

Equity Committee Report



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Background

Last summer the 509J Leadership Team, which includes principals and central office administrators, raised questions and concerns about equity issues related to open enrollment policies and practices in the district. Superintendent Jim Ford asked the School Board to review these policies and practices, and the Board subsequently appointed a committee of board members, parents and staff to undertake this task.

Equity Committee Charge

Based on the underlying belief that we need to give all students the best possible educational experience, the Board asked the committee to explore the following questions related to 509J enrollment policies and practices:

- How do current policies and practices benefit students? What's working well? Do current policies/practices harm students? Would changes fix this? What changes?
- How are other districts handling these issues?
- What will our community support?
- What current and future trends both locally and nationally could inform our thinking on this?

The Board also requested that the committee consider the following areas in its discussions and recommendations:

- Enrollment policy and practices, including transfer policy, enrollment caps, and transportation issues.
- Boundary revisions made as a result of consolidations and closures.

The board asked the committee to submit its recommendations to the Superintendent.

Summary of Recommendations

After four months of study and discussion, the Equity Committee recommended that the district:

1. Provide centrally produced, objective information to all parents about open enrollment options in the district.
2. Set realistic building capacities that take into consideration special programs at each school and that save spaces for students moving into the neighborhood. Then enforce the capacities when considering transfer requests.
3. Narrow the window for open enrollment to reduce the negative impact on school budgets and staffing. Administrative staff should determine the actual dates. This change should take into account the needs of families, different school levels, and special programs in the district.
4. Work with Crescent Valley High School to provide transportation to the Boys & Girls Club before and after school, and at 5:30 pm to accommodate after-school activities. The lack of public transit to Crescent Valley High School creates a unique inequity for that school, and the committee recommends that the district work with CVHS to address this.
5. Continue to encourage and find new ways to support diversity among school programs, while at the same time ensuring a comprehensive program at every school.
6. Trigger a review of internal and external factors that may be contributing to the declining enrollment at individual schools when their enrollment drops a minimum level over a specific time period.
7. Pursue an in-depth boundary change process in fall 2004 which would take into consideration the long-range facilities plan, placement of special programs, and another possible school closure. These boundary changes should address current imbalances in the number of students living in school boundary areas, and, when possible, move toward balancing socio-economic populations. The committee is forwarding several scenarios for consideration as part of the fall 2004 process.

Committee Process

The committee convened in November 2003 with study and discussion of articles on national trends and practices regarding school choice/open enrollment. The group also reviewed district data on transfers; enrollment; free and reduced lunch; socio-economic status by school; state test scores by school; and teachers salary averages by school. In addition, staff polled other districts to find out more about their policies and practices related to open enrollment. (See Attachment A in appendix.)

The committee developed a working definition of “equity” and agreed to criteria that would be used to evaluate potential recommendations. They analyzed the strengths and weaknesses of current open enrollment policies and then brainstormed possible recommendations to address areas of concern.

During this process, it became clear that the group needed to step back and develop a problem statement. With the diverse viewpoints represented by the group, it was a challenge to create a problem statement that the whole group could support. In the end, the group agreed to a statement that includes a minority report. This minority report expresses the perspective of two committee members—both district staff—who held strong dissenting viewpoints.

After creating the problem statement, the committee then returned to its analysis of the open enrollment policy. After considering pros and cons and unintended consequences, each potential recommendation was reviewed in light of the criteria. At the end of the process, the committee approved six recommendations related to open enrollment policies and practices to forward to the superintendent.

To address the boundary questions, the group formed a sub-committee to review data related to boundary changes and make recommendations back to the larger group. The sub-group gathered and reviewed data on the numbers and socio-economic status of students in each school boundary area, developed criteria for boundary changes and developed preliminary recommendations for the consideration of the larger committee.

Community and Staff Input

The committee invited written input from staff and community members. In two instances, they solicited feedback from the district’s Leadership Team as they deliberated the merit of specific potential recommendations. The committee received approximately 30 emails and letters from staff and community members.

Definition of Equity

The committee agreed to use the following as a working definition of equity in the context of our discussions:

All students have access to a rigorous education with high standards, and are held to and supported to achieve a demanding, high standard of learning.

Problem Statement: Open Enrollment Policies and Practices

School choice is a national trend. It takes different forms in other communities and states—charter schools, schools without boundaries like Franklin, magnet programs like the dual-language program at Garfield, and even inter-district options. In our community, school choice takes the form of open enrollment among district schools.

School choice meets a variety of school and family needs. It allows families to find the best fit in terms of academics, values and lifestyle. Free choice and self-determination are highly valued in American culture and in Corvallis. The opportunity for open enrollment has remained popular with a significant number of families and appears to enhance satisfaction with district services. Satisfaction is important because we believe public education supports democratic ideals and the goal of a commonly educated citizenry. Satisfaction also affects enrollment and taxpayer support, both of which impact the district's financial resources.

However, some in the Corvallis School District believe school choice has created inequities between schools and thus unequal educational opportunities for students. National research points to a number of possible reasons for this, including factors related to the availability of transportation and information. As in other communities across the country, all families in Corvallis currently do not have equal access to information and transportation, which impairs their ability to take advantage of the open enrollment option.

In addition, data indicate that some Corvallis schools have become increasingly stratified in terms of socio-economics over the past ten years. This stratification appears to be caused by multiple factors--increasing poverty in our community, declining enrollment, magnet programs, school closures and consolidations and open enrollment.

Another area of concern not related to socio-economic stratification is declining enrollment at a few schools. Factors contributing to this include open enrollment, a declining school-age population in the school boundary area and parent dissatisfaction about various aspects of a school.

The crux of the issue is determining if students at schools with socio-economic stratification and/or declining enrollment are negatively impacted by these trends.

Any school losing more students than it attracts suffers a loss of funding, which can—and in some schools does—have an adverse impact on the educational program. When school budgets have been cut year after year, every dollar is critical, and any further loss of funding is particularly difficult. While all of our schools have strong staffs and good programs, educational offerings suffer when enrollment declines and dollars are lost. Compounding this problem, schools can feel this puts them in the position of competing for students, which can draw time and financial resources away from their educational mission.

Our schools with larger low socio-economic populations face additional challenges. Students tend to come to school lacking the background experiences of middle class students, creating a different and more difficult teaching challenge than at higher socio-economic status (SES) schools. None-the-less, the quality of instruction at such Corvallis schools is held to the same high standard as other schools in the district. Corvallis places highly skilled teachers in all schools, regardless of their demographics. Additional resources are channeled to these schools through Title I, the district funding formula and, in some cases, other federal and state compensatory grants. These resources provide additional support to meet the unique needs of students and families in our lower SES schools.

In conclusion, the committee believes that the issue of open enrollment and its possible negative impact on equity has surfaced at this time largely because of the significant reduction in state funding over the last decade. Each year, schools have to get by on less and anything that might exacerbate this site funding issue is perceived as a problem.

Declining enrollment has had a negative impact on some Corvallis schools because a loss of students has resulted in additional loss of money. Open enrollment is a contributing factor to this decline at some schools. At several schools, it has contributed to an increase in socio-economic stratification, at both ends of the spectrum. Some families may choose to congregate at schools perceived to offer certain advantages. Some families lack the resources—specifically transportation and information—to choose and attend schools outside their zoned neighborhoods. In effect, they do not have the same access to open enrollment that other families are afforded.

Since open enrollment is valued by many families in Corvallis, the district should not abandon it. To do so, would cause significant dissatisfaction. The challenge, then, is finding a way within the context of open enrollment to diminish barriers that currently stand in the way of equal access and to reduce as much as possible the negative impact of declining enrollment. At the same time, individual schools with declining enrollment will need to look at what internal and external factors are causing parents to opt for other schools.

Minority Report: *Two committee members, both 509J staff members, wished to express a different viewpoint regarding the last paragraph of the committee's*

problem statement. They wanted to replace the last paragraph with the following, and the committee agreed to include this to document the differing perspective.

“While open enrollment is valued by many families in Corvallis, the district should consider curtailing the process until funding levels allow for an increased level of transportation. Families who lack the ability to transport their children to the school of their choice are disadvantaged within the current system. It also is clear that increased levels of transportation are not fiscally responsible at a time when cuts to basic services are a reality. It would be prudent for the district to limit or eliminate any program / policy that may cause inequities of access. Constraints to open enrollment also would help alleviate the problems associated with declining enrollment at certain schools and would lessen the need for schools to ‘market’ against each other.”

Current and Future Trends

After reviewing literature on open enrollment practices across the country, and discussing the particular characteristics of our community, the committee identified the following national and local trends:

National Trends:

1. School choice is a national trend, although it takes different forms in other districts and states. These different forms include charter schools, district-wide schools of choice (like Franklin), and transfers between districts.
2. None of the available research definitively proves that school choice is beneficial to students, although increased parent satisfaction may have an indirect benefit.
3. Providing information to all parents about school choice options is a concern in many districts and states.
4. Lack of transportation to schools of choice creates access inequities in many other districts and states.

Local Trends:

1. Our community has well-educated, extremely concerned parents who care about the quality of public schools and have the means and knowledge to home school their children and/or enroll them in private schools.
2. Generally, parents in Corvallis are very committed to public schools.
3. Less funding is available for public education in our community than in the past.
4. Shrinking state funding has contributed to growing class sizes.
5. In our community we have a growing number of students living in poverty.
6. Parents are more concerned than ever about their children “falling through the cracks.”
7. Parents seem to feel a greater need to advocate for their children.
8. Parents seem more concerned about getting their child into the right college.

Recommendations and Rationale: Open Enrollment Policies and Practices

Criteria for Open Enrollment Recommendations

The committee agreed to the following criteria for making recommendations related to open enrollment policies and practices. Recommendations should:

1. Help assure that every student has equal access to a rigorous, high standard of learning and quality public schools.
2. Support the goals of the district plan:
 - Learning for all
 - Collaborative, creative culture
 - Aligned systems
3. Be supported by the community
4. Be cost effective (save, cost neutral, or has minimal cost impact)

Recommendations and Rationale

- 1. Provide centrally produced, objective information to all parents about open enrollment options in the district.**

Rationale:

- National research indicates that lack of consistent information for all parents about open enrollment options creates inequities in access for districts across the country.
 - Parents hold many inaccurate assumptions about Corvallis schools. One Lincoln parent told a committee member that she thought Franklin was a private school. Another person thought Cheldelin was “the TAG school.” Accurate, objective information would help reduce misinformation about district schools.
 - Providing information centrally reduces the need for individual schools to spend precious time and resources on marketing.
 - Parents need equal access to information about transportation options for transfer students. Currently, a transfer student may ride a bus already going to the transfer school if there is room on the bus, the additional stop is already on the bus route, and the additional stop does not negatively impact getting students to school on time.
- 2. Set realistic building capacities that take into consideration special programs at each school and that save spaces for students moving into the neighborhood. Then enforce the capacities when considering transfer requests.**

Rationale:

- Because of pressure from parents to accept transfers and the fact that the enrollment of more students brings additional money to individual schools, principals typically accept as many students as possible to their buildings as long it does not create unmanageable class sizes at a particular grade level. This has contributed to enrollment imbalances in several schools in the district.
 - The problem is compounded when additional students move into the school boundary area after transfers have been accepted and the school is already full.
 - School capacities must take into account special programs at schools (like Lincoln and Garfield) that are an essential part of meeting the learning needs of the students in the building.
- 3. Narrow the window for open enrollment to reduce the negative impact on school budgets and staffing. Administrative staff should determine the actual dates. This change should take into account the needs of families, different school levels (elementary, middle and high school), and special programs in the district. Some flexibility should be maintained for families that move into the district after the open enrollment window and for schools like Franklin where the viability of the program is dependent on transfer students.**

Rationale:

- The current open enrollment period begins after winter break and ends the first Friday in August. Any transfer request submitted during that time must be honored, unless it would increase class size at a particular level beyond numbers stated in the transfer administrative rules. Since school budgets and staffing are determined in the spring, transfers after that time can have a negative impact on school programs.
 - In some cases, if enrollment drops, schools may not be able to offer programs and classes promised to parents and students in the spring.
 - Last minute adjustments in budget and staffing can create an unnecessary additional burden for staff in late August and early September. At the secondary level, staff may have to revamp the entire school schedule.
- 4. Work with Crescent Valley High School to provide transportation to the Boys & Girls Club before and after school and at 5:30 pm to accommodate after-school activities.**

Rationale:

- The lack of public transit to Crescent Valley High School creates a unique inequity for that school because students at CVHS do not have access to public transportation.
- On numerous occasions over the years the district has attempted unsuccessfully to work with Corvallis Transit to address this.
- The cost would be minimal.

5. Continue to encourage and find new ways to support voluntary diversity among school programs, while at the same time ensuring a comprehensive program at every school.

Rationale:

- Diversification of school programs creates more educational choices to meet the learning needs of students.
- Diversification also could help to balance socio-economic status in some schools (like Garfield, where the dual language program is attracting more middle class families).
- Diversification of school programs must be voluntary because these programs are most effective when they evolve from within the school. Such programs can raise morale and cause staff to take more ownership in the school program. If imposed, these programs can be perceived by some staff as “one more thing to do” at a time of high stress.
- It is important that a school’s unique focus not be allowed to erode the basic comprehensive programs that should be available to all students.

6. Trigger a review of internal and external factors that may be contributing to the declining enrollment at individual schools when their enrollment drops a minimum level over a specific time period.

Rationale:

- A review might uncover information that would allow the school and/or district to address declining enrollment issues at a building before it had a negative impact on the educational programs.
- This type of review would provide continuous district-wide monitoring for early detection of any broad trends that might need to be addressed in a district-wide process.

Additional Concerns Not Included in the Recommendations

Transportation: The committee felt strongly that the lack of transportation options created access inequities for families that couldn’t afford, or were not able for other reasons, to provide their own transportation to schools outside their

boundary area. After much discussion, the committee came to the conclusion that at this time it would be too costly to increase options beyond what is already in the policy. (See Attachment B in Appendix for options explored by the committee and estimated costs.)

Funding: While not part of the charge, the committee wished to express concern about the impact of open enrollment on school funding. Some committee members questioned the basic funding formula that dollars should follow students to individual schools. Because this was out of the scope of the charge, the committee did not pursue the matter. Still, because schools receive money on a per student basis, students shifting between schools can create instability in budgets and staffing. The district might consider widening the 1.5% funding cushion to reduce the impact of late spring/summer open enrollment shifts on school budgets/programs in September.

Other Items Discussed by the Equity Committee

Several items surfaced in committee discussions that were considered to be out of the scope of the committee's charge, or were administrative decisions/work. These items were taken up by district staff without further action from the committee.

- Moving the Developmentally Disabled (DD) Program out of Garfield and/or housing the new DD class for next year at a different building.
- Bringing Franklin's socio-economic status in the range of other district schools, as stated in district policy for schools of choice.
- Centralizing kindergarten enrollment process.

Recommendation and Rationale: Boundary Changes

Boundary Recommendation

The committee recommends that the district pursue an in-depth boundary change process in fall 2004 that would take into consideration the long-range facilities plan, placement of special programs, and another possible school closure. These boundary changes should address current imbalances in the number of students living in school boundary areas, and, when possible, move toward balancing socio-economic populations. The committee is forwarding several scenarios for consideration as part of the fall 2004 process. The committee recommends that the fall boundary change discussion be a high priority for the district and that the process commences by October 15 and decisions be completed by the end of January 2005.

Rationale:

- At this time, boundary decisions need to be strategic, not just a matter of moving students from one boundary area to another. These boundary changes need to be considered in context of other factors:
 - Long-range facilities plan
 - Placement of special programs
 - Garfield magnet program
 - Another possible school closure
- Because of the complexity of these decisions, the boundary changes will require careful study and ample time for input.
- Completing decisions by the end of January 2005 will allow ample time for implementation for the 2005-06 school year.

Additional Concerns about Boundary Changes:

- The committee wishes to emphasize the importance of considering the elementary Developmentally Delayed (DD) Program move (currently under consideration by district staff) in the context of boundary changes. This program needs a long-term placement that will not be effected by upcoming boundary changes.
- A concern also was expressed about “special program overload” if we move the high school DD program to CHS, which also houses the English as a Second Language (ESL) Magnet Program. Moving the DD Program also would have a negative impact on the enrollment at Crescent Valley High School.

Criteria for Boundary Decisions

The committee agreed to criteria for recommended boundary changes. These should:

1. Cause least disruption, trying to protect kids who moved most recently due to school closures and consolidations.
2. Enable that students attend school within a reasonable distance of home.
3. Take into consideration socio-economic balance – at least don't make it worse.
4. Provide a natural progression through all levels (elementary, middle school, and high school).
5. Consider safety issues related to streets with high traffic. Look for natural neighborhood boundaries.

Boundary Problem Areas for Elementary Schools

Under-enrolled schools:

- Jefferson: 218 students live in the boundary area (69 are on transfers to other schools).
- Wilson: 346 students live in the boundary area (151 are on transfers to other schools).
- Inavale: 57 students live in the boundary area (15 are on transfers to other schools).

Crowded Schools:

- Garfield: 428 currently enrolled
- Adams: 445 currently enrolled
- Mountain View: 424 currently enrolled

Possibilities for moving students:

Current School	Number of Students	Area / Program	Possible New School
Garfield	28 (Could move one or more classes. Expect to have another class next year with 10-15 additional students entering program.)	DD Program	Jefferson or Wilson
Garfield	23	Old Harding Boundary	Jefferson
Garfield	19	Peoria Road	Jefferson
Mt. View	21	Jack London	Wilson or Garfield *
Mt. View	7	Conifer	Wilson or Garfield *
Mt. View	1	Lancaster	Wilson or Garfield*
Adams	?	Oak Creek	Jefferson?

*If moved to Garfield, then we would propose moving a group of students from the downtown Garfield boundary area to Jefferson.

Boundary Problem Areas for Middle Schools

Current Enrollment:

Cheldelin 752

Westland 565

Number of students living in boundary areas:

Cheldelin 801

Westland 755

- Students living close to the new middle school between Circle and Walnut currently are in the Cheldelin boundary area.
- K-8 programs at Inavale and Franklin Schools are geographically located in the Westland (new middle school) boundary and therefore tend to draw more students from that boundary.

Possible Middle School Boundary Change

Move boundary from Circle to Walnut

Pros:

- Would move 113 students to new middle school boundary area, which would better balance number of students living in boundary areas
- Good socio-economic status mix in this area

Cons:

- Could have possible negative impact on CVHS enrollment, which has been declining in recent years:
 - Number of students living in high school boundary areas:
CVHS 1330
CHS 1078
 - Current high school enrollment
CVHS 1106
CHS 1375

Next Steps

The committee suggests that staff develop realistic work plans for how specific tasks related to the recommendations will be completed. In addition, the committee requests that in January 2005 the district reviews progress on the recommendations and provides an update for committee members.

Appendix

1. Attachment A: Information on Open Enrollment from Other Districts
2. Attachment B: Transportation for Open Enrollment

Appendix A

Information on Open Enrollment from Other Districts

November 2003

District	Open enrollment policy?	Window for Applying	Hold openings for boundary area kids who move in after open enrollment period?	How do you set caps?	Provide transportation?	Other comments
Beaverton	Currently reviewing administrative rules. With high growth, all of our schools are full.	3 rd Thurs. in Jan. to first Mon. in March	Try to anticipate the number of kids that will be at each school. Look at it school by school.	Look at demographic trends; include special considerations like special programs.	No, unless there is space available on current bus.	
Albany	Try to accommodate parent requests as much as possible. Principals are given lists and they approve up to their capacity.	Jan. 1- March 15	Yes, save spaces. Principals know best, so it is left to their discretion.	Currently reviewing this. Last year it was 25 students per classroom. Don't allow for extra rooms.	No, although if they can get to bus, if there is space, they are welcome to ride it.	
Lake Oswego	Accept transfer requests as long as don't have to add teachers and it doesn't create complications with IEP services.	Any time		Accept students as long as we don't have to add teachers.	No	Not a big issue in Lake Oswego. Not that many transfer requests.

District	Open enrollment policy?	Window for Applying	Hold openings for boundary area kids who move in after open enrollment period?	How do you set caps?	Provide transportation?	Other comments
Salem-Keizer	Needs to meet these criteria: Education program more suitable; unique and special program (like ROTC); medical or physical condition.	At semesters. Try to cut off in spring, but don't follow this consistently.			No	Used to have more open policy. Previously had 4000 transfers. Now down to 2000.
Eugene	Can apply for up to 3 schools	1 st day of school in Jan. to 1 st Friday in March		Done by each school, although "choice schools" have enrollment limits	Currently, no, except drop-off spots if room on the bus. Exploring possibility of providing transportation for free & reduced lunch students.	Two weeks are designated in January and February for parents to visit schools. Currently a committee is working on standardizing the transfer process— dates and processes are different for different schools.

Appendix B

Transportation for Open Enrollment

The following is the text of an email sent to the Equity Committee discussing transportation options and costs related to the open enrollment policy.

Dear Equity Committee Members,

Last week I met with Jeanne Holmes, Kim Patten, and Brian Maxwell to discuss transportation options related to the open enrollment policy. Jeanne and Kim briefed me on discussions that have taken place thus far in your group, and we tried costing out some of the options that came up as suggestions in your last meeting. I wanted to share this information with you in preparation for your next meeting.

Please understand that these are only estimates. Until we know exactly how many students would be involved, and where they live, we could not state an accurate figure. In some cases, we may have to add an additional bus, which could further increase the costs.

The Hub Option:

In this plan, students would be picked up at their home school and delivered from there to other schools in the district. Students could walk or ride their regular bus to their home school. My best estimate is that this could cost the district as much as \$180,000 a year for elementary school transportation. In addition, schools would have to pay for supervision of students before school, since, to make this plan work, some students would have to be delivered to school well before the official start time.

Transportation for middle and high school would be an additional \$3200. This is much less expensive since it is only between two sites. (The K-8 school costs are included in the elementary costs, since they would be on the elementary routes.)

The Cluster Schools Option:

In this plan, we would provide transportation between three schools at the elementary level. Logical clusters might be Adams, Inavale and Lincoln; Jefferson, Hoover and Wilson; and Garfield, Franklin and Mt. View. My best estimate is that this would cost about \$18,600 per cluster, for a total of about \$55,800.

Additional costs for the middle and high schools would be the same as in the Hub Option—about \$3200.

In addition to these two plans, we considered totally revamping our bus routes, making fewer pick-up and drop-off spots in neighborhoods, but dropping kids at more schools. Brian felt that elementary parents would not be happy with these changes. Parents like the bus stops to be as close to their homes as possible, especially for younger children.

We also discussed the possibility of just providing transportation from the largest low socio-economic areas. We didn't pursue an estimate on this, because we agreed that this could cause a drain specifically from our lower socio-economic schools, and has the potential to create other kinds of equity issues.

Yet another possibility is to have students ride the city transit system. I understand that currently about four middle school students ride to Franklin from South Corvallis. This isn't a great solution, but does provide an option for some. Unfortunately, not all schools are on the bus route, and the bus schedules don't necessarily jive with school schedules. Also, Brian stressed that city transit privileges can be suspended at any time, even mid-route, if there is inappropriate behavior.

One of the problems with providing transportation for open enrollment is that, if you offer it to some, you have to offer it to all. If we decided to do this, we would have to reorganize our bus routes, which would require notice to Laidlaw in early August about which students would need rides and from where to where. This would increase the already heavy work load for district staff, and as Brian described it, would be an "organizational nightmare" from his end.

Brian also shared that the Monmouth-Independence School District used to provide transportation for open enrollment anywhere in their district, but had to stop because of the high cost and complexity. I will have Kim call them to get more information about what happened.

I understand the dilemma about providing equal access for all families to open enrollment. However, at this time, I certainly do not have any extra money in my budget to pay for additional transportation. In fact, the superintendent has directed us to keep cuts away from schools for next year, so I most likely will be making additional cuts in my budget this spring.

I hope this information is helpful to you. As you can see, I have major concerns about the costs and inefficiencies of this proposal in these economic times.

Fred Wright
509J Auxiliary Service Director