

A Rebuttal to:

Striking a Balance: In Support of Diversity in the Wake County Public School System

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Facts are stubborn things, and whatever may be our wishes, our inclinations, or the dictums of our passions, they cannot alter the state of facts and evidence.

John Adams, Second President of the United States, 1770.

Abstract

On February 14th, 2008, the Wake Educational Partnership (WEP, wakeedpartnership.org) released the above-titled position paper in support of a policy pursued since the 1970s by the Wake County Public School System to obtain demographic balance in its schools. Balance was sought first according to race, then since 2000 by the percentage of students receiving free or reduced-priced meals in schools (F&R). WEP contends that this diversity is essential to maintaining excellent schools for all children in Wake County. The report purports to contain data substantiating this claim. It does not. The purpose of this rebuttal is to address the inaccuracies of this report and provide evidence that the assignment of children to achieve an arbitrary socio-economic balance has not produced significant improvement in the performance of poor students and it leads to worse results for children from higher-income families.

Background

Integration Achieved: Few could argue today against the necessity to integrate white and black school systems across the nation four decades ago; the author experienced this first hand attending public schools in Decatur, AL in the early 1970s. A result of the landmark *Brown v. Board of Education of Topeka* decision by the Supreme Court in 1954, the integration of people of varied cultural, racial, and economic backgrounds has reached an advanced stage in North Carolina today. For example, it was recently reported that children attending the Davis Drive Elementary School in western Wake County come from over 20 different nations representing every major continent and speaking over 20 native languages. Such a mixture of cultures in the public schools of Wake County was unimaginable in 1954, or even in 1975, when the author began his studies in engineering at North Carolina State University.

In the late 1960s, in order to avoid whatever ills were expected to come from school integration, many urban families moved to the suburbs, which often meant leaving a city-based school system in favor of a county system. The term ‘white flight’ was used to describe this redistribution of families along racial lines. A second cause for suburbanization of our cities was the growing affluence of the 1960s and 1970s that created demand for larger homes and land available only further from city centers. In North Carolina, the integration of schools proceeded without the controversy surrounding some education systems in other states. Thankfully, the issue of racial segregation has been relegated to a chapter in history books and should give cause for North Carolinians to be proud of having achieved great diversity in their communities without much turmoil or fanfare.

This success notwithstanding, the Wake County Public School System (WCPSS) clings to a policy of forced assignments of children from low-income neighborhoods to more affluent ones. According to the WEP report¹, this is a continuation of the previous race-based reassignments, found unconstitutional in a number of recent rulings by the U.S. Supreme Court.² Some legal experts have already predicted that the courts will eventually deem the use of income as a proxy for race, the policy followed by WCPSS since 2000, as unconstitutional.³

Student achievement in low-income neighborhoods remains below that for children from more affluent areas, falling generally along racial lines, with African-Americans, Hispanics and Native-Americans continuing to lag behind other subgroups. WCPSS believes that student achievement for these groups can be improved through osmosis: the presence of children from affluent neighborhoods will improve the education of those bussed in from poor neighborhoods simply by seating them together. BJ Lawson, Wake County parent and neurosurgeon, had the following to say about treating those in need, whether in a school or a hospital: “When the critically ill or injured need help, we don’t spread them across the hospital to lay aside the healthy; we put them in the intensive care unit and provide them with the best doctors and equipment.”⁴

Economic Segregation? From the standpoint of family income, the population of Wake County *is* segregated, but this is certainly not unique to this one county. Assuming that children are assigned to the schools closest to their homes, it is only natural that levels of income within a particular student body will be similar, whether the school is in a low-income part of downtown Raleigh, a middle-income subdivision in Cary, or a high-income neighborhood such as Raleigh’s Hayes Barton. What is different however about this sort of segregation is that it is entirely *inclusive*: only a family’s financial means limits where they choose to live and which school their children will attend. Whether housing patterns from the pre-integration era remain racially segregated is thus purely a matter of choice and financial means. There is abundant visible evidence that neighborhoods in Wake County, in particular middle-class ones built in the past two decades, are popular among peoples of all racial and ethnic backgrounds, proving that integration has been achieved.

Historically, families have opted to live near the schools of their choice, naturally expecting their children to attend these. In fact, during the past two decades of strong growth in Wake County, the real estate industry has taken advantage of this desire in the marketing of properties near schools considered superior to others. Increased intervention by the WCPSS in the assignment of children away from the proximity of their homes has now changed this situation, disrupting the normal desire families have to focus their lives

on their local schools, churches, parks and recreational facilities, shopping, etc. This desire is not unique to one racial or ethnic group. A number of studies have predicted little, if any change on racial segregation of neighborhoods despite massive bussing schemes like Wake County's. Reardon, Yun and Kurlaender concluded in a 2006 study " ... given the extent of residential racial segregation in the United States, it is unlikely that race-neutral income-integration policies will significantly reduce school racial segregation ... " ⁵ Indeed, America has a long tradition of protecting unique communities with homogenous cultural heritage, for instance Chinatown of San Francisco, Greektown in Detroit or the West African Gullah communities along the Atlantic coast of Georgia and South Carolina. The desire for one racial or ethnic group to *choose* to live together should not therefore be regarded as negative in the post-desegregation era, but as an expression of one of the many freedoms that Americans enjoy.

What is a Community? Since the 1960s, Wake County has experienced strong population growth. Four decades ago, only Raleigh had a population in excess of 10,000. Today, the county is home to 11 other major and distinct communities, the largest being Apex, Cary, Garner, Fuquay-Varina, Holly Springs, Morrisville and Wake Forest, all having more than 10,000 residents and continuing to grow steadily. Many entire counties in North Carolina have smaller populations than these municipalities. While three decades ago it might have been appropriate to have a combined Raleigh-Wake County school system due to the sparse population that existed outside Raleigh at that time, a strong argument can be made today for multiple school systems across the county to better serve the unique character and needs of local communities.

In an address to members of the Apex Chamber of Commerce on February 14th, 2008, Dr. Ann Denlinger, president of the WEP, argued in favor of a continuation of the concept of a county-wide 'community', an outdated notion given the growth that individual towns within Wake County have experienced since the 1960s. Calls for a number of smaller, community-based school systems in Wake County appear today justified. These systems might serve a cluster of geographically close towns, such as Cary/Apex/Holly Springs/Fuquay-Varina. Even one system for each town should be considered.

Problems with large school districts: While most public education officials favor smaller class sizes and smaller schools, paradoxically they remain silent on the issue of school district size. Numerous studies from the past decade have shown the many disadvantages of large school districts such as WCPSS, *in particular in dealing with students from poorer communities*. Craig Howley's often-cited report from 2000, *School District Size and School Performance*, concludes "Research in California, West Virginia, Georgia, Montana, Ohio, and Texas is reviewed indicating that the negative influence of socioeconomic status on academic performance is reduced in smaller schools and school districts, often dramatically. In impoverished communities, small schools in small districts boosted school performance. In addition, smaller districts and smaller schools demonstrated greater achievement equity." ⁶

Howley suggests a threshold of 4,000 to 5,000 students for the limit of a school district's size. While such small districts would not "guarantee improved test scores, ... ample evidence suggest it will increase the odds for improvement in school performance." In the fall of 2007, the Wake system reported an enrollment of about 134,000 students, *26 times larger* than the 5,000 student threshold recommended in Howley's study. By comparison, the median size of all 115 school districts in North Carolina is under 7,000 students.⁷ Howley's work also cites a recommended maximum high school size of 600 to 1,000

students. The average enrollment in Wake County high schools for the 2007-2008 school year is 2022, with the largest school, Wakefield HS (2626 students), being 2.6 times greater than the recommended maximum of 1,000. The average Wake County high school has a larger student body than found at most private colleges in the state of North Carolina!⁸

Lindalyn Kakadelis, former Director of the North Carolina Education Alliance, describes the cause for the lackluster performance in huge districts such as WCPSS:

*In addition to creating extra layers of bureaucracy, larger systems disenfranchise parents and students by weakening local control over schools. An accumulating pile of data indicates that these enormous districts actually cost more than they save, both financially and academically. Far from being models of efficiency, these bureaucratic giants guzzle resources and depersonalize education. Even though bigger districts have bigger budgets, their dollars don't always make it to classrooms: Mike Antonucci, in an Alexis de Tocqueville Institution study, found that as district size increases, the percentage spent on teachers, books, and teaching materials actually goes down.*⁹

Excellent schools? Dr. Ann Denlinger, president of the WEP, states in the forward to the Balance report:

*It's a promise Wake County leaders made to their public school children: every child will attend a high-quality school. Leaders in Wake County have delivered on that promise for over 30 years! They have made decisions that resulted in academic excellence in the Wake County Public School System. The school system also earned a far-reaching reputation for delivering high levels of teaching and learning in its classrooms.*¹

Evidence that Wake public schools may not be as excellent as portrayed in the WEP Report is hard to dismiss:

1. Over 17% of all children in Wake County attend non-traditional schools (charter, parochial, home and private), nearly twice the U.S. average.^{11, 12}
2. The home-school community in Wake County is the largest in the state, and growing steadily.¹³
3. High school graduation rates for minorities in Wake public high schools, the primary subjects of socio-economic balancing, are the lowest since 2000. Ironically, 2000 was the same year that assignment based on race was changed to one based on income.¹⁴

Excellence, like beauty, is in the eye of the beholder, i.e. is relative to some standard regarded as exemplary. Relative to many counties in our state, Wake County's public schools do appear superior. *But against what measures?* In 1993, North Carolina shunned standards being adopted in many other states, such as the Iowa Test of Basic Skills (ITBS), in favor of the home-grown ABCs of Public Education, documented as being lacking in many regards.¹⁵

Paul Peterson and Frederick Hess studied the variation in testing standards across the country that have been adopted as a requirement of the No Child Left Behind (NCLB) Act of 2002.¹⁶ They devised a grading system to measure the relative knowledge required to obtain 'proficiency' in 2005 for each of the

48 states that provide such data. North Carolina consistently received some of the lowest marks in the country for each proficiency standard:

4th Grade Math: D-

4th Grade Reading: D-

8th Grade Math: F

8th Grade Reading: F

Overall Grade: F

In the U.S. Department of Education's June 2007 report mapping the relative state proficiency standards onto the NAEP (National Assessment of Educational Progress) scales¹⁷, North Carolina again ranked near the bottom in the four major testing categories:

4th Grade Math: North Carolina ranked 3rd from last, ahead of CO and TN

4th Grade Reading: North Carolina ranked 6th from last, ahead of OK, AK, GA, TN & MS

8th Grade Math: North Carolina ranked 2nd from last, ahead of TN

8th Grade Reading: North Carolina ranked dead last

Not surprisingly, obtaining proficiency on North Carolina's ABCs tests is not a Herculean task. Not only are our state's tests ranked near the bottom of the nation as shown above, but students are given multiple opportunities to pass them. According to Mr. David Holdzkom, Assistant Superintendent, Evaluation & Research Division of WCPSS:

*If a student does not attain a level III score, then he/she is entitled to be re-tested, following a brief remediation period. If he/she is not successful on the re-test then one more test may be administered. If a passing score is still not attained, then the principal, teacher(s) and parents will want to review the child's work in class, the test scores themselves, and other information to determine what is the next best step for helping this child learn.*¹⁸

In *The ABCs of Public Disgrace*, Stoops documents the differences in the proficiency levels between the state and federal governments. Despite minor changes to math testing in 2005, North Carolina's standards remain far below what the federal government considers adequate. Students even have a good chance to pass these tests simply by guessing:

Now state education officials admit that some of these accountability measures have been neither real nor meaningful. As a result, the State Board of Education slightly raised the standards on 2005-2006 math tests to align state proficiency standards with the federal National Assessment of Educational Progress (NAEP) standards. For the last ten years, the state classified a high percentage of North Carolina's students as proficient on state math tests, but the U.S. Department of Education classified a much lower percentage of our students as proficient on federal NAEP

math tests. The sizeable difference between the two percentages suggests that the North Carolina state standards have been relatively lax for several years, especially when compared to states with a rigorous state testing program such as South Carolina.

While the 2005-2006 math standards are an improvement over the remarkably weak 2004-2005 standards, they are hardly rigorous. To be classified as proficient on the 2004-2005 end-of-grade math tests, students were required to answer an average of 40.7 percent of the questions correctly (33 out of 80). To be classified as proficient on the 2005-2006 end-of-grade math tests, students were required to answer an average of 49.4 percent of the questions correctly (25 out of 50). Despite raising the passing level, students who answered half of the questions incorrectly on most state math tests would still be classified as proficient or performing at grade level.

Moreover, students who guess on these exams can significantly offset the effect of raising the passing level. Students could be classified as proficient on the 2005-2006 math tests if they knew the answers to only 32.5 percent of the questions (17 out of 50) and guessed on the rest. That percentage dropped to an average of 24 percent (12 out of 50) for students who could eliminate one option before guessing.¹⁵

If North Carolina adopted the standardized tests recommended by the federal government, only half as many students in our state would be considered proficient, as seen in the table below, summarizing results for the 2006-2007 school year:¹⁹

Percentage of Students at or Above Grade Level (as reported by NCDPI, 2006-2007)		
	Wake	N.C.
Grade 4 Reading	89.9%	85.2%
Grade 4 Math	77.6%	67.7%
Grade 8 Reading	91.1%	87.9%
Grade 8 Math	73.0%	63.5%

As Reported by U.S. Dept of Education (mapped to standardized test, 2006-2007)		
	Wake	N.C.
Grade 4 Reading	N/A	29.0%
Grade 4 Math	N/A	41.0%
Grade 8 Reading	N/A	28.0%
Grade 8 Math	N/A	34.0%

Table 1: Proficiency levels as defined by NCDPI and the U.S. Dept. of Education (NAEP)

As seen in the table above, while the WEP may be justified in their praise of Wake County schools relative to the rest of the state, there is little reason for celebration when comparing performance to the rest of the country. (Note that at leading non-traditional schools in Wake County, such as the Franklin Academy charter school in Wake Forest, the Iowa Tests of Basic Standards are used. Grades K-8 at the Franklin Academy scored in the 90th percentile for ITBS in 2007.)

The sobering reality is that in North Carolina public schools, a student is considered proficient in a subject when the score on a test deemed inadequate by the U.S. Department of Education would normally receive a mark of 'F', and this even on the third attempt after free tutoring. Important policies such as performance-based curricula, funding for special-education, and teacher bonuses are thus all predicated on the acceptance of the ABCs testing standards as adequate means to measure educational quality and progress, which clearly they are not. Stoops summarizes the result of a decade and a half of inferior standards used in North Carolina:

*For the past 15 years, the state's testing program, the ABCs of Public Education, has established a dubious record of bewildering parents, vexing educators and exaggerating student performance. It is time to move to a better testing program, rather than tinker with the flawed ABCs. It is imperative for the Department of Public Instruction to get out of the testing business and use an independent, credible, field-tested national assessment.*³⁶

Education quality reflects teacher training: Families in Wake County live in a world economy, which has implications far greater than the origin of products found on store shelves. Americans have no choice but to compete with the smartest minds around the world. While studies in liberal arts might help round out the mind, without a strong educational foundation in reading, math and science, our country will be relegated to the back alleys of the modern world. Recent revelations that the training for future teachers in UNC's education departments does not include Direct Instruction (DI), phonics or long division, all considered key elements of a world-class education, do not bode well for the future of our state's children, but it does help explain the lack of real progress being made in public schools. In contrast to nations considered as world leaders in education, young adults in North Carolina attracted to a career in teaching come from the ranks of the lowest performing high school students. Few pursue scientific or mathematic studies in college, yet are regularly assigned to teach such demanding courses.²⁰

World-class education: Reports from the Organisation for Economic Co-operation and Development's (OECD) Programme for International Student Assessment (PISA) have in recent years done an admirable job comparing the effectiveness of primary and secondary education for science, math and reading for a large number of developed countries. *PISA 2006: Science Competencies for Tomorrow's World*²¹ presents the results from the most recent PISA survey, which focused on science and also assessed mathematics and reading.

Here are its key findings:

- *Finland, with an average of 563 score points, was the highest-performing country on the PISA 2006 science scale.*
- *Six other high-scoring countries had mean scores of 530 to 542 points: Canada, Japan and New Zealand and the partner countries/economies Hong Kong-China, Chinese Taipei and Estonia.*

Australia, the Netherlands, Korea, Germany, the United Kingdom, the Czech Republic, Switzerland, Austria, Belgium and Ireland, and the partner countries/economies Liechtenstein, Slovenia and Macao-China also scored above the OECD average of 500 score points.

- *On average across OECD countries, 1.3% of 15-year-olds reached Level 6 of the PISA 2006 science scale, the highest proficiency level. These students could consistently identify, explain and apply scientific knowledge, and knowledge about science, in a variety of complex life situations. In New Zealand and Finland this figure was at least 3.9%, three times the OECD average. In the United Kingdom, Australia, Japan and Canada, as well as the partner countries/economies Liechtenstein, Slovenia and Hong Kong-China, between 2 and 3% reached Level 6.*

In a recent article published by the Greensboro, NC *News-Record* newspaper, Terry Stoops, Education Policy Analyst at the John Locke Foundation, comments: "International assessments indicate that student performance in the United States starts strong but declines significantly by the time students reach high school. This decline suggests that the quality of public schooling itself, rather than factors like socioeconomic status, accounts for our nation's poor showing on international tests. The performance of high school students is particularly troubling because, as the saying goes, those who do not finish strong cannot win the race."³⁶ One explanation for this is the fact that in most of the leading nations cited by the OECD, a significantly greater percentage of secondary students attend schools *not* run by the government as compared to the United States.

If North Carolina's county and state governments are truly dedicated to providing children with a world-class education, they would be advised to follow the policies of the leading nations described in this latest OECD PISA report. One must also not ignore the dire need for trained technicians, something our state's public K-12 schools have ignored in the past decade, in their one-sided effort to push young adults into 4-year college programs. Other leading industrialized nations have vigorous, alternative-track programs for students interested in pursuing a trade.

If we are to prepare our children for the global competition for knowledge and skills, we *must* replace our current ABCs standards with those used in the best countries, and we *must* set for our state the same high achievement targets as used in these other lands. Stoops suggests these alternatives to the ABCs:

*There are a number of norm-referenced tests available for students in grades K-12, including the Basic Achievement Skills Individual Screener (BASIS), Metropolitan Achievement Tests (MAT 8), and the Stanford Achievement Test Series, 10th Edition (Stanford 10). Using one or more of these tests may require the N.C. Department of Public Instruction to make changes to the state curriculum. The effort would be well worth the time - North Carolinians would finally have a testing program they can trust.*³⁶

While the adoption of one of these tests would be preferable, for now, measurement of progress in Wake public schools must be made based on results of the ABCs tests from high school graduation rates and the SAT/ACT tests for college admissions. According to William Lynch, research scientist and expert in educational testing and performance monitoring,

It is not the absolute achievement that is important, but progress relative to one's peer groups that must be considered, if one wishes to assess the result of a policy such as assignment according to race, income, ability, etc. The comparison should be made with a "control" group that takes the

same test. The simplest, but not fully rigorous, method is to compare percentile rankings of individual, or mean, scores. If progress is being made, then the percentile ranking of the lagging individual or group will be rising when compared to the control group. That control group could be the entire body of students, or it could be a special group which the system wishes to employ as the standard for achievement, what industry would call a "stretch goal". This comparison eliminates the need for filtering the levels of "difficulty" for tests from one year to the next since the relative "gap" is independent of the test difficulty. This is true as long as the new tests are always "good" (appropriate) tests. A better estimate of absolute progress can be made by having the control group itself compared with other larger groups. Such tiered evaluations (calibrations) are usually done by means of sampling tests, such as the NAEP tests or the international tests. The NAEP tests given to all states allow the individual states to be ranked and subgroups within those states to be ranked as well. The relative difficulties of the state tests can be assessed since states with low standards will always have greater success on their own tests, but may do poorly on the NAEP test. The upper tiers of tests do nothing to change the relative comparisons at the lower tiers, but the comparisons that are made at the highest level of the tier groups are the ones that matter the most. Difficulty is an abstract term; it can only be defined quantitatively in relative, not absolute, terms.²²

Rebuttal of the WEP “Striking a Balance” Report

In the following paragraphs, opinions expressed by the Wake Educational Partnership in their ‘Balance’ position paper will be examined. Where questionable information is presented, evidence to the contrary from relevant sources will be shown. Text from the Balance report is denoted in a bold, sans serif font to distinguish it from this rebuttal.

The report may be downloaded from the WEP web site:

http://www.wakeedpartnership.org/publications/research_reports.htm

First by race, and more recently by family income, the Wake school system has actively sought to create and maintain the kind of enrollment balance that decades of research have proven to be critical for successful schools and successful students. (from WEP report, pg. 1, col. 1)

Reference 1 in the report cites a paper from the Century Foundation which examines twelve school districts including the WCPSS that strive to achieve an arbitrary socio-economic balance. While Wake schools are shown to have higher test scores than some other school districts that have not reassigned according to family income, no data is shown tracking the progress of actual students in low- and high-income groups within Wake County. Thus its contention that assignment by income is of benefit is based on circumstantial evidence at best. This is consistent with reports of the successful use of socioeconomic balancing in the other 11 school districts described in the report: in not one single case was data provided to show the progress of individual students, success being measured instead through comparisons of an entire school district where such policies exist to others where they do not. In only four other of the 12

districts (LaCrosse, WI; Cambridge, MA; Minneapolis, MN; San Francisco, CA) were improvements in academic performance through socioeconomic balance claimed, making a total of 5 out of 12 systems, not an impressive record.

Not mentioned in the WEP's Balance report was the decision made in 2001 by the Charlotte-Mecklenburg schools (CMS), one of the districts cited in the Century Foundation study, to abandon income-based assignments in favor of a stronger emphasis on neighborhood schools.³⁷ Performance of poor children, previously bussed out of their communities as part of the previous assignment scheme, has not suffered as a consequence.³⁸ Further evidence of this is shown on pg. 25 of this rebuttal.

Too often, schools skewed by high levels of poverty doom their students to low achievement and limited opportunities. (from WEP report, pg. 1, col. 1)

Wake County has long pursued policies to focus attention on low-income communities. Magnet schools, typically located in these neighborhoods, are the best example of this.²³

Since 1982, Wake County magnet schools have fostered greater achievement, crafted hotbeds of creativity and cultural diversity, and produced a rich array of educational choices for all students.

Objectives: Magnet Programs will be used to foster healthy schools throughout the Wake County Public School System by using choice to help:

- *Reduce high concentrations of poverty and support diverse populations;*
- *Maximize use of school facilities and*
- *Provide expanded educational opportunities*

Not only do magnet schools provide a wider array of coursework than at non-magnet schools, but they receive special funding not available to other schools.²⁴ To claim that the attendance of school in a low-income neighborhood “doom[s] their students to low achievement and limited opportunities” begs the question: why then has the WCPSS invested so heavily in Magnet Schools in these neighborhoods since 1982?

The current situation found in America's historically black colleges and universities (HBCUs) may provide some further insight into the correct handling of schools having high concentrations of minorities. George Leef, vice president for research at the John William Pope Center for Higher Education Policy in Raleigh, remarks:

Writing about this in The Wall Street Journal recently, Abigail and Stephan Thernstrom offered this explanation: “The HBCUs have an advantage over even the selective traditionally white colleges: There is no mismatch between black student qualifications and the academic demands of the schools.... And once they enroll at an HBCU, they can feel free to major in more difficult subjects, knowing that they will not be unprepared for the coursework.”

The “mismatch problem” has mostly been ignored by advocates of “affirmative action,” who refuse to acknowledge that affirmative action has any downside at all. Those scholars who have considered the flaws, Thomas Sowell for example, have attempted to get people to see the

*educational problems involved when a school admits a group of students who are significantly less academically able than most of the student body. The “preferred” students often struggle in school and gravitate toward the easiest courses. The experience of students at HBCUs is the opposite side of that coin – when they aren’t overmatched by students with stronger academic preparation, students are more likely to pursue studies in rigorous and demanding majors. And in a market economy, people succeed on the basis of their contributions, not their credentials. The discipline required to pursue a degree in a demanding field is apt to do more for a student (of any race) than is majoring in one of the “soft” disciplines, which are known for their low expectations.*²⁵

(Thomas Sowell is the Rose and Milton Friedman Senior Fellow on Public Policy at the Hoover Institution, Stanford University. He is also an African-American.)

While Leef was describing HBCUs, it is reasonable to expect that a similar ‘mismatch problem’ exists in public K-12 schools, and that allowing children to remain in schools with others of similar background may be more conducive to their learning.

Most recently, last year’s decision by the U.S. Supreme Court rejecting race as a factor in school assignments in Seattle and Louisville has seemed to settle the issue altogether. Most school systems simply have backed away from the politically risky steps needed to achieve enrollment diversity and have settled instead for the more politically expedient alternatives of neighborhood schools or plans that allow parents to exercise choices that often result in schools segregated by race and income. (from WEP report, pg. 1, col. 2)

The phrase above “ ... plans that allow parents to exercise choices ...” refers to open enrollment options, charter schools, vouchers or tuition tax credits that result in “the money following the child”, a policy gaining popularity as an alternative to failing government schools. The report’s claim, that school segregation by race and income is the result of such choices, is simply false. Charter schools in North Carolina assign students based on a lottery. In the case of the Franklin Academy in Wake Forest, 1,860 applications were received for the 94, K-12 seats available in the fall of 2007. No preferential treatment is given other than for siblings of children already enrolled in the school. Thus, the makeup of the student body in most charter schools is a reflection only of the race and income of the families who applied for their children’s admission. Charter schools have also proven to be particularly popular in low-income neighborhoods of Raleigh as well as in impoverished regions of the state, as parents search for stable and safe learning environments for their children, close to home. Their overall racial makeup is very similar to that found in traditional public schools:

*Of the total population of students enrolled in North Carolina Public Charter Schools in the school year 2005-2006 59.0% were white, 34.6% were black, 3.4% were Hispanic and 2.8% were other minorities. Of the traditional school’s population, 56.6% were white, 31.4% were black, 8.4% were Hispanic and 3.5% were other minorities. The Charter School Act requires that, after its first year of operation, each Public Charter School must have a school population that reasonably reflects the racial and ethnic composition that mirrors the general population of the county in which the charter school operates.*²⁶

Vouchers, still rare in the U.S. for political reasons, have been used with success in North Carolina. During the 1999–2000 school year, the private Children’s Scholarship Fund (CSF) offered partial scholarships to low-income students in Charlotte. The partial scholarships defrayed up to \$1,700 in tuition

expenses at the private elementary or secondary school of a family's choosing. Scholarships were awarded by lottery to families who went through an application process, because not enough funds were available to provide them to all the interested families. By all indicators of performance, economics and parental satisfaction, this program was a resounding success that has been praised widely by social scientists, proving that schools with high concentrations of low-income, minority students can be successful.²⁷

The new approach, adopted in 2000, rests squarely on what extensive education research shows: schools burdened by high concentrations of poor students and low achievement often face insurmountable challenges. Conversely, students in schools with a critical mass of children from middle class families tend to benefit from better teachers, stronger parental support and the influence of classmates more likely to be engaged academically. But even eliminating race from the equation in Wake hasn't settled the debate. (from WEP report, pg. 1, col. 3)

The reason that the debate is far from being settled lies in the fact that WCPSS has yet to show conclusive evidence that the performance of individual students from poor neighborhoods has improved, and the performance of individual students from middle class neighborhoods has not suffered as a result. Instead, figures for an entire school population as a function of the percentage of poor (F&R) students are presented as proof that instruction through osmosis works. Webster defines osmosis as "The tendency of fluids to pass through a membrane and so equalize concentrations on both sides." This implies that, as the child bussed in from a distant, low-income neighborhood will gain from being seated next to child from a middle class family; the child bussed from the more affluent neighborhood to a poor one will suffer.

The WCPSS faith in instruction through osmosis comes at no surprise. George K. Cunningham, in his sobering exposé of University of North Carolina's education schools, describes the 'whole language' approach that is prevalent today in our K-12 public schools:

*Whole language is a student-centered approach that emphasizes creative thinking and guessing the meaning of words through their context. Louisa Moats explains how this approach to the teaching of reading works: "Instead of teaching children how to read and comprehend, teachers using these approaches engage in 'shared reading' of books. They read books aloud until students can repeat the language and 'read' by osmosis, imitation, and/or memorization. These practices offer little or no direct teaching about reading words or making sense of language structure. That children who are so taught aren't actually learning to read becomes clear when they attempt to read an unfamiliar text for the first time and are stymied".*²⁰

Not surprisingly, leading non-traditional schools in Wake County have rejected whole language methods in favor of more traditional and much more effective DI and phonics-based approaches resulting in students that excel at reading - a skill that greatly helps them throughout their lives.

Growth vs. Diversity

Anti-busing candidates ran in nearly every school board race from 1993 on, but none were elected. Voters in the county consistently backed major school bond proposals except one in which opposition stemmed from objections to its high cost rather than district policies. (from WEP report, pg. 2, col. 1)

The first sentence above ignores entirely Wake Board of Education member Ron Margiotta, who represents a disproportionately large number of parents and students in District 8 in southern Wake County. He was first elected to the Board in 2003 and was re-elected (without opposition) in 2007. Mr. Margiotta has been a tireless critic of many aspects of school assignment policies and enjoys strong support from citizens living in some of the most culturally-diverse neighborhoods in the county.

In 2005, Curt Stangler (District 9) and Tillie Turlington (District 1) ran for Wake County School Board. Like many citizens in their districts, they questioned the high cost of Wake schools relative to other counties, and they doubted many aspects of WCPSS school assignment policies. Their well-funded opponents, supporters of WCPSS assignment policies, promptly initiated smear campaigns, labeling these two candidates as “racist” for questioning whether socioeconomic assignments were a good policy for all children in Wake County. Both of these people had long histories of service to the members of their communities, especially children, but lost their elections as a result of their support for keeping children in their own neighborhood schools.

The second sentence above from the WEP report completely ignores the fact that the 2006 billion dollar school bond effort passed by a razor-thin margin, despite a well-funded campaign lead by the “Friends of Wake County”, a proxy for the WCPSS consisting of the same people and organizations that support the WEP and who ultimately profit from bond-backed expenditures for public schools. The “Friends” hired New Media Campaigns to construct a “... warm and inviting ...” web site for their campaign. The following description of their work for the Friends of Wake County appears at www.newmediacampaigns.com:

New Media Campaigns was in charge of designing and building a comprehensive site for a one billion dollar mega-bond levy in Wake County. The bond was to support the county schools, so we gave the site a warm and inviting feeling. The site acted as the organization's main information hub and allowed visitors to see breaking news, preview upcoming events, signup to volunteer, view photo galleries of events, and register to vote. Also, highlighted on the front page was a Community Voices section that displayed testimonials from community members on why to vote for the bond. New Media also programmed a custom Flash feature that allowed voters to see "Why Should I Support the Bond." The feature showed how all voters were interconnected and when a demographic was moused over, a pop-up window would display with reasons on why to support the bond. In the end, the bond passed by a narrow margin.

Immediately following the bond’s passage, the ‘Friends’ web site was removed from the Internet and the organization disappeared.

The text from the WEP report above is therefore misleading, portraying a level of satisfaction among parents and taxpayers that is far from reality. Working through surrogates such as the WEP, the Friends of Wake County and a staff of full-time lobbyists, the WCPSS wields immense power over policy-making in Wake County and has an ability to influence the outcome of school board and school bond elections that overwhelms the modest grassroots efforts of the citizens of Wake County. To understand the motives behind such actions, one needs only to study the business relationships between the WCPSS and those providing financial backing to the WEP. This is described in detail in the author’s forthcoming book on the subject of public education in North Carolina.

While Wake citizens may not have the means to counter the well-funded efforts of the WCPSS, they can vote with their feet: 17% of all school-aged children in Wake County do not attend traditional public schools today. This compares to the national average of only 10%. Wake’s home school community is the largest in the state and growing. Numerous new private and parochial schools have been built in recent

years and fill quickly. Pressure is mounting on the state Legislature to lift the cap on charter schools and permit tuition tax credits. Gradually, concerned parents are finding ways around the government school juggernaut in Wake County, which has even resulted in costly lawsuits by parents to block certain new policies, such as the mandatory assignment of children to schools operating on year-round calendars despite a constitutionally-protected right of choice between these and schools running on traditional calendars.

In short, school leaders were under little local pressure to drop the use of race in making school assignments when a series of court decisions elsewhere created unavoidable external pressure to put the district's assignment objectives on a different footing. (from WEP report, pg. 2, col. 1)

As described in the previous paragraphs, this statement is factually incorrect. More disturbingly, it shows either great arrogance or great ignorance in its reference to "a series of court decisions elsewhere," referring to multiple decisions by the U.S. Supreme Court ruling that the use of race for school assignments is unconstitutional. The "unavoidable external pressure" mentioned is the U.S. Constitution, the supreme law of our land! Does the WEP view WCPSS to be above this law? It appears so, and not only with regards to the U.S. Constitution:

The school system's efforts to provide enrollment balance now are threatened, indirectly, by a 2007 court ruling that limits the school board's legal authority to assign students to schools that operate according to a non-traditional, year-round calendar. (from WEP report, pg. 2, col. 2)

Wake County Superior Court Judge Howard Manning Jr.'s decision in the spring of 2007 was very clear: WCPSS was breaking the law in its policy of mandatory year-round assignments:

"The Wake County Board of Education lacks the statutory authority to convert traditional calendar schools to mandatory year round schools. The Wake County Board of Education may not require the attendance of students at year round calendar schools without informed parental consent. The Wake County Board of Education is authorized by law to operate, on a voluntary consensual basis, year round calendar schools, modified year round calendar schools, and magnet schools operating as modified or year round calendar schools."

Manning said the school district had already made up its mind to convert the schools to year-round calendar, making the appeal process moot. Manning wrote:

"Because the BOE will not, and emphatically refuses, to undo its decision relating to the mandatory year round schools, the only crumb left to the affected students and their parents in the 'assignment' process is not whether or not the student's base school is traditional or year round, but rather whether or not the BOE, through its cumbersome and lengthy 'assignment' process will permit the student and the student's family to get 'off the hook' and allow transfer to another school for the 2007-08 [term] which has a traditional calendar."

*Wake County schools said the state's school calendar and student assignment laws let them create mandatory year-round schools. Manning disagreed. He said the assignment law doesn't apply in this case.*²⁸

Once again, the WEP report is factually incorrect, implying that its policies are legal and enjoy the widespread support of the public and legal system. With regards to the purported benefits of year-round

schools, there exists a wide body of literature that documents its many disadvantages and failings in school districts across the country:

*A study released in March 2000 by Bradley McMillen, a researcher for the North Carolina Department of Education, Division of Accountability Services, found in a comparison of 345,000 test scores that year-round calendar students had no academic advantage over traditional calendar students. The North Carolina study, the largest and most credible comparison of the effects of calendar change to date, also casts a cloud over proposals to extend the school year because North Carolina makes additional instructional days mandatory in a majority of its year-round schools.*²⁹

What is Poverty?

The decline in percentages from elementary to high school is more a reflection of the reluctance by older students to be seen as needy than a reflection of real differences in family income. In other words, poverty in high schools tends to be understated. (from WEP report, pg. 2 sidebar, col. 2)

The influence that public humiliation has on people, in particular school children among their peers, is undeniable. Standing in the corner, having to wear a dunce cap, or writing a verse 100 times on a chalkboard were all effective methods in past decades to prevent disruptions in the classroom without resorting to the use of a paddle. Therefore, the statement above from the WEP report might be one explanation for the drop in F&R percentages in high school rather than in middle and elementary schools.

According to information provided to the author by Ms. Marilyn Bottoms Moody, Senior Director of Child Nutrition Services at WCPSS, 66% of this year's eligible students were automatically qualified to receive F&R meals by virtue of their family's participation in aid programs such as food stamps and TANF (Temporary Assistance for Needy Families). The remaining 34% were "directly" certified on the basis of their reported income.

Another possible reason that there are fewer F&R recipients in high school might be the rising affluence in these families, lifting them out of poverty. This has been well documented as one of the positive outcomes of the 2001 federal income tax reductions³⁰ and welfare reform during the current Bush administration. For instance, Melissa Pardue of the Heritage Foundation writes:

While the number of black children living in extreme poverty is certainly a cause for concern, the overall level of child poverty, particularly among black children, has made tremendous progress:

- *For the 25 years prior to welfare reform, the percentage of black children living in poverty remained virtually unchanged.*
- *Since welfare reform, the poverty rate among black children has dropped by one-fourth, falling from 41.5 percent in 1995 to 30.0 percent in 2001.*
- *The black child poverty rate is at its lowest point in U.S. history.*
- *Since welfare reform, over 1.2 million black children have been lifted out of poverty.*
- *Since welfare reform, six black children have been made better off and lifted out of poverty for every black child whose economic condition has worsened.*³¹

The most likely cause though for lower percentages of F&R children in Wake County high schools is that *they are simply no longer attending school*. Table 2 below shows that, for three high schools in Wake County, only about 1/3rd as many F&R students are found in the 12th grade as compared to the 9th grade. These students do not show up as gains in the non-F&R enrollment, implying that a great number of the ‘missing’ F&R children are indeed dropouts. Data was obtained from reference 35, using results from the 2004-2005 State Competency Standard Test for grades 9-12. Any year could have been used; 2004-2005 was selected arbitrarily. The three high schools chosen represented a low F&R school (Apex), a high-F&R school (Garner), and a medium F&R school (Southeast Raleigh). ‘G12/G9’ figures give the ratio of FR students in the 12th grade relative to the 9th grade.

Apex High School – low F&R (G12/G9 = 0.30)				
Grade	FR Students	non-FR Students	FR + non-FR	% FR Students
9	56	545	601	9.3%
10	37	483	520	7.1%
11	28	465	493	5.7%
12	17	412	429	4.0%
Garner High School – high F&R (G12/G9 = 0.35)				
Grade	FR Students	non-FR Students	FR + non-FR	% FR Students
9	188	328	516	36.4%
10	114	282	396	28.8%
11	80	297	377	21.2%
12	65	254	319	20.4%
Southeast Raleigh High School – medium F&R (G12/G9 = 0.31)				
Grade	FR Students	Non-FR Students	FR + non-FR	% FR Students
9	159	429	588	27.0%
10	111	415	526	21.1%
11	76	421	497	15.3%
12	49	372	421	11.6%

Table 2: Decline in F&R percentage in grades 9-12 for three Wake County High Schools in 2004-2005

Disproportionately more school dropouts are found among the F&R children, and most quit school in the 9th or 10th grades. For instance, the graduate rate among African-American students in Wake County public schools has remained around 60% for many years, and does not show signs of improvement. The subject of high school graduation rates is addressed on pg. 25 of this rebuttal.

In Wake schools, the numbers of students eligible for free and reduced lunch have been increasing also, from 22.5 percent in the 2001-02 school year to 29.1 percent during the 2006-07 school year. (from WEP report, pg. 2 sidebar, col. 3)

According to information provided to the author by Ms. Marilyn Bottoms Moody, Senior Director of Child Nutrition Services at WCPSS, approximately 29% of children enrolled in Wake schools qualify for free or reduced meals. Compared to the 2004-2005 school year, the number of F&R students has risen by 32% while during the same time period the total enrollment increased by only 17%. This might be explained by the changing demographics of Wake families. It may also be the result of more aggressive

efforts on the part of WCPSS personnel to add students to the program, both for their own benefit and to increase the federal Title I funding for programs that is tied to F&R headcount. What remains to be explained however is the significant difference between the number of children living under the federally-defined poverty level, which in Wake County was last reported in the 2006 census as 10.0%, while the percentage of school children qualified for F&R meals is 290% greater than this at 29%. Some of the difference can be explained by the higher income limits allowed for free (130% of poverty level) and reduced (185% of poverty level) meals, however based on income data from the U.S. Census Bureau that the author has studied, this effect is minimal.

The US Census Bureau⁴⁵ reports the percentage of children between the ages of 5 and 17 living in poverty in Wake County. In the table below, the poverty rate is compared to the percentage of children in Wake public schools receiving free meals. Children receive free meals when their families' incomes do not exceed 130% of the federal poverty limits.

Fiscal Year	% Free	% Poverty	% Free - %Poverty
2002	19.8%	13.2%	6.6%
2003	23.7%	11.9%	11.8%
2004	23.2%	15.1%	8.1%
2005	24.4%	11.5%	12.9%
2006	24.5%	10.0%	14.5%

Table 3: Free meal percentages versus child poverty in Wake County, 2002-2006

Three conclusions can be made concerning this data:

1. As the percentage of children living in poverty in Wake County generally decreased from 2002-2006, the percentage of pupils receiving free meals increased.
2. The percentage of children receiving free meals is significantly greater than the percentage of children living in poverty.
3. The difference between the percentage of children receiving free meals and the percentage of those living in poverty has increased significantly, from 6.6% (19.8%-13.2%) in 2002 to 14.5% (24.5%-10.0%) in 2006. Given that the county's economy has remained strong since 2006, it is reasonable to assume that the percentage of children living in poverty has not increased. Yet the current percentage of Wake children receiving free and reduced meals has reached its highest level, 28.9%, since 2000, which, ironically, is the year when socioeconomic assignment was started in the county.

The author is currently researching this disparity further and does not imply any improper F&R enrollments on the part of WCPSS or falsification of applications on the part of parents of the type reported in other school districts, for instance in Maryland and New Jersey, as described in reference 32.

A large body of research, gathered over 40 years, provides irrefutable evidence of an inescapable correlation between poverty and school performance. The single most important predictor of academic achievement is family income, followed by the socioeconomic composition of the school that a student attends. (from WEP report, pg. 4, col. 1)

Trivial solutions to the two issues noted in the second sentence would be (1) provide poor families with more government aid, and (2) force poor families to send their children to schools in affluent neighborhoods, and vice-versa. The failure of solution (1) to lift the poor out of poverty is well understood; welfare reform in the past decade has done far more in this regard by encouraging the poor to seek education and work.³¹ WCPSS proposes to deal with the second issue, socioeconomic composition through forced assignments, although parents overwhelmingly and at all income levels prefer having their children attend neighborhood schools.

The WEP report lacks however evidence that socioeconomic assignments (a) lead to better scores for individual poor students, and (b) that it does not hurt the education of children from more affluent families. It uses overall performance figures for F&R children and non-F&R children on a system-wide basis in comparison to other school systems or state averages. This ignores many other factors that influence student performance for a given region of the state, for instance the overall level of income, job stability, historic concentrations of African-Americans, Native-Americans and Hispanics, etc., which vary widely across the state. Therefore, averages across grades in a given school, across all schools in a given county, or all school districts across the state are of little importance when evaluating the effectiveness of socioeconomic assignments in one particular school district.

Ideally, one would track the performance of a significantly large number of individual children as they are reassigned in attempts to improve their academic performance. Such information is unfortunately not provided in the WEP report, nor is it available for independent evaluation. This leaves several options for analysis:

1. Compare the performance of F&R students (referred in the following as FR) and non-F&R students (referred in the following as NFR) in the five schools with the highest and the lowest percentage of F&R students. This will be called a 'High-Low Comparison'.
2. For schools that have experienced a significant increase or decrease in F&R students, find the classes affected most and track their performance. While this is not as precise as following the results for individual students, it does allow a focus on a smaller group of like-affected children. This will be called 'Class Tracking'.
3. Review the overall impact of socioeconomic assignment on high school graduation rates. Since F&R students are far more likely to leave high school prematurely, one should expect to see rising graduate rates if, as the WEP contends, socioeconomic assignments in place since 2000 have been beneficial to students from poor families.

In each case, it is just as important to know the impact that WCPSS policies are having on non-F&R children as on the F&R children. Each of these three analyses will be described in the following paragraphs. The EOG (end-of-grade) proficiency levels in reading and mathematics for elementary school grades 3-5 were studied since (a) EOG testing begins in the third grade, and (b) without a solid foundation in reading and math, success in later grades is less likely. Data for this study was obtained from reference 35.

High-Low Comparison

From data provided by the WCPSS, the five elementary schools with the highest percentage of F&R students (Top 5) and the lowest percentage of F&R (Bottom 5) were determined for school years beginning in the fall of 2003, 2004 and 2005. Note as described above, the score required for proficiency in mathematics was modestly increased in 2005, leading generally to lower scores relative to 2004. The “Top” and “Bottom” schools are listed below, with the F&R percentages for the EOG reading test shown in parentheses:

2003 Top 5: Smith (64%), Brentwood (61%), Carver (59%), Creech Road (59%), Zebulon (51%)

2003 Bottom 5: Green Hope (2.9%), Davis Drive (5.4%), Olive Chapel (6.4%), Oak Grove (7.8%), Brassfield (8.8%)

2004 Top 5: Smith (70%), Brentwood (69%), Creech Road (63%), Carver (57%), Hodge Road (53%)

2004 Bottom 5: Green Hope (3.5%), Olive Chapel (5.9%), Davis Drive (6.2%), Morrisville (6.3%), Oak Grove (8.4%)

2005 Top 5: Smith (71%), Brentwood (70%), Creech Road (64%), Carver (61%), Knightdale (53%)

2005 Bottom 5: Green Hope (6.7%), Brassfield (6.9%), Davis Drive (7.7%), Oak Grove (7.8%), Olive Chapel (8.3%)

In the following table, average scores for grades 3-5 for FR and NFR students in reading and mathematics are given for each of these three school years.

Year	High/Low	F&R	Reading - FR	Reading - NFR	Math - FR	Math - NFR
2003	High	59%	78%	91%	89%	94%
2003	Low	6.3%	88%	95%	89%	95%
Diff.			+10%	-4%	0%	-1%
2004	High	62%	78%	88%	86%	93%
2004	Low	6.1%	81%	95%	92%	95%
Diff.			+3%	-7%	+6%	-2%
2005	High	64%	81%	89%	58%	76%
2005	Low	7.5%	86%	95%	56%	92%
Diff.			+5%	-6%	-2%	-16%

Table 4: High-Low Comparison Data

Year: designates school year; **High/Low:** whether average is for top (high) or bottom (low) five schools, in terms of percentage of F&R students; **F&R:** average percentage of F&R students for five high or low F&R schools; **Reading – FR:** average reading proficiency scores for F&R students in five high or low schools; **Reading – NFR:** average reading proficiency scores for non-F&R students in five high or low schools; **Math – FR:** average math proficiency scores for F&R students in five high or low schools; **Math – NFR:** average math proficiency scores for non-F&R students in five high or low schools.

Diff. in the above refers to the difference in the average scores for high or low F&R schools for a given school year. In a very general sense, it could be considered to be the effect of moving an FR student from a ‘high’ school to a ‘low’ school. For FR students, a difference from -2% to 10% can be seen. Since over

70% of all students in Wake schools however are classified as non-F&R, one must also consider the opposite effect, namely moving a non-F&R student from a 'low' school to a 'high' one. In all cases above, this yields a drop in scores or a negative Diff. from -1% to -16%. Thus, it appears that a non-F&R student moved from a low to a high F&R school will experience a greater decrease in performance than the F&R student will benefit by moving from a high to a low F&R school. While this can be explained by the balancing effects of osmosis, it contradicts the contention of the WEP that non-F&R students do not "suffer" as a result of socioeconomic assignments. Since 71% of all Wake students in 2008 are non-F&R, the fact that the large majority of students could potentially suffer through such assignments should be cause for concern.

This "High/Low Comparison" is only a generalization of the real impact of assignments to achieve F&R balance. The only accurate means to assess whether this practice is of value is to follow the progress of individual students. Since such information is not available to the author, a different approach will be taken to follow a class of students in a number of schools. This is described in the following paragraphs.

Class Tracking

First, the leading schools were selected for two categories: those experiencing the greatest increase in F&R students, and those seeing the greatest decrease in F&R students. Only elementary schools during the time period October 2001 – October 2005 were considered, noting that socioeconomic assignment policies were initiated in Wake County in 2000.

Next, for each of the grades three, four and five, the F&R percentages were tracked from 2001 to 2005. The class within each school that experienced the greatest increase or decrease in F&R percentages over a three-year period was chosen as the target class. Focusing on a single class as opposed to the entire school, while recognizing that the class's makeup is not static (the class may in fact be several individual groups of children with separate teachers, children may transfer into and out of the class over the span of the years studied, the class may experience changes in teachers, etc.), nevertheless provides a more accurate assessment of the impact on performance of such F&R changes. Even in the schools that overall saw the largest increase or decrease in F&R students, some classes experienced relatively little change while others had variations that significantly exceeded the school-average variation in F&R percentage.

Below are the selected schools and the classes chosen for tracking. A target class denoted, for instance, as 'G3/2003' refers to grade 3 in school year 2003-2004. Note that the data used here, taken from reference 35, gives no score greater than 95%. In a large number of schools, average scores for non-F&R students consistently were given as $\geq 95\%$, preventing a meaningful assessment of the influence that changing F&R percentages has on the performance for these children. In short, the EOG tests are too simple for a large portion of students. As described on pg. 6, the grade required to obtain proficiency in math was increased in 2005 from 40.7% to 49.4%, resulting in lower overall scores in math for the school year 2005-2006.

Greatest Increase in F&R, 2001-2005

- Durant Road: Target is G3/2003
 - overall increase in school from 2001-2005 of 23%
 - 3rd grade in 2003 experienced increase from 14.4% to 29.3% from 2003-2005
- Heritage: Target is G3/2003
 - overall increase in school from 2001-2005 of 22%

- 3rd grade in 2003 experienced increase from 12.1% to 33.0% from 2003-2005

Greatest Decrease in F&R, 2001-2005

- Wake Forest: Target is G3/2002
 - overall decrease in school from 2001-2005 of 19%
 - 3rd grade in 2002 experienced decrease from 32.6% to 19.2% from 2002-2004
- Vance: Target is G3/2003
 - overall decrease in school from 2001-2005 of 11%
 - 3rd grade in 2003 experienced increase from 44.3% to 35.1% from 2003-2005

The following figures show changes in EOG (End-of-Grade) proficiency levels for mathematics and reading for the targeted classes along with the class F&R percentage during the three years that are tracked. If, as WCPSS and WEP contend, the current assignment policies work, one should expect to see:

1. Decreasing levels of proficiency for F&R students as F&R percentages increase.
2. Increasing levels of proficiency for F&R students as F&R percentages decrease.
3. No changes to levels of proficiency for non-F&R students as F&R percentages change.

In these figures, the following abbreviations have been used:

F&R: percentage of children in a given class receiving free or reduced meals

R-FR: percentage of F&R children scoring at or above proficiency on EOG reading test

M-FR: percentage of F&R children scoring at or above proficiency on EOG math test

R-NFR: percentage of non-F&R children scoring at or above proficiency on EOG reading test

M-NFR: percentage of non-F&R children scoring at or above proficiency on EOG math test

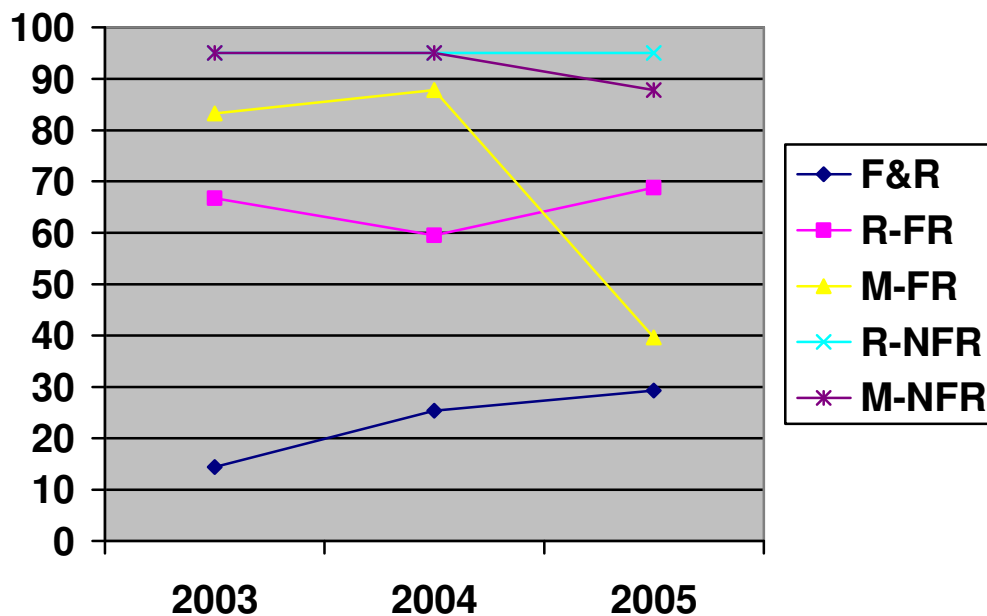


Figure 1: Durant Road Elementary, 23% overall increase in F&R from 2001-2005
G3/2003, 14.9% F&R increase from 2003-2005

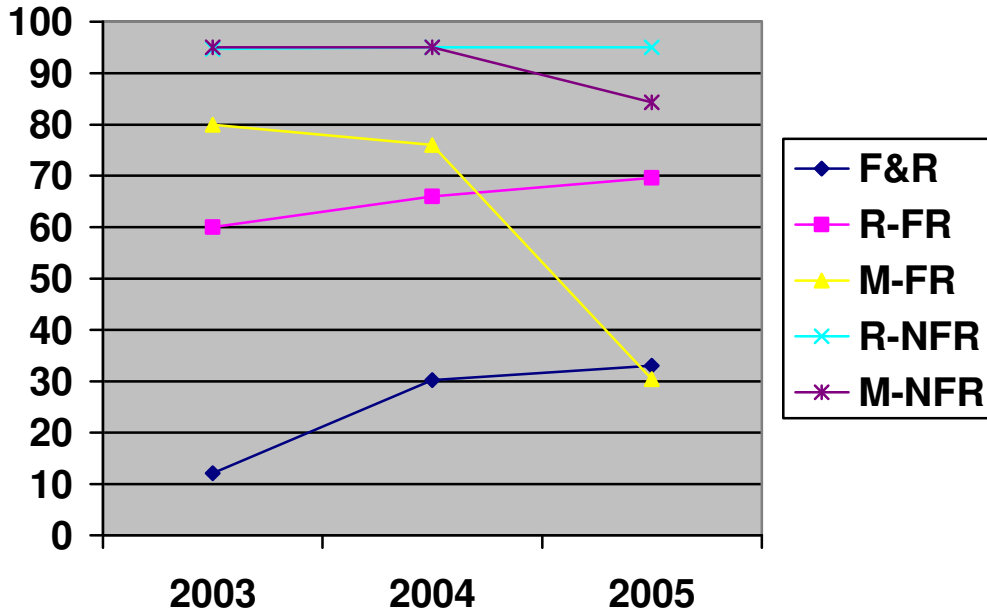


Figure 2: Heritage Elementary, 22% overall increase in F&R from 2001-2005
 G3/2003, 20.9% F&R increase from 2003-2005

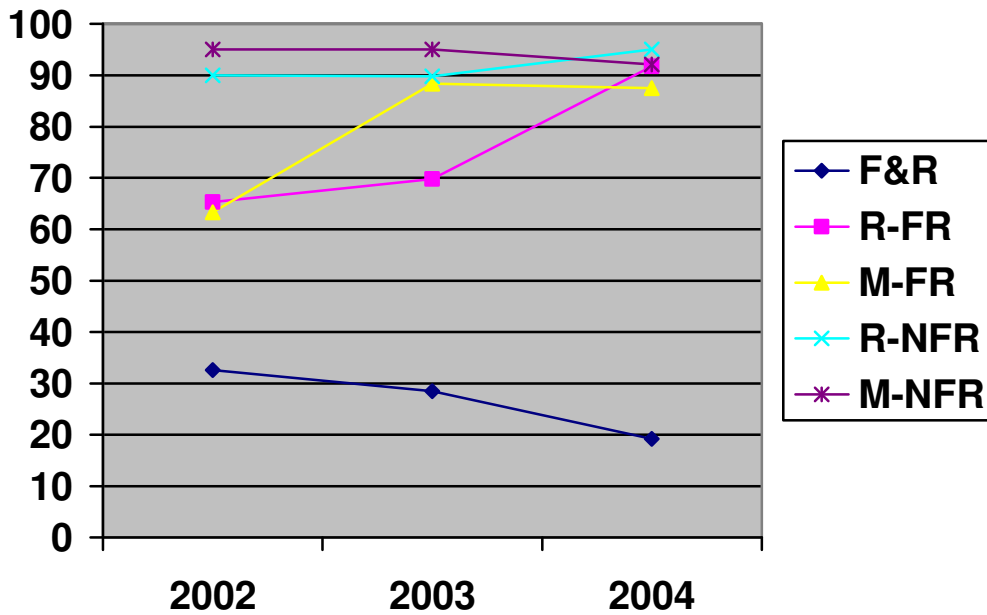


Figure 3: Wake Forest Elementary, 19% overall decrease in F&R from 2001-2005
 G3/2002, 13.4% F&R decrease from 2002-2004

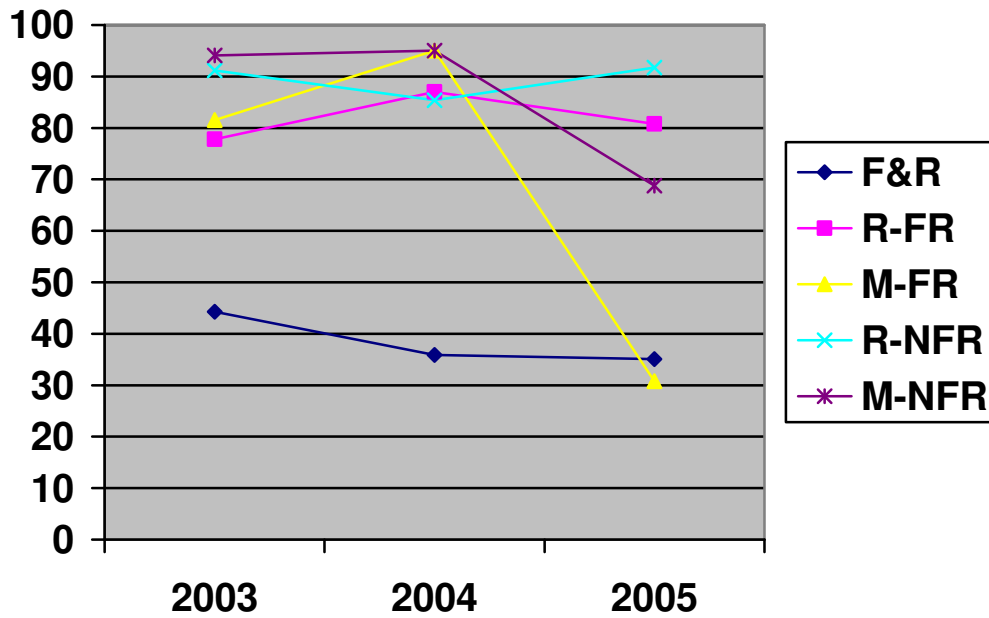


Figure 4: Vance Elementary, 11% overall decrease in F&R from 2001-2005
G3/2003, 9.2% F&R decrease from 2003-2005

Tracking class performance as F&R levels increased or decreased in these four schools leads to the following conclusions:

1. Most scores for non-F&R students are $\geq 95\%$, making it impossible to assess the impact that varying F&R numbers has on non-F&R students. This is even for the case of math scores in 2005, when the standards were toughened. While math scores dropped substantially for F&R students, little effect was seen in non-F&R math scores that year.
2. Math and Reading scores for F&R students are seen to both increase and decrease with increasing F&R levels at Durant Road and Heritage Elementary.
3. At Wake Forest Elementary, math scores improved while reading scores remained essentially flat as F&R levels decreased by 4% from 2002-2003, but reversed the trend when F&R levels dropped by nearly 10% from 2003-2004, with stronger gains in reading but a drop in math scores.
4. At Vance Elementary, all but non-F&R reading scores improved from 2003-2004, but then dropped significantly with further decrease in F&R levels, except for non-F&R reading.

In summary, tracking student performance in these four classes yielded results that are paradoxical at best, and contradictory at worse, relative to the fundamental contention from WCPSS and WEP, namely that reducing F&R levels results in better scores for children from poor neighborhoods. The simplicity of the EOG tests used to assess proficiency makes any meaningful determination of the impact that socioeconomic assignments has on the performance of children from more affluent neighborhoods impossible.

One further comparison of F&R student proficiency is worth making. The focus of the WEP Balance report, socioeconomic assignments, has been the policy in Wake County since 2000. In 2001, a ruling by the Fourth Circuit Court of Appeals declared that Charlotte-Mecklenburg Schools (CMS) was ‘unitary’. The school system immediately ended unpopular socioeconomic-based student assignments in favor of a new policy placing a greater emphasis on keeping students at schools in their communities³⁷. If Wake County’s socioeconomic assignment policy is, as contended by the WEP Balance report, superior to policies at CMS schools, one would expect to see improvement in the performance of F&R students in WCPSS schools relative to CMS schools since 2001. EOG results from 2000-2006 in reading for grade 5 students in the two systems is shown in Table 5 below, along with the percentage of F&R students and the percentage of children aged 5-17 living in poverty in Wake and Mecklenburg counties during this time. Data has been obtained from the NCDPI⁴⁴ and the US Census Bureau.⁴⁵

School Year	WCPSS Proficiency	CMS Proficiency	WCPSS F&R	CMS F&R	Wake Poverty	CMS Poverty
2000-1	74.6%	67.3%	21.7%	N/A	N/A	N/A
2001-2	78.8%	67.0%	22.0%	43.9%	N/A	N/A
2002-3	76.6%	71.6%	23.3%	42.5%	13.2%	11.0%
2003-4	82.6%	76.3%	23.6%	44.9%	11.9%	13.9%
2004-5	84.7%	80.7%	27.0%	47.6%	15.1%	14.2%
2005-6	80.4%	80.9%	27.2%	48.4%	11.5%	15.6%
2006-7	83.3%	82.2%	28.2%	47.7%	10.0%	14.1%

Table 5: 5th-grade reading proficiency levels for F&R students in WCPSS and CMS schools; also shown are the percentages of F&R students and the percentage of children aged 5-17 living under the poverty level in these two school systems.

One can conclude the following from this data:

1. EOG reading test results for 5th grade F&R students improved in both school systems from 2000-2007. The improvement was greater in CMS schools (14.9%) than in WCPSS schools (8.7%), in particular after CMS schools abolished socioeconomic assignments in 2001, resulting in a jump of nearly 10% in scores for F&R students within just two years.
2. F&R students in both school systems achieved comparable levels of proficiency in the most recently-reported EOG results for 5th grade reading.
3. The percentage of F&R children in CMS schools is significantly higher than in WCPSS schools. The poverty rate for children aged 5-17 has remained marginally higher in CMS schools than in WCPSS schools since 2005,

When comparing CMS’ neighborhood-focused assignment policy to WCPSS’ socioeconomic-focused policy, it is hard to make a strong case for the latter. Poor students in the CMS system appear to have benefited from the abolishment of socioeconomic assignments and now perform just as well as their counterparts in Wake County, despite the higher level of overall poverty among school-aged children in Mecklenburg County and the much higher percentage of F&R students in CMS schools.

High School Graduation Rates

Lacking test data for individual students, one is left with another means to assess the outcome that Wake’s assignment policies are having on educational quality: high school graduation rates. Ask any parent for a definition of graduation rate and they’ll likely answer with “The percentage of 9th graders who four years later receive a diploma.” For many years, North Carolina’s Department of Public Instruction and school districts such as WCPSS claimed unrealistically high graduation rates, sometimes exceeding 95%. This came to light in a landmark report from Daria Hall, Assistant Director for K-12 Policy at The Education Trust, documenting North Carolina’s gross distortion of rates:

*North Carolina is another state that uses an irrational graduation rate definition, a fact that the Education Trust identified in our analysis of the first round of state reported graduation rates. That analysis of 2001-02 graduation rate data found that the North Carolina calculation was based not on the percentage of students who entered in the 9th grade and received a diploma four years later, but on the percentage of graduates who got their diplomas in four years or less. In other words, students who dropped out of high school were excluded from North Carolina’s calculations altogether. Theoretically, if only 50 percent of students who entered high school in the state eventually obtained a diploma, but every one of those 50 percent did so in four years or less, North Carolina would report a “graduation rate” of 100 percent. This definition resulted in a 92 percent “graduation rate” for 2001-02. North Carolina stuck with this calculation for 2002-03, reporting an even higher graduation rate of 97 percent and arguing that the calculation is consistent with the wording provided in the actual NCLB legislation—“the percentage of students who graduate from secondary school with a regular diploma in the standard number of years.” This is an unreasonable reading of the statute and should have been addressed by the U.S. Department of Education. Legalistic maneuvering aside, no administrator, policymaker, or educator could, in good faith, report the kind of data North Carolina provided as an actual graduation rate, much less hold schools accountable only for ensuring that those students who do graduate do so in four years.*³⁹

Using an alternative method called the Cumulative Promotion Index (CPI) to estimate the actual rate, Hall’s report for the graduation class of 2002-2003 compared what states claimed against the CPI rate. North Carolina *led the nation* in the gap between the two rates at 33%, and in the major ethnic subgroups, underscoring the severity of misleading reporting from our state’s educational administration:

Category	NC-Reported Rate 2002-2003	CPI Rate 2000-2001	Difference In percentage points
Overall	97%	64%	33%
African-American	95%	54%	41%
Hispanic	94%	58%	35%
Native-American	96%	34%	62%

Table 6: NC Graduation Rates for 2002-2003 Reported by NCDPI and Computed using the CPI

Only after the federal government’s new AYP (Adequate Yearly Progress) reporting guidelines - part of the NCLB (No Child Left Behind) Act - specified the use of a ‘cohort’ rate, which reports the percentage of freshman who receive a diploma in four years and accounts for transfers into and out of the school, has

it been possible to determine how many students complete high school as expected. Cohort rates for the school years ending in 2006 and 2007 for all students in Wake County are shown in Table 7 below⁴⁰.

Subgroup	2005-2006	2006-2007	Change
All Students	82.6%	79.3%	- 3.3%
Male	78.9%	74.4%	- 4.5%
Female	86.2%	84.0%	- 2.2%
Native-American	90.5%	69.0%	- 21.5%
Asian	91.7%	86.9%	- 4.8%
African-American	69.9%	65.3%	- 4.6%
Hispanic	57.7%	55.3%	- 2.4%
Multi-Racial	82.3%	73.2%	- 9.1%
White	89.6%	88.2%	- 1.4%
F&R	59.7%	63.3%	+ 3.6%
Limited English Proficiency	51.5%	44.6%	- 6.9%
Students with Disabilities	62.8%	57.4%	- 5.4%

Table 7: Wake County Cohort Graduation Rates for 2005-2006 and 2006-2007

These figures are more in line with the CPI rates shown in Table 6; although a 55% improvement for Native-Americans graduating in 2006 seems a remarkable improvement in just three years.

A recent article in the Raleigh News & Observer reports on the latest dropout statistics:

*More North Carolina students dropped out of public schools last year than any time since 1999-2000, according to a report released this morning. / That is the biggest number in seven years and a 4 percent increase in the dropout rate from 2005-06. It also represents the highest dropout rate since 2001-02. / The dropout rate went up in Chatham, Johnston and Wake counties.*⁴²

The dramatic decline in cohort rates for the 2007 graduation class shown in Table 7 deserves an explanation from the WCPSS. All student subgroups in the report for the most recent year saw a reduction in rates, *except for F&R students*. Since WCPSS has reported that 28% - over one fourth - of all students in 2005-2006 were categorized at F&R, it is impossible to comprehend how this one subgroup could have seen an increase in graduation rate for 2006-2007, when all other subgroups saw a decrease in rates, although all F&R students are to be found in the other groups. The improvement in graduation rates for F&R students shown in Table 5 above is thus counterintuitive.

(One reason for the decline in graduation rates across all subgroups might be the negative overall impact that frequent reassignments and long bus rides for many children is having on education in Wake County.)

While cohort rates for years prior to 2006 are not currently available from the DPI or WCPSS, there is evidence that these rates have been computed in the past. For instance, the Schott Foundation for Public Education provides a “Report Card” for the education of African-American males in reference 41, reporting the following rates for Wake County’s 2003-2004 graduating class:

African-American Males: 55%
White Males: 79%

Since this document cites "State graduation data" as the source for these figures, it appears that the DPI has been tracking a cohort-like rate for some years.

In summarizing the comments above regarding graduation rates, very little reliable data is available from the DPI or from WCPSS for graduating classes prior to 2006, however the cohort rates required by the NCLB Act will, in future years, provide a better means to gauge progress. The fact that Wake County has just reported the highest dropout rate since 2000 - ironically the year when socioeconomic assignment policies were put in place - leads one to conclude that the goal of improving education for F&R children through osmosis has not been obtained. A 16 year-old dropout in 2007 was 8 years old in 2000, the year that the current assignment policies began. Since, as a group, F&R children are the most likely to quit school, had WCPSS' assignment policy since 2000 been effective, one would have expected lower dropout rates by now, when in fact no progress appears to have been made at all.

More disturbingly, state and county officials have been aware of low graduation rates for many years, but chose instead to report rates that painted an overly optimistic picture. Quoting from the *Indianapolis Star* on the same issue, Darian Hall concludes in reference 39:

"Education officials...have known for years that the graduation rates they report to the public are grossly inflated. Their failure to speak out about low and declining graduation rates has masked the extent of the dropout epidemic and kept the public in the dark. / The first step is to tell the truth."

Each of the three methods used above to assess the impact of socioeconomic assignments on F&R and non-F&R student performance has resulted in a mixed conclusion at best. However they are all superior to the globalizations made in the WEP's Balance report. A better approach would be to track a significantly large set of individual children as they are bussed from low-income to more affluent neighborhood schools, and vice-versa. Both the children being bussed and those who attend schools in their neighborhoods should be studied for the potential positive and negative effects of bussing. But is further analysis really necessary? The Charlotte-Mecklenburg School system, which abolished socioeconomic assignments in 2001, appears to be making at least as good progress as WCPSS, a school system that still clings to its unproven and unpopular policies.

Substantial evidence has been shown above to cast doubt into the existence of a clear benefit from socioeconomic assignments which, surprisingly, was recently confirmed by WCPSS officials⁴³:

Don't expect Wake County school leaders to prove that their policy of trying to strike a districtwide balance on the number of low-income students at each school helps those children academically. They just can't. Wake school leaders know and can show that having too many poor students drags down an individual school's test scores. But they haven't done the comprehensive research to prove that moving these economically disadvantaged students, sometimes to schools more than a dozen miles from home, improves their test scores. Despite this lack of proof, school leaders insist their nationally acclaimed policy of reassigning students to spread diversity helps keep schools strong -- a stance seized on by some critics in academia and angry parents. "The policy is meant to promote healthy schools, and the evidence is compelling that it's succeeding," said Chuck Dulaney, assistant superintendent for growth and planning. "We don't have low-performing schools."

The remaining information included in the WEP Balance report repeats these same unfounded assertions and frequent self-serving platitudes, citing a handful of references and generalizations that repeatedly fail to provide an accurate cause-and-effect justification for continued socioeconomic assignments. A discussion of the history of graduation rates in Wake County is noticeably missing from the WEP report. Repeated references are made to superior performance of Wake County schools without commenting on the comparative demographics, income and employment stability, presence of major colleges and universities as well as the state's Legislature, all factors that impact positively on the county's economy, community cohesiveness, level of parents' education, and the strength of families and thus the performance of school children. Superior performance of Wake public school children relative to those in other counties is not necessarily a consequence of the education they receive, but a result of the home and community environment in which they are raised. The fact that, in 2008, Wake County has the largest population of children *not* attending traditional public schools in the state - at 17% - is evidence of widespread rejection of Mr. Dulaney's contention that there are no low-performing schools in Wake County's system.

Conclusions and Recommendations

The following conclusions are drawn from the WEP Balance report and this rebuttal:

- In general, the report contains numerous claims that do not appear to be supported by the body of evidence. It also paints a misleading picture of the widespread dissatisfaction that exists today amongst parents and taxpayers in Wake County over the educational policy-making process, the cost of schools, the quality of education and the lack of choice in assignments. The fact that today one out of every six (17%) school-aged children attends a non-traditional school in Wake County, a much higher percentage than the national average (10%), is evidence of this dissatisfaction.
- Information regarding the benefits to attending neighborhood schools of 200-400 students in small school districts has been described; in particular children from minorities and low-income families gain the most.
- North Carolina's public school academic standards have been shown to be among the lowest in the nation.
- Data obtained shows an inexplicable and increasing gap between the percentage of children living in poverty and those receiving F&R meals, contrary to the general decline in child poverty in recent years in Wake County. As the percentage of school-aged children living in poverty has dropped, the percentage receiving free and reduced-price meals has surprisingly increased.
- No clear, consistent evidence of the benefits to F&R students obtained through socioeconomic assignments in Wake County, or in other school systems referenced in the WEP Balance report, has been shown.

- Information has been obtained that shows reductions in academic performance as a result of increased F&R populations for non-F&R students in Wake County, contrary to the claims in the WEP Balance report.
- F&R students attending CMS schools appear to have benefited from the abolishment of socioeconomic assignments in 2001 and perform today at least as well as their counterparts in WCPSS schools, despite having a significantly higher percentage of F&R students.
- No significant progress is being made in Wake County with regards to high school graduation rates, especially for children from minorities and low-income families. Data in the most recent cohort rates reported in Wake County include an inexplicable rise in the rate for F&R students while all other subgroups fell, some in excess of 5% in just one year. State and county educational systems have in past years led the nation in reporting misleadingly high graduation rates.

Per pupil expenditures in Wake County public schools is today \$9,462 from the following sources:

- State: \$4,886.91
- Federal: \$499.62
- Local: \$2,405.15
- Capital expenditures: \$1,669.89
- Total: \$9,461.57

By comparison, the average annual tuition for private and parochial K-8 schools in the state of North Carolina is less than \$6,000.00. Charter school attendees pay no tuition, the non-capital portion of public educational funds for these children being transferred to their school. The academic performance and graduation rate of children attending these non-traditional schools are generally superior to that of students in Wake public schools. Considering the overall grade of ‘F’ that our state has received for its current proficiency standards,^{16, 17} one must conclude that the value of the public education received in Wake County remains quite low compared to free-market alternatives.

While a more detailed description of recommendations may be found in the author’s forthcoming book on public education in North Carolina, in brief: the key to providing world-class education for American children may be found in the strength of our free market system.

For a proper understanding of the concepts of market-based school choice, the reader is advised to read the works of the late economist Milton Friedman, for instance *Capitalism and Freedom*, and *Free to Choose*, the latter written together with his wife, Rose Friedman. These and countless other works call for the concept of school funding “following the child”, permitting parents to choose the school they feel is appropriate for their child’s unique needs and interests. Vouchers, tuition tax credits, charter schools, home schools, open enrollment and other related programs provide for such choice. They all allow the “... invisible hand of free markets ...”, described in the 18th century by Scottish economist Adam Smith, to naturally and efficiently supply the demand for education, just as it has for centuries addressed all other needs of humanity, especially in the United States.

We know that choice works well in higher education, as evidenced by the great number and diversity of privately-funded colleges and universities found in the United States, especially in North Carolina. The G.I.Bill, that enabled the author’s father, a Korean War veteran, to obtain a degree in engineering, is an excellent example of a voucher system that has been used with great success in our nation since WWII.

The author also benefited from a similar system while working in Germany in the 1990s. His children were permitted to attend any German public school of their parents' choice, resulting in highly-competitive situations between high schools (Gymnasium) in his rural community outside Frankfurt.

Reference has been made in this rebuttal to several non-traditional schools in Wake County, in particular the Franklin Academy Charter School, the St. Thomas More Academy College Preparatory School, and the Thales Academy private school. All are the works of Raleigh businessman and philanthropist Robert Luddy. The first two schools have existed in north Raleigh and Wake Forest for some years, and have garnered national praise for academic excellence.

Since the North Carolina Legislature has limited the number of Charter schools to the arbitrary number of 100, and none are currently available, the Thales Academy must operate as a private school. It is though, in most respects, equivalent to the nationally-recognized Franklin Academy charter school. Thales Academy was founded in 2007 with a first campus located in North Raleigh. A second campus will open in Wake Forest, NC in the summer of 2008, and a third campus will open in Apex, NC, in the fall of 2008. The author is leading this last effort, serving as the Chairman of the local Board of Trustees for the Thales Academy of Apex. (Neither he, nor his fellow Trustees, receives remuneration for this effort.)

The Thales Academy 'model' enables any community, given sufficient local interest and support, to establish affordable, world-class schools. It consists of a number of important concepts, all proven in over 10 years of success at Thales' sister schools, the Franklin and St. Thomas More Academies:

- Community schools, by, and for the children and educators living in that community.
- Stability - no reassignments, ever.
- Schools are 501(c) 3 not-for-profits and owned by the communities in which they reside.
- The school focuses on character and academics excellence.
- Competitive athletics plays a minor role, since many options for sports are available today to families through community organizations.
- Schools are kept small, from 200-400 students, with maximum class size of 25.
- A common building design is used to keep construction costs at a minimum.
- When possible, multiple-level buildings are used to reduce land requirements.
- Direct Instruction teaching methods are employed.
- Teachers are paid competitive salaries based on their individual performance; no tenureship.
- No transportation and no cafeteria are provided, these being parental responsibilities. Multiple, small schools allow more children to walk or bike to school.
- Tuition is affordable, currently at \$5,000/year, with discounts for siblings.
- A scholarship fund supported by the school's community helps defray tuition costs for the needy.
- Communities help fund the initial construction; tuition covers all operational costs.
- A local Board of Trustees, consisting of leading community leaders and parents, supports the needs of the school, as determined by the Headmistress/Headmaster.
- Children and Teachers are expected to abide by a dress code.
- Internationally-recognized testing standards, such as the ITBS, are used to assess performance.
- All schools are essentially self-contained, with little support required from a central administration.

For more information on the Thales Academy or the others mentioned here, contact the author or refer to their respective web sites: www.thalesacademy.org, www.franklinacademy.org, www.stmacademy.org

A rising tide raises all ships: The author has learned through over three decades in private business that competition leads to the necessity for constant improvement in order to satisfy the needs of the customer. Remove competition - as is essentially the case in North Carolina today with the compulsory payment of taxes for public education and the lack of choice in school assignments - and mediocrity is the result. Low test standards, declining graduation rates and the poor national and international ranking of our schools is proof of this. Allow parents to choose which school their children may attend, and permit the power of free markets to supply this demand, and our state will experience a revolution in the quality and value K-12 education. Educators, too, would benefit through a wider variety of employment opportunities. Just as AT&T emerged as a global leader in telecommunications as a result of *losing* its monopoly on telephone service in past decades, so too could WCPSS schools see real improvement by adopting these recommendations. Embracing community schools and allowing more choices are the first critical steps.

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