

**ATTENDING TO THE BOTTOM LINE:  
Boosting District Revenue and Enhancing Educational Mission  
Through Interdistrict Enrollment & Attendance Policy**

**An Advanced Policy Analysis Prepared for  
the Berkeley Unified School District,  
Berkeley, California**

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## INTRODUCTION

Like school districts across California, the Berkeley Unified School District faced a frustrating budget bind in the 2004-2005 school year.

On the one hand, health care benefits, special education and staff costs continued on their seemingly unstoppable march upwards. Yet, the state of California, on which the district is dependent for a total of 70 percent of its revenue, was mired in the fourth year of its own budget crisis. The state reneged on a promise to restore K-12 budgets in 2004-05, depriving the district of \$1.5 million it expected to receive. Further cuts loomed as bargaining with the teacher's union stalled in the spring. In short, the district's precariously balanced budget appeared ready to topple at any moment.

Against this backdrop, the district in January, 2005 launched a broad ranging self-review process called Designing and Funding Quality Schools. The district's intent was first to define precisely what it means to provide Berkeley students with a quality education. Second, its intent was to examine all of the district's resources and operations top-to-bottom to uncover any sources of waste and any sources of untapped revenue.

"The response to past crises has been piecemeal, if gallant," Superintendent Michele Lawrence told the audience gathered at the Berkeley High School library for the the planning process inaugural meeting. Under-funding of school districts, chronic in the state since the enactment of property tax limits in 1978, means "schools must figure out how to get away from state control and dependence," Lawrence added.

This report is a contribution to the district's self-examination. Its focus is two key aspects of district revenue: enrollment and attendance. The analysis seeks to answer the following two questions:

- Should the district try to bolster enrollment – and thus revenue – by admitting more students from outside of the district?
- Should the district attempt to improve attendance to regain lost revenue? If so, how?

These questions stem from four common observations about the district.

1. The district's enrollment has declined since a 10-year peak in 2000-2001;
2. The district has excess capacity at the elementary and middle schools;

3. A large but unknown number of students live outside the district and attend BUSD school without a permit;
4. The district's attendance level is below state and county averages.

### **Unofficial Interdistrict Transfers: Findings**

The question of unofficial interdistrict attendance – how much of it there actually is, what it costs the district – is a longstanding one in the district. Using a variety of measurement methods, this analysis estimates that between 8 percent and 12 percent of students in the district - 720 to 1075 - live outside Berkeley and attend BUSD schools without an interdistrict permit.

Unofficial interdistrict transfers are not unique to Berkeley. West Contra Costa Unified, Hayward, Fremont and Albany all report a persistent problem with families who lie about their true residence in order to enroll their children in local schools. The Alameda County Office of Education estimates that many districts experience a rate of unofficial enrollment of between 5 and 10 percent. [Treff, 2005] Clearly, mobility, convenience, and unauthorized school choice are increasingly shaping parents' preferences about where to enroll their children in school.

Because most districts have not attempted to estimate the size of their unofficial populations, it is impossible to say whether Berkeley's experience with unofficial enrollment is unusual.

However, for Berkeley, the question of unofficial enrollment is made more pressing because Berkeley taxpayers support the local schools through parcel taxes to a greater extent than many of its neighbors.

And, while high test scores and per-pupil spending likely make BUSD particularly attractive to some out of district parents, it appears that many districts in the county have stricter proof-of-residency requirements than Berkeley and that many do more to enforce the requirement when a family's address is in doubt.

Berkeley may lack the incentive to institute more rigorous admissions procedures because it has significant excess capacity, especially at its elementary and middle schools. Furthermore, the district gains valuable revenue from additional students in the district. As this analysis demonstrates, the district makes a "profit" of about \$1,500 for

each additional interdistrict elementary and middle school student it admits and \$1,250 for each additional interdistrict high school student it admits because the state revenue additional students bring exceeds the marginal cost of educating them. Thus, unofficial interdistrict students bring in anywhere from \$1 million to \$1.5 million in additional net revenue to the district annually.

If the calculation was simply fiscal, our analysis could end here and the recommendation to the district would be to admit even more interdistrict students.

However, the calculation is not just economic. Interdistrict students pose management, educational, ethical and political questions that must be addressed before formulating interdistrict policy. Some of these questions include:

- Will interdistrict transfer students imperil the chances of voters renewing school parcel taxes such as the Berkeley Schools Excellence Project (BSEP)?
- Are the best interests of Berkeley children served by admitting large numbers of unofficial interdistrict students?
- Does Berkeley have an ethical obligation to admit some students from relatively poor districts?
- What is the effect of Berkeley's interdistrict enrollment policy on other districts?

Teachers in particular raise questions about the value of interdistrict transfers to both Berkeley and non-Berkeley school children. They say that interdistrict students are more frequently tardy than Berkeley residents, and some teachers say that their study time and community involvement are compromised by long commutes. When parents lie about their address and sometimes their phone number, they are hard to contact. Teachers wanting to share important information about a child's academic progress, absences, or well-being may find that they are not able to reach a parent directly by phone. Important written communication from the school sites or district may be delayed or lost when families provide a false address. These observations call into question the assumption that out of district kids always benefit from attending Berkeley schools instead of their home district. And they also raise the question of whether these children, and the school system as a whole, would be better served if unofficial transfers students attended with valid permits.

## **Interdistrict Policy**

In formulating recommendations for interdistrict policy, Chapter 1 of this report evaluates the above fiscal and non-fiscal considerations while recognizing that the analysis will serve as a starting point for a community and stakeholder discussion about unofficial interdistrict transfers.

At the same time, whatever direction that broader discussion takes, it must be grounded in several budgetary and policy realities.

Foremost among those realities is that the district is currently fiscally dependent on interdistrict enrollment. Given excess capacity in the elementary and middle schools, flat or slightly declining enrollment trends, and the district's thin margins, BUSD can not realistically afford to reduce enrollment without also simultaneously considering the closure of one of its 11 elementary schools, cutting staff, or limiting services.

The district has two feasible options in the short term for managing interdistrict enrollment.

The first is to simply let present trends continue. In doing so, the district will continue to reap the fiscal rewards of interdistrict enrollment. But it also faces the risk of increasing teacher and public discontent over interdistrict students. Although interdistrict enrollment has not been an issue in past elections, it could become one in future referendums on parcel taxes like BSEP. [Thyberg, 2005]

The second option is to attempt to maintain stable or even increase interdistrict enrollment while converting as many unofficially enrolled interdistrict students as possible to official permits. This option offers the district several advantages over doing nothing, including the opportunity to manage this population of students and for the students to attend lawfully and openly. But "regularizing" unofficially enrolled students – to the extent they can be identified - also incurs the risk of issuing more official interdistrict permits, a move that may be politically quite unpopular. Furthermore, this policy option would also require a moderate amount of new, dedicated resources including at least one half-time staff person to conduct early morning and evening home residency-verification visits.

In the longer term, the district may want to more closely examine private school attendance in the district as part of its strategic response its interdistrict enrollment. According U.S. Census data, about 25 percent Berkeley school age children attend private school – more than two-and-a-half times the state average of 9 percent. Luring even a fraction of these 2500 or so private school students back to BUSD schools could boost the district’s enrollment with much lower political costs than interdistrict students.

### **Attendance: Findings**

Chapter 2 of this report analyzes the fiscal and educational costs of absenteeism in the district, and makes recommendations for improving attendance district wide.

Absenteeism and truancy in some quantities are a fact of school life. No school district has perfect attendance. Yet, with the exception of Oakland Unified, most school districts in the county appear to be more successful at shoring up their average daily attendance (ADA) than Berkeley, and Berkeley ADA is several percentage points lower than the state average. [Hall, 2005] Because districts have a financial incentive to inflate their attendance rates, some observers have raised questions about the reliability of attendance data, which is self-reported to state and county authorities. In fact, Berkeley’s attendance rate suffered a dip in 2000-2001, when the district began keeping more accurate attendance records. Yet, state and national statistics consistently show Berkeley’s attendance to be below average.

The fiscal costs of lost attendance are significant. If Berkeley’s attendance rate met the county average this year, the district would theoretically see an additional \$1.7 million in revenue – roughly enough to give every employee in the district a 2.5 percent raise. [Berkeley USD Financial Circumstances, 2005]

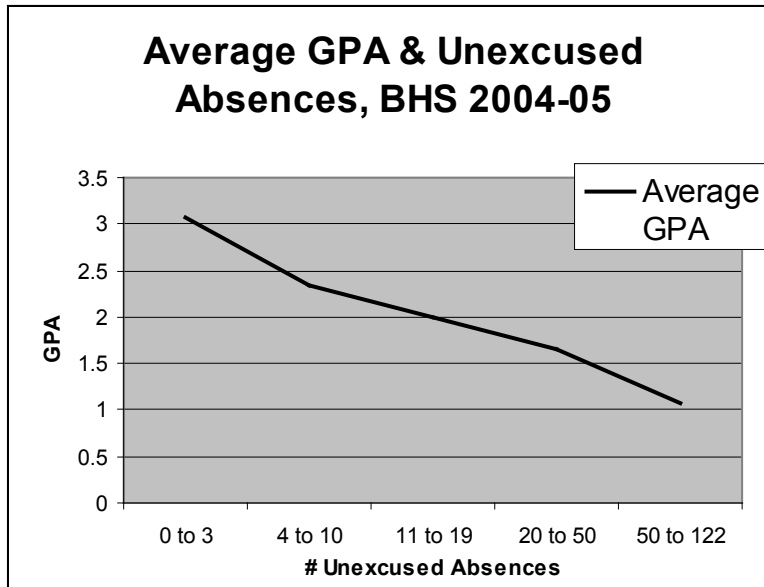
As is usually the case among schools, the High School’s attendance record is worse than the middle and elementary schools. Unexcused all-day absences cost just at the High School cost the district more than \$500,000 each year.

At stake, of course, is much more than money. Attendance is strongly correlated with the academic achievement, and a disproportionate number of chronic truants are African-American and Latino. The more often truants miss school, the worse their grade point average. Truancy may thus be a key part of the school’s response to the striking gap



in academic achievement between whites and Asians, and Latinos and African-Americans at BHS. Table 1 demonstrates the powerful negative relationship between skipping school and academic performance.

**Table 1: Unexcused Absences and GPA are Negatively Correlated at BHS**



### **Attendance Policy**

That attendance is a problem in the district does not seem to be in dispute. Administrators and teachers throughout the district agree that the district's attendance systems need strengthening. And a review of other districts' policies suggests that Berkeley dedicates fewer resources in terms of staff to attendance management.

For example, Berkeley recently adopted a new system for responding to truancy called the Student Attendance Review Board (SARB). SARBs are widely used in Alameda County and are a proven, effective strategy for reforming some chronically absent students. But districts that use SARBs also typically have on staff at least one and often two individuals whose primary focus is to help students with truancy problems and their families. Given the high costs of absenteeism, these individuals appear to be highly cost-effective for districts. Yet Berkeley does not currently have such a person on staff.

Nor does the High School, where one out of ten students is absent every day, have a dedicated attendance counselor.

Even a fully-staffed SARB process may not be enough to help raise attendance levels in the district. Research suggests that responses to truancy, particularly at the high school level, need to be systemic and multi-pronged. School districts that have raised attendance levels have:

- Given students incentives for improved attendance;
- Enacted serious and consistently meted out penalties for persistent truancy;
- Created task forces to combat staff and student apathy about attendance and to create innovative attendance improvement programs;
- Provided incentive for school sites to improve attendance.

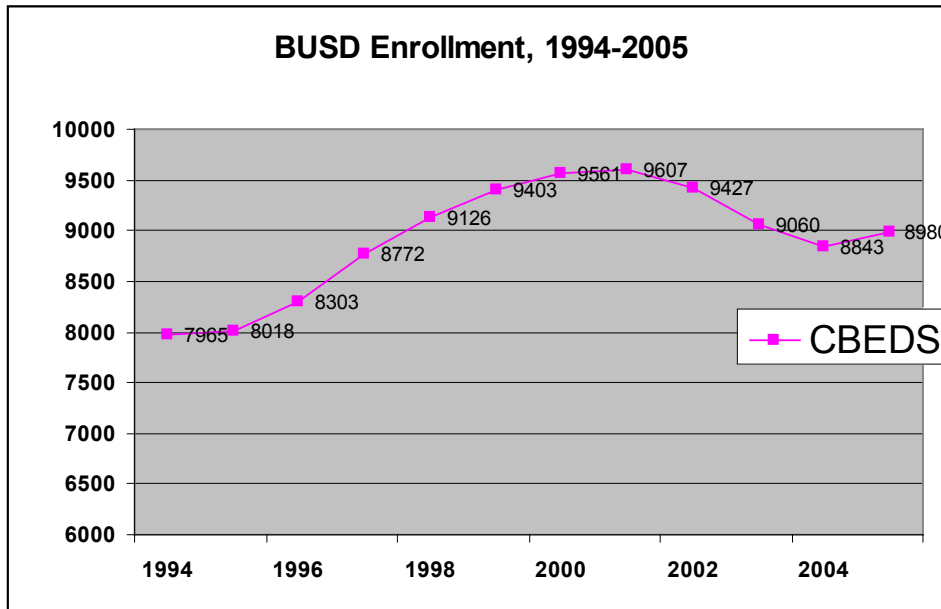
The goal of this analysis is to provide the district with information and inspiration to launch a whole-hearted campaign aimed at improving attendance, the district's bottom-line, and educational outcomes for its students.

## Chapter 1: INTERDISTRICT ENROLLMENT

The question of interdistrict transfer policy is a longstanding one in the district. The previous superintendent, Jack McLaughlin, believed that increasing enrollment through interdistrict permits benefited the district financially. But by 2000, enrollment at the high school reached 3200 and conditions became chaotic. [Wilkins, 2001] Concerned about truancy, overcrowding, high teacher-student ratios and a persistent achievement gap, the BSEP Planning & Oversight Committee (the committee that oversees how parcel tax revenues are spent at the district level) in 2001 repeatedly entreated the Berkeley School Board to investigate the district's interdistrict permit policy. "We repeat our request from our previous communication that the Board 'Demonstrate the cost-benefit of official Interdistrict Transfers: *Does the revenue received offset the additional costs, service burdens, and effects of the district's commitment to the goals of BSEP?*'" The committee also asked the board to complete an analysis of the unofficial enrollment of students who do not live in the district. [Wilkins, 2001]

Superintendent Michele Lawrence clamped down on interdistrict transfers after joining the district in the fall of 2001, lowering the number of official permits from about 900 to under 600. (Some Berkeley residents also attend schools in other districts with permits; this number totals about 300 students each year.) This change in permit policy, along with better record keeping, accounts for about 70 percent of the 600-student drop in enrollment between 2001 and 2005:

**Table 2: BUSD Enrollment, 1994-2005**



Even as the district limited official permits, the admissions office did not tighten up proof-of-residency requirements for new students to the district. Compared to many other districts, Berkeley’s rules for establishing residency and its residency enforcement mechanisms are weak. For example, Fremont, Albany and Palo Alto require that applicants supply either a copy of their rental agreements - with a manager’s name and phone number - or a mortgage statement to establish residency. In Albany and Fremont, families who have neither a rental agreement nor proof of home ownership must provide a notarized letter from the primary resident of the home attesting to the fact that student lives at the address. Most importantly, all five districts contacted for this report have at least one individual on staff who conducts home visits to verify addresses. Berkeley does not currently conduct such visits.

Table 3, below, provides a summary of residency requirements and enforcement policies at BUSD and five comparison districts.

**Table 3: A Snapshot of Other Districts & Proof-of-Residency Requirements**

School District	Proof of Residency Requirements	Families living with other families	State caregivers	Investigator?
<b>Berkeley</b>	3 proofs of residency, can all be utility bills.			Determined ineffective and not currently in use.
<b>Fremont Unified</b>	4 proofs of residency, one of which must be a rental agreement or property tax bill.	Renter/owner must provide proof of residency and sign a form stating they are subject to a \$5,800 fine per child for falsifying information. (Fine never imposed.)		Yes. Conducts surprise, early-morning home visits part-time approximately 3 months of the year.
<b>Palo Alto (Basic aid district)</b>	Lease agreement with manager's name and phone number or property tax bill or mortgage.	Leaseholder/owner must provide documentation of residency and provide a notarized letter stating that the pupil resides there.	Caregiver must prove residency and must provide notarized statement attesting to caregiver status.	Yes. Conducts early morning and evening home visits.
<b>Albany</b>	Three proofs of residency, one of which must be a lease or mortgage.	Leaseholder/owner must provide notarized letter stating that pupil is living at the address.		Superintendent conducts home visits. Data manager checks addresses of new registrants to see whether address is currently used by another family.
<b>San Lorenzo</b>	Rental agreement with canceled check or receipt for deposit showing manager's name and phone; utility bills, home insurance or escrow papers.	District offers to make an unscheduled home visit.	District offers to make an unscheduled home visit.	Two full-time staff assist with attendance and conduct home visits to verify addresses.
<b>Hayward</b>	Utility bills.			Yes. 1.5 Welfare & Attendance staff.

## **Estimating the Number of Unofficial District Transfers**

The district has until now never attempted to estimate the number of interdistrict students attending unofficially. Anecdotal evidence (for example, Oakland and Richmond buses and trains packed with youngsters heading to Berkeley in the morning) has suggested that there existed a significant population of BUSD students living outside the district. Referring to the Oakland Unified School District, which was taken over by state authorities in 2003, and the West Contra Cost Unified School District, which went bankrupt in 1992, the district admissions and attendance manager Francisco Martinez says: “The problem with Berkeley is that we are sandwiched between two failing school districts.”

Martinez estimates that between 7 and 12 percent of currently enrolled students in the district attend unofficially. This analysis corroborates his estimate using four different approaches. Taken together, these methods yield estimates of unofficial district enrollment of between 7.8 percent and 12 percent.

## **U.S. Census for Berkeley & BUSD Enrollment Data**

U.S. Census data suggests that in 2000, after taking into account private school enrollment, there was a significant positive discrepancy between the number of school age children living in Berkeley and the number attending public schools.

Using Census and district enrollment data as starting points, Table 4 estimates the number and percentage of out of district students attending BUSD schools without a permit. Because Census data has not been updated since 2000 and because there are numerous factors that can affect enrollment, an analysis of 2005 enrollment requires a number of assumptions which are explained below the table.

**Table 4: Estimated BUSD Unofficial Interdistrict Enrollment Using Census and District Data, 2000 & 2005**

	<b>2000</b>	<b>2005</b>
<b>School age population (2000 Census, estimate)<sup>a</sup></b>	11049	10850
<b>Private school enrollment (2000 Census, estimate)<sup>a</sup></b>	2764	2714
<b># Berkeley kids attending any public school</b>	8285	8136
<b># Berkeley kids officially transferring out of district (BUSD)<sup>b</sup></b>	275	275
<b># of Berkeley kids transferring unofficially to other districts (estimate)<sup>c</sup></b>	166	161
<b>Net Berkeley residents attending BUSD schools</b>	7844	7698
<b>BUSD enrollment (BUSD)<sup>d</sup></b>	9411	8980
<b>Difference = total non-Berkeley resident enrollment</b>	1567	1282
<b>Official interdistrict permits<sup>e</sup></b>	900	585
<b>Unofficial interdistrict enrollment<sup>f</sup></b>	667	697
<b>Estimated % enrolled unofficially</b>	7.1%	7.8%

Assumptions:

a. I estimate that the Berkeley school age population shrunk by 1.8 percent since the 2000 U.S. Census. This estimate is based on the decline in BUSD enrollment from the 1999-2000 school year to 2004-2005, after adjusting for BUSD record keeping improvements in 2002 that shrunk the rolls by 150 students and for the 2002 change in interdistrict permit policy that reduced enrollment by 300.

b. Number of students transferring out of district not available for 2000. Assumed that the number has remained constant and is the same as 2004-2005.

c. Assumes that 1.5 percent of the Berkeley school age population transfers to other districts unofficially. This assumption is based on conversations with child welfare and attendance staff at a number of districts, as well as staff at the Alameda County Office of Education, who say that the problem of unofficial interdistrict transfers is pervasive in many districts. It must be assumed that at least some of the students transferring unofficially to other districts are residents of Berkeley.

d. BUSD reported enrollment in 1999-2000 to the state as 9561, but in 2002 removed 150 "ghost" students from the rolls in 2002. I correct here for the overstated enrollment in 2000.

e. BUSD records for interdistrict permits not available for 2000, so this figure is an approximation based on interviews with the superintendent.

f. If accurate, temporary address, caregiver affidavit and homeless students will have been captured by Census as Berkeley residents. If not, they would appear as extra students in the

system. Currently, 350 students are registered under caregiver and temporary address affidavits. An additional 150 are currently registered as homeless.

g. Drop outs and children who do not attend kindergarten are not counted because their numbers are negligible for the purposes of this analysis

## **Phone Number-Address Discrepancies**

An analysis of the addresses and phone numbers provided by parents of Berkeley students provides a wider estimate of the percentage of students attending district schools unofficially. The theory underlying this method is that while interdistrict families use false addresses (borrowing a friend's, for example), the admissions department has observed that often such families provide a real telephone number.

To conduct this analysis, I compared the phone number of every elementary and high school student who provided the district with a Berkeley address. I looked up each unique telephone prefix in a database provided by the website [www.recnet.com](http://www.recnet.com), a consumer guide which uses mileage measurements to determine local calling areas. The database provides information about the central office from which each telephone prefix originates. Using this database, I was able to determine which phone numbers originate in Berkeley and which originate outside of the city. Because prefixes are imperfectly correlated with city boundaries, particularly along municipal borders, I also noted prefixes that originated from outside Berkeley but were concentrated along neighborhoods near the Berkeley-Oakland border.

I then looked up all the telephone numbers with non-Berkeley prefixes and Berkeley addresses in an online reverse telephone directory, [www.whitepages.com](http://www.whitepages.com). Whenever the directory provided an address, I compared it to the one provided by the student's family to the school district. I noted any discrepancies. In cases where the directory did not list an address for a given telephone number, I also noted whether the phone number was a cell phone or whether the address was simply not listed.

Ultimately, the number of telephone numbers with confirmed out-of-district addresses was small: 3.3 percent at the High School and 5.1 percent for the 11 elementary schools. The vast majority of phone numbers (nearly 70 percent) proved to be either cell phones (for which addresses are not available) or an unlisted/unavailable address.



For the phone numbers for which I found an address, the ratio of telephone numbers confirmed to be outside the district versus confirmed to be Berkeley addresses was 2:1 in the case of the high school and 1.5:1 for the elementary schools.

Given the large number of telephone numbers for which no address could be found, I conducted a sensitivity analysis in which I estimated that either 25 percent, 33 percent or 50 percent of the cell phone and address-unlisted numbers belonged to out of district families. These ratios are conservatively based on the ratio of Berkeley to non-Berkeley numbers found in the address-listed phone numbers. This estimate also reflects the fact that all of these phone numbers have non-Berkeley prefixes, many as far as away as Hayward and Richmond.

While there are numerous sources of uncertainty in this analysis, an important point is that it excludes any family that provided both a false Berkeley address and a false Berkeley phone number to the district, and may thus understate the number of students attending unofficially.

The phone number analysis suggests that the number of students attending unofficially at the elementary schools is between 9.5 percent and 14 percent and that the number of high school students enrolled unofficially is between 8 percent and 12.5 percent.

### **Berkeley High Feeder Schools**

A third estimate of the number of unofficial out of district enrollment comes from an analysis of 2004-2005 freshmen at Berkeley High and the schools from which they matriculated.

Of the 819 students currently in the 9<sup>th</sup> grade, 547 – exactly two-thirds – attended Berkeley middle schools. Based on our previous analysis, we can assume that at least a small percentage of these students are unofficial out of district enrollees. For the purposes of this analysis, we will conservatively assume that number to be 6 percent.

According to the BUSD attendance office, 180 of the remaining 272 students attended private schools before coming to BHS. A small percentage of these students may also be enrolling unofficially from outside of the district. We assume that a handful

of non-district private school students matriculating to BHS enroll under a false address – 4 percent.

Four freshmen received new interdistrict permits in 2004-2005.

The remaining 88 students graduated from schools outside of the district.

Although families may time moves to coincide with their children’s enrollment in high school, it seems highly improbably that 88 students – more than two homeroom’s worth – moved to Berkeley (a city of 100,000) before their freshman year. Instead, using a common sense guess, we will assume that 50 percent of the freshman in this category actually moved to Berkeley either with their families or in with a caregiver. We estimate that the remaining 44 are enrolled using false addresses, temporary addresses or false caregiver affidavits.

Ultimately, the Berkeley freshman feeder school method suggests that approximately 10 percent of High School students are enrolled unofficially.

**Table 5: Berkeley High School Freshman Class Analysis, 2004-05**

	#	Estimated % Unofficial Enrolled	Estimated # Unofficially Enrolled	Total Estimated % Unofficially enrolled
<b>2004-05 BHS Freshman Class</b>				
Attended Berkeley Middle School	547	6%	33	
Attended a Private School	180	4%	7	
Attended Other Public School	88	50%	44	
Received New Interdistrict Permit	4	0%	0	
Total	819		88	10.25%

### **An Elementary School Teacher Survey**

On April 27, 2005, I surveyed the teachers at a Berkeley elementary school, asking each to identify the unofficially enrolled students in her class. The theory behind this method is that teachers, particularly at the elementary school level and particularly by the end of April, are close enough to their students to know where they live. Families in a small school become well-known to teachers and the principal. And teachers say students – particularly younger students - often can’t help but volunteer information about where they live. (One first grade teacher recalls how, during a lesson on continents, one of her students jumped up and asked, “Where is San Leandro?”)

For the survey, I presented each teacher with her class list, and asked her to mark any student she knew to live outside of the district. I also asked the teachers to note the city in which the child actually resides. The teachers identified 47 students as out of district. After checking the interdistrict permit list, I verified that 45 of these students do not have an interdistrict permit. With a total enrollment of 274, 45 students suggests that 16.4 percent of the school is enrolled unofficially.

The teachers were certain about the students’ actual city of residence in 60 percent of the cases. Teachers identified student residences as far as Hayward, El Sobrante, and Vallejo, but said that about half the unofficially enrolled students live in Oakland.

Though it appears that the results of this survey are quite reliable for the school surveyed, it is not known whether the results are generalizable to other schools – particularly schools in the northern part of the city - since some observers believe that more of the interdistrict “seepage” occurs at schools in the southern part of Berkeley. [Thyberg, 2005] Repeating this survey at other elementary schools would yield valuable information about variability of rates of unofficial enrollment at elementary schools, but the survey method is likely to become less accurate in middle and high schools where teachers spend less time with individual students on a daily basis.

### Summary

Taken together, these four methods give us an estimated range for unofficial interdistrict enrollment from a low of 7.8 percent to a high of 16.4 percent. In the interest of being conservative, we will use the lower range of the estimates and conclude that unofficial interdistrict enrollment at BUSD ranges from between 8 percent and 12 percent.

**Table 6: Best Conservative Estimate of Unofficial Enrollment**

Method	Estimate %	Estimate #
Census	7.8%	700
Phone-Address Discrepancies	8%-14%	1075-1250
Berkeley High School Freshman Feeder Schools	10%	900

Elementary Teacher Survey	16.4%	1475
<b>Best Conservative Estimate of Unofficial Enrollment</b>	<b>8%-12%</b>	<b>720-1075</b>

## **Fiscal Impacts of Interdistrict Enrollment**

Out of district students matter because, given their significant numbers in the district, they have an important bearing on the BUSD’s finances and its educational mission. As the following analysis demonstrates, interdistrict transfers bring significant net revenue to the district, probably in excess of \$1 million per year. To calculate net revenue, we begin by calculating the marginal cost of each additional student to BUSD given existing capacity and compare the cost to the additional state revenue the district earns for each additional student it enrolls.

### **Key assumptions in calculating marginal costs**

#### **1. Interdistrict students are not absent at significantly higher rates than Berkeley residents.**

Because average daily attendance has such a direct bearing on the district’s revenue per student, it is crucial to determine Average Daily Attendance, or ADA, for interdistrict students before calculating their net marginal cost or benefit to the district.

I tested the hypothesis that interdistrict students have higher rates of absenteeism than Berkeley residents in two ways.

First, I examined year-to-date attendance records for the 301 students whose telephone numbers I was able to confirm matched an out-of-district address. The High School students had an overall attendance record of 90.7% - almost exactly the average for the High School overall.

Elementary students in this category had an attendance record of 94.6%, comparable to the ADA of elementary students as a whole.

Second, attendance records of 45 students identified by the surveyed elementary school teachers as unofficially enrolled suggests a small difference in attendance rates. The Berkeley residents had a 97.3 percent attendance rate, unofficial out-of-district students had a 95.2 percent attendance rate. To be conservative in our estimates of the

marginal benefits of out of district kids, we will take into account this 2.1% difference in attendance.

Note: this analysis did not take into account tardiness, which is important educationally but has no independent bearing on state revenue.

## **2. Interdistrict students appear to use special education services at the same rate as Berkeley residents.**

Depending on the severity of their diagnosis, special education students are between 30 percent and 350 percent more costly to educate than a student in the district's regular programs. [Jacopetti & Buster, 2005] To that end, rates of assignment to special education are critical to determining the marginal costs and benefits of additional students in the district.

An analysis of the 301 students whose telephone numbers were confirmed to belong to an out-of-district address suggests that unofficial interdistrict students do not tap special education services at higher rates than average Berkeley students. Fewer than 8 percent of the elementary students and 9.5 percent of the high school students in this group are currently assigned to special education programs. These assignment rates are actually lower than the district average of 12.7 percent.

An analysis of the enrollment in special education at the surveyed elementary school sample was too small to be conclusive. Yet, teachers and district administrators report anecdotally that interdistrict transfers are more likely to use special education services. Conducting additional surveys at multiple individual schools sites may provide more reliable data on special ed assignment rates.

## **3. Interdistrict students do not require additional capacity**

Existing capacity for additional students in BUSD schools means that we do not need to be concerned about costs associated with new buildings when enrollment grows within capacity.

However, it could be the case that interdistrict students are allowing the district to keep open schools that would otherwise close for lack of students. For example, if 8 percent of the elementary students are unofficially enrolled in the elementary schools,

they account for 297 students – 20 more students than are currently enrolled at Emerson Elementary. However, since closing an elementary school may not be feasible at this time [Nitschke, 2005], we do not treat the annual additional costs of keeping open one elementary school as a cost of interdistrict enrollment.

The chart below summarizes current existing capacity in BUSD schools.

**Table 7: Comparison of Capacity to Enrollment, BUSD 2004-2005**

	<b>Capacity</b>	<b>Enrollment</b>	<b>Available Capacity</b>
Elementary	4,639	3,716	923
Middle	2,733	1,868	865
High School	3,563?	3,077	486?

Source: Capacity Analysis for Elementary, Middle and Other Educational Program Schools, California Financial Services, 2001; Capacity Analysis and Housing Plan, California Financial Services, 2001.

### **Calculating marginal costs**

To calculate marginal costs, I relied on the expertise of BUSD data analyst Peter Bloomsburgh, who prepared extensive summaries of BUSD expenditures and staffing for the Resource Committee, one of the two committees charged with making recommendations for the Designing and Funding Quality Schools study. Most helpfully, Mr. Bloomsburgh created a table detailing both school site expenditures and typical district allocations for the average Berkeley elementary school student. [Bloomsburgh, 2005]

To calculate marginal costs, we divided these expenditures into fixed and variable categories. [Bloomsburgh, 2005] For example, we included teachers and instructional aides in our marginal cost calculations, but removed principals, school secretaries, custodians, and maintenance costs. We also removed grant-based funding for programs, i.e., funding from the non-special education restricted general fund.

We reduced our marginal cost calculations by the amount of class-size reduction income per student from BSEP and from the state and by the amount the district receives per student of state and federal aid for special education.

After including these offsets, we determined that the marginal cost of educating an additional BUSD elementary student is \$3,540. The marginal cost table is below:

**Table 8: Marginal Costs for Berkeley Unified Elementary School Students**  
Based on 2003-04 staffing and expenditures

Program Element	Other Unrestricted General Fund	Special Ed	BSEP	Revenue offset	Totals	Comment
<b>Teachers</b>						
- regular classes for grades K-3	2921			-960		Class size reduction pays for \$960 of the costs of CSR for K-3
- regular classes for grades 4-5	1996			0		
Regular Teachers K-5					1,978	
- SDC class		169		-68	101	State and federal govt pay about 40% of the costs of special ed
- release time teachers	206	14	45		265	
- other special education teachers		169		-68	101	State and federal govt pay 40% of the costs of special ed
subtotal for teachers					2,411	
<b>Certificated Benefits</b>					705	Certificated benefits calculated at 29.26% of salaries
<b>Classified Staff</b>						
- special education		321		-128.4	192.6	State and federal govt pay 40% of the costs of special ed
- other salaried staff	14				14	
- hourly / daily	51				51	
subtotal for classified staff					226	
<b>Classified Benefits</b>					100	Classified benefits calculated at 44.5% of salaries
subtotal for labor expenditures					<b>3,442</b>	
<b>Non-Labor Expenditures</b>	33				33	
subtotal for direct expenditures					<b>33</b>	
<b>Allocated Expenses</b>	97	199			296	

- other instruction		70			70	
- other pupil services						
subtotal for allocations	97	269			366	
<b>Grand Total</b>					<b>3,540</b>	

Comparably detailed per-student allocations tables are not currently available for the middle schools and high schools. However, such tables are not necessary for estimating marginal costs for the middle and high schools, because the average costs and allocation distribution for all three levels are very similar at BUSD. As Table 9 (below) demonstrates, the average high school student is just 3 percent less expensive to educate per student per year than an elementary student after we take into account class size reduction subsidization for the kindergarten through third grades. The ratio of school site expenditure versus district allocation is approximately the same for all three levels, 2:1. In sum, the similarities in average costs and in the ratio of school site-district expenditures strongly suggests that the marginal cost of educating an elementary, middle and high school student at BUSD is the same.

However, relatively poor attendance by high school students drives up cost per ADA, reducing the marginal benefit of revenue limit dollars. We take this into account in our calculation of marginal benefit in the following section.

**Table 9: Average Costs Per Student, Elementary, Middle & High Schools Based on 2003-2004 Unaudited Actuals**

	Enroll-ment	ADA	Expenditures (School Site)	Allocated Expenses	Total Expenses	Cost Per Enrollee	Cost Per ADA
<b>Elementary</b>	3795	3555	\$23,460,340	\$10,781,595	\$34,241,935	\$9,023	\$9,633
<b>Middle</b>	1861	1756	\$11,303,322	\$5,287,101*	\$16,590,423	\$8,915	\$9,447
<b>High</b>	2884	2578	\$16,834,349	\$8,438,307*	\$25,272,656	\$8,763	\$9,802

Note: Elementary school-site expenditures are reduced by \$2.17 million in state class size reduction funding.

\* Allocated expenditures for middle and high school are estimates.



## Marginal Benefits of an Additional Student

California districts receive money from the state in exact proportion to the number of students who attend school on an average school day. The starting allotment per enrolled student or revenue limit in the district is set by a complex formula created by the state to foster fiscal equity among school districts.

For example, current state revenue per student in Berkeley is \$5,412 less 1.14 percent deficit factor, or \$5,350. At 92.5 percent average daily attendance, the district actually receives \$5,006 per student, plus approximately \$90 in lottery funds, for a total of \$5,096. [Bloomsburgh, 2005]

In the table below, we calculate marginal benefit of additional students to BUSD by comparing marginal cost (\$3,450) to marginal benefit (the additional income BUSD receives from the state for each student it enrolls) separately for K-8 and 9-12 students, accounting for differing average attendance rates. We then calculate the estimated number of unofficial interdistrict transfers in grades K-8 and 9-12 based on three estimates of unofficial interdistrict transfers: 8 percent, 10 percent, and 12 percent.

We conclude that unofficial interdistrict transfers yield a net benefit to BUSD of between \$1 million and \$1.5 million per year.

**Table 10: Marginal Cost/Benefit Analysis of Interdistrict Enrollment**

	K-8	HS	Total
Revenue Limit	\$ 5,350	\$ 5,350	
% ADA*	93%	88%	
Net Revenue Limit	\$ 4,970	\$ 4,708	
Lottery	\$ 90	\$ 90	
Total revenue per ADA	\$ 5,060	\$ 4,798	
Marginal Cost	\$ (3,540)	\$ (3,540)	
<b>Net Benefit Per student</b>	<b>\$ 1,520</b>	<b>\$ 1,258</b>	
If 8% enrollment = unofficial	459	249	707
<b>Total Benefit if unofficial enrollment = 8%</b>	<b>\$ 697,445</b>	<b>\$ 312,789</b>	<b>\$ 1,010,234</b>
If 10% enrollment = unofficial	574	311	884
<b>Total benefit if unofficial enrollment = 10%</b>	<b>\$ 871,806</b>	<b>\$ 390,986</b>	<b>\$ 1,262,792</b>
If 12% enrollment = unofficial	688	373	1078
<b>Total benefit if unofficial enrollment = 12%</b>	<b>\$ 1,046,167</b>	<b>\$ 469,184</b>	<b>\$ 1,515,351</b>

\* ADA percentages reflect a 2 percent decrease over district average. See p. 21.

## Unofficial Enrollment & BSEP Diffusion

A frequently raised concern about interdistrict students is their effect on BSEP funds, the parcel tax in Berkeley that raises \$10.5 million each year for the schools. BSEP funds are raised on a per-parcel rather than on a per-student basis. About half of BSEP money pays for class size reduction. The fund also pays for music teachers, classroom materials, and miscellaneous enrichment staff, such as dance, art physical education, and reading recovery teachers.

BSEP funds are diffused by out of district students, as they would be by any additional students in the system. To calculate the diffusion, we divided BSEP funds into variable and fixed expenditures, finding that 81 percent of BSEP, or \$8.576 million, pays for variable expenses such as class size reduction, music teachers and classroom materials. The only fixed costs are administration, public information, library and computer technicians. [BSEP Annual Plan, 2005] Currently, each student benefits from \$970 in variable BSEP spending. That amount would rise to \$1,054 per student if 8 percent of the population was removed from the rolls, \$1,078 per student if the student population were to shrink by 10 percent, and \$1,104 if the student population were to shrink by 12 percent.

**Table 11: Analysis of BSEP Diffusion Due to Unofficial Transfers**

	<b>Enrollment</b>	<b>BSEP \$ Per Student</b>	<b>Difference</b>
<b>Total Enrollment</b>	8,843	\$970	
<b>Minus 8% Unofficial enrollment</b>	8,136	\$1,054	(\$84)
<b>Minus 10% Unofficial enrollment</b>	7,959	\$1,078	(\$108)
<b>Minus 12% Unofficial enrollment</b>	7,766	\$1,104	(\$134)

Two points are important to keep in mind, however. Although additional students diffuse BSEP, the total amount of BSEP money in the system remains the same. Thus, larger enrollment and the diffusion of BSEP does not affect the ultimate marginal benefit calculation for the district.

In addition, larger enrollment means more discretionary revenue for the district, which appears to compensate for BSEP diffusion. For example, if 10 percent of BUSD students are unofficial, they may yield \$1.2 million in net revenue for the district, or \$133 per student – \$25 more than each student “lost” because of BSEP diffusion.

### **Educational and Equity Concerns**

Unofficial interdistrict enrollment raises a host of educational, equity and political questions that are not captured in fiscal calculations. How do unofficial interdistrict kids affect classroom management? What are BUSD’s obligations to neighboring districts when it comes to interdistrict enrollment? What, if any, are the district’s ethical obligations to children who live outside the district? Do interdistrict children harm or help the education of Berkeley resident school children? And, do interdistrict transfers benefit from their education in Berkeley? We discuss these questions in turn below with an eye toward formulating a fiscally and ethically sound interdistrict transfer policy.

### **Commutes, Community & Communication**

Classroom teachers have numerous concerns about unofficial district students. Perhaps first among them is the propensity of out-of-town students to be tardy to school.

The April 27 elementary school survey underscores this concern: unofficially enrolled pupils were late on average two and a half times more often than their Berkeley counterparts. Where Berkeley residents averaged 10 tardies through the end of March, unofficial students averaged nearly 25 tardies each.

“They are late,” says a first grade teacher at the school. “The tardiness is killing us.”

For example, a brother and sister who commute with their mother each day from Concord are routinely late, the teacher says. The son, a struggling learner, misses the first 30 to 45 minutes of his reading instruction each day, his teacher says. “They don’t make it,” she says. “We believe they would be better off at a [Concord] school.”

Teachers and administrators interviewed for this project say that communicating and meeting with the parents of unofficial kids is more difficult, and that the greater distances harm the ability of the school to build a community of families.

Kristin Collins, a King Middle School teacher, says that parents of unofficial kids may not provide their real phone number to the school site. She recalls telephoning a student's ostensible home number one evening only to be told that she had reached an answering service for the parents. Rory Bled, the High School vice principal in charge of attendance, says that attempts to communicate with interdistrict parents about their children's absences often fail because telephone numbers are not accurate.

Problems with commutes, communication and community make teachers wonder whether unofficial kids are actually benefiting from their Berkeley experience.

"It's really about the quality of the education," says Jamie Carlson, a first grade teacher at Emerson, "the integrity of the services and the quality of children's learning. It's so hard on the teacher to have these chronically late and absent kids...they just don't bond in the same way."

Cathy Campbell, a Willard Middle School teacher, says long commutes affect student performance.

"The amount of the day dealing with transportation is a huge. It cuts into homework and after school activities. It cuts into the things that create school culture."

"Our leadership has a philosophy that students [from struggling districts] should be allowed to come Berkeley," says Campbell. "I think that policy should be reexamined. It may not serve the best interests of the kids in Berkeley or the out of districts kids."

### **Interdistrict Transfers, Race, Social Justice & Educational Mission**

Few Berkeley educators neglect to mention broader social equity issues when assessing the district's interdistrict policies. Many – though certainly not all – Berkeley teachers, parents, and school administrators believe that, from a social justice perspective, children from weaker school districts are entitled to partake in the higher quality education BUSD offers.

An important part of this social justice perspective is race. That interdistrict enrollment and ethnicity are intertwined is not surprising, given the following statistics: While whites comprise 60 percent of the city's general population, 30 percent of the school population is white. And while just 13 percent of the city is African-American, 31 percent of its students are black. As the table below demonstrates, white migration out

and African-American and Latino migration in are dramatically shifting the demographic composition of Berkeley’s schools.

**Table 12: Ethnic Composition of City of Berkeley and Berkeley Schools**

	White	African-American	Asian	Latino
<b>City of Berkeley</b>	59.2%	13.6	16.4	8.6
<b>BUSD</b>	29.3%	31.4	7.3	15.9

Source: U.S. Census 2000, California Department of Education

Teachers say racial politics make discussions about interdistrict transfers sensitive – sometimes unfairly so.

“Race consistently raises its head” in discussions about interdistrict kids, says Collins, the King teacher. “There are many who say, ‘If we’re that good, let them come.’”

“But they aren’t in the classroom,” Collin adds. “It’s a hard issue. At the end of the day, it’s a job and you need it to be sustainable so teachers don’t burn out. There have been years where my biggest problem is an out of district kid. Should that kid be handled differently than if a kid lives in Berkeley? What does it look like if that kid is poor? Or African-American?”

Indeed, critics are quick to question Berkeley’s motives with regard to interdistrict enrollment.

“I’m afraid that much of the recent interest in reducing the number of students coming into Berkeley is based on racist policies of exclusion and a desire to meet the requirements of [No Child Left Behind] for sub-groups,” contends Katrina Scott-George, Special Assistant to the State Administrator at Oakland Unified School District and a Berkeley parent. “I am skeptical that BUSD is simply interested in improving [Oakland’s] enrollment.”

But some Berkeley parents take exception to the view that Berkeley has an obligation to admit large numbers of interdistrict students. They say the district’s primary obligation is to serve its own population of children – many of whom are Latino and African-American.

Wanda Stewart, a parent of two Berkeley school children and a former private school admissions director, believes the district would be better served focusing on

recruiting private school students back to the schools. Furthermore, she argues the district's racial guilt over interdistrict kids is misguided, given the number of underserved children within the district boundaries.

"My taxes should be educating Berkeley kids," Stewart says. "There are children in Berkeley who need us."

### **Intradistrict Equity: Capacity Revisited**

Although BUSD elementary and middle schools currently have excess capacity in the aggregate, popular individual schools like Cragmont Elementary remain oversubscribed. Because the district admissions office retains authority over school assignment as part of its racial/socioeconomic balancing plan, parents compete for seats at the most popular schools. How do unofficial interdistrict transfers affect this competition?

A recent anecdote may be indicative. "Mary," a Berkeley resident of the Elmwood district (and an acquaintance of the author) failed to get a seat in any of the top four schools she had selected for her daughter, an incoming kindergartner, last spring. Meanwhile, her daughter's North Oakland friend – whose parents used a friend's Berkeley address to enroll in the district – breezed into Mary's top choice, John Muir.

Such injustices are impossible to rectify when unofficial enrollment is rampant, but remediable if BUSD were to succeed in getting unofficial interdistrict kids on permits, in which case Berkeley residents get priority. Yet, if it is true that a higher proportion of unofficial interdistrict transfers are minorities, a policy giving Berkeley residents priority in school assignments could tip the racial and ethnic balance the district works so hard to achieve through its school assignment system.

### **Interdistrict Transfers: School Vouchers By Another Name?**

A liberal interdistrict transfer policy must also take into account the impacts of such transfers on Berkeley's neighbors. After all, each student that Berkeley gains is a loss to Richmond, Oakland and Hayward. In this sense, unofficial interdistrict enrollment functions to increase competition between school districts for students, much like a voucher system would. Does that kind of competition serve the interests equity?

The answer is probably yes. Although in the very short term interdistrict enrollment may reward stronger districts with larger enrollment at the expense of weaker ones, research on an interdistrict open-enrollment program in Massachusetts suggests that districts that initially lose enrollment do recover by improving their policies and programs and attracting new students. [Peiser, 1998] Caroline Hoxby, a Harvard economist and researcher in school choice, concludes that school achievement per dollar spent actually increases when public schools face competition in the form of vouchers and charter schools. [Hoxby, 2003]

### **Four Policy Options**

Fiscal and equity considerations suggest that Berkeley's policy responses to unofficial interdistrict transfers are fraught with tradeoffs. Crack down on unofficial interdistrict enrollment, and the district will satisfy some teachers, but lose a valuable revenue stream, possibly force a school closure, and find itself accused of racism. Open the floodgates and the district may raise the ire of teachers, neighboring districts and perhaps taxpayers - but will also gain valuable enrollment dollars and the knowledge that it is improving educational opportunities for students from "sending" districts. If it simply allows present trends to continue, the district will continue to benefit financially from the additional enrollment, but perhaps risk taxpayer and community dissent in the future. Out of district kids will continue to benefit from Berkeley schools, but would they be better served on official permits?

The following is a summary of the pros and cons of these four possible policy responses, weighing each in terms of impacts fiscal impacts, inter- and intradistrict equity, and feasibility.

#### **1. Let Present Trends Continue**

- **District revenue.** Neutral.
- **BSEP.** Neutral (continued diffusion).
- **Classroom management.** Continued teacher unhappiness about impacts of unofficial enrollees.

- **Interdistrict Equity.** Interdistrict kids get access to Berkeley schools, but neighboring districts lose enrollment. Long term effect on other districts may be positive, however.
- **Intradistrict Equity.** Unidentified out of district kids compete with Berkeley students for seats at popular schools, but they may also be supporting the continued viability of all 11 elementary schools.
- **Public relations.** Neutral or negative.
- **Feasibility.** This is a very feasible option.

## 2. Decrease unofficial interdistrict enrollment. Do not increase official permits.

- **District revenue.** Very negative.
- **BSEP.** Positive. Will concentrate BSEP money among Berkeley resident students.
- **Classroom management.** Positive. Teachers will have better access to students and parents and fewer tardy students.
- **Interdistrict Equity.** Ambiguous. Neighboring districts get their kids back, but would-be transfers lose opportunity to receive a Berkeley education.
- **Intradistrict Equity.** Ambiguous. Removing large numbers of interdistrict kids will reduce competition for popular schools, but lost revenue could compromise education for Berkeley residents.
- **Public relations.** Positive, unless BUSD's move is cast as a racist? What if teachers lose jobs because of lost revenue?
- **Feasibility.** Not feasible because of loss to district revenue and risk of school closure.

## 3. Allow Unofficial Interdistrict Enrollment to Increase.

- **District revenue.** Very positive.
- **BSEP:** Negative. Increased diffusion.
- **Classroom management.** Negative. More hard-to-reach parents, tardiness, etc.
- **Interdistrict Equity:** Ambiguous. Neighboring districts lose kids, but could end up stronger in the long term. More out of district kids get Berkeley education.



- **Intradistrict Equity:** Negative. More competition for school assignments, more resources serving nonresidents.
- **Public relations:** Negative. Would exacerbate perception that BUSD is not attending to core mission.
- **Feasibility:** Somewhat feasible

#### **4. Decrease Unofficial Enrollment, Increase Official Enrollment to Maintain Current Enrollment Levels With Fewer Unofficial Transfers**

- **District revenue:** Neutral or slightly negative. There are costs associated with increased vigilance about residency requirements, but they could be earned back if the district is able to remove truant students or students who, because of behavior problems, consume inordinate amounts of teacher or administrator time.
- **BSEP:** Neutral.
- **Classroom Management:** Positive. When students are official, teachers can reach parents more easily. District has a powerful lever – the threat of revoking a permit – to control out of district student truancy and behavior.
- **Interdistrict Equity:** Allows most unofficially enrolled students to continue in the district. In the future, could mean more limited school assignment options for nonresidents.
- **Intradistrict Equity:** Positive. May improve overall classroom management; gives Berkeley residents priority at popular schools.
- **Public Relations:** Ambiguous/negative. District may be applauded for taking steps to manage the interdistrict transfer phenomenon, but it may be difficult for many to accept larger numbers of official permits, even if the net enrollment is the same.
- **Feasibility:** Somewhat feasible. It will continue to be a challenge to enforce residency requirements, and persuading the public (and the School Board?) to accept more interdistrict permits may be tricky.

**Table 13: Weighing Interdistrict Enrollment Policy Options**

	<b>Let Present Trends Continue</b>	<b>Increase Out of District Enrollment</b>	<b>Decrease Out of District Enrollment</b>	<b>Maintain number of OOD's, only make them official when possible</b>
<b>District Revenue</b>	Neutral.	++ OOD's bring in lots of money to the district	--	Neutral?  Strengthening admissions and oversight may cost a bit more money – but the district could come out ahead if it is able to remove truant/disruptive kids
<b>BSEP</b>		- BSEP funds are diffused	+ BSEP funds become more concentrated	Neutral
<b>Classroom management</b>	- Teachers frustrated when OODs interfere with classroom mgt			++ Teachers could recommend revocation of permits for truant/highly disruptive OODs
<b>Political Feasibility / Public Relations</b>	- Teachers are already up in arms about district's lack of action re: unofficial OODs. Public awareness of rampant cheating erodes district's credibility as a manager.	-- ? Voters and teachers won't like it, neither will neighboring districts. Can voters and teachers be persuaded that increased enrollment is in their interest	+ / - Some Berkeley taxpayers may approve; but others within and outside the district will perceive the move as elitist and even racist.	- Critics will protest an increase in the number of official permits. Can forthright communication about the policy rationale offset some of the criticism?

<b>Feasibility</b>		?  It could be a PR challenge, but with existing capacity at the elementary schools, particularly Malcolm X, does it make sense to increase OOD enrollment?	---  Removing large numbers of OODs would cost the district money and worse, could force the closure of an elementary school site. Not feasible at this time.	No system will be foolproof; as long as demand exceeds supply of permits, families will find a way into BUSD schools. However, tougher proof-of-residency requirements may help the district control the phenomenon.
<b>Equity (within the district)</b>	--  Unidentified OOD's compete for spaces with Berkeley residents in sought after elementary schools.	-  How to increase enrollment while maintaining SES balance among schools AND giving Berkeley residents a priority for full schools?	-  Removing large numbers of OODs could force an elementary school closure	Neutral
<b>Equity (among local districts)</b>	Many out of district students receive a better education than they would in their home district.	-- / + ?  Increased competition robs other districts of revenue. Yet research suggests that competition may mean better districts for all in the long run.	--  Out of district students will lose the opportunity to receive a Berkeley education.	+  OOD kids will get the opportunity to learn Berkeley - but Berkeley residents must come to terms with the fact that they are openly competing with neighboring districts for kids

## **Policy Recommendation: BUSD Should Attempt to Convert Unofficial Interdistrict Transfers to Official Permits**

Given the tradeoffs of any interdistrict policy choice, the district and stakeholders should review the choices and attendant risks before making any interdistrict policy decisions.

At the same time, as the discussion above suggests, there are several distinct advantages to ‘regularizing’ unofficial interdistrict transfers:

Converting a significant number of unofficial interdistrict students to official permits will allow the district to better control enrollment. For example, the district could accept more students at the elementary schools with the understanding that it will revoke the permits when the student is ready to attend high school if the high school is full.

Tightening residency requirements is not a particularly expensive proposition, since the burden of proof is on the applying families. Making proof of residency requirements more stringent is an additional burden on applicants, but not uncommon in other districts, and Berkeley appears outside the norm in its residency requirements.

The major expense of a tougher enforcement policy will be staff to conduct home visits. However, this does not have to be a large expense. Child Welfare & Attendance staff in Fremont, for example, make about \$20 an hour and conduct hundreds of home visits each year. [Pickerill, 2005]

Converting unofficial interdistrict students to official permits will give the district a powerful lever for managing this population, satisfying teacher concerns about classroom management. Although state law prevents the district from setting admissions criteria for interdistrict transfers, it does allow the district to set minimum behavioral and attendance standards for the renewal of a permit. [Treff, 2005] Albany, for example, reviews interdistrict permits annually, revoking permits for students with above a minimum number of absences, tardies or disciplinary incidents. [Baker, 2005] Regularizing most interdistrict students to attend legitimately will help teachers stay in touch with parents by allowing parents to provide real telephone numbers and addresses.

Additionally, converting unofficial interdistrict students to permits will allow the district to ensure that Berkeley residents get first priority at full-enrollment schools.

The major challenges to implementing this recommendation are public relations and enforcement. To make the policy effective, the district will have to:

- Communicate the fiscal importance of interdistrict transfers to teachers and the community at large. Emphasizing the importance of interdistrict enrollment to keeping schools open may be the most effective way to convince teachers and the public to accept more interdistrict permits. Working to decrease private school enrollment may also help gain the public confidence.
- Even with stricter proof of residency rules, persistent out of district families will find a way to beat the system. However, requiring better documentation, conducting home visits, and working with teachers and other school site staff should help put an effective program in place. One possible approach may be to work with school sites to identify current unofficial interdistrict transfers, and then offer these families amnesty: an annually renewable permit in exchange for a real address. Even a 50 percent unofficial-to-official conversion rate would make a significant difference at the school sites.

### **Specific Policy Recommendations**

1. District administration should convene a discussion with stakeholders to discuss interdistrict policy. The discussions should take into consideration:
  - fiscal impacts
  - impacts on Berkeley resident students
  - impacts on the ability of BUSD to keep open its existing elementary schools and maintain current level of services and staff
  - impacts on neighboring districts
  - the best interests of interdistrict students
  - feasibility
2. The district has two viable policy options when it comes to unofficially enrolled students: a) let present trends continue, or b) attempt maintain stable enrollment

or even increase interdistrict enrollment while converting as many unofficially enrolled out of district students to official permits.

3. The latter policy option offers the district several advantages over doing nothing, but will require a moderate amount of new, dedicated resources including a half-time staff person to conduct early morning and evening home residency-verification visits. (Cost not to exceed \$40,000 per year, including benefits. This estimate is based on staffing levels and pay rates at other Alameda County districts for this type of staff.)

*Recommendations 4 through 7 apply if the district pursues policy option b:*

4. The district should work with teachers, principals and other school site staff to identify unofficially enrolled students and convert them to permitted students. School site staff can often identify children enrolled unofficially.
5. The district should bring its proof-of-residency requirements into alignment with other districts – i.e., it should make them more stringent.
6. When a student’s address is in doubt, the district should reserve – and execute - the right to conduct an early morning or evening home visit to verify the pupil’s residence.
7. The district should set clear, objective expectations of interdistrict students in terms of attendance and behavior and revoke permits when students fail to meet those standards.
8. Whatever its decision, district should clearly communicate its policy decisions and policy rationale regarding interdistrict enrollment to teachers, who are most directly affected by unofficial enrollment.
9. The district should engage a consultant (perhaps a graduate student) to study private school enrollment and make recommendations as to how to reduce the rate of private school attendance.

## **Chapter 2: CRACKING THE ATTENDANCE PROBLEM**

If enrollment is one side of the revenue limit equation, average daily attendance is the other. With higher enrollment comes more state revenue, but poor or sub-par attendance can erode those gains and cut deeply into a district's budget. BUSD teachers and administrators agree that BUSD can do more to improve attendance rates.

### **Summary of findings**

- BUSD's average daily attendance is below average for Alameda County districts. In fact, BUSD's total ADA is second to last in the county, just ahead of Oakland Unified;
- Lost ADA is extremely costly to the district;
- BUSD appears to invest fewer resources in attendance management than many other districts in the county;
- Although attendance is worse at the High School, the middle school and elementary schools have their share of chronic absenteeism;
- Poor attendance is strongly correlated with poor academic performance at the High School;
- Minorities are significantly overrepresented among chronic truants at the High School.

### **BUSD Attendance Compares Poorly with Other Districts in the County**

The Alameda County Office of Education – which collects ADA information from districts for the state - provided 2003-2004 ADA figures ("P-2" data) for each district in the county by grade. To obtain attendance rates, I compared the P-2 data to enrollment figures provided by the districts to the state in October and available on the CDE website.

Compared to other districts, Berkeley's attendance appears low. BUSD overall attendance rate ranks at the bottom of the county, just above Oakland Unified.

Clearly, variability in attendance record-keeping inflates ADA for some districts relative to Berkeley. For example, it is unusual for high schools to have better attendance

than elementary schools – yet San Leandro and New Haven claim just that in their ADA records. BUSD should be commended for its accurate record keeping, since accurate records is a prerequisite for an effective attendance policy.

Yet, it would be a missed opportunity for BUSD to write-off its ADA as a function of superior record-keeping only. This conclusion would belie the consistency data showing Berkeley’s attendance to be sub-par as well as Berkeley administrators’ own acknowledgement that the district lacks an effective attendance policy. For example, nationwide, high school attendance is 92.7, several percentage points higher than Berkeley High. [Hoachlander, Dykman & Godowsky, 2001]

“In our district, attendance is still a major issue,” says Kenneth Jacopetti, the district’s director of student services.

“[Attendance has] always been a priority,” agrees Rory Bled, the BHS vice principal in charge of attendance. “Has it been an acted-upon priority? No.”



**Table 14: Alameda County Districts Average Daily Attendance, 2003-2004**

**K-8 ADA**

District	% ADA K-8
Piedmont	98.4%
Albany	97.6%
Pleasanton	97.6%
Fremont	97.1%
Castro Valley	96.9%
Dublin	96.7%
Newark	96.4%
New Haven	96.3%
<b>County Average</b>	<b>97.1%</b>
Livermore	95.2%
Alameda	95.2%
San Lorenzo	95.1%
<b>Berkeley</b>	<b>94.9%</b>
San Leandro	94.8%
Hayward	94.8%
Emery	93.9%
Oakland	88.7%

**9-12 ADA**

District	% ADA 9-12
San Leandro	97.4%
Piedmont	97.3%
New Haven	97.0%
Emery	97.0%
Pleasanton	95.9%
Albany	95.7%
Livermore	94.6%
<b>County Average</b>	<b>96.4%</b>
Fremont	93.5%
Dublin	93.2%
Castro Valley	93.2%
Newark	92.9%
Alameda	92.7%
Hayward	92.1%
<b>Berkeley</b>	<b>90.2%</b>
San Lorenzo	89.4%
Oakland	84.1%

**K-12 ADA**

District	% ADA TOTAL
Piedmont	98.0%
Pleasanton	97.0%
Albany	96.9%
New Haven	96.5%
Fremont	96.0%
Dublin	95.7%
Castro Valley	95.6%
San Leandro	95.6%
Newark	95.3%
Livermore	95.0%
<b>County Average</b>	<b>94.9%</b>
Emery	94.7%
Alameda	94.4%
Hayward	94.1%
San Lorenzo	93.3%
<b>Berkeley</b>	<b>93.3%</b>
Oakland	87.5%

Source: Alameda County Office of Education, California Department of Education

## The Fiscal Cost of Lost ADA

Whatever the source of the differences in ADA between Berkeley and higher-ranked counties, the discrepancies are costing BUSD a lot of money. As Table 15 below demonstrates, BUSD would have earned an additional \$1.69 million this year if its ADA met the county average.

**Table 15: Lost Attendance, Lost Revenue**

	Berkeley Actual ADA	If Berkeley ADA = County Average	Actual Revenue Limit	Revenue Limit if ADA Equaled County Average	Difference
<b>K-8</b>	5444	5567	\$29,127,540	\$29,792,465	(\$664,925)
<b>High School</b>	2804	2996	\$15,002,203	\$16,029,199	(\$1,026,997)
<b>Total</b>	8249	8565	\$44,129,743	\$45,821,664	(\$1,691,921)

## The Educational Cost of Lost ADA

Although we do not know which is cause and which is effect, the correlation between poor school performance and truancy is striking. Table 16 (below) shows how average GPA plummets for students with large numbers of unexcused absences. It also highlights the concentration of truancy at the High School: 477 students have 11 or more unexcused all-day absences; 257 have more than 20 unverified absences. One-third of Berkeley High School students account for 92% of all unverified absences.

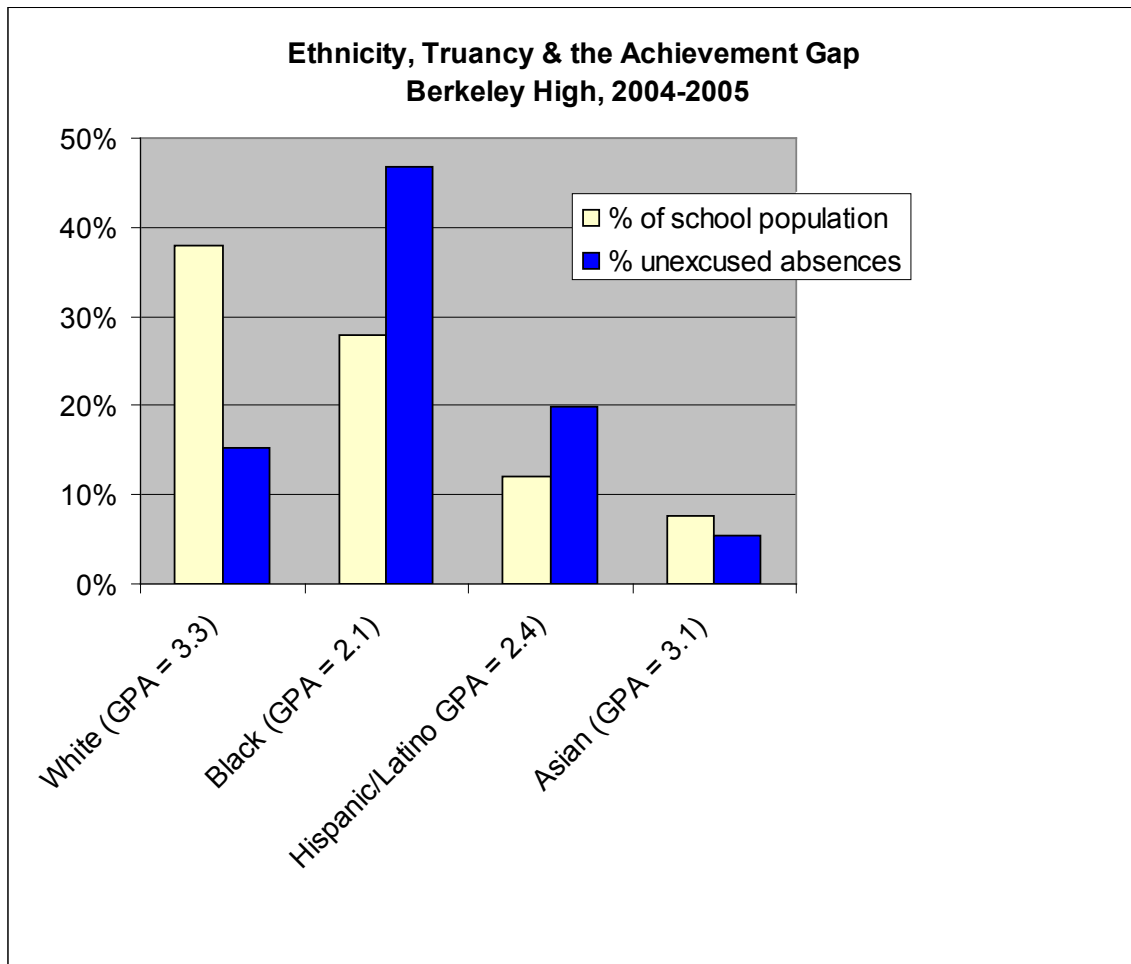
**Table 16: Frequency of Unexcused Absences at BHS & GPA**

# All-Day, Unverified Absences	# of Students	Average GPA
0-3	1,929	3.07
4-10	577	2.35
11-19	220	2.0
20-50	187	1.66
50-122	70	1.07

## Truancy and the Achievement Gap

A disturbing facet of attendance patterns at the High School is the extent to which African-American and Latinos are overrepresented among chronic truants. In Table 16, I compare the size of ethnic groups at the High School to the percent of total unverified absences accounted for by each major ethnic group. In addition, I note each group's average GPA. The association between ethnicity, absenteeism and school performance is notable.

**Table 17: Truancy & the Achievement Gap at BHS**



### Policy Analysis

**District wide.** The district has recently taken an important step toward responding to chronic truancy. Earlier this year, the district created a Student Attendance Review Board, a district-wide group whose members include student services director Ken

Jacopetti, a parole officer, and Teresa Drenick, the Alameda County deputy district attorney in charge of filing truancy cases. The group is charged with meeting with habitual truants and their families, with the understanding that the district attorney can bring truants and their parents before an Alameda County Superior Court judge if the student's attendance does not improve. Drenick has filed numerous charges against parents and teens in other Alameda County districts that utilize the process.

SARBs, and particularly the threat of prosecution, can be effective tools in reforming individual truants – especially at the elementary and middle school level. [Drenick, 2005] But the process does not stand alone, and it has several limitations. Specifically, SARBs are slow, and habitual truants do not face consequences for their actions immediately; SARBs are resource-intensive and expensive, and they target only most severe truants. [Bookman, 2004].

SARBs are governed by legal due process guidelines, foremost among them that the school sites first attempt to conduct meaningful intervention with the truant student and her family. [Drenick, 2005] For example, in addition to a series of letters that the school site must send out to the parents of truant children before referring a truant to the SARB, school sites must meet with families and try to provide referrals - such as family counseling – that get at the underlying cause of the child's absences from school.

Such interventions are extremely time consuming, and may be impossible for existing administrative staff to tackle when truancy is pervasive. For this reason, many districts specifically hire individuals to help contact truant families. The San Lorenzo, Hayward, Fremont, and New Haven school districts all have so-called Child Welfare & Attendance staff whose job is to support school sites by tracking down truants and their parents and help them get back to school. Often, CWA staff step in after a school site attendance clerk and principal have been unsuccessful in contacting a family. CWA staff are a key component to making the process effective, Drenick says.

“If a school really cares, and actually says, ‘we will try to affect change and have a meaningful early intervention,’ [SARBs] can do a lot of good,” she says. But, adds Drenick, meaningful intervention requires an investment on the part of the district, “not just sending perfunctory letters.”

CWA staff are in all likelihood revenue neutral or a net fiscal benefit to their districts. Linda Freccero, a CWA employee with the San Lorenzo school district, says she and her co-worker each get paid about \$40,000 a year for full time work. “It’s our belief that we more than pay for ourselves,” Freccero says. “If you can really turn around one student, that’s five or six thousand dollars per year. I turn around at least ten cases per year.”

Berkeley does not have any district wide attendance staff at this date and has not assigned or hired any new staff to tackle the workload associated with the new SARB process.

In addition to providing district wide staff, BUSD may motivate school sites to dedicate more of their existing resources (for example, principal or counselor time) toward attendance improvement by giving them financial incentives. For example, the district could reward schools sites with discretionary dollars in proportion to improvements to a baseline attendance. (Stiff penalties, of course, must also wait off-stage for sites that fudge numbers to take advantage of the reward.)

**The High School.** The High School has also independently taken some recent steps toward tackling attendance. Last year, the new principal, Jim Slempe, announced that grades would be lowered for unexcused absences. And this year, the administration is considering the possibility of hiring a part-time intervention counselor to focus specifically on truancy. The High School would also like to begin using email to contact parents whose child is absent without an excuse. (Currently, the High School uses an autodialler to leave messages for parents when children are absent.)

These are steps in the right direction, but they may not be enough.

- Email may help the district get in touch with parents, but many parents may not have an email address. Email will also not send nearly as powerful a message to parents and students as an evening telephone call to the parent by a high school counselor informing them that their child missed school that day.
- Though lowered grades may be a deterrent to students who care about grades, chronically absent students may have low enough GPAs that lowered grades may not present much of a threat.

- Rory Bled, the vice principal, says that the automatic dialler works only sporadically, given that students know how to erase such messages before their parents hear them.
- Discipline officers and teachers at the school are focused on the problems created by students who actually attend class, and teachers sometimes view chronic truants as students who present challenges when they are in school.
- A part-time attendance counselor would be a great start – but given the sheer volume of truant students, a full-time employee may be better able to handle the caseload.

Meanwhile, since the High School does not directly share the brunt of lost revenue due to absences, it has little motivation to invest resources in a problem many view as intractable. The problem may be one of a bit of moral hazard: although the High School is the designated enforcer of attendance policy, it does not directly bear the cost of absenteeism or directly reap the fiscal rewards of improved attendance.

Researchers and educators agree that high school truancy is very difficult to combat successfully, but there are success stories. Simple punitive approaches are largely ineffective, while successful methods require parent-teacher cooperation, intervention programs, good record keeping and consistent penalties [Teasley, 2004; Reid, 2002] A combined approach of both positive reinforcement and appropriate penalties for chronic absenteeism can be effective in raising attendance. For example, Paul M. Hodgson Vocational-Technical High School in Newark, Delaware raised its attendance rate from 90 percent in 1990 to 96 percent in 1999 through a reform plan that included: a task force that met monthly to create incentives for improving attendance; reward systems like free breakfast for perfect attendance; a student attendance review board; and a rule whereby no student could earn credit for a course if she missed more than five classes without making up the time. [Hoachlander, Dykman & Godowsky, 2001]

Perhaps because of a greater sense of accountability and community, students at smaller high schools tend to have better attendance than students at larger schools. [Gardner, Ritblatt & Beatty, 1999] The High School may want to investigate the feasibility of assigning truant students to its small schools.

## **Attendance Policy Recommendations**

1. The district should hire at least one full-time and one part-time school term Child Welfare & Attendance staff to support efforts to improve attendance and to help enforce residency requirements. The job of the CWA staff shall be to conduct home visits to verify addresses, to conduct home visits when students are chronically absent or truant, and to support school sites in their efforts to create meaningful intervention for chronically absent students.
2. The district should consider setting up an incentive program for school sites wherein they share in the fiscal rewards of improved attendance, perhaps 50 percent of the improved ADA over baseline. In the first year of the program, schools should be given a small amount of seed money to create their own anti-truancy programs.
3. The district should convene an “attendance summit” of school site administrators and representative teachers in August, 2005 to reiterate the district’s commitment to attendance, disseminate information about the Student Attendance Review Board, introduce new CWA staff, and introduce the incentive program.
4. The High School should create a task force charged with changing permissive attitudes among students, teachers and staff about attendance, researching best practices, and creating effective incentives for improved attendance.
5. If feasible, the High School registrar or district attendance office should collect multiple telephone numbers from parents of high school students, including daytime/work telephone numbers and cell phone numbers, in order to ensure that teachers, administrators or counselors can reach parents when children are absent without an excuse.
6. The High School should proceed with plans to hire an attendance counselor on a trial basis, full-time if at all possible. The counselor’s contract should that he or she work in the evening hours at least several times a week in order to promptly reach parents about their children’s absences when the parents are most likely to be home. At a cost of \$75,000 (including benefits), the district

could recoup her salary for the district with a mere half-percent increase in ADA. Furthermore, these calculations surely understate the benefits to the school when improved student outcomes and reduced drop out rates (which are highly associated with truancy) are taken into account.



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