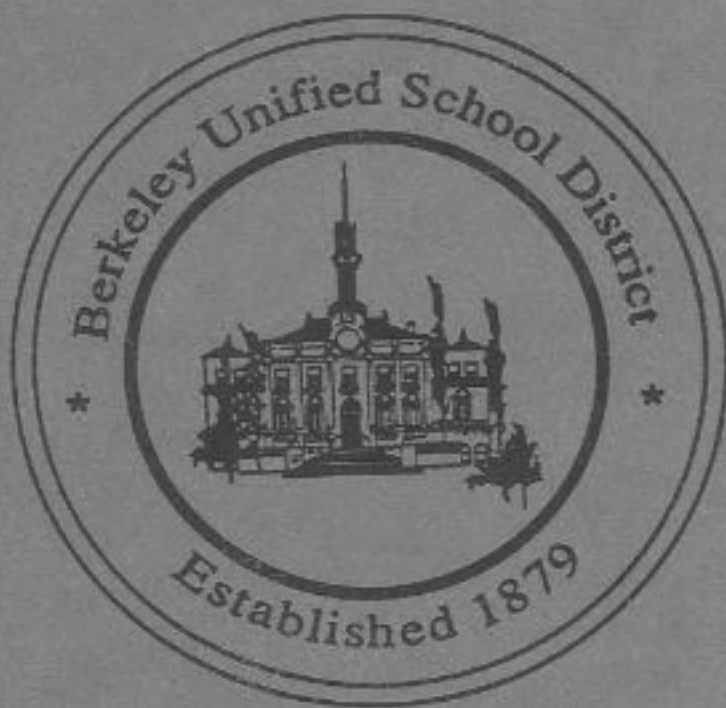


**REPORT OF THE
BERKELEY UNIFIED SCHOOL DISTRICT
SUPERINTENDENT'S
AD HOC TASK FORCE
ON
SCHOOL ORGANIZATION**



February 17, 1993



(ABBREVIATED VERSION)

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Executive Summary

Superintendent LaVoneia Steele recommended and the Berkeley Unified School District Board of Education approved the creation of an Ad Hoc Task Force on School Organization in July, 1992. The Task Force was established by the Superintendent to review issues such as desegregation policy, student enrollment methods, grade configuration and school size. It worked on a weekly basis during the fall and winter, with its final meeting on February 11, 1993. After wide ranging and intense discussion, the Task Force made several recommendations. If adopted, those recommendations will increase parental choice and involvement in the education of their children and at the same time reaffirm the commitment of the Berkeley Unified School District to desegregate all of its schools.

Desegregation Standards on Grouping of Students. The Task Force made six recommendations. One key recommendation provides BUSD shall seek to assure that enrollment at a school shall be made so that each school will have a student population which reflects a racial balance that is consistent with the district-wide racial balance, and any racial group that comprises more than 25% of the student population will be so enrolled, and the size each of the assigned groups in a school should not vary more than plus or minus 5% from its district-wide total. The complete language of these six recommendations is in the body of this document.

Student Enrollment Methodology. In order to assure the tight plus-or-minus five percent variance of Black and White students desired by the Task Force, the members recommended a "system of choice" be developed in which every family would have an equal chance of being admitted to a school. Each school would enroll members of the two largest groups only up to the level of that groups district wide percentage for those grade levels, +/- 5%.

Grade Configuration.

The Task Force recommends that a mosaic, or variety, of grade configurations be allowed, giving due consideration to the programs and choices of the site.

School Size. The Task Force recommended that the preference of each site be accommodated with the proviso that there be at least two classes per grade level.

Site Based Management The Task Force recommended the district implement a system of site based management with all deliberate speed.

These recommendations are presented to the Superintendent and Board of Education for their review and action.

**STAFF REPORT AND RECOMMENDATIONS OF
THE SUPERINTENDENT'S AD HOC TASK FORCE ON SCHOOL ORGANIZATION
February 17, 1993**

This document was prepared by staff to the Superintendent's Ad Hoc Task Force for School Organization (SOTF): Jim Masters, Facilitator, Monica Thyberg, Manager of the Berkeley Schools Enrichment Project, Ann Aoyagi, Program Assistant.

This document contains an overview, prepared by staff, of the history, goals, process, context of the SOTF, using the minutes of the SOTF, notes from work group meetings and other documents. The Recommendations of the Task Force members consist of (a) the proposed policies on grouping of students (pages 5 - 7), and (b) the recommendations voted on by the Task Force on the topics of: student enrollment methods, grade configuration, school size, site based management and related issues. These motions are on pages 11 through 13. The motions are displayed in bold face type so as to distinguish those votes from the process description prepared by staff.

BACKGROUND AND PURPOSE OF THE TASK FORCE:

In the development of the Strategic Plan for the Berkeley Unified School District, the Facilities Action Team and the School Building Advisory Committee (an extension of the Facilities Action Team) recommended that, before rebuilding the District's facilities, the organization of the District should be reexamined in light of new educational theories, expectations, demographics, new technologies and other realities.

Thus, in October, 1992, Superintendent LaVoneia Steele convened an Ad Hoc Task Force on School Organization. A group representative of parents, teachers, support staff, community organizations, administrators and School Board members was appointed and charged to review the matters of:

- a) grade configuration
- b) student assignment methods, e.g., zones and other methods
- c) transportation of students
- d) desegregation policy and methodology
- e) other issues related to school organization (e.g., school size, magnet schools, space utilization for pre-school and extended day programs, integrated social services, other public services, etc.)

Committees were also convened at several school sites to discuss issues related to implementation of Measure A. In late October, at the direction of the Superintendent and Board, the site committees from every school were invited to discuss grade configuration and student assignment methods and other matters before the SOTF and to designate a representative to the Task Force. Some of the site representatives began attending SOTF meetings in November, while others began attending in December. Due to the addition of these new members to the SOTF, the term of the Task Force was extended to the end of January, 1993.

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PROCESS OF THE TASK FORCE

The Task Force took some time to delineate its charge. There were a number of unresolved issues from (1) school closure discussions of 1980-84; (2) the Master Plan process in 1989; (3) the Strategic Planning Process in 1991; and (4) the Measure A planning process of 1991/92 (School Building Advisory Committee). Some of the participants perceived that the group had a broad mandate in terms of the scope of the issues it was to address and in terms of the depth of authority it was to exercise over these issues; others perceived that the SOTF had a more narrow focus.

One issue contributing to the complexity of the group process was the matter of grade configuration. Prior even to the Strategic Planning process, recommendations had been made by the grade configuration subcommittee of the Master Plan Task Force of 1989 to review the District's current grade configuration and to "reduce the number of transitions for students between schools from three to two," which "would probably result in a K-5 or K-6 configuration for elementary schools." This recommendation had not been acted upon.

The existing grade configuration (K-3, 4-6, 7-8) was established in 1968 to implement the District desegregation policy and methodology ("two-way busing"). Some participants questioned whether there was any other way to achieve the desired desegregation standard on grouping except through use of the existing grade configuration and student assignment ("paired zones") arrangement.

Furthermore, participants raised the issue that the quality of education for all the children, was not, and could not be, addressed by simply looking at the framework of how a school is organized (i.e., grade configuration). Issues related to educational content including matters such as, but not limited to, curriculum, special programs, classroom management, tracking, teacher training, student testing, student transfer policies and practices, equity of resources (public and private) repeatedly arose in Task Force meetings, either because participants perceived them as integral to the issue of desegregation and integration or because they did not perceive any other forum appropriate for discussion of these issues. This led to much discussion among Task Force members and the need to repeat much of the information sharing and the learning process that went into the development of the Strategic Plan and other previous planning efforts.

DESEGREGATION/INTEGRATION POLICY:

A motion was made in the early stages of the SOTF to discuss a change in grade configurations by reducing the number of transitions between schools. It became apparent during the discussion of the motion that underlying concerns about racial desegregation policy and practices would have to be addressed first. A large majority of participants wanted to make sure the district's commitments to the principles of desegregation and integration could be achieved under any alternative grade configuration that was to be

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considered. These matters needed to be agreed upon before there would be action on grade configuration.

The Task Force members emphasized that any grade configuration model adopted by the District should honor the District's commitment to desegregation of its schools, but the questions were raised: "What does this mean in practical terms?" "Does the existing policy (and practice) need to be more stringently enforced or should it be modified?" "Should it permit greater flexibility in providing special programs where needed to better serve the District's students?"

The Task Force developed an understanding that there are three separate but related topic areas: desegregation, integration and anti-discrimination. The term "desegregation" was used to apply primarily to distribution of input factors, such as staff, facilities, resources and grouping of students. The term "integration" was used to describe the dynamic elements, such as programs and other efforts to help people develop understanding and acceptance of each other. The term anti-discrimination was used to describe the rules that would apply primarily to processes and transactions, making sure they occur in a fair way.

The staff then prepared a background paper summarizing the District's position on integration and desegregation. It described the goals adopted in the Strategic Plan that are linked to integration and helped to illustrate the many areas in which the BUSD is actively pursuing its commitment to integration. (This paper is to be found in Appendix A.)

In reviewing compliance with federal and state law on desegregation several areas might be evaluated to determine the degree of equity that is present. Some of them are:

1. staffing assignments
2. equipment and teaching materials
3. facilities
4. organization of and participation in extra-curricular activities
5. program resources
6. grouping of students

The Task Force developed recommendations on that aspect of desegregation policy that relates most directly to school organization: that of "grouping of students." The Federal standard on grouping of students requires that, "Each school will have a racial balance that is not so disproportionate as to deprive students of an integrated experience, or to be perceived by the community as a 'white' or 'black' school."

School districts have some flexibility in establishing standards for each of the six areas addressed in the law. The local standards may exceed those of federal and state law. For example, the law does not require that any percentage figure be established to determine if a school meets the test of "not so disproportionate." However, many districts including

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Berkeley do adopt a percentage figure.

The grouping of students for language programs is another area of considerable complexity. A Work Group met several times to further develop elements of the proposed policy as it related to "language minority" students and to the current and future bilingual and bicultural programs.

The Task Force worked on these proposed standards over the course of several meetings, and on 2-2-93, the SOTF completed its work on these proposed policies.

These proposed policies on the grouping of students to achieve racial desegregation is the next section of this document is Article I of this document (following).

**PROPOSED POLICIES ON GROUPING OF STUDENTS
TO ACHIEVE RACIAL DESEGREGATION
AT THE SCHOOL LEVEL
IN THE BERKELEY UNIFIED SCHOOL DISTRICT
(Fifth Edition, adopted by the School Organization Task Force 2/2/93)**

The Superintendent's Ad Hoc Task Force on School Organization was charged, in September, 1992, to review the matter of grade configuration and related school organization matters. The Task Force's work in considering alternative grade configuration models led them to review the District's racial desegregation policies in order to recommend standards which may be used to assess any models or methods of school organization. Following are the Task Force's recommendations for the part of the District's policies on desegregation that are most directly related to school organization -- that of the "grouping of students." All of the language in the following six statements was voted on by the SOTF.

STATEMENT ONE:

ENROLLMENT OF RACIAL GROUPS* FOR DESEGREGATION PURPOSES

- A. BUSD shall seek to assure that enrollment at a school shall be made so that each school will have a student population which reflects a racial balance that is consistent with the district-wide racial balance for the grade levels that are found within that school.

(Examples: a school with a K-8 grade configuration will have racial ratios that are consistent with the district-wide ratio of all children who are at the K-8 level; a school with a K-5 grade configuration will be consistent with the district-wide ratio of all children at the K-5 level.)

Consistency is defined as being within plus or minus five percent (5%) of that racial group's district-wide ratio for the grade levels found in that school.

- B. The threshold that BUSD should use to determine if a racial group is included for distribution purposes should be twenty five percent (25%) of the total BUSD population.

STATEMENT TWO: LANGUAGE MINORITY STUDENTS

- A. **Grouping:** BUSD shall permit language-minority children in those languages for which there is a formal instructional program to meet the linguistic needs of limited English proficient students to attend schools providing those programs up to the limit described in section "B." [NOTE: Participation in such programs shall in every instance be voluntary.]

*(Note: The categories of racial groups identified for school desegregation purposes is determined by the Federal Office of Civil Rights and the State of California. Currently, the family is offered seven groups to identify the race of the child: White, Black, Asian, Hispanic, Filipino, Native American and Other.)

Proposed Policies on Grouping of Students to achieve Racial Desegregation
from the Superintendent's Task Force on School Organization
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STATEMENT TWO: LANGUAGE MINORITY STUDENTS (continued)

- B. **Limit on Number of Language Minority Students Assigned to a School for Instructional Purposes:** The grouping of language minority students for instructional purposes at a school shall not exceed the District-wide percentage of the largest population subgroup in that grade level grouping.

Example: If it is a K-3 school, and District-wide the largest ethnic group in those grade levels is (at present) 39% of the total, then that is also the percentage limit for language-minority students in that school. At the present time, for instance, if the students covered under Statement One were in that school in proportion to their current percentages, e.g., 39% for the largest group and 34% for the next largest group, there would only be 27% of the enrollment "slots" remaining in that school. However, this policy "thinks forward" to the likelihood that in a few years, the largest group may be, for example, 32% and the next largest group might be 27%, thus leaving 41% of the slots for other groups. In that future situation, this recommendation would limit that language assignment group to no more than the largest ethnic group assigned under Statement 1, which in this example is 32%.

Note: This policy would work until a single language minority group becomes the largest population of the District, at which time the policy would need to be reassessed.

STATEMENT THREE:

GROUPING OF ETHNIC GROUPS THAT ARE BELOW THE THRESHOLD ESTABLISHED IN STATEMENT ONE.

An ethnic minority group whose numbers are below the threshold established in Statement One shall be allowed to cluster at schools, BUT the total of that group present in any school shall not exceed the District-wide percentage of the largest population subgroup in the grade level grouping.

EXAMPLE: If it is a K-3 school, and District-wide the largest group in those grade levels is 35% of the total, then that is the percentage limit for the number of "ethnic minority below the threshold" students from any one group to be in that school.

Note: This policy would allow clustering of an ethnic group until such time as that group exceeds the threshold established in Statement One, at which time it would be subject to the distribution identified in Statement One.

STATEMENT FOUR: ENROLLMENT PREFERENCES

If a particular school has the physical capacity to accommodate a particular student in the desired grade level, then:

**Proposed Policies on Grouping of Students to achieve Racial Desegregation
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- a) All currently enrolled students will be allowed to re-enroll for the following year;
- b) All children living in the same household as currently enrolled students will be allowed to enroll for the following year;
- c) All children living in the same household as a currently enrolled BUSD student who previously attended a school shall be allowed to enroll in that school for the following year.

These enrollment preferences do not apply to interdistrict transfers.

STATEMENT FIVE: INTERDISTRICT TRANSFERS

BUSD shall require that all interdistrict transfers into the district be assigned to schools so that those assignments fit within ratios established for that school. No inter-district transfer will be permitted outside the established ratios; further, where possible, inter-district transfer students should be assigned in a way to improve any imbalances in the racial composition of the school.

STATEMENT SIX: METHOD TO ASSESS COMPLIANCE AND CORRECT PROBLEMS

In January of each year, the Superintendent shall present to the Board a written report on the grouping of students for desegregation purposes in each school and an analysis of the District's compliance with these policies. Within the parameters of the policies set forth herein and in the integration/enrollment methodology adopted in conjunction with these policies, the Superintendent will make written recommendations to the Board on steps to be taken by the District in the upcoming school year to enhance compliance with these policies.

Where changes may require the realignment of students, the BUSD Administration would discuss the proposed realignment plan with the affected school communities (staff and parents) both before recommendations are made to the Board and after Board action.

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After completing work on the above six statements on proposed standards on grouping of students for desegregation purposes, the SOTF then began discussing the methods by which these standards might be met. The process of identifying the students who would be in the groupings at each school was called variously "student assignment methodologies," "methods of meeting desegregation standards," and "student enrollment methods." A generic phrase of "student enrollment methodologies" has been used herein to encompass all these approaches.

After the proposed standards grouping of students at the school level were developed, the SOTF then began discussing the methods by which students would be enrolled in schools in a way that would result in attainment of the desired desegregation standards.

STUDENT ENROLLMENT METHODOLOGIES:

The Task Force developed an understanding that desegregation standards and the methods by which those standards are achieved are independent variables. The standards can be achieved through a variety of school enrollment methodologies; e.g. there are several different ways in which students can be assigned to schools that will result in the achievement of desired policies on desegregation.

The matter of "student assignment methodology" was considered at several meetings, and then an SOTF Work Group reviewed seven methods of "student assignment." The models considered included:

- 1) 1/2 mile "neighborhood school" model;
- 2) 1/4 mile neighborhood school, with controlled choice for people outside the 1/4 mile;
- 3) controlled choice citywide (a composite of the "Cambridge" and other controlled choice models);
- 4) "open" enrollment, (go where you want to until the space is gone);
- 5) present BUSD method (which was labeled as "zones with very loose or "open" transfer");
- 6) zones with tightly controlled transfer;
- 7) partial fill by neighborhood proximity with controlled choice for capacity fill with choice criteria controlled by the school (Burt Levy model).

Underlying the discussion was the assumption that all of the above would require some form of transportation of students, and that magnet schools would be possible (but not required) using most of the models, Transportation and magnet schools were thus considered to be

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independent variables that would be addressed apart from the specific recommendation on this topic.

At Work Group meetings of 1/21/93 and 1/28/93, all seven methods were assessed in terms of the degree to which each method would achieve the six proposed policies on grouping of students and other criteria developed by the subcommittee such as "fairness" "administrative workability" and "understandability by parents." [See Appendix B: "COMPARISON GRID of Student Enrollment Methods to Achieve Desegregation"].

The criteria with which the group began working to assess each of the methods were directly related to the six proposed policies on grouping of students:

- 1) how possible is it to achieve the plus or minus 5% variance in distribution of the major racial groups?
- 2) how does it work for bilingual/bicultural grouping?
- 3) how does it support/impede enrichment programs?
- 4) does it maintain the "family link" preference?
- 5) how does it distribute interdistrict transfers?
- 6) what is the feasibility and likelihood of enforcement?

The Work Group went on to add the following criteria:

- 7) grouping of students who are in racial groupings that are below the threshold;
- 8) transfer policies;
- 9) fairness;
- 10) administrative workability;
- 11) understandability by parents,
- 12) the threshold that is used to include groups (does the inclusion or exclusion of certain groups have an effect on the method used?)

Since basic fairness was perceived a major criteria for assessing the desirability of any method of student enrollment, all Work Group participants offered ideas about what fairness meant to them. These ideas included:

- ▶ comprehensive information about the system and options is available to all;
- ▶ there is full disclosure of the rules and procedures;
- ▶ all parents have the same probability of success in their choices;
- ▶ all parents have the same amount of choice (number and quality of choices);
- ▶ applies to allocation of personnel;
- ▶ applies to allocation of money;
- ▶ an equal shot at getting into the desired school/class;
- ▶ attention to the priority concerns of the parent;

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- ▶ equity of resources in size and attractiveness of the school;
- ▶ sibling linkage (placement of second sibling in same school as first);
- ▶ equity in fact; if need more, get more; not necessarily same per pupil allocation of resources, need to "level the playing field";
- ▶ equity in access to the resources;
- ▶ "no less unfair than life itself";
- ▶ need to fix what's broken;
- ▶ clear standards;
- ▶ follow your own rules;
- ▶ no arbitrary decisions;
- ▶ fairness in transportation;
- ▶ extension of policy on grouping of students below the school level into the classroom level.

Work Group participants then used whichever criteria were most important to them to decide whether they personally felt that a particular method was "high," "medium," or low on the element of "fairness."

At the SOTF meeting of 2/9/93, there was no objection to the Subcommittee's recommendation that all methods that clearly failed to meet two tests be dropped from further consideration. These tests were: a) +/- 5% variance in distribution of racial groups; and, b) the "fairness" test as defined by subcommittee members.

The three methods that were dropped were:

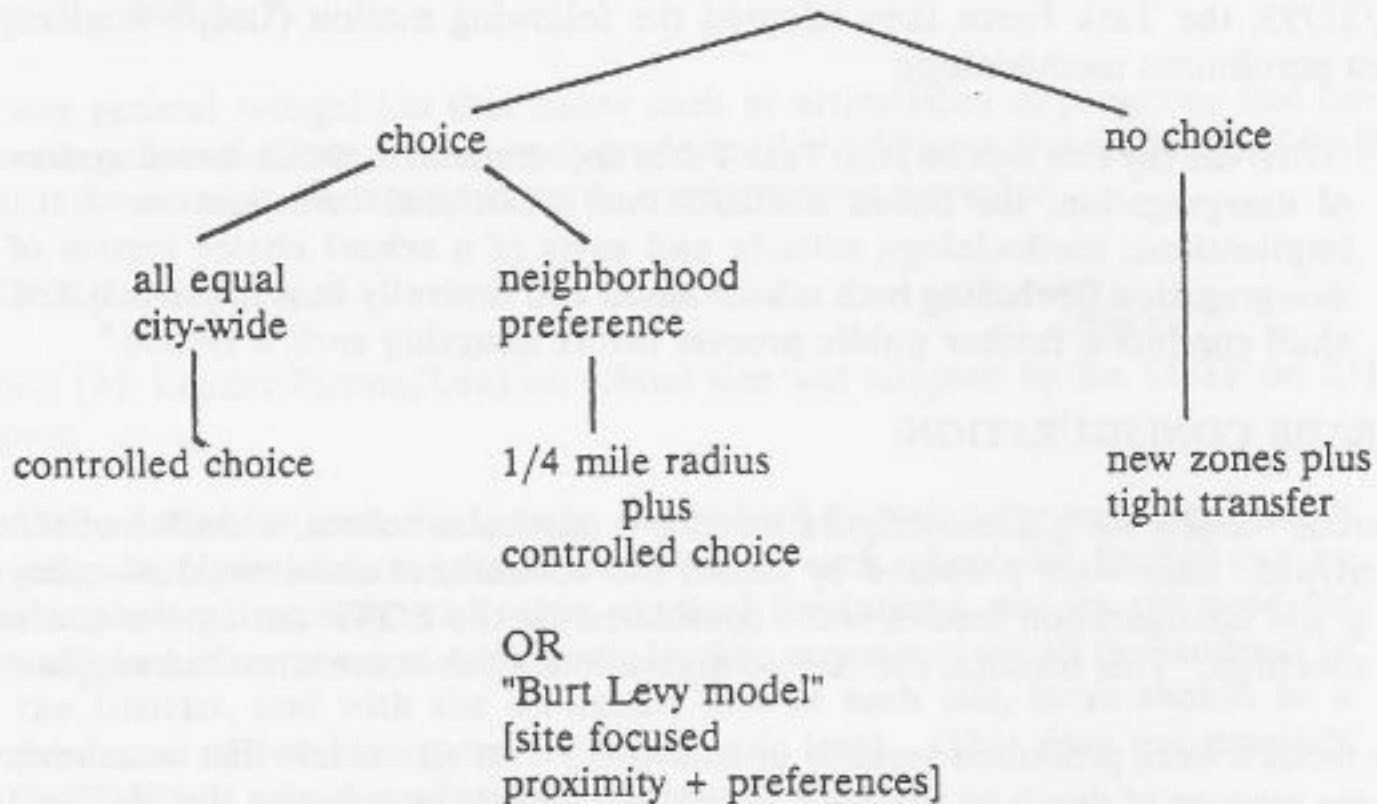
- ▶ 1/2 mile radius (children within 1/2 mile of a school were assigned to it)
- ▶ open enrollment (first come first served)
- ▶ the status quo (zones plus loose transfer).

The SOTF then began reviewing the remaining four methods of student enrollment. They were:

- ▶ controlled choice,
- ▶ 1/4 mile radius (children living within 1/4 mile of a school assigned to it plus controlled choice for those outside 1/4 mile),
- ▶ site focused enrollment plus preferences (Burt Levy model),
- ▶ new zones plus tight transfer policy.

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At this same meeting, the Task Force reviewed the decision tree displayed below.



The Task Force then (on 2-9-93) approved a motion (Levy/Huseby) that:

"recommended the 'choice pathway' be adopted for consideration by BUSD, thereby rejecting the 'no choice' and the 'new zones plus tight transfer methodology' option."

Also on 2/9/93, a second motion was made (Levy/Sherertz):

"that the Task Force adopt some type of (as yet unspecified) neighborhood preference, and thereby reject what is labeled 'all equal citywide' and 'controlled choice.'"

This motion was clarified to state that, along with desegregation criteria there would be one more criterion for determining where students would attend school--that of neighborhood proximity. The maker emphasized that the desegregation criteria would take precedence over all others.

This neighborhood preference motion failed.

Appendix E

READINGS

ON SCHOOL ORGANIZATION TOPICS

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