

INITIAL REPORT OF THE CMS EQUITY COMMITTEE TO THE CHARLOTTE-MECKLENBURG BOARD OF EDUCATION

FEBRUARY 2003

I. INTRODUCTION

With this Initial Report, the Equity Committee intends to impart visions. First, we want to share a vision of how we see our Committee's role in assisting the Board of Education. Second, we also will touch on the vision that we have for the future of public education in Charlotte-Mecklenburg. The people who make up our Committee – pastors, business people, lawyers, parents, and citizens – share this vision. We trust the Board will share this vision. We hope our community will continue to embrace and enthusiastically pursue such a vision.

In short, our vision involves a family moving into Charlotte-Mecklenburg with school-aged children. When the family asks their realtor about the quality of public education in Charlotte-Mecklenburg, we want that answer simply to be “excellent.” When the not necessarily naive family bores in on the realtor and asks him or her, “Well, where should we really buy or rent a house to make sure our children will have the option of going to a good public school?,” we want the realtor to be able to respond honestly that, “It does not matter in what part of the City or County you purchase a home because consistently excellent educational opportunities are provided throughout our community.” To complete this initial glimpse at our vision, we want the experience of that newly-arrived couple and their children to bear out the realtor's, and the community's, lofty promise.

In many ways, the Board has given us a herculean task. You charge us to “help the Board to facilitate an annual analysis of its efforts to provide equal access to excellent educational opportunities for all of its students in all of its schools.” If history already has not indicated the difficulty of that task, you add to our unrealistic burden by convening us in December and advising us that we should prepare a report by early February 2003. We have embraced the challenge. To be clear, however, this initial report will bear little resemblance to the reports we envision providing in 2004, 2005, and beyond. We envision our Committee helping to serve as the probing eyes, questioning voice, and sharp pinprick of conscience for our school system to help make sure that the vast but not unlimited resources our community marshals for public education are utilized equitably throughout our system for the benefit of all children. With the rest of this initial report, we hope to provide you with more detail of how we envision ourselves fulfilling this role.

II. CMS EQUITY EFFORTS UNDERTAKEN THUS FAR

Initially, we the members of the Equity Committee would like to applaud your courage and prudence for the April 3, 2001 and July 31, 2001 Board Resolutions, in which, the Board adopted the March 1999 document entitled “Achieving the CMS Vision: Equity and Student Success” (the “Equity Plan”) and also reaffirmed your commitment to it. We are grateful that the Board of

Education is committed to continuing the quest for equity, offering support, and aggressively seeking funding where necessary to achieve it.

Furthermore, during our preliminary meetings, the Equity Committee members have taken note of the Board's diligence to identify where inequities exist and how to address them. Deliverables such as the *EquityPlus II* Project, the Template for Schools with High Concentration of Low Socio-Economic Status Students, the Balanced Scorecard, and the Annual Status Reports on Equity and Student Success: Achieving the CMS Vision – including the most recent January 2003 Status Report – all have served us well and have gotten our Committee headed in the right direction.

Additionally, the Board's drafting, implementation, and adoption of the Equitable Education Opportunities (ADA) and Instructional Resources and Materials (IJ) policies are further testimony to providing equal access to excellent educational opportunities for all students in all schools.

Lastly, the very formation of the Equity Committee speaks to the Board's commitment regarding the equity issue, and we look forward to the role we will play in working with the Board and the CMS administration toward this end.

As a group, we think that recognizing and attempting to identify the absence of equity is progress in and of itself. We, the members of the Equity Committee, are hopeful that we can serve as a responsible resource as we partner with you in this ongoing effort.

III. A WORKING DEFINITION OF EQUITY

The Equity Committee members believe that "equity" can be an abstract concept, which initially may be difficult to measure. Equity comes in various forms. For example, it may take the shape of physical needs (*i.e.*, supplies, educational materials, facilities, etc.) and/or professional factors (*i.e.*, a faculty's years of experience, licenses, advanced degrees, etc.). When combined, however, into the right formula for each child, equity should ultimately enable appropriate achievement for each child. The measurement of achievement will be our indicator to determine that we have successfully allocated our resources in the most cost efficient manner.

Our Committee has decided to adopt the Student Assignment Oversight Committee's definition of "equity" with the understanding that our Committee may modify the definition based on discoveries made over time. We anticipate "drilling down" from this definition to identify specific objective goals, not just subjective aspirations.

The SAOC's – and our current working – definition of equity is:

Equity is the condition in which each student is able to realize his or her full potential for academic achievement, individual performance, and personal success. Equity requires an ongoing process to allocate resources to each school so that each student has access to rigorous academic challenges and an environment that promotes high expectations. An equal allocation of baseline resources is the first step toward equity, but equity requires

much more. Equity requires differentiation of resources among all schools to enable each school to meet the unique needs of each student.

In general, the Equity Committee concurs with the above definition, which is also our understanding of what CMS is trying to accomplish. The following two primary goals are based on this definition:

- 1) The primary charter of the Equity Committee is to make recommendations to the Board of Education to ensure that resources are allocated in a manner that allows *all* children equal access to a quality education and the opportunity to succeed; and
- 2) To develop a way to verify and monitor, on a continuing basis, that allocated resources are used in a manner congruent to the goals set by the Board of Education.

IV. MONITORING THE PROVISION OF EQUITY

Our Committee views monitoring the provision of equity as a crucial task. Our community needs to be convinced that its tax dollars and volunteer support for our schools actually are accomplishing equity so that these contributions will continue. Until a true level of trust permeates all segments of our community, our community also will need to be persuaded and convinced that progress toward equity is being made and – provided we achieve the ultimate vision outlined here – that a state of equity actually has been achieved. An active, ongoing monitoring process seems to be a key component in providing necessary assurances to the community and in developing the trust within our community that is ultimately crucial for the success of our children and ourselves.

Although believing that monitoring equity is vital, our Committee does not see itself as the long-term solution for monitoring all aspects of equity. To be sure, we see part of our task as monitoring equity. We will review reports and data provided by the CMS administration. We will make suggestions about what data to gather and how to present it. We also will keep a close watch on this Board of Education’s policies concerning equity, and we anticipate monitoring those and letting you know when we feel you may have deviated from the best course toward achieving equity. We also envision monitoring equity by doing some checking up ourselves. We anticipate touring schools and observing classes and programs at work. We anticipate interviewing parents, students, teachers, and administrators about equity. We do not envision, however, going into every media center and counting every book. We also do not intend in any way to usurp this Board’s role in being the ultimate community monitor (apart from the community itself through the popular vote) of the provision of equity to our school children.

Instead, we envision ourselves suggesting how best to monitor equity based on what we learn. In the past, other community organizations have provided a valuable service in a very hands-on monitoring approach toward the physical resources in our schools. For example, the Helping Empower Local People (“HELP”) organization has done much to demonstrate some of the most glaring inequities in bricks and mortar and in books and teaching resources in our schools. It

seems wise to us to figure out ways to take advantage of these types of efforts by various organizations and provide them with a specific liaison either to our Committee or to the Board that would provide a clear pathway for taking advantage of their efforts and in building up trust that those efforts are not being wasted.

Similarly, we envision the task of monitoring being performed most efficiently by those who have the most vested interests in the provision of equity. Instead of relying on CMS officials to count books, compare numbers of teachers with advanced degrees, and tally up numbers of computers with actual wiring and up-to-date software, we envision a program that would train School Leadership Teams to perform audits and to monitor the provision of equity in their own schools. Who better to highlight a perceived or actual problem in a school than the parents, teachers, and leaders working to make that school the best it possibly can be? Granted, such a plan may beg the initial question of whether all schools have the strength of parental and volunteer resources to form effective School Leadership Teams that can receive such training and fulfill such a role. We will be doing our best to answer that question for you. If there are not equitable resources in place to help provide each school with such a strong School Leadership Team, we will be telling you about it and making suggestions for how to get those resources pumped into the situations in which they are needed.

Monitoring equity is inextricably intertwined with the notion of accountability for scarce resources and developing trust within our community. We hope that our periodic reports to the Board of Education will be perceived as a means of monitoring equity, but we do not suggest that we can – or should – undertake all aspects of this crucial task ourselves.

V. HOW BEST TO MEASURE EQUITY

CMS has made a good start in measuring equity in the annual report on Achieving the CMS Vision: Equity and Student Success. Our Committee, however, has some concerns about how CMS measures equity. First, we have concerns that not all the best criteria for measuring equity are being tracked. Second, we have concerns that some of the specific measures being used need to be refined further. Third, we have concerns about the presentation of the information and the need to make it more “user-friendly” and accessible to our community. Also in this third area of concern, we perceive an ongoing need to demonstrate accountability to our larger community, namely that resources designated to help provide equity actually are providing equity.

Over time, our Committee expects to give you specific recommendations to address all of these concerns, including suggestions for a local “user-friendly” equity report card that would track progress school by school. For now, however, we simply want to touch on examples of some of the concerns mentioned above.

As an example of tracking the right criteria for equity, our Committee would like to see more being done in the area of measuring and reporting faculty strengths and weaknesses, both for principals and for teachers. In addition to tracking percentages of clear licensure, advanced degrees, years of experience, and similar criteria, we would like to see more focus on tracking actual success in the classroom. Although as discussed below, this type of tracking also would depend on some more refined measures of what counts as “success in the classroom” and

“success in the schools,” it seems important to us to note that the best indication of someone being an effective teacher – or an effective principal – is an actual track record in a classroom or school. Examples of other data we would like to see tracked and reported include a breakdown by school of resources provided by non-CMS sources (PTA fundraising, corporate or community partnerships, etc.), as well as additional indicia of student safety and disciplinary efforts in various schools.

We also want to provide some initial examples of how current measures need to be refined and improved. Although we believe monitoring “student success” is crucial, we believe “success” should include more than just progressing from level to level. A student (and that student’s teachers) have not accomplished less just because progress has been made within a level, but not quite enough progress to trigger entry into the next level. Put another way, we would like student achievement to be measured as much by how many “rungs” a student actually advances on the “achievement ladder,” not just by how many particular thresholds on the ladder the student might pass. Measuring success this way seems to us a fairer method, especially when we link that measure to a way of tracking the effectiveness of teachers and principals.

Additionally, we need to refine “average class size” as a measure of equity. A low ratio can be achieved even though large numbers of students might not get the benefit of smaller classes. For example, a 16 to 1 student to teacher ratio is little help to the student in a 28-person class if only 4 other students are in a second class. Our Committee wants to explore further the practice of “trading staff positions” within schools by principals to determine how that practice affects the reliability of statistical data and whether all students are getting the benefit of more focused time with teachers in the schools.

Other examples of how to refine and improve existing measures include: examinations of the best way to track parental involvement at a school (percentages of participation in all activities? percentages involved in certain activities like parent/teacher conferences? survey data?); consideration of more transportation data (average time on a bus for schools within a choice zone? comparisons between choice zones?); an analysis of the resources made available to students for participation in electives and co-curricular activities; and an analysis of the actual utilization of computers and other resources being provided.

Finally, after only a relatively few weeks of immersing ourselves in the data and reporting done by CMS, we are beginning to grasp the complexity of the information and the care that must be taken in reporting data to the public. At the same time, we fear that most parents, students, and taxpayers will not have the opportunities we have had in having (i) specific materials provided and explained to us, (ii) blocks of time committed to reading, questioning, and understanding the materials, and (iii) designated CMS staff spending substantial time with us to answer questions and explain materials. With these realities in mind, we believe strongly that we can help this Board of Education and CMS by making suggestions about how to report data in a user-friendly but accurate way. Our ultimate goal is an easy-to-read, “dashboard indicator” report card broken down school by school that charts and measures performance in a variety of categories that we deem most important for tracking equity in the schools.

VI. OUR PRELIMINARY THOUGHTS, OBSERVATIONS, AND RECOMMENDATIONS

At this point in our initial report, our Committee wants to share with the Board of Education some of our initial thoughts and observations on equity in the CMS System as we find it. We also want to share with you our ideas for prioritizing the use of resources best to achieve equity in a period of conspicuously limited resources. Over the next three years, and beyond, we anticipate providing even more details and concrete suggestions than appear here. At this point, however, we want you to have the benefit of the initial collective thoughts and recommendations of our Committee. We first will note areas in which we perceive there have been successes achieving some measure of equity, then we want to identify some of the most important challenges remaining to achieving equity, and finally we will attempt to prioritize these challenges.

Successes

A review of the January 2003 Status Report for Achieving the CMS Vision: Equity & Student Success demonstrates progress. As we have noted earlier, the annual Status Report itself and the effort to track various categories of equity is progress in and of itself. Even a cursory review of the listed categories demonstrates some successes in achieving equity. In no particular order and without exhausting a list of successes: (i) it is undeniably good that more facilities meet CMS's equity standard; (ii) it is good that more schools meet the standard for AV equipment; (iii) it is good that more elementary, middle, and high schools meet the standard for co-curricular activities; and (iv) it certainly is good that CMS reports that all students have access to textbooks. We are cautiously optimistic that gains are being made in most of the other areas tracked in the Status Report.

We also believe that particular programs, when properly funded and staffed, make a real difference in providing equity in our schools right now. Examples of such programs include parent advocacy and support programs at various schools as well as Talent Development programs in numerous schools. As will be detailed below, challenges certainly exist in these good types of programs, and in too many instances, these programs may not be properly funded and staffed. In numerous places around our system, however, such programs – and others – offer hope for providing equity throughout our system.

In Section II of our Report, we also detailed for you some of the successes we have perceived in areas such as the adoption of particular policies and the use of the Balanced Scorecard approach to linking goals, procedures, and funding. As will be detailed below, although more needs to be done in demonstrating accountability to our community and in providing “user friendly” information to the community, some progress already has been made in these areas as well.

Challenges

In many instances, challenges for achieving equity also can be seen in the same data we just discussed from the January 2003 Status Report. For example, in no particular order, and again without exhausting the list of challenges, we note the following. Far too many facilities are not

yet at the equity level – we need more bricks and mortar and we need it in particular places. Too many schools lack the instructional materials they need. Perhaps most glaringly from the 2003 Status Report, we are going backwards in terms of providing equitable instructional supplies for our exceptional children. Some media centers have not been able to stay at the equity level in terms of numbers of books as these schools’ student populations have grown. Even more alarmingly, much progress needs to be made in the quality of over 80% of our media center collections. In too many instances, schools do not have adequate technology systems for their students – or for their faculty and staff members. Adding to the technology deficit are the realities in many schools that merely having a requisite number of computers does not equate with those computers being wired up for use or having the appropriate software to take best advantage of the equipment. Even achieving a 5 to 1 or 8 to 1 student to computer ratio is scant consolation when the computers cannot be used to the best educational advantage of the students in the classroom.

Our Committee believes strongly that the overarching issue confronting CMS as it seeks equity is how best to provide equity among the faculties at every school. Our Committee uniformly believes that principals and teachers are the most important resources that CMS provides our students. No one disputes that every school ought to have an outstanding principal. No one disputes that every child ought to be taught by a high-quality teacher. No one disputes that outstanding principals and high-quality teachers abound in our system. The volatile issue remains of how best to promote the provision of outstanding faculties at every school. We appreciate that this Board has adopted a policy to bring about such equity in teacher resources. We also acknowledge the recent change in teacher transfer regulations from the CMS Administration. No one yet knows the system-wide impact of these new regulations, and they may or may not address inequities going forward. In our Committee, however, we remain concerned that not enough concrete steps are being taken – and dollars directed – to encourage principals to lead and teachers to teach students in all schools, including our most challenging schools.

Similarly, as we addressed above, challenges also remain in refining our measures for equity and improving the tools we use both to track progress toward equity and to communicate that progress to our community. As discussed in Section V, we continue to need more work in determining the best measures for equity and in coming up with “user-friendly” ways of reporting our journey toward equity throughout Charlotte-Mecklenburg.

A Prioritization of Several Ongoing Challenges

Although impossible at this stage (and perhaps at any stage) for the Equity Committee to list all of the areas in which the need for equity must be matched with specific funding, we will attempt to make a beginning here. As this Board of Education, Mecklenburg County’s Board of Commissioners, and our community grapple with how best to devote considerable but finite resources to vitally important and sometimes seemingly endless needs, we offer the following seven (7) areas in which budgets should be increased or the highest possible priority made for complete funding. These suggestions are given equal priority by our Committee, and we list them in no particular order, although we note most of them could be described as “spending to improve the lives of teachers.”

- **Baseline Instructional Supplies.** Despite some progress, and indeed some innovation, in getting teachers the basic resources they need in the classroom, we fear problems persist. We remain disturbed at hearing any anecdotal evidence that teachers have to use their personal resources to purchase instructional items to help them teach in the classroom. We remain disturbed at the inequity that allows some schools – whether because of more active or more affluent PTAs or because of corporate partners or other benefactors – more flexibility than other schools enjoy in providing instructional materials teachers may want or need. First, we believe strongly that CMS needs to fund all basic instructional materials in the classroom, and the definition of “basic” needs to be broad. Second, we also believe strongly that CMS should fund an additional, discretionary amount for each school to purchase instructional supplies and that CMS should allow principals and teachers flexibility to use these funds to purchase what they perceive as being needed most for their particular students.
- **Teacher Compensation.** Based on the discussion above, this one seems obvious to us. We implore the Board of Education – and the Board of County Commissioners – not to make any funding cuts in any aspect of teacher compensation. Indeed, we urge more funding in this area. We realize much of CMS’s funding in this area comes from the State of North Carolina. Additional stipends and incentives, however, are funded locally, and our community must continue to devote more resources to attract, develop, and keep outstanding teachers.
- **Teacher Development Dollars.** Just as compensation for teachers is important, so too are enough funds for teacher development. We also see this category as one in which CMS has to provide a level playing field and not force schools to rely on outside support for such a basic need. This area also is one in which principals need to exercise discretion over spending the funds and in offering development opportunities to teachers. A “one size fits all” approach may in some ways be “equal,” but it will not promote “equity” when the needs of a student population require the development of different skills among a faculty.
- **Parental Involvement.** Our Committee cannot stress enough the contribution active parents make toward the success of individual students and a school’s population as a whole. In too many instances, however, schools need help in developing programs that put parents in a position to make contributions and help their children’s schools succeed. We believe we can debate which programs are most effective and whether the programs are appropriately staffed to achieve their purposes, but we believe no debate is necessary to reach the conclusion that some types of effective programs are essential in this area if CMS truly is to provide equitable educational opportunities for all students at all schools. CMS cannot fully develop all of the resources it has at its disposal – specifically the parents and families of all of its students – without continuing to spend needed money in this area.

- Full Utilization of Existing Resources.** We also perceive this area as a pretty obvious priority. Just like CMS needs to spend its money wisely to develop parental involvement programs to leverage all of the “people” resources to which it has access, CMS needs to spend other money wisely to leverage resources already in place. An easy – and we believe still too frequent – example is schools having a certain number of computers but not having the wiring or the software necessary to utilize those computers. Before buying more computers anywhere, it just makes sense to spend money to enable CMS fully to utilize the resources it already has. To the extent any program or expenditure can be identified as enabling CMS to “leverage” existing assets and use them to their full potential, those programs should be fully funded and not cut.
- Talent Development Programs.** Generally, our Committee fears an equity of mediocrity. We do not want to see CMS achieve some measure of “equality of opportunity” by reducing opportunities for everyone down to some sort of educational lowest common denominator. Recall that our “equity” definition includes enabling all students to achieve their highest potential, and “all” includes those with the capacity for the very highest academic achievement. Part of enabling all students to achieve at their highest levels involves effective Talent Development programs in all of our schools that meet the needs – and challenge the intellects – of all children that qualify for inclusion in these programs. CMS’s current Talent Development programs also must be enhanced and fully funded to enable TD teachers sufficient time in every school to work with both TD and “catalyst” children. Improving the TD program and fully funding TD positions with the acknowledgment that TD teachers must be able to reach both TD and catalyst children accomplishes two goals. First, it equitably meets the needs of all children in the program. Second, it communicates to the community at large a commitment to excellence in our schools that avoids any possibility of CMS being perceived as a school system that would tolerate equity by mediocrity. We urge that CMS’s Talent Development program be expanded, enhanced, improved, and fully funded.
- Programs for At-Risk Children That Do Not Fall Into a Neat Category.** Finally, CMS must balance the needs of the many with the needs of the few. Specifically, we mean that in an era of special interest groups clamoring for their particular group’s needs to be funded, we not forget the many children who may not fall into a particular category, but who need an equitable educational opportunity just the same. We are particularly mindful here of students who historically, for whatever reason, have not commanded a voice in our society’s decision-making dialogues, but who need a quality public education to have a chance to make their individual voices heard. We do not want the Board of Education *not* to pay attention to the needs of exceptional children, or children in Talent Development programs, or any child in an *EquityPlus II* school, or a child in a particular magnet program. We just want to remind the Board – and our community – that most children likely do not fall into a particular special-interest category, but all children are at risk of losing their opportunity for a quality

education if we pay too much attention to the multitude of various parts and not enough to the greater good of the whole when making budget decisions.

VII. CONCLUSION

In the Equity Committee's vision of public education for Charlotte-Mecklenburg, equity is a means, not an end. We aspire to equity so that all students can achieve and fulfill their true potential be it as a Nobel Prize-winning scientist, a teacher or other professional, the best truck driver ever to navigate our streets and roads, or as a parent or other participant in our civic life. Equity in and of itself will matter little if children and young adults do not learn, achieve, and grow.

At the same time, for the purpose and focus of our Committee and its vision, we do view the achievement of equity as our end and goal. We will embrace a variety of means to help us achieve that end. We will review data. We will interview administrators, teachers, students, parents, and citizens. We will observe programs in action in our schools. We will determine what new data we need. We will determine how best to measure that data. We will help to determine the best format for sharing that data with the greatest number of people in our community. We will monitor how well CMS achieves the equity goals set by this Board, and we will establish a framework so that this monitoring remains an ongoing part of our Committee's function even as we include other groups and volunteers to assist us in that part of the equity process. We also intend to monitor this Board and provide it with our thoughts and suggestions about setting the right equity goals for our CMS administration to strive to achieve.

For too long, our school system – and others – have relied on “lagging indicators” to tell us what is wrong. The problem with reacting all of the time to lagging indicators is that too many pupils and teachers have suffered to create the statistics and data from which hopefully we eventually learn. Our vision involves looking at “leading indicators” and taking steps to provide equitable resources in order to avoid educational pitfalls before they occur.

Ours is a lofty vision. Doubtless there will be nay sayers who will question whether it ever can be achieved. We believe strongly that this vision can and must be achieved. We appreciate the opportunity and the trust bestowed upon us by the Board to undertake this important work to help this Board and our whole community to achieve such a vision. Please stay tuned, and we look forward to being back in front of you with additional concrete steps toward this vision no later than January 2004.

The CMS Equity Committee

Rev. George Cook, Jr.	Ellen C. Martin
Kay Cunningham	Greg Metcalf
Richard Helms	Jose' Hernandez Paris
Rev. Paulette Higgins, Vice Chair	Rev. Dr. John H. Walker
Michael Kasper	Julian H. Wright, Jr., Chair