

# The Case for Continuous Improvement: A Comprehensive Review of CMS

June 13, 2010

*(This memo was sent from Board chair Eric Davis to the Charlotte-Mecklenburg Board of Education)*

Colleagues,

Thank you for the discussion and input at our Tuesday June 8 meeting. Our discussion well represented the views across the community as well as the risks, concerns, and opportunities that this work creates. To better capture the Board's previous work and to effectively explain this work to our community, I have prepared this draft summary. This is not an official record of our discussions as that is captured in our minutes but is intended to capture the essence of our work. This summary seeks to address the Board's concerns expressed in our June 8 meeting around clarity of scope and purpose, an aggressive schedule, and managing risks. This document is a collaborative effort of the Board's; please review this summary and share with the Board any input to make this work more effective.

## **Background**

### Student assignment

During the January 2010 retreat, many Board members expressed a desire to conduct a comprehensive review of student assignment. This desire stemmed in part from the previous year's boundary discussions as well as the realization that the current student assignment plan is the combination of a plan crafted in 2001 with multiple layers of policy tweaks through the years. The result is a confusing set of policy documents and boundaries. In addition, the Guiding Principles were created in 2005. Both the plan and the Guiding Principles were crafted at a time when our community was in a significantly different place than we are today. In January, the Board by consensus decided to delay the student assignment work until after the 2010-2011 budget process.

### Capital Needs Assessment

The economic reality of constrained capital resources requires creative solutions to our capital needs. Board discussions on a capital needs assessment highlighted the interdependency with student assignment, transportation, and academic programs. The Board received a staff report on the current state of facilities and, by consensus, elected to include the capital needs discussion in the comprehensive review of student assignment.

### 2010-2011 Budget process

Throughout the budget process a number of options surfaced that the Board concluded could not be implemented effectively prior to the start of the 2010-2011 school year, such as school consolidation which requires at least a year to plan and implement. So the Board by consensus decided to delay school consolidations and include that work in our comprehensive review after the budget process. Similarly, some Board members expressed a desire to begin the 2011-2012 budget process earlier to allow for development of options that require more time to plan and implement.

### Transportation

As part of the budget process, transportation options such as shuttle stops and bell schedules were evaluated and decided in late spring long after impacted students and families had selected their schools the previous December. The Board received feedback requesting that these decisions be made prior to December. For the 2011-2012 school year, this requires the Board to begin work in June.

### 2011 funding cliff

Due to the pending decrease in ARRA/stimulus funding of about \$50mm, the Board recognized that we must begin preparations for the 2011-2012 budget prior to the spring of 2011 in order to have more viable options to consider.

### Convergence of multiple forces

In addition to the issues described above, we are in the midst of a number of converging forces. These forces include but are not limited to our positive trajectory of achievement results and the need to accelerate those positive results, a stable Board that has gained some confidence from the community and is not facing an election this year, a Superintendent that has earned the community's support, and a national reform movement expressed in the Race to the Top.

Moreover the Board recognizes the need to build greater confidence and trust in the system through community engagement at the beginning, middle and end of decision making. A number of recent Board decisions potentially could have gained greater community understanding, and possibly buy in, if a more effective community engagement process was included in our work.

**Purpose** The purpose of this review is to:

- Prepare for the 2011-2012 funding cliff and accelerate achievement growth
- Maximize the efficiency and effectiveness of CMS systems to obtain our achievement goals
- Engage more effectively with the Community and begin to build a more collaborative relationship

### **Outcomes and Deliverables**

This review will result in a series of Board decisions regarding the district's methodology for magnet and pre K programs, assigning and transporting students, closing facilities, and the resultant capital needs. The Board will either reaffirm the current policies or revise them. Examples of the areas to be considered for policy adjustments include but are not limited to:

- Guiding principles
- Pre-K program
- Magnet program
- Transportation
- School start times
- Student assignment
- Facility utilization
- Capital needs

### **Phases of the work**

Phase 1: Review current conditions, gather input during community forums on Guiding Principles, Board discussions on Guiding Principles, and define and prioritize Board's guidance to staff. June 2010

Phases 2 and 3: Considering school consolidations, student assignment, magnets, pre K, and transportation, staff will develop options with a primary focus on what we need to implement for the 2011-2012 year. Following dialogue on these options in community forums, the Board will discuss and analyze the options, providing additional guidance to staff. July-August 2010

Phases 4, 5, and 6: Staff will refine the options into the proposed plan, the community will have an opportunity for input on the plan, and the Board will deliberate, provide direction, and select a plan. September-November 2010

Phases 7 and 8: Staff will implement Board decisions that impact the 2011-2012 school year to include integrating the results of the review into Budget process and Capital Needs Assessment for 2011-2012 year.

More detailed descriptions of each phase of work to include additional community engagement opportunities will be provided. Undoubtedly, elements will surface from this review which cannot be implemented in the 2011-2012 year. These items will be included in future phases as this work continues.

## **Process**

### Criteria for Success

The Board will develop the criteria for success – the means of measuring the options prepared by the staff. These measures will guide staff work and inform the public about how the Board will make decisions. The criteria will indicate Board priorities in specific areas.

The Board will begin its work with a series of community conversations to establish priorities. The starting point will be existing policy, which is based on the current guiding principles for student assignment which were adopted March 22, 2005. The principles read, in part:

*Our focus must always be improving student achievement for every student in every school. We will provide the leadership, resources, staffing, safe environment and innovative programming necessary for all schools to succeed. We do not believe that the problems faced by low performing schools can or should be solved through student assignment alone.*

*For the review of the student assignment plan, we establish the following guiding principles:*

- 1. **The student assignment plan** must provide our students and families with stability and predictability to the extent possible. This will require careful consideration of both expected growth patterns and additional schools planned for the area before home school boundaries are established.*

*Home e school boundaries will be changed only in accordance with a predetermined schedule or when necessary because of the opening of new schools.*

*New schools in high growth areas will reserve capacity for future growth. Consideration will be given to placing special/alternative programs in new schools to utilize seats until needed for growth.*

2. **Every student will be guaranteed a seat in a school close to home.** *There will be no capping of schools for students within the home school area. Home school zones will be logically drawn, compact and contiguous. To the extent possible, the boundary lines for such home school zones will incorporate whole neighborhoods, anticipate growth, and make efficient use of facilities.*
3. **We will make effective use of all of our school buildings.** *Determination of capacity must consider the need for room for differentiated staffing and special needs programs. We will consider smaller schools, schools within schools, innovative scheduling and different grade configurations as methods to utilize schools efficiently. We will develop a school overcrowding policy.*
4. **We believe that a diverse educational environment enhances learning. Therefore, diversity should be fostered, although it should not be forced.** *We will focus on strengthening schools in naturally diverse areas.*
5. *Magnet programs should be strengthened. Magnet schools should offer academically distinct programs. Ineffective magnet programs should be eliminated, and additional strong magnet programs should be considered. Magnets should be strategically placed to make effective use of facilities and offer reasonable access to students from all parts of the county.*

***Magnet programs should offer diverse learning environments.***

*Consideration will be given to establishing prerequisites and/or merit-based admission to some magnets.*

*Consideration will be given to establishing magnet zones which will not allow a student to choose a magnet outside of his or her zone. The sibling guarantee should be maintained except for programs with merit-based admission.*

6. **The student assignment plan should be simplified. Relevant costs and benefits of the plan must be carefully weighed, and costs should be reduced if at all possible.** *Transportation costs and travel time for students should be minimized.*

*The sibling guarantee should be maintained. Consideration will be given to reducing the size of the non-magnet zones and eligibility for transportation.*

*Because actual non-magnet choice options have been limited, consideration will be given to providing non-magnet choice only through No Child Left Behind (NCLB) and a staff-operated transfer process for open seats.*

7. **To the greatest extent possible, students with disabilities (EC) and students with limited English proficiency (LEP) will be offered the same assignment opportunities as other students.**

These principles have been used since their adoption in 2005. On June 29, 2010, the Board will adopt revised and prioritized guiding principles.

### Presentations/Workshops

As the Board is discussing guiding principles with the community, staff will be briefing the Board on the issues related to the current levels of service and answering any Board questions.

Since decisions must be made in regard to which **programs** are to be accommodated and to what extent, the first briefings will be on the pre-k and magnet programs. Although CMS considers these programs valuable, neither program is explicitly required by the state. In considering future facility use, the Board must reaffirm or alter its commitments to these programs and discuss what revisions to the current levels of service the Board would consider in the current economic climate. Other curricular issues that affect facility use are:

- Grade configuration
- School size
- Graduation rate
- Four-period day
- Staffing allocations
- Schedule (180 day or year around calendar)

**Transportation** has historically been a reactive service provided once other decisions are made. But recent budget reductions have made clear that it is among the many issues surrounding student assignment and facility use. Several possibilities have surfaced in recent budget work – the savings available if four tiers are scheduled instead of the current three, and the savings available if magnet schools service or locations are changed. Since family choices of schools can be influenced by bell schedules, Board decisions for the 2011-12 school year will need to be made by the first meeting in November 2010.

Other issues that may be discussed include:

- Funding formula
- Current levels of service for partial magnets, pre-k centers, Title I choice, etc.
- Routing/bell schedules

The **student assignment** issues to be presented involve general procedure and specific details about current configuration. By examining policies and procedures, the Board will be able to assess the way students are assigned as well as the effects of those assignments. Student

assignment has legal, academic, social and pragmatic elements. Micro- and macro-demographics, achievement data, mobility between schools and economic disadvantage are linked to assignment too. Other topics may include:

- History
- Lottery
- Projections
- Planning horizon

Likewise, the **facility-use** issues are substantial. How we calculate facility capacity is linked to how we document temporary capacity (mobiles and older buildings), and classroom use (floating at secondary). Other issues that may arise are:

- Facility age and condition
- Feeders

It is important that the Board have all the background information before making a decision on guiding principles. This will give the Board a solid foundation upon which to construct a set of principles and ultimately a plan that will provide efficient and effective educational environments at each and every school.

### Creating the Options

With the principles in hand, the staff will prepare proposed options. Community conversations will occur simultaneously. The purpose of the public meetings during the staff work is twofold: an opportunity for the staff and the Board to vet proposals being considered and an informational opportunity for the public to hear about and discuss the work as it proceeds.

### Work in Progress

As the options take shape, the staff will bring them to the Board in a series of public workshops. This is another opportunity for the Board to discuss members' preferences and for the public to participate.

### Proposal Review

By the end of August, the Board will review a proposed plan and provide direction to staff prior to presentation of the proposed plan to the community.

### Information Meetings

In September, Staff will dialogue with the community on the specifics of the proposal that the Board reviewed. Based on community input and Board direction, Staff will refine the proposal into a staff recommendation.

### Board Decision

In October and the first week of November, the Board will analyze Staff's recommendation, take public comment, make any necessary adjustments, and ultimately vote on a plan at its first meeting in November.

### Implementation

Staff will begin implementing the decision for the 2011-2012 school year to include integrating into the Budget and Capital Needs Assessment process.

### **Closing**

While this work is exciting and potentially transformative, it is essential to acknowledge that this review is not a silver bullet solution for CMS. This review will not fix overnight all that is desired to change in our system. Equally so this review is not an exercise in the Board managing the system. Conversely, this is another step in a series of actions in managing our economic reality and in reforming our system. We remain focused on our Strategic Plan 2014 goals. In achieving those goals, we are committed to take our current success at an individual student level or a single school level and expand that success across the system. This will require higher expectations of all of us, increased community engagement, creative solutions, and above all leadership from the Board to leverage input from our fellow citizens, to enable our staff to be creative, and to build trust and confidence in each other and in our system. The easy path would be to let this opportunity pass us by. Our students deserve more than the easy path, they deserve the better path. Instead of waiting for someone else to require this of us, we voluntarily accept the challenge and the risks that come with this work, knowing that the challenges and risks in no way compare to the benefits that will come for our students.