that the community become informed about both student assignment to accommodate growth in Wake’s public schools and efforts to maintain a healthy balance of students at all schools,” said Tony Habit, Partnership president. “Almost every aspect of our community is affected by these decisions, including the strength of our local economy, local crime rates and the future prospects of our graduates.”

To this end, the Partnership has engaged in a series of actions to facilitate community discussion about this important topic. In August 2002, the Board of Trustees presented a resolution urging the Wake County Board of Education to remain committed to balanced enrollment in all public schools. From December 2002 through February 2003, a series of television programs, produced by Time Warner Cable, Wake County PTA Council, News 14 Carolina and the Partnership, appeared on Triangle TV, focusing on the economic, academic and political issues tied to the debate around diversity and student assignment. These three television programs preceded this report, which was presented at a panel discussion and community meeting to address the consequences of “free market” approaches to student assignment and to consider the experience of other communities. The community meeting was held in cooperation with Garner Chamber of Commerce, Cary Chamber of Commerce, Apex Chamber of Commerce, Triangle Urban League, Wake PTA Council and Wake NCAE.

The Partnership has also supported the Board of Education’s formation of the Healthy Schools Task Force, which began meeting in December 2002. The task force is charged with examining a variety of issues that impact the on-going health and stability of public education in Wake County, including academic success for all students, school diversity, utilization of facilities, and the community’s expectations of our public school system.

For more information about the Partnership’s efforts or to comment on this report, please visit our Web site at [www.WakeEdPartnership.org](http://www.WakeEdPartnership.org) and click on “Making Choices.”



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[www.WakeEdPartnership.org](http://www.WakeEdPartnership.org)