

## WAKE COUNTY SCHOOLS: A QUESTION OF BALANCE

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**B**rentwood Elementary School is tucked inside a once upwardly mobile development of split-level homes in Raleigh, North Carolina. The school dates from the time when classrooms in the South were either black or white, and student achievement was measured by grades or a report card rather than year-end test scores. Today, that 1960s-era school is among the most diverse in a sprawling county where the upwardly mobile are drawn to more distant subdivisions with fancier names and bigger homes.

Brentwood's classrooms fill each day with the children of working-class families. They reflect numerous races, cultures, and ability levels. Halfway through the last school year, a newly arrived third-grade girl from Kenya was learning to tell time in one classroom. A Ukrainian boy in fifth grade was still learning the English alphabet in another.

More than most schools in Wake County, which includes Raleigh, Brentwood faces stiff challenges. More than half of the students who attend the school receive federally subsidized lunches. More than a quarter of the school's third, fourth, and fifth graders failed the state's reading tests last spring.

Linda McMasters, Brentwood principal last year, said that the challenges students bring put particular pressure on the school to help struggling students. "More progress is expected of students who aren't on grade level," McMasters said. "The more students who are at that level, the greater the effort."<sup>1</sup>

Because of the often uphill struggle that schools like Brentwood face, the county's school system now assigns students to schools in a way intended to limit the strain of poverty and low achievement. Anita

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Jones has taught at the school for sixteen years and has seen those pressures increase. “It takes a special kind of teacher to work at Brentwood,” Jones said. “You have to be willing to give 110 percent.”<sup>2</sup>

Some teachers are not. Of the school’s thirty-six instruction positions, fourteen of them were newly staffed last year, reflecting a turnover rate of about 40 percent. All four kindergarten teachers were new last year; five other teachers were hired from overseas.

Stephanie Callahan, a first-year kindergarten teacher, was getting an education herself in the challenge at the school. She’s had parents ask if she could take their children home with her and watch them after school.<sup>3</sup> She started the year with nineteen students, but had twenty-four later in the fall, five more than what the state recommends. Almost half of her students had limited English proficiency or special-education needs.

McMasters and her teachers are proud of what they’ve accomplished. During three of the last four years, the state has recognized Brentwood for the strong gains students made on reading and math tests. The U.S. Department of Education awarded the school a blue ribbon for school excellence in 1998.

Still, teachers admit that limiting the number of high-needs students would improve their school. They hope county school leaders will help balance Brentwood’s enrollment. “Teachers have challenges wherever they are,” said Jennifer Smith, a fifth-grade teacher. “They’re just different. We talk to the kids about fairness. That should apply here, too.”<sup>4</sup>

Wake County school and community leaders have held firm to the belief that the public school enrollments should be well balanced—whether by race or, more recently, by economic and achievement criteria. A commitment to racial balance resulted in an independent county school system and a separate Raleigh city district through merger in the mid-1970s, sustained that belief in desegregation through the 1980s and 1990s, and led a later generation at the close of the twentieth century to craft an innovative but still largely untested approach for reaching a goal of educational equity.

The 105,000-student school system is now beginning its third year of experimentation with a plan to limit teaching and learning barriers, which often confront schools with high concentrations of students from low-income families and those struggling with low academic achievement.

Children in various neighborhoods are now assigned to schools based on the number of students in the neighborhood who participate

in federally subsidized lunch programs, as a measure of family income, and academic achievement gauged by performance on annual state reading tests. The aim is to create and maintain enrollments in all 125 schools in the county so that none is burdened by excessive poverty and low performance. Under the school system's guidelines, no school is supposed to have more than 40 percent of its students receiving free or reduced-price lunch, or more than 25 percent performing below grade level.<sup>5</sup>

### **A WORKABLE BALANCE: WAKE'S RECORD**

Based on nearly twenty-five years' experience, education leaders have learned that the county's public schools fare better when they reflect the community as a whole. By most measures, the vast majority of schools in the county could be declared healthy, even as the school board was voting for sweeping change nearly three years ago; student performance was at least acceptable, parents were generally supportive, and enrollments were stable or growing. The schools tended to enjoy good political support, if not always the most generous financial backing, from the county's political leadership. The business community could point to the school system as an attractive drawing card for prospective industry looking to relocate and for the families that new business and industry would bring.

By that measure alone, leaving educational quality aside, the schools have been key to the area's economic vitality. The 2000 Census showed that the county's population surged to nearly 630,000 (48 percent) during the 1990s. Much of that growth was fueled by new and expanding industry in Research Triangle Park, one of the region's principal engines of economic growth. The county's per-capita income ranks second of one hundred North Carolina counties, behind Mecklenburg County (which includes Charlotte, the state's largest city).<sup>6</sup>

One of the biggest challenges facing the school system since the early 1990s has been simply keeping up with enrollment growth of three thousand or more students a year. Since 1993, voters have approved nearly \$1 billion in bonds to build, expand, and renovate schools.

It was against this background of a generally sound and successful school system that, in 1999, school leaders in Wake County began confronting a changing legal landscape in which the goal of desegregation was increasingly under attack. The Charlotte–Mecklenburg school system, which prided itself on having made busing work in the

nearly thirty years since the historic *Swann* decision, was locked in a high-profile legal challenge of that long-established and, in fact, Court-mandated effort to balance schools racially. In the case of *Swann v. Charlotte-Mecklenburg School District*, the U.S. Supreme Court upheld a lower court decision that required the school system to bus black children and white children as a means of desegregation. But in the 1990s, the Supreme Court held that race-based desegregation must begin to wind down. Elsewhere (including Arlington, Virginia, and Montgomery County, Maryland), school assignments in which race played a role had been rejected as unconstitutional by the Fourth Circuit Court of Appeals.<sup>7</sup>

Wake County's experience with an assignment approach guided by family income and student achievement was triggered by what school leaders viewed as an immediate legal threat to what many consider the backbone of the school system. The new approach was untested in the county, but the concept of balanced enrollments was not; it had shaped the schools for more than two decades. School leaders wanted to preserve what the county had achieved, if not do more to alleviate the growing disparities among schools during the 1990s.

Whatever the approach and whichever criteria are used, sustaining well-balanced schools in the nation's twenty-ninth largest school system is easier said than done. Rapid growth and demographic shifts across the 864-square-mile county now pose formidable challenges. Public support remains fragile for a plan that highlights a child's economic disadvantages over the color of his or her skin. Despite the move away from busing for racial balance, charges of social engineering are raised by some. Past decisions by school leaders have already widened the gap between some schools. The Wake County school system is at once an opportunity and a challenge for those who promote balance as an effective instrument of school reform.

## LEGACY OF INTEGRATION

Wake County's school assignment practices, which for more than two decades considered race as a key factor, escaped a serious challenge from parents unhappy with their own child's school assignment. Although calls for neighborhood schools became a perennial campaign issue for school board challengers throughout the 1990s, anti-busing candidates

failed to win a seat on the board, even after well-financed election efforts by some. In Wake County, at least, the public had accepted an assignment policy that still could be viewed by some as disruptive, if not unfair. Students could be moved, and were, for reasons that some parents believed had less to do with education than social engineering. In parts of the county seeing rapid growth, children were even more likely to have their school assignment shifted, although usually more for reasons having to do with crowding than for racial balance. The absence of serious, vigorous opposition can be traced to efforts by school leaders to provide parents with some measure of choice through a network of magnet schools and a system of generally satisfactory schools, aided in part by efforts to maintain desegregated schools.

It was within that climate of basic acceptance and support, then, that the Wake County school board voted in early 2000 to scrap a race-based assignment plan that had been in place for nearly twenty years and replace it with one based on family income and student performance.

Even before the board discontinued the use of race in student assignments in favor of economic and academic factors, the school system had been indirectly making those same adjustments. Because of the correlation among race, income, and student performance, most schools in the county using race as the basis for balancing school populations were also balanced under the new criteria. In fact, more schools were in compliance with the board's new guidelines in 1992 than in 1999, just as the revised policy was on the verge of being adopted.<sup>8</sup>

School and community leaders feared that resegregation of the county's schools would lead to the eventual erosion of school quality countywide. "The bottom line is if you're going to have schools that any consumer will choose, you've got to do some balancing," said Jim Surratt, a former Wake County schools superintendent who helped craft the new plan. Otherwise, he said, the county's schools would be trapped in a "cycle of ever worsening conditions."<sup>9</sup>

The background is important. Over a twenty-year period, leaders in Wake County had developed a school system where the notion of racial balance was widely accepted, without a court order, and schools and children were generally better off because of it. In other words, Wake County was not starting from scratch in its new tack on assigning students to school. Instead, the county's education leaders were trying to preserve hard-fought gains while at the same time focusing more precisely on indicators of student success: income and achievement.

## MAGNET SCHOOLS: A FOUNDATION FOR BALANCE

Even ten years ago, the layout of Wake County was particularly conducive to a model designed to promote racial balance. A nearby ring of mostly white suburbs surrounded the city of Raleigh, which included much of the county's black population. As a countywide school system, Wake County was fully unified. The district's only boundary was the county line.

In the early 1980s, the school system launched a network of magnet schools comprised of all the schools remaining in Raleigh's inner-city black neighborhoods. As the city and county's growth pushed to the suburbs, the enrollments of these schools in the city's urban core declined and became increasingly black. Meanwhile, schools in some predominately white suburbs were facing severe crowding. The campus of one North Raleigh elementary school grew to include some twenty classroom trailers to accommodate the overflow.

The community was divided about how to respond. Suburban residents clamored for new schools, and a bond referendum was scheduled to raise the necessary funds for construction. However, residents of Raleigh's older neighborhoods near the city's center objected to spending money to add new classrooms when many downtown classrooms were empty. They prevailed. "The crucial thing was when we were able to stop building schools in the suburbs, and closing schools in the city," said John Gilbert, a retired professor of political science at North Carolina State University and a member of the Wake County Board of Education during much of the 1980s and 1990s. The school system either shut down or converted some fourteen Raleigh schools during the 1970s and 1980s as enrollments dipped.<sup>10</sup>

The critical turning point for the school system came with the decision in 1982 to convert most of Raleigh's neighborhood schools to magnet programs beginning that fall. The schools were recast with extras unavailable in the county's suburban schools: appealing arts and music electives, additional foreign language choices, and other features intended to lure children out of the suburbs and into the city. The magnets served a twofold purpose: to fill underused schools and to achieve voluntary desegregation of schools that were becoming increasingly black.

Even then, however, when education leaders in Wake County and elsewhere were most acutely attuned to issues of racial balance, student achievement and school performance were a growing concern: "If you had a huge concentration of children from a high-poverty neighborhood

assigned to a school,” Gilbert said, “there was some effort to avoid that. We tried to avoid big concentrations of low-achieving children of whatever race.”<sup>11</sup>

Nonetheless, school assignment officials focused primarily on racial balance. The Wake County school board set guidelines that remained in place until they were set aside in 2000 in favor of economic and academic factors. Each school in the county was supposed to have no more than 45 percent minority enrollment or no less than 15 percent. When those guidelines were established in the late 1970s, the county’s school enrollment was approximately 70 percent white and 30 percent minority, nearly all black. The fifteen-point margin on either side of 30 percent allowed for flexibility in assigning students to schools.

The magnet approach was not without its downside. Although the schools of choice created a system of voluntary desegregation for some, other students had no such choice. To integrate largely white suburban schools, and in some cases open seats in magnet schools to voluntary transfers, black students faced mandatory busing more often than white students. In one extreme case, none of the mostly black children living in a south Raleigh public housing complex attended the magnet elementary school directly across the street from where they lived. Instead, they were bused several miles away to schools in Cary, a largely white suburb of Raleigh. A portion of that housing development has been assigned back to the nearby elementary school, but students across east and south Raleigh’s historically black neighborhoods continue to shoulder a disproportionate share of Wake County’s mandatory busing, even under the revised assignment policy.

Magnet schools have not been equally available. Because the schools were intended to attract white students to integrate enrollments, which included children from nearby black neighborhoods, blacks and minorities from suburban neighborhoods could be turned away. Conversely, white students in neighborhood schools could be refused magnet seats if their departure might skew the minority enrollment beyond the board’s guidelines for racial balance.

Because nearly all of Wake County’s magnet schools were located in or near historically black neighborhoods, these schools have been among the most diverse in the county.<sup>12</sup> And, since assignment administrators have a measure of control over enrollments through which magnet applicants are selected, they have been generally able to achieve a balance within the system’s policy limits. For that reason, the twenty-four magnet schools have been at the core of the school system’s desegregation

efforts. Ensuring their viability helped push the board to revamp its assignment policy.

### **WATERSHED DECISION: TAKING RACE OUT OF THE EQUATION**

Susan Parry was one of four new members elected to the nine-member school board in October 1999. Parry and three other newcomers played pivotal roles in forcing the change in policy. “We were elected on the basis of supporting the board’s commitment to diversity,” Parry said. “It was becoming clear that race-based assignment was in peril.”<sup>13</sup>

Two key arguments were made by school leaders advocating change: putting the school system’s assignment practices on safe legal ground and aiming them more precisely at the goal of improved school performance and student achievement.

Earlier in the year, school leaders had already taken a step in the same direction. They removed race as a factor used in selecting applicants for magnet schools and replaced it with family income, generalized by the subsidized lunch characteristics of a child’s neighborhood. With few exceptions, the school system’s assignment map—broken into more than seven hundred neighborhood zones, or “nodes,”—tends to reflect accurately the characteristics of individual students, said Ramey Beavers, director of student assignment.<sup>14</sup> Also, a student’s eligibility for free or reduced-price lunch is confidential information, so the school system relies instead on the general neighborhood profile for assignment purposes. Beavers said that in most cases, the approach works. There have been only a few instances when parents whose income may be unlike that of the node’s characteristics seek special consideration for a school assignment.

The shift in the system’s magnet assignment policy was made in direct response to the cases then pending in Arlington and Montgomery counties, both of which focused on assignment practices pertaining to magnet schools and transfers from other schools. Wake’s policy was changed with little notice.<sup>15</sup>

But, when assignment planners proposed in late 1999 to leave school boundaries untouched for the following year, except to fill several new suburban schools without racial or any other kind of balance as a consideration, new board members balked. They forced a vote on the new policy. Jim Surratt, then superintendent, said the decision was all but unavoidable. He and his staff had been studying

the options for months, but were not planning to present an alternative plan until the following year. “We were following the situation in Charlotte–Mecklenburg pretty closely. It was becoming clear that if you were to have a desegregation plan, it couldn’t use race—at least in itself—in assigning students.”<sup>16</sup>

Karen Banks, director of the school system’s evaluation and research division, said she recalls a tense meeting when administrators wrestled with finding a workable alternative. “What I remember most intensely was that a number of people would say, ‘It makes us sick to our stomach because we are walking away from 20 years of doing something that had been good for the school system and for the community.’”<sup>17</sup>

The rulings from the Fourth Circuit of the U.S. Court of Appeals on the Virginia and Maryland cases seemed to offer few options for Wake, since North Carolina is part of the Fourth Circuit’s jurisdiction. John Charles Boger, a law professor, and Elizabeth Jean Bower, a law student, both at the University of North Carolina at Chapel Hill, outlined the significance of the Fourth Circuit rulings as well as a federal district court in Charlotte in an article for the N.C. Institute of Government in 2000:

In essence, the new decisions forbid all school boards (unless they are operating under federal desegregation decrees) from considering race or ethnicity as they assign children to public schools. The prohibition holds even if it leads to resegregated schools, even if most parents desire their children to attend racially diverse schools, and even if school boards are acting in good faith to ensure that students receive the educational benefits that may come from a diverse school environment.<sup>18</sup>

Wake County schools were, and remain, significantly more integrated than most others in the country. A 1999 study by the Civil Rights Project at Harvard University found that 70 percent of black students across the country were attending schools that were predominantly black, Latino, or Native American. In Wake County during the 1999–2000 school year, only 21 percent of black students attended schools with minority enrollments above 50 percent.<sup>19</sup>

Yet, the school system’s administration had already begun laying the groundwork for the shift away from race-based assignments. In early 1999, months before the policy was overhauled by the board, Banks’ department published a brief report citing national research supporting

**the educational argument for limiting concentrated poverty in the schools:**

A large body of research shows that an individual student who is eligible for free or reduced-price lunch is at risk for academic failure. The risk factors for individual students can be ameliorated by extra support and academic assistance to ensure academic success.

[For schools], a high concentration of low-income students . . . appears to have negative effects on students, teachers and the school, and these effects extend beyond the effect of individual students' economic condition.<sup>20</sup>

These were hardly groundbreaking conclusions, but they helped reassure school leaders that efforts to balance schools along lines of family income—rather than race—were effective, if not crucial. In fact, economic balance had always been a factor implicit in the school system's desegregation plan. During the 1992–93 year, only one elementary school in the system, representing less than 2 percent of the fifty-nine schools then open, had more than 40 percent of its students receiving subsidized lunch. The school, Zebulon Elementary, is located in a rural community where assignment shifts are not practical since few other schools are nearby. Approximately 42 percent of the school's students were participating in the lunch program that year. Nine other elementary schools (15 percent) had enrollments of students receiving subsidized lunches ranging from 30 percent to 40 percent. The remaining schools had less than 30 percent.<sup>21</sup> Therefore, even ten years ago, all but one of Wake County's schools—including middle and high schools—would have been in compliance with the rules adopted a decade later.

By the 1999–2000 academic year, when the policy was adopted, six elementary schools—about 8 percent of Wake County's seventy-four elementary schools—had student enrollment in the federal lunch program exceeding 40 percent. At the eighteen other elementary schools (24 percent), students with the same lunch status represented between 30 percent and 40 percent of total enrollment.<sup>22</sup>

Although race was previously a critical factor in making school assignments, it had an indirect impact on a school's socioeconomic makeup. While the parallels between race and poverty in Wake County have widened over time, the school system's previous steps for desegregation also helped limit the effects of concentrated poverty. According to John Gilbert, a former school board member, "It was implicit in our

commitment to desegregation. There has been ample data to show that school performance does go up when you avoid isolating kids who are in poverty. Kids do better in desegregated schools and not in schools with high concentrations of poverty and low achieving students.”<sup>23</sup>

An analysis by the *Raleigh News & Observer* in early 2000 found a persistently strong correlation among race, student achievement, and income. As of the 1998–99 school year, more than 30 percent of minority students scored below grade level on state-administered standardized reading tests, and more than 50 percent were receiving free or reduced-price lunches. In all, more than 60 percent, or three of every five minority students in Wake County schools, were counted as low achieving, low income, or both.<sup>24</sup>

Conversely, assigning students on the basis of neighborhood characteristics of free or reduced-price lunch status and/or below-par achievement also meant that some minority students who might formerly have been identified for assignment purposes no longer are, while some white students face reassignment shifts. In fact, almost 40 percent of Wake County’s minority students are no longer automatically targeted for integration. About 13 percent of the district’s white students are among those who could be moved to help schools comply with the new guidelines set for income and achievement.<sup>25</sup>

School leaders say the new policy is not simply a subterfuge to continue a policy of racial integration. Ann Majestic, the lawyer for the Wake County Board of Education, said “It’s not just a ruse. It really is resting on a foundation of experience and research. I think it helps us to get away from the debate about race and social engineering and move to talking about academic improvement for students across the system.”<sup>26</sup>

According to Boger and Bower, the policy can withstand scrutiny by the courts as a constitutional means to achieve diversity because the “Wake County plan has strong nonracial justifications in addition to the legitimate interest in racial diversity. The plan should improve academic performance, avoid the concentration of either poorly performing or economically needy children in a few disfavored schools, and increase the overall diversity in every school.”<sup>27</sup>

The county’s education leaders also see the new assignment strategy as an essential step for reaching the ambitious goal of improved student performance, which the school board adopted in 1998. That goal calls for 95 percent of students in third and eighth grades to score at least passing on state year-end reading and math tests.

An analysis by school system researchers in March 2001 found that not only is the absolute performance of students depressed in those schools with higher levels of poverty—more than 35 percent of students receiving subsidized lunch—but so also is their academic progress. In other words, they score lower and make fewer gains. The report stated:

Poverty concentration has an impact on the percentage of students scoring at or above grade level in [Wake] schools, but this is not surprising because of the correlation between the individual student's socioeconomic status and test scores.

[But in terms of achievement growth] school poverty also has a small, statistically significant, negative effect on [state test] scores in [Wake], but the magnitude of the effect varies across grades and subjects. . . . Large differences in poverty levels (e.g. 5 percent vs. 40 percent) can be expected to have a one or two point negative impact on [state test] scale scores. If we consider that just two scale-score points can equal one-third to two-thirds of a year's growth in some grade levels and subjects, differences of that magnitude are probably not only statistically significant but educationally significant as well.<sup>28</sup>

Jim Surratt, who was superintendent when the performance goal was set and the new assignment policy was adopted, said the two cannot be separated. "I doubt [the goal] could be achieved without balance," Surratt said. "Faced with accumulated problems of poverty, you have to deal with those." Some schools elsewhere have succeeded with high percentages of low-achieving students, he said, but their success tends to be short lived and an exception rather than the rule. "Camelots can exist for the most brief of periods."<sup>29</sup>

## PRACTICE VS. THEORY

Despite all the sound arguments Wake school leaders and others have made in support of the race-neutral approach, serious questions remain about its practical application. Externally, public opinion remains ambivalent, at best. Internally, the continuing evolution of the school system, shaped as much by changing neighborhood patterns as by any assignment policy, already is testing the school system's ability to live by the new rules. In the first year the policy was put in place, the 2000–01

school year, assignments were shifted for about 3,500 students. Many of those transfers were to fill new schools, not to balance the enrollments of other schools.

Within months of the school board's decision to alter the terms of the assignment policy, a local Gallup Poll on school issues found little public backing of the board's new take on balance. Parents and nonparents alike gave only tepid support: No more than 36 percent of those questioned in the poll said they supported the goal of limiting the number of low-performing students at each school. Support was even weaker when they were asked about limiting the number of poor students at each school; no more than 26 percent said they agreed with that approach.

Most people said they want children to be able to attend the nearest school with no regard to diversity. No fewer than 78 percent of those polled said they supported allowing students to attend their closest school, even if it means that schools may not have a diverse population.

On other poll questions related to maintaining diverse enrollments, parents and nonparents indicated sensitivity to the issue. Approximately 75 percent of both groups said they supported initiatives to build affordable housing in all areas of the county. The same proportion also said they supported efforts to expand the magnet school concept to more schools to help maintain diversity.<sup>30</sup>

The poll did not allow for participants to be undecided on the questions, hence the remainder were those opposed to the approaches of balancing enrollments by achievement or family income. On both questions, opponents were divided about equally between those counted as opposed and those counted as strongly opposed.

Some community leaders think the poll's results show that school leaders need to do more to explain what they see as the importance of the policy. Tony Habit, president of the Wake Education Partnership, a nonprofit public school advocacy group said:

It's important that citizens be made aware of the effect of having a concentration of poor children in a school. If that does affect the performance of students and schools, that's an important message that needs to get out. Wake County is making significant progress in the achievement of minority children.

It's important to the whole quality of the Wake system, end to end. Schools that are diverse and preventing high concentrations of poverty are a way to ensure the success of children. The board is caught between the reality of those issues and a community that is

not informed about the link between high concentrations of poverty, teacher quality, school quality and school performance.

If people want quality schools, they're going to have to be more knowledgeable about what that means and how to achieve that.<sup>31</sup>

During the policy's trial run in 2000, parents at Joyner Elementary School raised objections soon after the board approved a shift of sixty-eight children from a largely low-income neighborhood to the school. The children were attending a different school that exceeded the board's 25 percent limit for low student performance and was projected to exceed the 40 percent limit on students receiving free and reduced-price lunches the following year.

In a letter covered widely by the local media, PTA leaders at Joyner Elementary, the magnet school where the students were to be assigned, urged parents to appeal to the school board to withdraw the assignment change. The letter stated that the students could hurt property values in the surrounding neighborhood. The parent leaders also pointed out that minority students already represented 42 percent of their school's enrollment and that the new students would mean an additional burden.<sup>32</sup>

Of the students targeted for the move, 81 percent were receiving subsidized lunches, and 52 percent were performing below grade level in reading. All but one of the students was black. Joyner's enrollment included a free and reduced-price lunch enrollment of 23 percent of the total student population.

The assignment shift was completed as planned, but it caused some families to leave the school. As a result, Joyner had a higher concentration of low-income students than administrators intended. Some parents said they did not think teachers would be able to give their children as much attention with so many low-income, high-needs classmates.<sup>33</sup>

This episode helped expose a critical liability in the income-achievement model, said Bob Bridges, superintendent of Wake County schools from 1985 to 1989, years when the school system was pushing hard to maintain racial balance. By using a child's economic status and achievement level as a reason for assignment, Bridges said, the school system is tampering with what he calls key "intangibles" related to issues such as poverty, race, and ignorance: "When you design an assignment plan highlighting poverty and achievement," said Bridges, "you give all the people the opportunity to look at your intent. It brings all the intangible stuff to the surface."

When race was an explicit factor in assignment, Bridges, who is black, said, teachers were less likely to judge a minority student's potential disadvantages: "It's been accepted that we needed to mix up the races," he said. "Now, a teacher might think, 'Why do we have to deal with these poor kids?' I think that's significant."<sup>34</sup>

Vernon Malone is a Wake County commissioner who was on the former Raleigh city school board when it merged with the Wake County system in 1976. One of the county's leading black elected officials, he was the unified system's first board chairman. Malone believes that balanced enrollments are critical to the health of the school system as well as the county's economy, but worries that continued efforts to achieve them, whether by race or other criteria, are becoming increasingly more difficult:

My prediction is that in the final analysis, the school system will have to totally rethink its approach to student assignment, or face the continual birth of charter schools and alternative forms of education. People who I know have been strong supporters of public education are considering other alternatives.

I think there's going to be a strong move to begin having kids go to school closer to their homes.<sup>35</sup>

However the recast approach for balancing enrollments is received by the public, and in the schools themselves, changing residential patterns and existing school options pose other difficult challenges.

## **SCHOOLS AT ODDS: YEAR-ROUND EDUCATION ALTERS LANDSCAPE**

Although the network of magnet schools was the linchpin of the school system's desegregation efforts from the early 1980s through the mid-1990s, demographic changes in the county began to undercut their effectiveness as growth pushed further from central Raleigh. In addition, the school board unintentionally hurt the traditional magnet schools by adding a new option for the very families the schools were intended to attract.

In the early 1990s, school leaders opened the county's first year-round elementary school. Following a national trend that was just beginning to gain momentum, the school board saw the year-round program as a cost-saving approach to school construction. Students

were assigned to one of four different calendars, with one on break at any time. By doing so, the school could accommodate more students than could otherwise attend at one time, thereby requiring fewer classrooms. Year-round proponents have also argued that the calendar, which alternates nine weeks of classes with three-week breaks, is a more effective instructional model and a better fit for working families. With a shorter summer break, students are less likely to forget as much and less likely to require lengthy review when they begin the next grade. Because of the unconventional calendar, however, the schools had no neighborhood assignments, and all students attended only as volunteers. The school board felt it could not force the program on families, so it was left optional to those who applied.

Within just a few years, several more year-round schools had been added to keep up with strong demand. Parents were often turned away because of a lack of seats. But because all of the schools were located in the suburbs, and all were “schools of choice,” they quickly became predominately white, with very limited black participation.<sup>36</sup> By the mid-1990s, school leaders took limited steps to bring the schools into compliance with the system’s guidelines for racial balance. They assigned a few predominantly black neighborhoods to the schools, but gave parents the option of allowing their children to attend a school with a traditional calendar. They tried to entice minority families to participate through fully paid special programs during school breaks, including extra instruction and field trips.

However, the long distance between the schools and the minority neighborhoods was often too great. Few black parents enrolled their children in the year-round schools. The alternative calendar failed to attract significant minority participation even when one relatively high-minority school in an inner suburb was converted to the all-year program: “There’s been a real attempt on the part of the board and the administration to address the problem,” said then-superintendent Jim Surratt. “There’s no question that year-round schools were becoming an avenue for some parents to avoid desegregation.”<sup>37</sup>

Despite the system’s efforts, however, minority and low-income families have continued to largely ignore the year-round option, even when the school officials promote it as a good choice for improved achievement. “As we talk about closing the achievement gap, some kids just need more time and this is a perfect way to provide more time for instruction,” said Caroline Massengill, the school system’s director of magnet programs. She said the school system is trying to improve

its communications with minority parents about the schools, but she said that the long distances between the schools and neighborhoods remain the greatest hurdle.<sup>38</sup>

The net effect of the year-round schools, which now number nine elementary, three middle schools, and more than 10 percent of the school system's 100,000 students, has been to disrupt the balance of schools across the county.<sup>39</sup>

Nowhere in Wake County is this more dramatically apparent than in Garner, a town of approximately 18,000 residents on Raleigh's southern border. The 1997 addition of Timber Drive Elementary, a new year-round school, was quickly felt by six other nearby schools, all of which faced relatively high percentages of minorities, free and reduced-price lunch participants, and achievement below county averages. By the 2000–01 school year, three of the six schools had minority enrollments above 55 percent, two were above the board's 40 percent limit for free and reduced-price lunches, and two others were just beneath it. Meanwhile, the minority percentage of the year-round school was 23 percent, three points lower than it had been when the school opened. The percentage of students receiving free or reduced-price lunches had dipped below 9 percent, less than the nearly 14 percent when the school opened. Ramey Beavers points out that the "impact on other schools has been significant in some areas. . . . Garner is a prime example."<sup>40</sup> Bill McNeal, Wake County school superintendent, is more blunt about what Timber Drive has done: "There's been an amassing there of the middle class and upper middle class."<sup>41</sup>

Whether the desired balance was along lines of race or family income and achievement, the year-round schools remain a hurdle for the school system to clear. With more than one of every ten students enrolled in one of the schools, education leaders can't easily retreat from the program without losing critical public support. "Year-round schools are a significant issue," said school board member Susan Parry. "We've created a market for a different kind of school."<sup>42</sup>

### **SUBURBAN SPRAWL: A FORMIDABLE CHALLENGE**

Perhaps the greatest challenge to Wake County's magnet schools—and, in fact, to its efforts to balance all enrollments—has been the county's rapid population growth and shifting demographics. The problems with the year-round schools are just one symptom of this. Of perhaps even

more critical importance are shifting population patterns that have become particularly apparent with the 2000 Census.

While four towns in the western portion of the county accounted for only 12 percent of the population in 1990, they represented 20.5 percent in 2000, according to Census figures. By race, the shift was also predominantly white. Holly Springs, for example, a small, largely black rural community of 908 residents in 1990, grew nearly tenfold during the decade to 9,192—nearly all of it white. Ten years ago, 78 percent of the town's population was black; in 2000, 77 percent was white. The town of Apex had a population of about 5,000 in 1990, nearly 20 percent of which was black. The population had grown fourfold by 2000 to 20,200, but again overwhelmingly white. The percentage of black residents fell to 7.5 percent.

Cary, the county's second-largest community with 94,536 residents in 2000, more than doubled in size during the 1990s. The town's black population is 6 percent, largely unchanged from 1990, but still far less than the nearly 20 percent countywide. In all, the four towns represent less than 8 percent of the county's black population of 123,820.

Although race is ostensibly no longer used in school assignments, school leaders concerned about maintaining balance cannot ignore the significance of these demographic shifts, even if the new measurement is family income and student achievement. Fast growing suburbs on the western flank of the county pose a formidable challenge to creating enrollments that are anywhere near countywide averages in terms of percentages of students receiving free and reduced-price lunch or achievement. In fact, Wake's most segregated schools, by income and student performance, are located in the suburbs. Nine of the fifteen elementary schools in the county where fewer than 10 percent of the students qualified for free or reduced-price lunch were in the county's fast growing western suburbs. Coincidentally, the enrollments of most of these same schools were less than 10 percent black, although several had larger numbers of other minorities, primarily Asian students.

All of these schools are at such a distance from the county's concentration of lower income neighborhoods to make bus rides all but prohibitive. Yet the presence of these schools, and their somewhat select enrollments, sends a clear signal to families that they need not participate in more diverse settings if they choose to move to the county's outer suburbs. At the same time, parents have little incentive to send their children on long bus rides to downtown magnet schools.

Most of these suburban schools have been built within the past ten years, the classrooms are spacious, and the presence of well-prepared students from largely affluent homes has attracted a stable, qualified teaching corps.

A similar pattern also has developed in the northern end of the county, but the proximity of more diverse neighborhoods has allowed for more manageable assignments. Nonetheless, the county's shifting demographics—with growing enclaves of affluence farther removed from the county's historic city core—presents one of the greatest challenges to school leaders in their effort to achieve a degree of balance in all schools. According to school board member Susan Parry, "We haven't been as smart as we could have been in locating schools. We need to work with communities to promote diverse housing."<sup>43</sup>

Despite some effort along those lines, notably in Cary and Apex, little affordable housing has been built, resulting in school enrollments that tend to be uniformly above the county averages in terms of income and student achievement.<sup>44</sup> Bill McNeal, Wake County superintendent, agrees that the location of schools has a significant impact on housing patterns. "It's not just where people are living," he said, "but where we're building the schools."<sup>45</sup>

To a large degree, however, the school board fought that battle in the mid-1990s and lost to development interests and suburban residents clamoring for new schools close to home. Unlike the debates of the early 1980s, when the magnet schools were created, the suburbs prevailed. A school board plan to build midpoint schools more convenient for students from both city and suburban schools failed to gain support. In recent years, the school system has built impressive new campuses in distant locations, sometimes within easy reach of large-scale residential developments aimed at affluent families.

Although the new assignment policy sets a ceiling for percentages of low-income and low-achieving students, there is no minimum, or floor—unlike the previous guidelines for racial balance, which used a 15 percent minimum. As a result, schools can theoretically have no disadvantaged students and still be in compliance with the policy. Some school leaders think a floor should be set. "The policy would have been more complete with a minimum," Parry said. "But people didn't think it was practical."<sup>46</sup> Bob Bridges, the former Wake County superintendent, said the lack of a floor weakens the overall approach. "It cannot work without a minimum," he said. "The more aggressively you apply it, the more noticeable the absence."<sup>47</sup>

The result of these decisions—school locations, a failure to effectively influence residential patterns, and the addition of year-round schools with largely unchecked enrollments—has added significant obstacles for school leaders as they attempt to implement a policy of well-balanced schools. Ramey Beavers, director of student assignment, wonders whether the “board, when push comes to shove, [will] make the hard call. Or will they give in to the cry of some people in the community. This policy and the posture of the board are not congruent with their actions. We haven’t been to the wall. A board that has this policy has the leeway to make the hard call.”<sup>48</sup>

### TOWNS TOO FAR: THE CHALLENGE OF DISTANCE

At the other extreme of the suburban shift is the county’s largely rural eastern half, which has disproportionate numbers of low-income families and students with lower academic performance. In these communities, where the suburban development common in much of the county has yet to reach, efforts to apply the assignment policy aimed at balanced enrollments are as challenging as on the other side of the county. Here, however, the problem is reversed. Schools with higher than desired percentages of students from lower income families are too far from other schools with lower percentages to make busing practical for the school system or acceptable to parents.

During the 2000–01 school year, 45 percent of the students enrolled in Zebulon Elementary, the county’s easternmost school, were receiving free and reduced-price lunch—one of the highest low-income student populations in the county. But, nearby schools also served similar neighborhoods, and their enrollments were only marginally less represented by low-income students.<sup>49</sup> In this case, an isolated pocket of economic disadvantage, at least in relation to the county as a whole, makes balance impractical to reach. “There was not a realistic way to get some schools into compliance,” assignment director Ramey Beavers said when the initial plan was being designed and implemented for the 2000–01 school year. “The point is to get as many schools as possible under the guidelines. The proximity piece is the hardest to deal with.”<sup>50</sup>

Kathryn Watson Quigg, chairperson of the board of education, said there are few easy solutions to the assignment problems in eastern

Wake County, which is part of her own district. “How can we make this work in outlying areas?” she asked. “That’s my dilemma.”<sup>51</sup>

McNeal, the school superintendent, said he believes the limits set by the policy should be flexible enough to allow decisions on a school-by-school basis: “Do parents and staff feel it’s a progressive school?” he said. “If parents and staff are happy, that should be considered. The policy serves as a guide. The limitation tends to be how rigidly do you apply it.”<sup>52</sup>

By setting the guidelines in place, McNeal said, the school system has set up a mechanism that forces education leaders and the community to pay closer attention to schools that may need extra help because of socioeconomics, student performance, or both. “It has forced us to have a list of schools that we’re always monitoring,” he said. “Without the policy, we wouldn’t be as vigilant. The trick is to provide a level of support to help students who fall short.”<sup>53</sup>

For now, school leaders are trying to compensate imbalances, such as Zebulon Elementary, by providing additional resources. The school system is beginning the third year of a local funding initiative that pays for an extra month’s teaching salary for every ten students who failed the state’s standardized reading and math tests the previous year. The extra funds are used to pay teachers for supplemental tutoring, either after school or on Saturdays, for students considered at risk of failing the state tests. North Carolina now requires students in third, fifth, and eighth grades to earn proficient scores on the exams to be promoted. Wake County has applied the same standard to every grade, from third through eighth. The cost of the additional remediation reached about \$10 million last year, supported both by state and local resources. By contrast, about \$9 million, or roughly 30 percent, of the school system’s \$29.2 million bus transportation budget in 2000–01 was spent on busing to achieve balance. Of the \$9 million, about \$2.62 million was for involuntary busing, primarily from low-income neighborhoods; \$6.42 million was for voluntary busing to magnet and year-round schools. The biggest share of the busing expenditure, about \$20.2 million, was devoted to basic transportation of students to and from school, regardless of the balance policy.

Extra resources can help, McNeal said, but the issue of balance remains critical: “Growth is more critical to sustain,” he said. “How much energy do you need to put out to do that?”<sup>54</sup>

## CONCLUSION: WAKE COUNTY'S EXAMPLE, WAKE COUNTY'S CHALLENGE

Most students in Wake County attend diverse schools. Few are isolated by poverty or low achievement. By that measure, the school system has been successful. Yet, even with schools where enrollments are well balanced between rich and poor, black and white, many students continue to lag academically. Wake has not solved the achievement gap. On average, black students and those from low-income families continue to struggle. Wake County's education leaders have learned that although balance is a critical ingredient for school success, it cannot be the only strategy. "The trick is to provide a level of support to help students who fall short," McNeal said.<sup>55</sup>

Nonetheless, McNeal said, diverse enrollments are important for improving the educational gains of all students. While mixed schools do not close the achievement gap, Wake County research suggests that low-income students in mixed schools do perform better than they would if they attended schools with high concentrations of poverty: "The reason you want to create middle class schools is expectations as much as anything. How do you know what excellence is without seeing it. You've got to be able to touch it and feel it."<sup>56</sup> In 2001, 64 percent of Wake County students eligible for free and reduced price lunch performed at or above grade level, a rate that outpaces most low-income students in urban districts.<sup>57</sup>

While schools in Wake County can demonstrate the educational benefits of enrollments that are well balanced along lines of family income, achievement, and race, this was not accomplished overnight. Had it not been for Wake's long history of general success with desegregation, in fact, the board may never have seriously considered adopting a model that would weigh other factors instead. According to Karen Banks, the school system's director of research and evaluation, "In Wake, this has been a 25-year process. If we can maintain the balance we currently have—and not lose ground, we're in a better position. If we cannot maintain that balance, we have a different set of challenges."<sup>58</sup>

Last year, the administration proposed a number of shifts in school assignments that would have gone further than the first two years of the new approach to help imbalanced schools. About 5,800 students would have been sent to different schools, several of which had enrollments that exceeded the board's thresholds for balance. Of the thirty-four

elementary schools where shifts were proposed, eight would have seen the percentages of low-income students reduced. Four of those schools had more than 40 percent of their enrollments receiving free and reduced-price lunches. For the first time, significantly more middle-class students would be shifted to schools with higher percentages of low-income, low-achieving students.

Yet, just hours after parents staged a rare protest outside the school system's administration building in March, board members voted against one part of the plan intended to draw students from one of the county's most affluent schools and send them to one with a higher proportion of students from low-income families.

The board split, largely along suburban-urban lines, to allow about 150 students to remain at Apex Elementary, a generally affluent school, instead of assigning them to Swift Creek Elementary, another suburban school, but one with a growing percentage of low-income students.<sup>59</sup> Assignment planners had recommended the move to reduce crowding at Apex while simultaneously aiding Swift Creek, where enrollment and student performance has lagged.<sup>60</sup> Parents at Apex Elementary spent months fighting the shift on the grounds that their children would be removed from a high-achieving neighborhood school and sent to a school that was farther away and with lower student performance.<sup>61</sup> The number of students involved was almost insignificant, involving only 3 percent of those transferred.<sup>62</sup> But the proposed shift was perceived as a much larger litmus test of the board's resolve to uphold its own commitment to balanced enrollments. The future remains uncertain. With three new schools set to open next year, and ten more in 2004, school leaders will continue to face difficult decisions about filling them, while trying to strike a balance between public opinion and their own policies for educational equity.

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