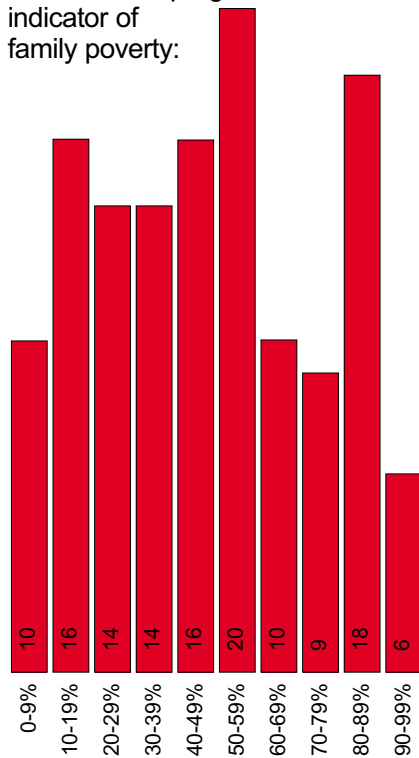


The Poverty Line

Based on projected enrollments for fall 2003, the number of CMS schools with indicated percentages of enrollment served by subsidized lunch program, a common indicator of family poverty:



Where the seats are

The first school assignment lottery has been run. There are plenty of empty seats at elementary schools, but not enough at the high schools. Numbers below do not count seats set aside for exceptional children. The projected fall enrollment is 112,845, up 3,241 from this fall. More details begin on Page 6.

Level	Projected enrollment	Total capacity
Elementary	51,413	60,104
Middle	25,301	28,424
High	29,353	28,360

A matter of character

Business, education leaders huddle on what works to build children's sense of respect, responsibility

Character education has been at the heart of American public education for generations. But Charlotte-Mecklenburg is refocusing on the tradition, hoping for a payoff in citizenship and sturdier academic achievement.

A program has been building at Cotswold Elementary for some years. This fall, the program will expand into 25 schools.

And at a conference sponsored by the Charlotte-Mecklenburg Workforce Development Board last week, teachers, administrators and businesspeople reviewed the concept, and listened to how the idea had played out in Tennessee.

There is no one formula for what people mean by character education in public schools. More than 80 programs are in use nationwide. And there is disagreement even among proponents about what makes for a useful

"A child has interests far higher than those of mere physical existence. Better that the wants of the natural life should be disregarded than that the higher interests of the character should be neglected."

*—Father of U.S. public education
Horace Mann, 1846*

program.

Some advocates embrace the billboards that visitors to Chattanooga can see, that proclaim the trait of the month (list, page 3). But there are critics:

"Nobody saved a kid by putting up a poster, or by reading a quote," university professor Marvin Berkowitz told the Charlotte audience. Children, he said, are directed toward their potential by caring adults who recognize potential. "That in a nutshell is character education."

Continued on Page 2

In upcoming budget, redouble efforts to sustain teachers, equity group says

A citizen committee Tuesday told the CMS school board that if the budget is lean, it should focus on "spending to improve the lives of teachers."

In its first report, the Equity Committee proposed to be "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."

Said committee chairman Julian Wright to school board members, "As you and the county commissioners go about the bruising budget process and you try to balance the needs of growth versus equity versus all the other needs... we want us – all of us – to stand up strong for making sure that money gets spent on equity."

The committee report, republished beginning on page 9, asks

Continued on Page 8

Character education potential explored

Continued from Page 1

Children must be taught right from wrong, Berkowitz insists. And even though some educators shrink from the task, "that's the easy piece."

What's really needed, is to turn children into "independent reasoners, because we can't pre-program them for every moral dilemma.... They've got to be able to figure it out for themselves" through the use of critical thinking about morality and social issues.

Greensboro-based character education consultant Phil Vincent, who addressed the Charlotte conference, writes in his book "Developing Character in Students" that "If you want to make permanent changes in the attitudes and beliefs of children as they grow into adulthood, you

must model good behavior and right conduct and explain to the children what good practices you expect of them.

"Repeating slogans like 'Just say no!' or 'Resist the urgin' .. stay a virgin!' will have no deep impact or lasting effect on a person's character."

And to hear Berkowitz tell it, character education could challenge the fundamentals of school organization and practice.

"We live in a democracy in which our citizens are mostly abstainers," he says. If participation is to increase, students must not just understand how democracy works. They must have experienced it.

And "paternal, hierarchical" families and workplaces – and schools – do not give them that experience. School "has got to be democratized," Berkowitz said.

"I don't mean so the inmates rule the institution. There are

Continued on Page 3

Calendar

March

- 3 Author Jim Trelease, author of *The Read-Aloud Handbook*, at Stella Center, 7 p.m., on the value of reading to children.
- 7 Equity Committee, 8 a.m., Board Room.
- 7 Board Planning Workshop, 9 a.m., Van Landingham Estate, 2010 The Plaza.
- 11 School Board meets, 6 p.m., Board Room.
- 12 Education Budget Advisory Committee, 7:30 a.m., Government Center, 11th floor conference room.
- 18 Bond Oversight Committee, 7:30 a.m., Building Services.
- 18 Policy Committee, 3 p.m., Board Conference Room.
- 20 Finance, Capital & Facilities Committee, 4 p.m., Board Conference Room.
- 25 Curriculum Committee, 3 p.m., Board Conference Room.
- 25 School Board meets, 6 p.m., Board Room.
- 26 Education Budget Advisory Committee, 7:30 a.m., Government Center, 11th floor conference room.
- 29 Parents on the Move, parent conference, UNCC, 10 a.m.-2 p.m. For information: Blanche Penn, 704-890-4101.

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Character education potential explored

Continued from Page 2

many elegant models” for assuring that children have an appropriate role in school governance, he said.

The best character education, he said, is not another subject or class period. To educators who complain that they have too much on their plate, Berkowitz says “character education IS the plate. It is not something you add.” The goal is “to build relationships, to empower kids, to give them a better vision of what they can be.”

Character education programs that work, he said, are neither simple nor cheap. It’s not simple because it touches on all that the schools do. It’s not cheap because it requires training and “staff development is one of the key issues we are missing.”

Corporate sponsorships may buy posters, he said, but the essential money goes to hire substitutes while classroom teachers are trained at conferences.

Character education is grounded, he said, in the “firm conviction that teachers are surrogate parents.

“They can deny it all they want” but it’s still true. He quoted New York education leader Lorraine Monroe as saying, “I don’t want to hear about what they didn’t learn at home. We ARE home.”

Jesse Register, superintendent of Hamilton County, Tenn. schools where a character education program is in full swing, told the Charlotte audience that “something happened to us in education several decades ago, where we backed away from our moral responsibility to help young people to learn how to behave, learn what’s right.”

Character education, Register said, gets the schools “back to a time when teachers were really serving just as parents, or even more than parents.”

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Chattanooga’s ‘Character is cool!’

When Jesse Register was superintendent of Iredell-Statesville Schools in the 1990s, he began a character education program. When he moved to Hamilton County, Tenn., he used a character education program as a unifying element as the Chattanooga and Hamilton County schools underwent a forced merger.

In the Hamilton program, a committee selects nine character traits for the “Character is Cool!!” program. Billboard companies have donated space to display the traits. School posters list the month’s trait and the name of the business sponsoring the poster.

The traits and their definitions:

September: Respect

Showing high regard for authority, other people, self, and country. Treating others as you would want to be treated. Understanding that all people have value as human beings.

October: Responsibility

Being accountable in word and deed. Having a sense of duty to fulfill tasks with reliability, dependability and commitment.

November: Perseverance

Pursuing worthy objectives with determination and patience while exhibiting fortitude when confronted with failure.

December: Caring

Showing understanding of others by treating them with kindness, compassion, generosity and a forgiving spirit.

January: Self-discipline

Demonstrating hard work. Controlling your emotions, words, actions, impulses and desires.

February: Citizenship

Being law abiding and involved in service to school, community and country.

March: Honesty

Telling the truth, admitting wrongdoing. Being trustworthy and acting with integrity.

April: Courage

Doing the right thing in the face of difficulty and following your conscience instead of the crowd.

May: Fairness

Practicing justice, equity and equality. Cooperating with one another. Recognizing the uniqueness and value of each individual within our diverse society.

– From a Hamilton County Department of Education brochure. Text is also available at www.hcde.org/schools/highschools/soddydaisy/backup/soddydaisy/characed.htm

For more information about Hamilton County’s program, write director Nancy Reed at reed_n@hcde.org

Character education potential explored

Continued from Page 3

Since the program took root, he said, student behavior “is definitely better,” an alternative school always has empty seats and “I cannot tell you the last time we had a gun at school.”

“We expect way too little of kids,” Berkowitz said. But “when you do demand more of them, it’s got to be possible, and you have to give them support... These kids are watching, watching, watching. You’ve got to walk the talk.”

Another reason character education may push schools toward fundamental change is that research shows bad behavior is reduced not by punishment but by fewer rules and less negative feedback offered in a more supportive environment.

And for older teens, “investing in smaller high schools would be one of the best investments you could make,” Berkowitz said. Smaller schools nurture the personal relationships that character education depends on, Berkowitz says.

“It makes eminent sense. You’re building a sense of community,” which creates attachment, a sense of safety and caring.

“Good character education is good education, period. It’s the right way to teach kids. It will also have a positive academic outcome.

“You cannot get kids to be respectful if you do not treat them with respect.... You can talk about it and preach about it all you want.... Respect is a two-way street.... Students ought to have some voice and say in the classroom and the school.”

Good character education requires that parents be involved in education. But pulling off parent involvement “is a little more complicated than we thought,” Berkowitz acknowledged. “Schools do not make themselves inviting to parents.”

Research explores what helps make character education programs work

To teach children character, schools don’t need to buy a new curriculum, says Marvin Berkowitz. “You can grow your own program.

“But please don’t grow your own program out of your intuition. We are learning what works.”

Berkowitz, Sanford N. McDonnell Professor of Character Education at the University of Missouri at St. Louis, is in the middle of a review of 80 or more character education programs already in use. The programs under study were of general application – not, for example, focused just on drug prevention. The preliminary findings, as shared with the What’s Working III conference last week:

1. Go to scale. “Full and faithful implementation is key.” Some programs are only partially implemented.

2. Be global. “Effective programs are multi-component or ‘bundled’ interventions implemented over multiple years.” An example is the Seattle Social Development Project.

3. Include social skills. “Effective character education ought to include social skills training.”

4. Link kids to school. “A consistently identified factor in effective character education is school bonding. This can also be understood as attachment to

school, experience of school as a safe and caring environment, or school as community.”

5. Think broadly. “Many effective programs take a broad developmental approach. They focus not on a specific character aspect, but more on broad child development.”

6. Anticipate spillover. Some programs “show positive impact on factors not targeted by the program; e.g., Child Development Project reduces substance abuse.”

7. Use teachers. “Trained teacher delivery of character education has been shown to be more effective than outside expert trainer delivery.” In his address, Berkowitz said teachers gave the program more clout – and more time, because references to the program’s goals could be embedded in work throughout the day.

8. Involve kids: “Involving students in service delivery, as in service learning, is an effective strategy.”

9. Cross age lines. “Multi-age initiatives are effective. For example, systematic cross-grade ‘buddying’ at the elementary level, multi-aged home rooms or advisories at the secondary level, or peer tutoring across schools or grades.”

10. Involve parents. “Parent involvement in school in general and in character education in particular is an effective strategy.”

Part of the solution is not for the schools to invite parents to participate: “Kids need to invite parents.”

When parents do participate, schools need to have activities that parents can do in which they feel competent. Tutoring new math or physics may not be the

right place to start. But helping struggling readers might be.

As important as the parent piece is, Berkowitz said there’s a prior mandate: “We cannot succeed in educating kids with character... if we don’t create a culture of caring among staff.”

Continued on Page 5

Character education potential explored

Continued from Page 4

Many teachers won't go in the teacher's lounge "because there's too much negative energy" in there, he said. "We must train principals that the first house you need to put in order is the adult house."

"In bad schools, teachers are left to drift," to solve problems with difficult or needy children as best they can. "In a good school, everybody will look out for those kids.... It's a different culture, a different world."

Earlier in the conference held at a downtown hotel, departing Cotswold Elementary Principal Donna Cianfrani, who initiated character education at her school some years ago, said "We thought we were doing it for the kids.

"What we learned very quickly was that it was for the staff. It changed the culture in the school."

Cianfrani helped spur an effort, now funded by a \$1.8 million, four-year grant, to pursue character education at 25 CMS schools. That effort begins this fall under Julia Babb, named by Supt. Jim Pughsley Tuesday night to be director of character education. Babb was transferred from the CMS pre-kindergarten program. Cianfrani has been hired by former CMS Supt. Eric Smith in Anne Arundel County, Md.

Register, the Tennessee superintendent, had advice for CMS.

"When you get started, involve a lot of parents and teachers into the process. What's important is for that footprint to remain after you're gone. It's got to become part of the culture."

For Berkowitz, the test of any character education program is this: "Ask yourself if what you've implemented should have any impact on a kid's attachment to the school.... It has to be, does the kid experience the school as a caring community?"

Preparing a student for school

Author Jim Trelease, from "The Read-Aloud Handbook":

"There is one skill that matters above all others, because it is the prime predictor of school success or failure: the child's vocabulary upon entering school. Yes, the child goes to school to learn new words, but the words he or she already knows determine how much of what the teacher says will be understood. And since most instruction for the first four years is oral, the child who already has the largest vocabulary will understand the most, while the child with the smallest vocabulary grasps the least."



Trelease

Trelease will conduct a free public session in Charlotte this Monday, March 3, at 7 p.m. at the Great Aunt Stella Center, 926 Elizabeth Ave., sponsored by Charlotte Reads, Wachovia and Trinity Episcopal School. RSVP: randerson@charlottereads.org.

"How many [children] are coming to school and wishing they didn't have to?"

"It's not a reading list or a vocabulary list or a phonics program. That's not why they don't want to come to school. It's because somebody isn't treating them right." Maybe it's a teacher, or just one other child or a group of kids. "It could be anybody."

Out-of-school suspension is precisely the wrong method of dealing with problems, Berkowitz asserted. "We've got to think about ways to connect kids to school, not disconnect them."

School board member Vilma Leake has on several occasions used her board reports to question that practice, talking about youngsters she sees out in the community during school hours.

On Feb. 11 after Leake's most recent address, board chair Wilhelmenia Rembert directed Supt. Jim Pughsley to prepare a report on alternative responses to rules infractions that would keep kids in school.

Last school year, 950 students were removed after hearings. That was up from 857 in 2000-2001, but down from the 1,120 removals in 1998-1999.

Berkowitz also took aim at the

inclination to separate children by age. Middle schools now being built have "grade wings," keeping eighth-graders cordoned off for most of the day from their younger schoolmates.

At a recent event with middle schoolers, Berkowitz said he had an "annoying brainstorm," and asked the eighth-graders if they realized that adults thought they were dangerous – "so dangerous you shouldn't be allowed near sixth-graders."

Instead, he said, home room and other noncurricular parts of the day should deliberately mix age groups. Eighth-graders should be responsible for the annual get-acquainted activities held for sixth-graders.

"They will live down to your expectations or up to your expectations," Berkowitz pleaded.

—
The 24-member Workforce Development Board, the prime sponsor of last week's conference on character education, is composed of representatives from the public and private sectors appointed by Charlotte's mayor. The board is the local oversight agency for the N.C. JobLink career center system.

Lottery results in; resegregation continues

The season's first assignment lottery placed 113,111 children for next fall into a system that continues to resegregate.

For the second year, black families were far more likely than whites or Hispanics to shun resegregated home schools. And blacks as a group continued to have the lowest odds of receiving their first choice.

The number of schools with 71% or higher minority population is projected to rise from 59 to 63.

Tuesday night, much of the school board's discussion after a presentation on the lottery results focused on overcrowding.

Supt. Jim Pughsley was given authority Tuesday to cap schools' enrollment, but those caps won't limit all growth, because children in the school's geographic home school zone will not be affected by the cap.

The real issue with overcrowding lies in delays in providing new seats, particularly at the high school level. (The district has a large oversupply of elementary school seats; numbers, Page 1.)

When board members peppered the staff with questions about large schools, Pughsley blew up, his quiet, even voice rising ever so slightly:

"I don't like large schools, but we don't have the mechanisms in place to control that at this point in time. Now, you've given me some authority by way of your vote tonight and I truly appreciate that, and will exercise it, to the degree that I can, on some objective criteria.

"But to complain about the size of a school tonight," he said, "that's the same situation you were faced with last year, and we allowed an elementary school to get up to be 1,400."

The data released Tuesday left even veteran school board members asking lots of questions.

Said John Lassiter, "I can't sort out what the real capacity (of

schools) is, I can't tell what the impact of ESL is... the numbers are a moving target. I'd like more specificity to understand, so I can explain to somebody why we're taking three trailers away or why we're adding eight trailers."

There were lots of questions. Some of them came up last year, but administrators had not incorporated them into this year's presentation. Examples of missing data:

- The number of children at each school next fall who will not have chosen to be there.

- For children at schools this year, the school-by-school number and percentage of children who tried to leave for next year. This data would show where parents were most motivated to leave schools, for whatever reasons.

- For all schools, the so-called "roof capacity," or the number of children who can be served in the permanent classrooms on the site - not including mobile classrooms.

- The number and percent of students who were asked to make a choice but did not do so. These students were placed in a seat by the computer program.

- The number and percentage of those who applied, but who did not have to.

- A breakdown of the new students by grade level, specifically how many will be in kindergarten.

- The number of children on subsidized lunch who sought placement in low-poverty schools; how many got in; how many didn't. CMS publicized this lottery priority only late in the choice period (*Educate!*, Jan. 23).

- Of the more than 5,500 not now enrolled but who applied for seats, the number who would be returning to CMS from charter schools.

- Of students who were denied their first choice, the proportion denied that choice because of capacity issues.

- For each school that is over-capacity, the portion of next fall's additional enrollment that is due to home-school area children, and the portion due to children choosing in.

- The demographics of those who applied but did NOT get their first or second choice.

On Page 7 of this issue is detailed lottery data for the high schools. Similar data for elementary and middle schools will be published next week.

High schools by size

	Projected enrollment	Pct. FRL
Independence	2,718	35
Vance	2,625	33
Myers Park	2,578	21
Providence	2,451	7
East Meck	2,260	33
North Meck	2,205	16
South Meck	2,169	18
Butler	2,077	16
Hopewell	1,876	14
West Meck	1,818	48
West Charlotte	1,596	66
Garinger	1,569	55
Harding	1,427	42
Olympic	1,372	32
Northwest Arts	1,169	0.43
Berry Tech	1,150	0.66
Waddell	1,117	0.45

By percentage growth

	Pct. growth	New kids	Proj. total
Berry Tech*	55%	408	1,150
Olympic	20%	225	1,147
North Meck	18%	331	2,205
Garinger	15%	210	1,569
West Meck	12%	194	1,818
Harding	10%	128	1,427
Butler	9%	175	2,077
Hopewell	8%	139	1,876
Waddell	8%	79	1,117
South Meck	7%	151	2,169
East Meck	7%	157	2,260
Vance	7%	166	2,625
Myers Park	6%	152	2,578
West Charlotte	6%	84	1,596
Providence	4%	94	2,451
Independence	4%	101	2,718
Northwest Arts	3%	30	1,169

*New Berry Tech adds a grade.

Results of first lottery for CMS high schools

High School	Year	Enroll.	Capacity	Refigured	Util.	Mob.	PK	EC	ESL	FRL	W	B	H	A	N	M
Berry Tech (E+) (phased opening)	'02	742	1,600		46	0	0	0	8	59	17	73	4	3	1	1
	'03	1,150	1,600	N	72	0	0	0	12	66	12	79	5	3	1	1
Butler	'02	1,902	1,700		112	16	0	6	0	19	69	25	3	3	0	0
	'03	2,077	1,740	N	119	18	0	6	0	16	72	22	3	3	0	0
East Meck	'02	2,103	1,720		122	12	0	8	81	31	49	40	7	4	0	1
	'03	2,260	1,900	N	119	21	0	8	121	33	45	43	8	4	0	1
Garinger (E+)	'02	1,359	1,660		82	0	0	6	132	55	12	67	11	9	0	0
	'03	1,569	1,660	N	95	0	0	6	138	55	13	68	11	7	1	0
Harding	'02	1,299	1,120		116	8	0	7	3	35	27	63	2	7	0	1
	'03	1,427	1,200	N	119	12	0	7	7	42	20	70	3	7	0	0
Hopewell	'02	1,737	1,440		121	3	0	6	0	14	69	26	2	2	0	0
	'03	1,876	1,580	N	119	9	0	5	0	14	69	26	2	2	0	1
Indepen. (E+)	'02	2,617	2,120		123	15	0	9	163	34	40	47	8	3	0	1
	'03	2,718	2,280	N	119	22	0	8	199	35	37	49	9	3	0	1
Myers Park	'02	2,426	2,020		120	3	0	10	54	22	64	27	4	5	0	0
	'03	2,578	2,160	N	119	11	0	11	54	21	64	26	4	6	0	0
North Meck	'02	1,874	1,520		123	0	0	8	3	16	71	23	3	2	1	1
	'03	2,205	1,840	N	120	13	0	5	23	16	68	24	3	3	0	1
Northwest (grades 6-12)	'02	1,139	1,000		114	5	0	4	5	37	48	48	2	1	1	1
	'03	1,169	980	N	119	4	0	4	6	43	40	55	2	1	1	1
Olympic (E+)	'02	1,147	1,560		74	0	0	6	53	31	40	42	9	8	0	0
	'03	1,372	1,580	N	87	0	0	5	70	32	40	41	12	6	1	0
Providence	'02	2,357	2,080		113	22	0	6	47	6	82	9	2	6	0	0
	'03	2,451	2,060	N	119	19	0	4	46	7	81	10	2	6	0	1
South Meck	'02	2,018	1,740		116	2	0	6	86	18	67	16	10	6	0	1
	'03	2,169	1,820	N	119	4	0	4	129	18	67	16	10	6	0	1
Vance	'02	2,459	2,020		122	31	0	7	90	31	30	55	6	7	1	1
	'03	2,625	2,200	N	119	39	0	6	119	33	28	58	7	6	0	1
Waddell (E+)	'02	1,038	1,360		76	0	0	7	104	47	26	53	15	5	1	0
	'03	1,117	1,400	N	80	0	0	5	125	45	24	53	17	5	1	0
W. Charlotte (E+)	'02	1,512	1,800		84	0	0	6	79	64	5	86	5	3	0	0
	'03	1,596	1,800	N	89	0	0	6	73	66	3	89	5	3	0	0
West Meck (E+)	'02	1,624	1,900		85	0	0	7	38	48	27	63	4	6	0	1
	'03	1,818	1,900	N	96	0	0	7	71	48	27	61	5	7	0	1

Notes to the charts

The abbreviated headers on each column stand for:

Year: The '02 line is for the 20th day enrollment this past fall. The '03 line is a projection based on the first lottery in February. Another lottery will be held in May for new residents and those changing programs (e.g., exceptional children being recategorized).

Enroll: Number does not include exceptional children, if any, at the school. Note that classrooms set aside are listed to the right, and the number of ESL students is a separate vertical column.

Capacity: This number takes account of any mobile units at the school or to be placed there next year, but does not

include EC students.

Refigured: An N (for No) in this column means the administration has not yet phased in a new policy of setting aside space at each school for a math room, an art room and a computer room. Phase-in occurred this year only where space was available.

Util.: Utilization takes into account lower class size limits at Equity Plus II schools. The list of E+ schools for next year has not been released. E+ schools for this year are marked with an (E+) after the name.

Mob.: Mobile units on the site in each year.

PK: Total pre-kindergarten classes on the site.

EC: Total classes set aside for excep-

tional children's classes.

ESL: Total English as a Second Language students on site.

FRL: Percentage of all students in school on subsidized lunch program, an indicator of low family income.

W, B, H, A, N, M: Demographic categories are white, black, Hispanic, Asian, Native American and multiracial.

Mobile units will be moved about the system to equalize overcrowded conditions. Thus, some schools have more students next year than this year, but still lose mobile units. The targets for overcrowding:

	Equity Plus	Non-E+
Elementary	80%	100%
Middle	90%	100%
High	120%	120%

Equity committee issues first report

Continued from Page 1

the school board and county commissioners to maintain funding for: adequate supplies; teacher compensation; teacher training; parent involvement; spending that will leverage investments already made (i.e., Internet cabling for computers already in schools); challenging student programs to prevent an “equity of mediocrity”; and the programs serving “the majority in the middle” whose needs, Wright said, could get lost amid pressure from special interest groups.

The report was lauded by both Supt. Jim Pughsley and board chair Wilhelmenia Rembert as one of the best reports ever received by the school board.

Wright’s group, which convened in December, took note of the work already done toward equalizing facilities in a district with remnants of segregated and unequal schools, and of the school board’s commitments to equity.

But “as laudable as those efforts are and impressive as they have

been,” Wright said, “it is abundantly clear to this committee that they are not enough.

“We don’t have a state of equity in our system yet that provides equal access to all these excellent educational opportunities that we want everyone to have. We have got a long way to go before we get there.”

Last month’s annual staff report on equity, Wright said, “notes a lot of progress, but it also notes how far yet there is to go....

“Any achievement gap strikes us as too much of a gap – and a clear sign that we are not where we want to be on this issue of equity.”

Wright said his panel had for now adopted as a definition of equity the one written by the Student Assignment Oversight Committee, “when it recommended to you that, to fully achieve the promise of the choice plan, you’ve got to be able to guarantee equity in the schools.”

Monitoring equity will not only keep CMS on track, he said, but will assure the community that its financial investment is not being wasted.

To help with the monitoring, the committee’s report recommends

collaboration with community groups like H.E.L.P. It also suggests that leadership teams of parents and educators at each school should be trained to monitor and report on equity.

“Equity will be an empty slogan if we don’t prick the conscience of this community,” former board chair Arthur Griffin told the committee. “We don’t have years and years to make it happen.... Each day that we don’t provide equity we are losing youngsters.”

Rembert said the report was consistent with most board members’ vision to “have every school in our district, no matter where it is located, defined as an excellent school where children, no matter what their background, what their condition, will have an opportunity to have an excellent education....

“We appreciate your willingness to engage in this process with us, to ensure that we do not let happen over the next 30 years what may have happened in the past.

“We are on a new journey, and it is going to cost us, not just financially but a lot of ways, if we don’t make good on some of the promises we’ve made.”



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A PRESENTATION OF THE CMS EQUITY COMMITTEE'S INITIAL REPORT TO THE CHARLOTTE-MECKLENBURG BOARD OF EDUCATION

February 25, 2003

Text of the initial report of the CMS Equity Committee, delivered to the school board Feb. 25.

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. 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,

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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. 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

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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.

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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. 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

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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.

Proritization 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

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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 vari-

ous 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 naysayers 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

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Michael Kasper, Ellen C. Martin, Greg Metcalf,
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