

Executive Summary and District-Level Findings

Introduction

Montgomery County Public Schools (MCPS) is the nation's 17th largest school system, serving more than 156,000 students in 202 schools, including 37 National Blue Ribbon schools. MCPS is one of the most diverse school systems in the country with students from 157 different countries and native speakers of 138 languages. Six MCPS high schools ranked in the top 200 of the *Washington Post's* 2015 High School Challenge; and all 25 MCPS high schools have appeared on the list, which includes only the top 11% of all high schools in the nation. In 2010, MCPS was the recipient of the Malcolm Baldrige National Quality Award, the highest presidential honor given to American organizations for performance excellence.

MCPS has a long history of offering a variety of choice and other special academic programs designed to provide students with opportunities to receive specialized instruction in schools outside of their local attendance boundaries. These programs include full and partial language immersion programs at the elementary and middle school levels; elementary centers for highly gifted students; magnet and other application programs with selective admissions criteria at the middle and high school levels; and two high school regional consortia and one middle school consortium with lottery-based admission processes that offer a choice of thematic instructional options. In 2013–14, MCPS offered 43 choice and special academic programs in 36 schools that collectively served approximately 22,700 students, which accounted for about 14.5% of the district's student population. In addition, approximately 8,000 other students (5.2% of MCPS students) attended a school outside of the attendance boundary assigned based on their residence through a change of school assignment (COSA) or for other administrative reasons.

Montgomery County has a population of more than one million residents and is growing both in terms of population and diversity. District-level enrollment indicates that the system has experienced significant increases in the number and diversity of students over the past 20 years. Certain areas in the district including those in the southeastern portion of the county and along the Metro's Red Line have experienced higher growth than others. According to the student enrollment trend data provided by the MCPS Division of Long-range Planning, the enrollment of Black/African American, Hispanic/Latino, and low-income students has increased dramatically—by as much as 20 percentage points over the past decade—within schools that have been historically high-poverty schools. As a result, MCPS is currently facing increasing levels of concentration of students by socioeconomic and racial/ethnic groups at specific schools within the county.

In January 2015, the Montgomery County Board of Education (Board) awarded a contract to Metis Associates to conduct a comprehensive study of the wide variety of choice and other

special academic programs that MCPS offers. The study is designed to address four main objectives:

- understanding the unique history and current state of each of MCPS's choice and other special academic programs;
- identifying the original purposes of each of these programs and assessing whether they are fulfilling those purposes;
- assessing whether all students have equitable access to these programs, especially in light of the continuing growth of MCPS student enrollment and the changing demographics of the region, both countywide and at the neighborhood level; and
- ensuring that these programs, both individually and collectively, are well-positioned to effectively advance the mission; core purpose; core values, including equity; and core competencies set forth in the MCPS Strategic Planning Framework (SPF), *Building Our Future Together: Students, Staff, and Community*.

The research is being conducted in three phases. This report provides findings from Phase I, which included gathering and analyzing data and information on the unique history and current state of MCPS choice and other special academic programs, and Phase II, which included benchmarking innovative, high-quality programs in other districts and reviewing academic research on access to educational options outside students' home schools. Phase III, which will be conducted in March through May 2016 following the presentation of this report, will entail developing a collaborative action plan for MCPS choice and special academic programs with engagement and feedback from community stakeholders.

Study Methodology

The study of MCPS's choice and special academic programs utilized a mixed-methods approach to collect qualitative and quantitative data from multiple sources and stakeholder groups. The data collection and analyses methods included the following activities:

- **Documentation review** of historical newspapers, policies, reports, and other documentation on MCPS's choice and special academic programs.
- **Benchmarking and research** to gather best practices and effective strategies implemented in other school districts of comparable size and demographics to MCPS and key findings from academic research.
- **District and community input** through individual and small group interviews with 15 current and former Board members, 36 other current or former central office staff, 10 MCPS Parent Community Coordinators; and 32 community leaders and external stakeholders with extensive historical knowledge of MCPS choice and special academic programs.

- **Site visits** conducted at a sample of 20 of the 36 schools that offer choice or special academic programs to hold individual interviews with school leaders; focus groups with 125 teachers, 354 middle and high school students, and 303 parents; and class and school walkthroughs.
- **Online community surveys** conducted in English and Spanish during the period from September 28 through October 26, 2015, which yielded a total of 5,318 respondents, representing a robust response rate for a voluntary online survey. In addition, a total of 976 comments were received in an online comment box from May through December 2015.
- **Student data analyses.** A comprehensive analysis of student-level data was conducted to examine the following areas: **student applications** to choice and special academic programs; **student enrollment** in programs and districtwide; **consortium** enrollments and lottery results; **academic achievement** milestones (outcomes); and **change of school assignment** requests and approvals.
- **Expert panel review.** Researchers worked with MCPS to identify and convene a panel of experts in the fields of educational equity and choice, gifted education, language instruction, and magnet programs to review key findings and data that emanated from the research. Members of the expert panel reviewed a summary of materials from the study and convened in December 2015 to provide feedback and input on key issues for consideration and recommendations for the study. Feedback from the expert panel is integrated into the final report.

Summary of Findings and Recommendations

The data and results presented throughout the report on MCPS’s choice and special academic programs point to eight overarching findings for MCPS to consider in assessing alignment of these programs with the district’s SPF. Each finding is supported by one or more recommendations that will help MCPS better achieve equity of access and excellence through choice and special programs.

Key Finding 1: MCPS provides a wide variety of choice and special academic programs that have been developed at key junctures in MCPS’s history and layered upon each other to create a complex system of programs that are not fully aligned with the district’s core values, including equity. Over the past 40 years, MCPS has developed a variety of programs to support its voluntary integration efforts and meet unique academic needs of students—within the context of a geographically expansive and increasingly diverse school district that is currently growing rapidly and creating significant challenges in terms of school capacity and budgets. Magnet programs were first developed in the 1970s as part of the implementation of Board of

Education Policy ACD, *Quality Integrated Education*, to maintain diversity and avoid racial isolation.

The original magnets have evolved into three types of programs—language immersion programs at the elementary and middle school levels that tap into families’ interests in second language acquisition for their children, elementary centers for highly gifted students, and magnet and application programs at the middle and high school levels that are designed to suit the unique academic needs of highly gifted students, and regional consortia. Language immersion programs are lottery-based, while elementary centers, as well as the magnet and application programs at the middle and high school levels, are academically competitive programs with specific selection criteria.

The three regional consortia were developed between 1998 and 2005, in response to growing enrollments across the district and concerns about the potential impact of opening new schools on increasing racial isolation within schools. The Northeast Consortium (NEC) and Downcounty Consortium (DCC) at the high school level and the Middle School Magnet Consortium (MSMC) attract students through distinct thematic programs and utilize random lottery processes that take into consideration student preferences, socioeconomic status, and other demographic factors.

The varied group of programs, as currently configured, does not share a well-articulated mission that is aligned with the SPF. The lack of common language about the programs makes it difficult for some parents or community members to understand what programs are available and the possible—and differential—benefits of the programs for their child. In focus groups and interviews, MCPS parents, students, and staff agreed that special academic programs are valuable resources for the community in providing high quality and unique instructional programs for students. They added that the level of academic rigor offered in special programs is important to meeting the needs of students in the programs. However, they stated that all MCPS students should have the same access to rigorous instruction, regardless of whether they participate in choice and special academic programs. They added that all schools should provide effective and rigorous options, including differentiation and acceleration for all students. Lastly, they added that quality of education should not differ based on the geographic location of a student’s home across the district. These last sentiments were echoed by Interim Superintendent Larry Bowers in his presentation of the Fiscal Year 2017 budget recommendations, in which he stated, “We have created structural and systemic barriers that have prevented some of our students from full participation in an instructional program that meets their needs and pushes them to excel. We must address these barriers and the unintended consequences of the impact these program decisions have had on our achievement gap.”

- **Recommendation I:** Revise Policy ACD, *Quality Integrated Education*, to clarify a defined mission for choice and special academic programs with input from community and staff stakeholders to clearly outline the goals and purposes for the programs, as well as their

alignment with MCPS' core values and stakeholders' strong belief that MCPS should pursue equity on a broad level by raising expectations and opportunities for rigorous instruction across all schools.

Key Finding 2: Information and communications about MCPS's wide variety of choice and special academic programs are not filtering to all segments of the community equally, which is impacting equity of access to the programs. MCPS has developed and implemented a wide variety of communication tools to share information about the programs with parents and community members. These include printed materials that are mailed to MCPS households in seven languages; information on the district's website and PTA listservs and webpages; informational meetings at local schools in English and Spanish; program-level Open Houses; and outreach through school-based counselors, staff, and principals.

Despite these efforts, data on program applications and from focus groups indicate that information about these programs is not reaching some segments of the community, namely Hispanic/Latino, Black/African American, non-English-speaking, and low-income families as well as they are to other groups. Furthermore, in focus groups with staff and parents, some respondents indicated that the district's communications are confusing to understand and require parents to conduct independent research. They added that the district does not conduct enough outreach and recruitment within the community to engage with parents face-to-face and does not offer enough information in languages other than English. As a result, families who prefer or require these types of communications and outreach do not have equitable access to information as do other families.

- **Recommendation 2: Develop and implement new strategies for communicating, outreach, recruitment, and sharing information with underrepresented or hard-to-reach families within MCPS. These strategies should include, but not be limited to:**
 - Streamlined communications in easily-understood language;
 - Revision of existing communication tools for cultural validity;
 - Outreach to families at community events or locations;
 - More opportunities for one-on-one or in-person communications with and recruitment of families; and
 - Additional materials and events held in languages other than English.

Key Finding 3: There are significant racial and socioeconomic disparities in the enrollment and acceptance rates to academically selective programs, which suggest a need to revise the criteria and process used to select students for these programs to eliminate barriers to access for highly able students of all backgrounds. Data on applications and acceptances to elementary centers and secondary magnet and application programs show that Hispanic/Latino, Black/African American, Limited English Proficient (LEP), special education, and low-income students are less likely than White, Asian, and higher income students to be selected and enroll in these programs. As a result, Hispanic/Latino, Black/African American, LEP, special education,

and low-income students are underrepresented in academically selective programs when compared with districtwide enrollment data.

These data are found despite direct efforts by MCPS to increase representation of all groups in the elementary centers and the secondary magnet and application programs. The district utilizes multiple indicators in the selection process that include, in addition to cognitive assessments, teacher recommendations and other school-based input, report card grades, unique student profiles, demographic data such as eligibility for free and reduced-price meals (FARMS), and the lack of an intellectual peer group at the home school. Yet, the lack of diversity and underrepresentation of some student subgroups in these programs suggests that the process may rely too heavily on one or more indicators or may need to consider additional measures of student ability. These indicators may include broadening the definition of gifted to include non-cognitive measures such as motivation and persistence, using group-specific norms that benchmark student performance against school peers with comparable backgrounds, offering automatic admissions for students in the top 5-10% of sending elementary or middle schools in the district, or using other methods that are outlined in the report and utilized in other districts across the country. Furthermore, these data also suggest that the district should use additional programs or tools, such as expanding the existing MCPS's Young Scholars Program to identify students from underrepresented groups in early grade levels for academically selective programs. These programs would serve to increase the applicant pool of underrepresented students and encourage greater levels of participation.

- **Recommendation 3a:** Implement modifications to the selection process used for academically competitive programs in MCPS, comprising elementary centers for highly gifted students and secondary magnet programs, to focus these programs on selecting equitably from among those applicants that demonstrate a capacity to thrive in the program, that include use of non-cognitive criteria, group-specific norms that benchmark student performance against school peers with comparable backgrounds, and/or a process that offers automatic admissions to the programs for students in the top 5-10% of sending elementary or middle schools in the district.
- **Recommendation 3b:** Invest resources to expand and enhance early talent development programs for students of underrepresented groups in order to bolster participation of a broader segment of the MCPS student population in academically selective programs.

Key Finding 4: The district's implementation of some provisions in the current Board Policy JEE, Student Transfers, does not fully align with MCPS's goal to provide equitable access to choice and special academic programs. Specifically, the Board's current Policy includes two provisions that have been implemented in ways that do not fully support equitable access: 1) currently students are automatically admitted to an elementary language immersion program if they have an older sibling who currently attends the program; and 2) students who attend a

particular middle school may continue in that school's feeder pattern high school, without regard to programmatic reasons.

First, data on implementation of the sibling link in elementary language immersion programs show that almost a third of students (29.8%) who were admitted to the programs through the lottery in 2013–14 were siblings. The proportion was as high as 45.8% for some programs. This sibling link hinders equity of access for non-siblings because it reduces the total number of seats that are available.

Secondly, the provision in Policy JEE for the automatic articulation of students from middle to high school encumbers equitable access because it impacts school capacity which may limit seats for students who seek transfers due to programmatic reasons, such as to attend a career pathway of interest or to continue study in a thematic focus outside of a feeder pattern.

It must be noted that the following recommendations should be considered within the context that changes to Policy JEE, *Student Transfers*, may produce heightened levels of socioeconomic isolation within schools if socioeconomic status is not explicitly defined as a factor in the review and approval process for student transfer requests (COSAs).

- **Recommendation 4a:** Consider revisions to Policy JEE, *Student Transfers*, to clarify that the sibling link for immersion and other choice programs is not automatic; while siblings of applicants should be able to attend the same school where the special academic program is located provided that there are available seats, those siblings should be required to participate in the application process, such as the lottery for immersion programs to earn a seat in the program.
- **Recommendation 4b:** To the extent that the district considers revisions to Policy JEE, *Student Transfers*, to alter the automatic articulation from middle school to high school within the cluster feeder pattern *or* consider approvals for programmatic requests, MCPS should analyze the impact on both school capacity and its efforts to promote diversity and avoid racial isolation.

Key Finding 5: The placement of special academic programs within local schools has increased the diversity of those schools' student populations; but, in the absence of targeted mechanisms to integrate the program participants and non-participants, it has created conditions of within-school separation. Consistent with the original goal of locating programs in schools to increase the diversity of the overall student populations in those schools, enrollment data show that the demographics of students who participate in the programs are substantially different from the student populations of the schools that house the programs. More specifically, language immersion, elementary centers, and secondary magnet and application programs with selective admissions criteria enroll higher proportions of White, Asian, and higher income students, and lower proportions of Hispanic/Latino, Black/African

American, LEP, and low-income students than the schools that house the programs. Furthermore, the programs are designed to enroll students in separate classes for at least part of the day by virtue of providing unique curricula and instructional themes. This combination of the vastly different student populations and the isolation of students within special classes has produced perceptions among students, parents, and staff in schools that house special programs of within-school separation.

- **Recommendation 5:** Facilitate a process to devise strategies for fuller integration of special programs into the schools that house the programs to ensure that program participants and local or home school students have meaningful social and academic interactions, such as expanded use of specials or electives, common lunch or recess periods, and extracurricular programs; and that recruitment efforts are tailored to encourage home school populations to apply for the programs.

Key Finding 6: The MSMC has been more successful than the high school consortia (the DCC and the NEC) in promoting racial, ethnic, and socioeconomic diversity due in large part to shifting demographics as well as three programmatic elements: the MSMC, unlike the DCC and the NEC, does not utilize base areas, admits out-of-boundary students, and has developed and implemented distinct, whole-school themes. Enrollment data for the three consortia indicate that the MSMC has been more successful in attracting diverse populations of students, in terms of race, ethnicity, and socioeconomic status, than the two high school consortia. Data also show that the admissions of out-of-consortium students is a key component in the success of the MSMC, and that out-of-consortium students are largely attracted to the schools because of the magnet themes and programs.

Data for the high school consortia show that a large majority of students receive their first choice school through the choice process (89% in the NEC and 75% in the DCC), and most are generally satisfied with the choice process. Data also show that approximately half of the students in the NEC (50%) and DCC (42%) select their base area school, which has limited the impact of the choice process on increasing diversity. Base areas are not attendance zones; rather, they are non-contiguous geographic areas near or around each school, established to allow students to choose to attend a school near their home while also promoting, at least when they were originally developed, racial integration.

In focus groups, some students and parents expressed concerns that the high school consortia themes are not distinct enough to attract large numbers of students from outside the base area. Furthermore, the student populations across all three consortia have become less diverse due to the shifting demographics across the areas of the county served by the consortia. As a result, since the high school consortia do not accept out-of-boundary students and there is variability in the strength of their signature themes, they have been less successful in promoting diversity across participating schools.

Furthermore, MCPS's high school consortia have relied on the effectiveness of smaller learning communities (SLC) in attracting students. However, academic research has shown that school districts across the country have experienced challenges with implementing the SLC model. In its place, some districts, including for example Jefferson County Public Schools, are moving toward career pathways as a more effective model of high school choice that provides options of students using rigorous college and career-focused pathways and promotes diversity.

- **Recommendation 6a:** Conduct a comprehensive review of the signature and academy themes offered in each DCC and NEC school to ensure they provide options that are consistent with the district's SPF and provide access to programs that would not otherwise be available in home schools, such as career education pathways.
- **Recommendation 6b:** Assess the feasibility and impact of revising the high school consortium model to reconsider the use of base areas and to allocate a number of seats for out-of-consortium students to enroll in signature programs and themes.

Key Finding 7: The overall demand for choice and special academic programs in MCPS exceeds the supply of seats in the programs. In 2013–14, 14.5% of MCPS students enrolled in choice and special academic programs. However, many students are not able to access the programs due to the limited supply of seats. For elementary language immersion, approximately half of all applicants are placed on a waitlist each year. Additionally, only 18% of applicants to elementary centers for highly gifted students, 26% of applicants to middle school magnets, and 37% of applicants to high school magnets and application programs are invited to enroll.

The limited supply of seats has been intensified by growing enrollment across the district. District enrollment trend data show that the number of students enrolled in MCPS has increased by an average of more than 2,000 students a year since 2008. And yet, the last increase in the number of seats came approximately fifteen years ago, with the creation of the Chinese Immersion program at College Gardens ES, an elementary center at Chevy Chase ES, and magnet programs at Roberto Clemente MS and Poolesville HS.

Qualitative data collected through focus groups and on the community survey also pointed to a large demand for special programs and a shared request from parents, staff, and students for more opportunities for choice and special academic programs in MCPS. Nevertheless, stakeholders also expressed concern that any expansion needs to be paired with efforts to address equitable access to these programs and the other challenges identified above, as well as stakeholders' strong belief that MCPS should pursue equity on a broad level by raising expectations and opportunities for rigorous instruction across all schools.

Data from the analyses of staffing and transportation costs suggest that an expansion of seats would not necessitate substantial increases in program budgets; however, it would pose challenges for staffing (recruiting and hiring qualified staff for the programs), as well as school

capacity. Furthermore, expanding transportation to accommodate an increased number of students to attend choice and special academic programs would require additional investments from the district.

Research and benchmarking highlights a number of choice and special academic program models that build upon program models that are currently being implemented in MCPS but may provide greater alignment with the district's SPF. For example, in the area of language immersion, academic research has shown positive benefits of dual language immersion models—programs that serve both native English speakers and native speakers of other languages—increasing both equity of access and student academic outcomes. Furthermore, research on magnet programs highlights the benefits of whole-school models, as well as the use of both academically-selective and non-selective programs in providing options for a broad segment of students.

- **Recommendation 7:** To the extent that MCPS invests in expanding seat capacity in choice and special programs to catch up with growth in district enrollment and demand, it should ensure that these efforts are aligned with the district's core values, including equity, and consider a wider variety of models, such as dual language and whole-school, theme-based magnet programs that use lottery admissions processes that rely primarily on student interest.

Key Finding 8: MCPS does not systematically track participation in or attrition from its choice and special academic programs. While the district's data systems include the capacity to set up program flags to determine a student's enrollment in these programs, as well as their trajectory across programs over the course of their MCPS career, the lack of systemic and consistent use of program flags hinders the district's ability to examine the characteristics and performance of students who enroll in choice and special academic programs and to track program completion or attrition. Furthermore, the district is not able to conduct ongoing or systematic assessments of the extent to which the programs, individually or collectively, are meeting the intended goals.

- **Recommendation 8:** Consistently utilize variables within the district's student data system to identify students who enroll in choice and special academic programs to assess participation, attrition, and academic and other outcomes of students in the programs to monitor implementation and impact of the programs.