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# Aligning Resources to Improve Student Achievement: San Diego City Schools (A)

## December 4, 2003

As San Diego City Schools (SDCS) Superintendent Alan Bersin prepared for an emergency budget meeting with his senior advisors, the district's financial position weighed heavily on his mind. Three weeks earlier, the financial officers had projected that the district would need to slash $98 million from the unrestricted[1] general fund to balance the $1.1 billion SY05 budget.[2] In addition, SDCS would need to cut restricted fund expenditures for the district's reform plan, the *Blueprint for Student Success in a Standards-based System* (the *Blueprint*), by 25% to 35% for next year.

A lawyer by training, Bersin considered the facts at hand. When he had arrived at SDCS in the summer of 1998, SDCS was a highly decentralized district in which each school made its own decisions over resources, curriculum, and professional development. For the past six years, he had labored to transform SDCS into a unified system committed to improving teaching and learning. Under the *Blueprint*, SDCS had reversed a seven-year decline in student achievement. Bersin and his leadership team believed that centralizing the major resource allocation and instructional decisions in the district had been critical factors in this success.

Bersin now wondered if this was the time to let principals have more control over their school budgets, even if it meant that the *Blueprint* would have to evolve into a more flexible reform strategy. Indeed, when Bersin and his team called the district's 167 principals together on December 2 and 3 to share the budget news and solicit their priorities, the majority of principals expressed their commitment to "protecting the classroom" and "maintaining supports for improving instruction."

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[1] *Unrestricted* funds can be used for any legal purpose related to the operations of the district. Alternatively, the terms *categorical* and *restricted* are used interchangeably to denote funds that are provided to cover the expenses of a particular program or activity, usually in accordance with a federal or state government categorical program such as Title I or special education. Cited in "Glossary of Budget Terms," SDCS Web site, http://www.sdcs.k12.ca.us/budget/glossary.pdf, accessed January 16, 2004.

[2] SY is a PELP convention that denotes "school year." For example, SY05 refers to the 2004–2005 school year.

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Research Associate Caroline King prepared this case under the supervision of HGSE faculty member James P. Honan and Stacey Childress, Executive Director and Senior Researcher for the HBS Initiative on Social Enterprise. PELP cases are developed solely as the basis for class discussion. Cases are not intended to serve as endorsements, sources of primary data, or illustrations of effective or ineffective management.

As Bersin entered the meeting, his team members' faces reflected a shared anxiety about the district's fiscal crisis. Bersin began, "Our only agenda item today is to resolve the $98 million deficit. Since 1998, we've made all the key resource allocation choices here at the central office. Now that we are six years into the reform effort, and in light of the budget crisis, should we start giving our principals more authority over their budgets and the *Blueprint*?"

## Context

### *Financing for Public Education in California*

Since the late 1970s, public education financing in California had effectively been linked to the health of the state's economy by two state ballot initiatives.[3] Proposition 13, approved in 1978, primarily limited property tax rates to 1% of a property's assessed value and capped annual increases to the lesser of 2% or the percentage growth in the consumer price index. Local funding for public schools declined swiftly and dramatically. In order to reverse the downward revenue spiral, California voters passed Proposition 98 in 1988, which guaranteed a minimum amount of state aid for public education through a set of formulas tied to changes in enrollments, per capita personal income, and projections of state and local property tax income. As a result of the two measures, California schools relied heavily upon state revenues, which comprised approximately 80% of school district budgets statewide.

Not surprisingly, California's sizable budget deficit—estimated at $38 billion for 2004 and $15 billion for 2005—had an acute impact on public schools. In SY04, state lawmakers reduced per pupil revenues and deferred cost-of-living adjustments for all district teachers and employees. In March 2004, Californians would vote on Propositions 57 and 58, which intended to balance the state's 2005 budget by issuing a $15 billion bond to refinance the state's debt. School districts expected to recoup a portion of forfeited state revenues for SY05 if the propositions passed. However, many districts would continue to feel budgetary constraints, since the bond would provide only temporary relief from the state's projected multiyear structural imbalances.

Concurrently, California's new Republican administration, led by Governor-elect Arnold Schwarzenegger, initiated a substantial review of the state's public education policies. A few weeks after winning the state's November 2003 gubernatorial recall to replace Democratic Governor Gray Davis, Schwarzenegger appointed Richard Riordan, the former mayor of Los Angeles known for his unorthodox ideas in public education, as state secretary of education. Riordan quickly called for overhauling the state's education finance system, empowering principals' oversight over school budgets, and ensuring that the neediest students received additional funds.[4] By December 2003, Riordan's ideas had gained traction among some Republican lawmakers and a handful of educators and editorialists across the state.

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[3]Information in this section adapted from Penny Howell, *Understanding School Finance: California's Complex K-12 System* (Palo Alto: EdSource, Inc., 2000); and "California School Finance News, March 2004," EdSource Web site, http://www.edsource.org/edu_fin_cal.cfm, accessed March 18, 2004.

[4]Specifically, Riordan called for streamlining state categorical programs and implementing a weighted student formula that "allocate[s] dollars directly to schools on a per-pupil basis . . . [by] calculating a base amount for the 'average student' to which is added money determined by weights assigned to various categories of students, such as high poverty or English learners." See "Weighted Student Formula Concept Enlivens School Finance Debate," EdSource Web site, http://www.edsource.org/pub_brief_weighted.cfm, accessed May 14, 2004.

## *San Diego City Schools*

**Demographics** Serving 138,600 students in SY03, the San Diego City School district was the 13th-largest urban school district in the United States and the second largest in California (see **Exhibit 1** for SDCS demographics). SDCS housed a diverse socioeconomic and ethnic student body, with more than 65 languages spoken at home. Hispanics comprised nearly 40% of SDCS students, whites 27%, Asians 16%, and African-Americans 16%. These figures represented a near reversal from 1977, when the district's overall enrollment was approximately 70% white and 30% minority.[5] More than half of students qualified for free or reduced-price meals, and nearly 30% were learning English for the first time. Following 18 consecutive years of growth in student enrollment, the number of children attending SDCS schools began declining steadily in SY02 consistent with a trend beginning to affect other large urban districts in California.

**Budget and school financing** In SY04, SDCS received $873.5 million of its $1.1 billion budget from the state, $117.5 million from the federal government, and $36.6 million from local and private sources (see SDCS financial statement in **Exhibit 2**). Approximately 64% of the revenues were *unrestricted*. The remaining 36% of revenues were *restricted*. SDCS confronted a multiyear budget crisis starting in SY03 precipitated by California's fiscal woes, rising health and benefit costs, and declining enrollment—particularly of low-income students generating restricted Title I funds.[6] Despite making over $79 million in cuts to balance the SY04 budget in June 2003, the district projected a $98 million unrestricted fund deficit for SY05 in November 2003. Further, while district leaders had managed to make the SY04 budget reductions without impacting schools, they reluctantly acknowledged that schools could not be sheltered for a second year in a row.

In SY04, SDCS individual schools received unrestricted funds through a formula-driven allocation for staff positions and dollar-based allocations for instructional supplies based on student enrollment. Given that staffing allocation formulas were determined under collective bargaining agreements, principals and their school advisory groups controlled only their budgets for supplies and non-supervisory employees. Schools received restricted funding in two ways. SDCS provided all schools with an allocation—known as the *Blueprint* allocation—to support instructional strategies. Most schools also received additional restricted funds to support specific state or federal programs offered at the site, such as special education. School leaders did not have discretion over the *Blueprint* allocation but did make spending decisions over the other site-specific restricted funds.

## *Governance*

**Board of education** A fiscally independent board of education (the board) was charged with setting policy for SDCS. The board consisted of five members, each elected biannually to represent

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[5]Cited in Margie Craig Farnsworth and Neil Kendricks, "Diversity and Division: Reading, Writing, and Race in San Diego Schools," *San Diego Magazine Online,* March 2001, http://www.sandiego-online.com/issues/march01/diversity2a1.shtml, accessed June 16, 2003.

[6]Title I is the largest federal education program in the U.S., with a 2003 funding level of $12.3 billion. Created by the *Elementary and Secondary Education Act of 1965* (reauthorized by the *No Child Left Behind Act of 2001*), Title I addresses the academic needs of underperforming students at high-poverty schools. Eligibility for Title I funding to a school is determined by the poverty level of the student population the school serves, measured in SDCS as the percent of students who qualify to receive free and reduced-price meals. Schools with a poverty rate of 40% or higher can apply to use their Title I funds to support all students in the school. In SY04, 126 of the district's 187 schools received Title I funding; 125 operated schoolwide programs. See "Title I," Education Week Web site, http://www.edweek.com/context/topics/issuespage.cfm?id=126; and "Title I Schools Fact Sheet," SDCS Web site, http://www.sdcs.k12.ca.us/comm/factsheets/ttl1_schools.pdf, accessed January 16, 2004.

one of the five subregions of the district. Contentious board politics had characterized most of Bersin's administration. Districtwide reform efforts initiated in SY99 polarized the governing body into a virtual split, with three members often voting in favor of Bersin and the reforms and two voting in opposition.

In addition to the board, California state law and local agreements required SDCS to collaborate with three advisory bodies on resource allocation policies:

**District Advisory Council for Compensatory Education (DAC)** A state-mandated, elected body composed of parents and staff from Title I schools, the DAC voted annually to approve the district's budget proposals for federal Title I and state compensatory education program funds.

**School site councils (SSC)** The state required an SSC in every school receiving federal Title I funds. Composed of the principal, teachers, staff, parents, and community members, as well as a student at the secondary level, the SSC approved proposed restricted fund expenditures that supported school improvement, compensatory education, and Title I programs at the school site.

**Site governance teams (SGT)** SGTs were advisory groups required in every SDCS school under a March 1998 agreement to "shared decision making" brokered between the board of education and local employee groups. SGT membership included 50% teachers and certificated staff,[7] 35% parents and community members, 15% classified staff, a student in secondary schools, and the principal. SGTs reviewed scheduling, budgetary, and staffing decisions.

### *Collective Bargaining Units*

An affiliate of the California Teachers Association and the National Education Association, the San Diego Education Association (SDEA) represented over 8,300 certificated district employees, or nearly 50% of SDCS full-time personnel. Following a debilitating strike in 1996, Bersin's predecessor, Superintendent Bertha Pendleton, began repairing the SDCS-SDEA relationship. Ultimately, Pendleton negotiated the shared decision-making processes that created site governance teams.

## Bersin's Philosophy: Providing Coherence to the System

*The mission of San Diego City Schools is to improve student achievement by supporting teaching and learning in the classroom.*

—SDCS Mission Statement, adopted fall 1998

### *Bersin Arrives*

Dissatisfied with a seven-year decline in student achievement and SDEA's growing power, San Diego business and community groups coalesced around a common commitment to district reform in 1997, calling for a new and nontraditional superintendent. Their efforts culminated in the candidacy of Bersin, former U.S. attorney for the Southern District of California and so-called southwest "border

[7]Certificated staff were credentialed for a specific function, such as classroom teacher, librarian, counselor, nurse, principal, and vice principal. Classified staff worked in a specific function that did not require a credential, such as a secretary, police officer, custodian, bus driver, budget analyst, or food service worker. Cited in "Glossary of Budget Terms," SDCS Web site, http://www.sdcs.k12.ca.us/budget/glossary.pdf, accessed January 16, 2004.

czar" (see **Exhibit 3** for Bersin's biography). In March 1998, the board appointed Bersin as SDCS superintendent by a 4–0 vote with one abstention. Bersin assumed office in July.

Bersin was determined to increase both the quality and equity of public education offered to every child in the district. He immediately set out to assemble an executive leadership team to help him design the strategy. Bersin recruited Anthony Alvarado as the new chancellor of instruction. Alvarado brought a relentless focus on improving professional development and an impressive track record to SDCS. During his 11-year tenure as superintendent of New York City's Community School District 2 (District 2), increases in student achievement moved District 2 from the sixteenth- to the second-highest ranking among the city's 32 community school districts. On the operations side, Bersin appointed long-standing SDCS controller Henry Hurley as chief administrative and financial officer and Terry Smith, a former colonel with the U.S. Marines Corps, as chief of staff.

Bersin and the team inherited a decentralized district in which schools did not share common curricular frameworks, professional development principles, or a fundamental vision about how to improve educational outcomes for every student. Moreover, the district housed both flagship and failing schools. A substantial achievement gap evidenced that not all students, particularly not minority and low-income students, were receiving a high-quality education (see **Exhibit 4** for historical student achievement data).

Before Bersin, the district's resource allocation system was also highly decentralized. With the exception of salaries and benefits for certificated and classified staff, principals and their school councils decided how to spend their school's unrestricted and restricted funds. From Bersin's perspective, the myriad curricula, professional development programs, and instructional techniques in the district were a direct result of schools' considerable budgetary latitude. As Bersin and his senior advisors wondered where they would find the resources and the levers to introduce districtwide reform initiatives in every school, they began to consider reducing schools' decision rights over resources, at least for a time. If the team could control the district's human and financial resources, the district could reallocate these resources to implement a districtwide strategy. Once systemic coherence was introduced and reform efforts had created the potential for each school to offer a high-quality education, the district could consider restoring decision rights over resources to principals and their school advisory groups.

## *Implementation of Instructional Reforms: The Blueprint for Student Success*

In SY99, the district launched an ambitious districtwide reform agenda to improve student achievement.[8] Bersin recalled the need to create a sense of urgency at the outset: "There was no other way to start systemic reform. You don't announce it. . . . You've got to jolt the system, and if

[8]For more information about the early reform years in SDCS and the *Blueprint for Student Success*, see Larry Cuban and Michael Usdan, "Fast and Top-Down: Systemic Reform and Student Achievement in San Diego City Schools," in *Powerful Reforms with Shallow Roots: Improving America's Urban Schools*, eds. L. Cuban and M. Usdan (New York, NY: Teacher's College Press, 2003), pp. 77–95; Linda Darling-Hammond, et al., *Building Instructional Quality: "Inside-Out" and "Ouside-In" Perspectives on San Diego's School Reform* (Seattle, WA: University of Washington's Center for the Study of Teaching and Policy, September 2003); Amy Hightower, *San Diego's Big Boom: District Bureaucracy Supports Culture of Learning* (Seattle, WA: University of Washington's Center for the Study of Teaching and Policy, January 2002); *Evaluation of the Blueprint for Student Success in a Standards-based System* (Palo Alto, CA: American Institutes for Research, January 29, 2002); *Evaluation of the Blueprint for Student Success in a Standards-based System, Year 2 Interim Report* (Palo Alto, CA: American Institutes for Research, rev. July 31, 2003); and Milbrey McLaughlin and Joan Talbert, *Reforming Districts: How Districts Support School Reform* (Seattle, WA: University of Washington's Center for the Study of Teaching and Policy, September 2003).

people don't understand you're serious about change in the first six months, the bureaucracy will own you. The bureaucracy will defeat you at every turn if you give it a chance."[9]

Based on a considerable body of educational research and Alvarado's success in District 2, the reforms started from the hypothesis that improving teachers' practice increases student achievement. The SDCS central administration assumed a new proactive role in leading and executing a coherent reform strategy while encouraging the formation of learning communities in schools.

Early efforts were formalized in March 2000 by the *Blueprint for Student Success in a Standards-based System* (the *Blueprint*). The *Blueprint* articulated the district's commitment to improving educational outcomes for every SDCS student through a districtwide reform strategy: "It is one thing to embrace the idea that all children can learn, it is another thing to make sure they do learn. That is the premise of the *Blueprint for Student Success*. . . . There is a saying, 'A rising tide lifts all boats.' The key long-term payoff of the *Blueprint* is that as the base of instruction across the whole system rises, so will the academic achievement of all students."[10]

The comprehensive plan proposed three types of instructional strategies. *Prevention* strategies intended to raise achievement among all students in the district "through a broad commitment to well-defined curriculum, content standards, and extensive professional development." *Intervention* strategies would support struggling students, and *retention* strategies were designed to bolster and accelerate the academic skills of retained students. The *Blueprint* called for an aggressive reallocation of human and financial resources to implement the plan districtwide starting in the summer of 2000.

Using redirected restricted funds and central office savings, the board narrowly approved the *Blueprint*'s $62 million price tag by a 3–2 vote in March 2000. Heralded as a "living reform" by the district, *Blueprint* strategies were modified by Bersin and the leadership team annually based on effectiveness, capacity, and the level of restricted funds and private grants available. As the plan evolved, *Blueprint* financing fluctuated between $62 million and $108 million from SY01 through SY04, representing between 6% and 10% of the total SDCS annual budget (see **Exhibit 5** for *Blueprint* budgets). Following the announcement of the district's multiyear budget crisis in the fall of 2003, the team anticipated a 25% to 35% reduction in *Blueprint* expenditures for SY05.

## *Key Reform Elements*

The *Blueprint* extended three key reform elements: professional development, curriculum frameworks, and focusing resources on low-performing schools and students.

**Professional development** Established in the summer of 1998, the SDCS Institute for Learning transformed professional development from uncoordinated, one-time workshops into a districtwide enterprise at the core of the reforms. Professional development concentrated on two areas: strengthening instructional leadership and improving teacher practice. Alvarado replaced administratively focused regional superintendents with instructional leaders (ILs) charged with supporting a learning community of about 25 principals each. ILs led monthly principal conferences and trained principals to observe teachers' practice during school "walkthroughs." Alvarado and the ILs counseled principals to focus exclusively on improving instruction, a radical shift from their traditional operations management role. In tandem, SDCS instituted a new accountability system under which ILs evaluated principals based on their ability to improve instruction and achievement.

[9] Hightower, p. 8.

[10] *The Blueprint for Student Success in a Standards-based System* (San Diego, CA: SDCS, March 14, 2000), p. 5.

In October 2000, SDCS and the University of San Diego partnered to establish the Educational Leadership Development Academy (ELDA) to spearhead training efforts for principals and instructional leaders.

From SY99 through SY03, the Institute for Learning utilized the three mandatory districtwide professional development days to offer intensive training to teachers. Teachers were also encouraged, and paid, to attend voluntary district-designed workshops and demonstration lessons during the summer, intercessions, and weekends. Concurrently, the district established a number of new school-based positions to help disseminate research-based instructional practices and support the adoption of new curriculum frameworks. Following protracted negotiations with SDEA, the district created a network of certificated peer coach/staff developers (peer coaches) in SY00. Other new school-based support positions followed in subsequent years, including early-literacy resource teachers, math resource teachers, and secondary site content administrators for math, literacy, and science.

**Curriculum frameworks** Dissatisfied with the uneven quality of academic programs offered across the districts' schools, Bersin's team implemented rigorous, systemwide curriculum frameworks. Early efforts concentrated on literacy, considered a gatekeeping skill for accessing more advanced academic content. The district officially introduced a balanced literacy framework in SY99, followed by a mathematics framework in SY01 and science interventions in SY02. Concurrently, enhanced materials and professional development were introduced into K–6 classrooms.

**Additional resources for low-performing students and schools** Finally, SDCS redirected and focused resources on low-performing students and schools. Beginning in the summer of 1999, the district dramatically increased summer school, intercession, and extended-day programs to assist struggling students. In addition, the district reduced student-teacher ratios in classrooms with a high percentage of retained and academically at-risk students and offered accelerated literacy and math-block classes to low-performing sixth graders and high school students. The district also provided extra support to a group of eight low-performing elementary schools, or "focus schools," that ranked in the bottom 10% of schools statewide according to California's Academic Performance Index (API).[11] Focus schools had an extended school year, a second peer coach/staff developer, supplementary early-literacy and math resource teachers, an additional $8,000 for materials, a parent liaison, and preschool programs. The number of focus schools increased to 10 in SY02 and to 20 in SY03 to include all elementary and middle schools in the two lowest API deciles.

## Aligning Resources to the *Blueprint*

Bersin and his team took aggressive action in four areas to realign the district's resources to the *Blueprint*: 1) transforming human resources, 2) centralizing and reallocating restricted funds, 3) external fundraising, and 4) redirecting central office savings.

[11]The Academic Performance Index (API) was the cornerstone of California's accountability system. The API measured the academic performance and growth of schools by an index that ranges from a low of 200 to a high of 1,000, with 800 set as the performance target for all schools. An API 1 score indicates that schools' test scores rank in the lowest 10% of elementary schools in the state; API 2 schools are in the second-lowest grouping. Cited in "Focus Schools Fact Sheet," SDCS Web site, http://www.sdcs.k12.ca.us/comm/factsheets/focus_schools.pdf, accessed January 18, 2004; and "Academic Performance Index Fact Sheet," SDCS Web site, http://www.sdcs.k12.ca.us/comm/factsheets/api.pdf, accessed January 18, 2004.

## *Transforming Human Resources*

The *Blueprint* inaugurated a sweeping reallocation of the district's human resources in order to upgrade the quality of leadership and professional development. Chief Human Resources Officer Ruth Peshkoff described how SDCS "diverted resources away from central office functions and school paraeducators in order to provide highly trained instructional staff at the school sites to support the reform strategies." For example, citing research demonstrating the negligible impact of teacher aides on student achievement, SDCS dismissed 612 Title I-funded classified teacher aides and reduced work hours for an additional 286 at the end of SY00. The move freed up between $2 million and $3 million in federal Title I funds. By SY01, SDCS had completely eliminated teacher assistants and their $14 million in salaries. In their stead, SDCS funded the new certificated positions created under the *Blueprint*, such as peer coaches and site content administrators for literacy and math (see **Exhibit 6**).

In addition, SDCS hired a cadre of external consultants from New York's District 2, the University of Pittsburgh's Institute for Learning, and New Zealand to provide intensive professional development for teachers, peer coaches, content administrators, ILs, and principals. In response to declining revenues and feedback from principals and teachers, SDCS reduced consultant expenditures considerably and relied increasingly on the peer coach/staff developers to offer ongoing school-based support. By SY04, every K–8 school had one peer coach, while schools with an API 1 and 2 ranking were allocated a second peer coach. All middle schools had a math content administrator, and API 1 and 2 middle schools also received a literacy administrator. All senior high schools had a math administrator, a peer coach, or a literacy administrator, and six had science administrators. Also in SY04, the district began developing online professional development tools in partnership with the educational network provider Teachscape Inc.

## *Centralizing and Reallocating Restricted Funds*

**Rationale** SDCS decided to centralize restricted funds for practical and instructional reasons. Chief Administrative and Financial Officer Hurley pointed out that unrestricted funds—82% of which paid for personnel salaries and benefits—were simply not available for reallocation. On the other hand, federal Title I and state restricted funds were growing as a result of the district's rising poverty rate and California's economic boom.[12] While principals and school site councils had considerable discretion over how to spend their restricted funds, Alvarado argued that principals were using restricted dollars to fund low-impact strategies, such as the classroom teacher aides. Using restricted funds would allow the district to implement *Blueprint* interventions districtwide and concentrate additional resources on the most academically at-risk schools and students. Furthermore, using restricted money was less politically charged than using unrestricted funds, the latter of which was likely to provoke a protracted debate with either the board or SDEA or both.

**Constraints** The district's use of Title I funds to support districtwide reforms was unprecedented due to the highly restrictive nature of the federal program. In order to comply with Title I regulations, SDCS had to satisfy three key provisions:

- *The intent of Title I,* "by providing socio-economically disadvantaged children 'an enriched and accelerated educational program' and for 'upgrading the quality of instruction by

[12]Title I funds increased as the district's poverty rate grew. State integration funds grew as a result of the healthy economy and, in 2000, California lawmakers temporarily removed a cap on the amount of hourly state funds districts could earn by offering summer school and other programs for low-performing students.

providing staff in participating schools with substantial opportunities for professional development'"[13]

- *Supplement not supplant*, which prevents districts from using Title I money to replace regular state or local education funds

- *Comparability*, which requires that Title I schools, in the aggregate, receive *more or comparable* state and local funding per student than non-Title I schools

SDCS asked the U.S. Department of Education (DOE) to review its proposed use of Title I funds for the *Blueprint*. In a June 2000 letter to Bersin, Assistant Secretary of Education Michael Cohen declared the district's plan "consistent with program requirements" and "the kind of school reform that we wish to see school systems across the country put into place."[14] However, the District Advisory Committee on Compensatory Education's (DAC) chairwoman had filed a uniform complaint against SDCS with the California Department of Education (CDE) in March 2000 protesting the central office's new control over school-based Title I dollars.

The CDE launched a three-year investigation focused on whether or not SDCS had violated the *supplement not supplant* and *comparability* provisions. For example, if Title I funds were being used to pay for interventions paid for by other state or local funds in non-Title I schools (e.g., peer coaches), it stood to reason that Title I schools would be receiving *less* local and state funds per pupil than non-Title I schools. In March 2002, SDCS applied to the DOE for a waiver to exempt peer coaches and enhanced classroom instructional materials from the Title I *comparability* requirement. Commending the district's achievement gains from 1998 to 2001, the DOE granted the district a one-year waiver for SY03 that was later extended through SY06. In May 2003, the CDE declared SDCS in full compliance with state and federal regulations and formally closed its investigation of the district.

**Implementation** Beginning in SY01, the district redirected restricted funds that had previously flowed directly into principals' discretionary budgets to the *Blueprint* (see **Exhibit 7** for school reallocation examples). SDCS also reduced the per pupil Title I allocations distributed to its 126 Title I schools so that a larger percentage of these funds were allocated to the district versus schools. In SY01, the district estimated that it redirected $62,749,739 of its total $122,860,456 restricted resources, including one-half of federal Title I and one-third of state Integration funds (see **Exhibit 8** for annual reallocations). As a result of these actions, schools only controlled 20% of their Title I funds from SY01 to SY03. In response to feedback from principals and parents, SDCS increased this amount to 50% in SY04.

A portion of the redirected restricted funds paid for *Blueprint* interventions based out of the central office, such as curriculum, professional development institutes, and the instructional leaders. The remaining restricted funds were given back to schools but with a substantial percentage earmarked for *Blueprint* strategies—the *Blueprint* allocation—offered at the school site, such as a peer coach/staff developer or accelerated math and literacy classes for struggling students. However, the district had to use more flexible sources of revenue, such as private grants and state and local funds, to support *Blueprint* strategies in schools that did not qualify to receive Title I or other compensatory dollars.

[13] SDCS news release, June 13, 2000, SDCS Web site, http://www.sandi.net/indices/news.htm, accessed February 22, 2004.

[14] Ibid.

### *External Fundraising*

During Bersin's tenure, SDCS successfully generated substantial revenues from private foundations. From SY01 to SY04, SDCS garnered nearly $40 million for the *Blueprint* from various donors, including the Carnegie Foundation, the Bill and Melinda Gates Foundation, Atlantic Philanthropies, the William and Flora Hewlett Foundation, and the Broad Foundation.[15] Gates, Hewlett, and Atlantic conditioned their five-year grants, totaling $27.5 million, upon the continued leadership team of Bersin and Alvarado.[16]

### *Redirecting Central Office Savings*

Bersin and the team dramatically streamlined the SDCS central administration in order to shift more resources to support teaching and learning in the classroom. Between 1999 and 2002, the district cut central office positions by 15% and redirected about $12 million in central office reductions to schools.[17] Approximately $7.8 million of the administrative savings was specifically redirected to fund *Blueprint* strategies.[18]

## Results and Perceptions

The *Blueprint* remained controversial among board members, district staff, teachers, the union, and external stakeholders. In October 2002, a local reporter observed:

> Opponents argue that the *Blueprint* is a narrow, one-size-fits-all curriculum controlled by a top-down hierarchy in which teachers are expected to follow guidelines to the letter or risk criticism. . . . Supporters, on the other hand, say that what was in place before the *Blueprint* was a jumble of ineffective reading, writing, and math programs that not only put San Diego schools on a seven-year decline in state standardized test scores, but rendered a student population unable to think for themselves, oftentimes barely able to decipher words on a page.[19]

### *Measuring Success*

**Student achievement** By various measures, the district attained demonstrable gains in student achievement, particularly in the lower grades and in the targeted focus schools (see **Exhibits 4** and **9** for student achievement trends). Stanford-9 test scores had steadily improved, especially among second graders, referred to affectionately within the district as "*Blueprint* babies." More students met California's rigorous standards in 2003, as measured by the California Standards Test (CST) introduced statewide in English language arts in 2001 and mathematics in 2002. By 2003, 36%

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[15] SDCS news releases, November 5, 2001, February 12, 2002, and November 7, 2003, SDCS Web site, http://www.sandi.net/indices/news.htm, accessed January 16, 2004.

[16] Maureen Magee, "Schools in S.D. to get grant worth $5 million; Money depends on Bersin keeping job," *The San Diego Union-Tribune*, February 12, 2002.

[17] Darling-Hammond, et al., p. 16, cited that nearly 282 central office positions were eliminated between 1999 and 2002, and the district's budget department estimated that 1,824 employees worked in the SDCS central office during that period.

[18] Hightower, p. 14.

[19] Kelly Davis, "Uncertain Standards," *San Diego City Beat,* October 2, 2002.

of all students scored proficient or advanced in reading and 29% in math. Students of color in elementary grades and in focus schools reported higher gains on the CST. For example, the percentage of focus school pupils scoring below or far below basic on the CST dropped from 64% in 2001 to 48% in 2003. Despite these gains, a considerable achievement gap persisted.

SDCS fared well against state and national performance benchmarks. Relative to seven other large urban districts in California, SDCS outperformed every school system except San Francisco Unified School District on the CST. Only SDCS and Long Beach Unified reached their 2003 Adequate Yearly Progress (AYP)[20] participation and performance goals in both ELA and mathematics for every student subgroup. In 2003, SDCS outscored the national average for large central cities on the National Assessment of Educational Progress's (NAEP) second Trial Urban District Assessment Reading and Mathematics tests.

However, an evaluation of the *Blueprint*'s second year of implementation conducted by the American Institutes for Research (AIR) concluded that San Diego high school students actually lost ground relative to their peers across the state.[21] Test scores among high school students continued to stagnate through SY03. In response, SDCS reinvigorated the district's high school reform initiative in SY04 and secured over $11 million in support from the Gates and Carnegie Foundations. Key reforms included implementing a more rigorous curriculum, strengthening performance metrics/accountability, and converting three low-performing high schools into 14 small "high-performing" learning communities planned for SY05.[22]

## *Stakeholder Reactions*

**Principals** Despite the fact that most schools received additional resources under the *Blueprint* and no school suffered a net reduction, many principals and school site councils resented their loss of decision rights over school-based resources. Former Deputy Administrative Officer for Human Resources Deberie Gomez recalled the debate that erupted when the district banned the spending of restricted money on hourly classroom aides, noting that many principals and teachers relied upon aides to perform duties in school offices and classrooms, such as providing extra assistance to non-native English-speaking students, photocopying, and clerical tasks. After the top-ranked La Jolla High School began exploring charter school status, the board voted unanimously in April 2002 to grant La Jolla High "academic autonomy"—essentially a green light to opt out of the *Blueprint*—contingent on maintaining an API of 800 or above.[23]

By SY04, many principals, while generally supportive of the reforms, increasingly desired more flexibility and control over instructional and budgetary decisions. As one principal of an elementary focus school remarked, "Given that the site governance team has the authority to renew or dismiss the peer coach each year, the position quickly becomes a blessing or a curse. And, if I can't fill the position, I cannot reallocate that salary set-aside towards anything else for my school." A first-year middle school principal argued, "My students have a lot of needs. I have a vision to address those

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[20] The *No Child Left Behind Act of 2001* mandated states to bring all students up to the proficient level on state tests by SY14 and required individual schools to meet Adequate Yearly Progress (AYP) targets toward this goal. Adapted from "No Child Left Behind," http://www.edweek.com/context/topics/issuespage.cfm?id=59, accessed May 12, 2004.

[21] *Year 2 Interim Report*, American Institutes for Research, p.xiii.

[22] SDCS, Gates Foundation, and New American Schools news release, November 25, 2003, SDCS Web site, http://www.sandi.net/indices/news.htm, accessed January 16, 2004.

[23] Maureen Magee, "La Jolla High wins academic autonomy; School board assents, with high performance proviso," *The San Diego Union-Tribune*, April 10, 2002.

needs—demanding excellent instruction and the highest expectations for every student—but I need to have control over every possible resource in order to start making that vision come true."

Moreover, the combination of new responsibilities, strengthened accountability, and a high retirement rate transformed the makeup of the SDCS principal corps. For the first time in over 20 years, the board reassigned 13 principals and two vice principals at the end of SY99. The central office assumed an increasingly proactive role in the annual appointment and evaluation process for principals in order to both reinforce expectations for instructional leadership and assign strong principals to low-performing schools. District officials estimated that between 80% and 90% of principals in place in SY04 had been appointed under Bersin's watch.

**Teachers** Broad-based teachers' acceptance of the *Blueprint* remained elusive, as many were torn between supporting the instructional strategies that had proven successful and harboring resentment over the perceived top-down way in which the reforms were developed and implemented. The 2002 AIR report also cited teachers' discontent with the rapid pace at which they were expected to make complex pedagogical changes and the perceived variable quality of professional development. Evaluators concluded that "the fact that teachers have not 'bought in' sufficiently is likely to be impeding the effects of professional development, peer coaching, principal leadership, and other reform strategies . . . [and] could ultimately undermine the long-term success of the *Blueprint*."[24] In 2004, one elementary school teacher described "the intense stress" of working in a school in which teachers were divided into "us versus them" camps based on their support or resistance to the *Blueprint*. She added, "I agree with the reforms, but it is impossible to make meaningful change in this environment." A bilingual literacy teacher and former peer coach/staff developer observed that "most teachers in my school don't value their peer coaches. In their minds, peer coaches would be the first to go if the budget crunch gets worse."

**San Diego Education Association (SDEA)** SDEA opposed the *Blueprint*, criticizing the reforms as a "cookie cutter" educational approach and the top-down implementation process as grossly disrespectful of teachers. Union grievances multiplied by a factor of 10 between 1998 and 2003, according to SDEA Executive Director Robin Whitlow and SDEA President Terry Pesta. The union also charged that the continued centralized reallocation of funds violated shared decision-making contract provisions. As the district deficit grew, Whitlow and Pesta countered that the fiscal crisis was provoked by "the district's reckless spending over the past six years." Union leadership specifically criticized the addition of costly administrators who did not work directly with students, such as external consultants, instructional leaders, and secondary site content administrators. Pesta also noted, "We see the November 2004 board elections as an opportunity for real change. Hopefully, we will have a more independent board with fewer rubber-stamp votes."

**Board of education** The 3–2 board split, manifested soon after Bersin's arrival in 1998, had solidified by SY04. The two opposition board members concurred with many of the union's allegations and voted consistently to eliminate external consultants, peer coaches, and other *Blueprint* reforms. As the November 2004 board elections approached, budget cuts and the *Blueprint* became "lightning rods"[25] and threatened to splinter Bersin's slim majority. Three vacant seats would be on the ballot, as two Bersin supporters and one detractor would not be running for reelection. Some school board candidates had already ignited the campaign trail by promising to dismantle the *Blueprint*-inspired reforms and buy out Bersin's contract in advance of its 2006 termination. Board

[24] *Year 2 Interim Report*, American Institutes for Research, p. xii.

[25] Maureen Magee, "Blueprint is a lightning rod in school race; Most hopefuls want plan revamped or dismantled," *The San Diego Union-Tribune*, February 14, 2004.

President Ron Ottinger, a former SDCS employee and three-term board member, reflected on the changes since 1998 and the challenges ahead:

> As a result of the reforms, the focus and conversation systemwide is, for the first time in my almost 20 years in the district, on instruction and how to improve achievement for each student. The two major challenges into the future are to ensure a board and superintendent succession so that the core of the reforms are institutionalized, and to enlist greater buy-in to the reforms from teachers and their union.

**Parents and the community** Parents and community groups were divided about the reforms. Many parents fiercely resisted the district's dismissal of over 600 Title I-funded classroom aides. Current DAC Chairman David Page continued to criticize reforms as "top down" and for lowering the quality of education in SDCS. For Page, "The strategies imposed on schools under the *Blueprint* denied parents our right to be involved in instructional and resource allocation decisions as guaranteed by state and federal law." At the same time, since resources were concentrated in the lower grades and on math and literacy courses for low-performing students, he argued that the *Blueprint* "had watered down the quality of the SDCS curriculum to the lowest common denominator." Page hoped that the growing fiscal crisis would force the central office to send money and decision rights over resources back to schools.

The civic and business community and local philanthropists consistently supported Bersin and the *Blueprint*. Jimma McWilson, executive vice president and chief operating officer of the San Diego Urban League, suggested:

> The implementation of the *Blueprint* reforms has not been as top down as people think. Educators are involved. And they have stopped a seven-year slide in performance. It is hard to change the standards we have for adults in schools. However, we still have an unacceptable achievement gap, and minority and low-income students are losing out. In my mind, the changes are not happening fast enough.

**SDCS leadership** By 2004, many senior SDCS positions had turned over. After 30 years with SDCS, the district's chief administrative and financial officer retired in the summer of 2002. Outcries from the union and community eventually led to the departure of the reform's instructional architect, Alvarado, in the spring of 2003. In May 2003, a larger number of senior administrators than expected participated in an early retirement package, including nearly 50 principals and vice principals as well as the chief of staff, director of human resources, general counsel, and two instructional leaders. Thus, Bersin had to replace many of his top advisors in a short period of time. Bersin remarked that he "viewed the transition an opportunity to ignite a 'second stage' in the process of change."

## Looking Ahead

As the SDCS leadership contemplated their next steps, conversations revolved around two key issues. First and foremost was the severity of the district's financial situation. Given that 65% of the district's unrestricted funds were allocated to school sites, they realized that they could not shelter schools from the cuts necessary to close the $98 million unrestricted fund deficit. Further, with restricted funds and private grants declining, *Blueprint* expenditures would have to be cut by more than 25% for SY05. Second, Bersin and some senior leaders wondered if perhaps the budget crisis provided the opportune moment to restore authority over school resources to principals, an issue they had been grappling with for some time.

## *Coping with the Budget Crisis*

In response to the mounting fiscal crisis, Bersin and senior leadership prioritized *Blueprint* modifications based on four goals: making data-driven decisions for instructional programs, sustaining an ongoing system of professional development, preserving supports for struggling schools, and meeting student needs to the fullest degree possible within available resources.[26] While everyone recognized that the *Blueprint* had to be scaled back, making the tough decisions about what and where proved immensely difficult. More importantly, the team worried about losing the concrete gains made in student achievement under the reforms, which in turn jeopardized their aspirations for accelerating those improvements.

Mary Hopper, who became chief academic officer after Alvarado's departure, articulated the team's challenge: "We proved you can reallocate resources to improve student achievement. Now, we've got to figure out how we are going to spend our reduced dollars to maintain our instructional improvements and forge ahead, and it is really hard to pull back from good strategies that are working." Board Vice President Katherine Nakamura conceded that the cuts were even more complicated now that the district faced a deficit for the second consecutive year: "Last year, we were able to cut the ugly programs. This year, we have to start cutting the beloved ones, the programs people really care about."

Karen Bachofer, executive director of the standards, assessment, and accountability division, suggested that the lack of robust performance indicators for specific *Blueprint* strategies made conversations about trade-offs all the more difficult:

> I always ask myself, "How do we know what is really working? Are we setting our priorities based on a variety of data that helps us determine which strategies are the most effective for supporting struggling students and improving the achievement of all students?" If we cannot answer those questions, or do not stop to consider the evidence before setting our priorities, I fear we may cut core districtwide programs and strategies instead of those on the periphery.

## *Resource Allocation Decision Rights*

Concurrently, senior leadership engaged in an internal debate over the merits and risks of granting more autonomy over resources to principals. In the fall of 2003, Bersin articulated his support for reinstating principals' decision rights as part of a natural cycle inherent to the SDCS reform process:

> The *Blueprint* reforms were designed to provide coherence to a decentralized system, which required a great deal of centralization at the outset. Now that we've been successful over the past five years in creating "a system of schools" in which our principals share the same core values about improving teaching and learning and feel accountable for implementing those values, we can, and should, devolve more autonomy and flexibility to the school sites. This is not returning to the days of "anything goes," however. We are maintaining our systemwide focus on student achievement and instructional improvement while evolving towards a "coordinated accountable decentralization."

[26] *The Blueprint for Student Success in a Standards-based System*, paper presented by Alan Bersin to the Council of Great City Schools on October 23, 2003, p. 14.

In fact, some senior leaders asserted that they had always intended to release more authority to sites and had even attempted it earlier. Hopper and Chief Financial Officer Scott Patterson recalled that site-based budgeting (SBB) was initially proposed in 2000 but had been shelved in order to gather more input from principals. Both agreed that now was the perfect time to reintroduce SBB, as principals and site leaders deserved to be involved in decisions over how to allocate increasingly scarce resources in their schools. Lead Instructional Leader Ann Van Sickle concurred:

> Over the past five to six years, we have selected and trained the principals who lead our schools today and held them accountable for improving student achievement. They know what good teacher practice looks like, and they know what they have to do in order to put instruction first. Increasing their discretion over school resources is the next step. And they are asking for this for their students' sake.

At the same time, some team members expressed some practical concerns. Chief Administrative Officer Lou Smith observed, "We're in a situation where either we make the cuts at central, or we allow the schools to decide. Now, another question is, can they do it? One consequence of telling our ILs and principals to just focus on instruction over the past six years is that they haven't been trained to think strategically about budgets and operations." Karen Bachofer echoed Smith's apprehension:

> I actually do believe that principals should have increased control over their schools' budgets and should have more freedom to determine which programs and support strategies best meet the needs of their students. However, I also question whether the district has the necessary infrastructure to support principals and school site councils as they attempt to make informed decisions. . . . To do that well, schools must have timely and accurate budget information, deep knowledge about instructional strategies, an understanding of both student achievement data and state and federal accountability systems, a working knowledge of the rules governing the expenditure of various types of categorical funding, detailed knowledge about human resource issues including the contracts for all employee groups, and so on. Jumping into this too quickly is asking a lot of principals who have been told for years that "it's all about instruction."

## Next Steps

Looking ahead, these discussions surfaced a number of thorny debates within the management team. With revenues projected to decline even further, was a districtwide reform effort still viable? Or, instead, should the district consider focusing the diminished resources on the lowest-performing schools? While on one hand that seemed an attractive option, detractors argued that by not providing systemwide supports, struggling students in higher-performing schools could get lost in the shuffle.

More fundamentally, should the district grant more flexibility over resources to principals? If principals gained more control over their resources, however, did that necessarily mean that they should be able to make decisions over instructional strategies as well? If the *Blueprint* had to be scaled back, who was in the best position to decide "what's best for students"—central office administrators or principals and their school-based advisory groups? These questions created tensions for all those involved, as they all feared falling back into what some described as the "decentralized chaos of pre-1998."

Bersin and his senior advisors had five days before the board would meet to certify the district's financial position for the first quarter. They all knew that the board expected concrete recommendations to close the deficit.

**Exhibit 1** SDCS Demographics

| SY03 SDCS Overview | |
|---|---|
| **District Area Demographics** | |
| Total Population | 986,131 |
| Per Capita Income (in 1999) | $22,902 |
| Families below poverty level (in 1999) | 11.6% |
| Median household income (in 1999) | $42,491 |
| Percent of county residents holding college degrees | 33.8% |
| Unemployment (2003) | 4.3% |
| **Student Demographics** | |
| Number of students (K–12) | 138,600 |
| Hispanic | 39.7% |
| White | 26.6% |
| Asian | 16.4% |
| African-American | 15.6% |
| Other | 1.7% |
| Eligible for free and reduced-price lunch | 56.4% |
| English language learners | 29.1% |
| Special education students | 10.9% |
| Gifted and talented education program students | 15.2% |
| Graduation rate | 83.3% |
| Dropout rate (4-year) | 15.2% |
| **Schools and Staff (2nd-largest district in CA)** | |
| Number of schools | 187 |
| Elementary | 123 |
| Middle | 23 |
| High | 18 |
| Atypical grade configuration | 13 |
| Alternative | 10 |
| Total personnel | 16,705 |
| Certificated staff | 9,240 |
| Classified staff | 7,465 |
| Average teacher salary | $53,152 |
| Student/teacher ratio | |
| K–3 | 19:1 |
| Gr. 4–6 | 32.13:1 |
| Gr. 7–8 | 28.73:1 |
| Gr. 9–12 | 29:1 |

Source: "San Diego City Schools At a Glance," SDCS Web site, http://www.sdcs.k12.ca.us/comm/factsheets/sdcs_quickfacts.pdf, accessed January 16, 2004 and SDCS files. Census 2000 data from http://www.nces.ed.gov/surveys/sdds/singledemoprofile.asp?county1=0634320&state1=6, accessed April 14, 2004. Unemployment rate cited in *San Diego Economic Bulletin Forecast 2004*, San Diego Regional Chamber of Commerce Web site, http://www.sdchamber.org/, accessed May 14, 2004.

Note: Graduation and dropout rates are for SY02.

**Exhibit 2** SDCS Multiyear Financial Statement for General Fund Activity, SY98–SY05 (projections as of fall 2003, $ million)

| | ACTUALS | | | | | | PROJECTIONS | |
|---|---|---|---|---|---|---|---|---|
| **RESOURCES** | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
| STATE | | | | | | | | |
| Restricted | $ 180.9 | $ 192.9 | $ 214.4 | $ 243.8 | $ 258.2 | $ 274.2 | $ 241.0 | $ 241.0 |
| Unrestricted [a] | 532.1 | 564.5 | 585.5 | 670.5 | 685.7 | 663.5 | 632.5 | 632.5 |
| TOTAL STATE | 713.0 | 757.4 | 799.9 | 914.3 | 943.9 | 937.7 | 873.5 | 873.5 |
| FEDERAL | | | | | | | | |
| Restricted | 46.7 | 53.4 | 63.7 | 63.6 | 67.3 | 99.9 | 107.1 | 107.1 |
| Unrestricted | 7.8 | 7.8 | 28.1 | 6.9 | 16.7 | 21.3 | 10.4 | 10.4 |
| TOTAL FEDERAL | 54.5 | 61.2 | 91.8 | 70.5 | 84.0 | 121.2 | 117.5 | 117.5 |
| LOCAL [b] | | | | | | | | |
| Restricted | 10.1 | 13.5 | 11.6 | 13.4 | 27.9 | 24.8 | 22.6 | 22.6 |
| Unrestricted | 18.5 | 18.8 | 20.3 | 23.2 | 25.1 | 15.7 | 14.0 | 14.0 |
| TOTAL LOCAL | 28.6 | 32.3 | 31.9 | 36.6 | 53.0 | 40.5 | 36.6 | 36.6 |
| **TOTAL RESOURCES** | $ 796.1 | $ 850.9 | $ 923.6 | $ 1,021.4 | $ 1,080.9 | $ 1,099.4 | $ 1,027.6 | $ 1,027.6 |
| **EXPENDITURES** | | | | | | | | |
| Instructional [c] | $ 482.1 | $ 528.0 | $ 561.4 | $ 617.2 | $ 627.9 | $ 648.7 | $ 678.7 | $ 666.5 |
| Instructional Support [d] | 119.9 | 127.4 | 140.9 | 157.8 | 185.6 | 189.3 | 179.0 | 175.8 |
| Pupil Services [e] | 53.1 | 60.0 | 64.5 | 69.5 | 66.2 | 72.5 | 75.6 | 74.3 |
| General Support [f] | 116.4 | 122.6 | 126.6 | 142.2 | 152.7 | 144.9 | 162.8 | 159.9 |
| Auxiliary Programs [g] | 3.3 | 6.5 | 2.4 | 1.5 | 3.6 | 8.0 | 5.0 | 4.9 |
| Other Outgo [h] | 0.5 | 0.8 | 12.0 | 17.4 | 21.6 | 27.4 | 28.0 | 27.5 |
| **TOTAL EXPENDITURES** | $ 775.3 | $ 845.3 | $ 907.8 | $ 1,005.6 | $ 1,057.6 | $ 1,090.8 | $ 1,129.1 | $ 1,108.9 |
| **OPERATING SURPLUS/(DEFICIT)** | 20.8 | 5.6 | 15.8 | 15.8 | 23.3 | 8.6 | (101.5) | (81.3) |
| OTHER FINANCING | | | | | | | | |
| Transfers In [i] | 1.4 | 0.1 | 0.3 | 0.9 | 6.0 | 32.4 | 2.6 | 0.0 |
| Transfers Out/Other Uses [j] | 19.7 | 10.8 | 18.6 | 15.6 | 16.1 | 11.9 | 7.2 | 5.7 |
| TOTAL OTHER FINANCING | (18.3) | (10.7) | (18.3) | (14.7) | (10.1) | 20.5 | (4.6) | (5.7) |
| **NET CHANGE IN FUND BALANCE** | $ 2.5 | $ (5.1) | $ (2.5) | $ 1.1 | $ 13.2 | $ 29.1 | $ (106.1) | $ (87.0) |
| BEGINNING BALANCE [k] | 46.2 | 48.7 | 41.8 | 39.3 | 40.4 | 73.8 | 102.9 | 0.0 |
| ENDING BALANCE | 48.7 | 43.6 | 39.3 | 40.4 | 53.6 | 102.9 | (3.2) | (87.0) |
| **NET CHANGE IN FUND BALANCE** | $ 2.5 | $ (5.1) | $ (2.5) | $ 1.1 | $ 13.2 | $ 29.1 | $ (106.1) | $ (87.0) |
| ENROLLMENT | 132,045 | 132,209 | 134,605 | 134,629 | 134,030 | 132,027 | 131,040 | 129,024 |
| Per Pupil Expenditure | $ 5,871 | $ 6,394 | $ 6,744 | $ 7,469 | $ 7,891 | $ 8,262 | $ 8,616 | $ 8,595 |

**Exhibit 2 (continued)**

Source: SDCS Office of School Site Support, Financial Operations, Budget Operations, May 5, 2004.

[a]Includes local property tax.

[b]Includes grants from private foundations.

[c]Expenses incurred in the classroom and/or directly related to instructions.

[d]Expenses incurred that support instructions, i.e., school administration, professional development, course and library support.

[e]Attendance, counseling, health services, and pupil welfare.

[f]District administration, maintenance, custodial, landscape, utilities, police, transportation, and so on.

[g]Food service, capital outlay, and Associated Student Body/Parent Teacher Association.

[h]Transfers to charters/nonpublic schools.

[i]Transfers in from other funds.

[j]Transfers to other funds and debt service.

[k]Due to audit adjustments some years' beginning balance will not equal prior year's ending balance.

Beginning in fiscal year 2003, to be in compliance with Standardized Account Code Structure (SACS) & Governmental Accounting Standards Board (GASB 34), the district was required to recognize fund balances for "Special Projects" restricted funds of approximately $41.6 million.

The projections for fiscal years 2004 and 2005 assumed that the expenses in the "Special Projects" restricted funds would be equal to the revenue, thus netting to a $0 ending balance.

The district is required to end the fiscal year with a balance that covers the Reserve For Economic Uncertainty, which is 1% of the budget, or $11 million in 2004 and 2005. Adding $11 million to the projected $87 million negative ending balance resulted in a projected $98 million deficit for SY05.

**Exhibit 3** Biography of Alan D. Bersin

Alan D. Bersin became superintendent of the San Diego City Schools on July 1, 1998. Mr. Bersin received his bachelor's degree from Harvard College, studied at Balliol College, Oxford University as a Rhodes Scholar, and received his law degree from Yale Law School in 1974. He was a practicing attorney from 1975–1992 with the law firm of Munger, Tolles & Olson in Los Angeles.

Prior to his appointment as superintendent, Mr. Bersin served as the United States Attorney for the Southern District of California for five years, during which time he also served as the Attorney General's Southwest Border Representative. Mr. Bersin was appointed by Governor Gray Davis in April 2000 to be a member of the California Commission on Teacher Credentialing and served as chairman of the Commission until November 2002.

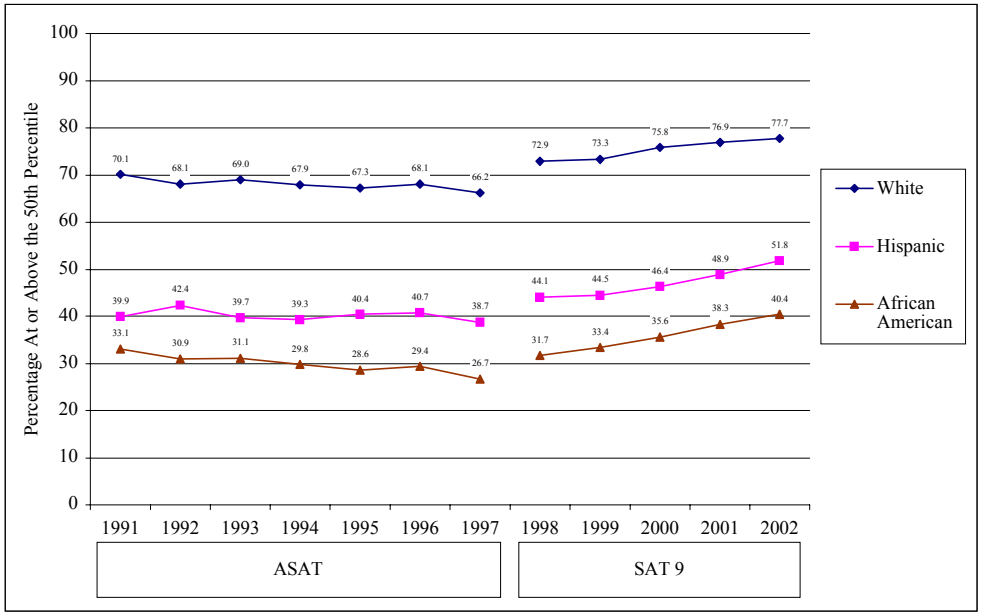
Mr. Bersin served as a trustee of The Neurosciences Institute, as a member of the board of directors of the San Diego County YMCA, and as an advisory board member for the Center for U.S.-Mexican Studies of UCSD. He was also a member of the Council on Foreign Relations and the Pacific Council on International Policy.

Mr. Bersin and his wife, Judge Lisa Foster, lived in Point Loma. Their eldest graduated from Harvard College in 2001 and received her masters degree from Bath University in December 2002. Their middle and youngest daughters both attended public schools within the San Diego City Schools.

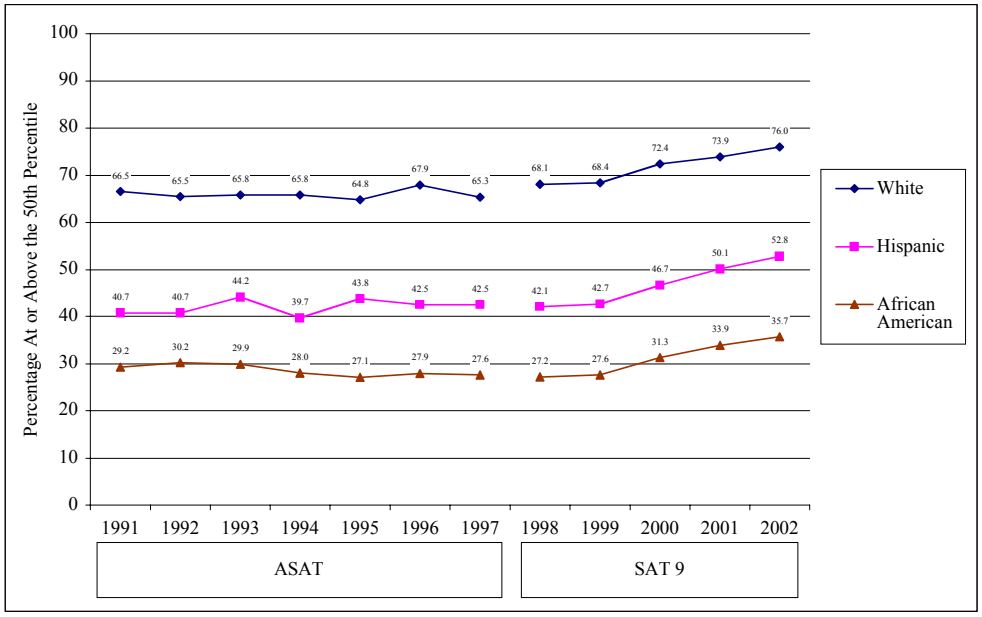
Source: Superintendent's Biography, SDCS Web site, http://www.sdcs.k12.ca.us/indices/superintendent.htm, accessed March 31, 2004.

**Exhibit 4** Historical SDCS Student Achievement Data, SY91–SY02

**District Norm Referenced Reading Test Results for Grades 5 and 7: 1991 – 2002**




**District Norm Referenced Mathematics Test Results for Grades 5 and 7: 1991 – 2002**




Source: SDCS Office of Standards, Assessment, and Accountability.

Note: SDCS administered the Abbreviated Stanford Achievement Test (ASAT) from 1991–1997 and the Stanford-9 (SAT9) from 1998–2002. Grades 5 and 7 are the only grades for which testing occurred for all 12 years, and results include only English-fluent students. It is appropriate to look at trends in the chart but not to compare student performance on the two tests.

**Exhibit 5** *The Blueprint for Student Success in a Standards-based System* Budgets, SY00–SY05 ($ million)

| | FINAL BUDGET | | | | TENTATIVE |
|---|---|---|---|---|---|
| **FUNDING SOURCES** | **SY01** | **SY02** | **SY03** | **SY04** | **SY05** |
| **STATE** | | | | | |
| Hourly Programs | $ 16,897,951 | $ 14,755,806 | $ 24,106,180 | $ 8,400,929 | $ 7,555,649 |
| Targeted Instructional Improvement (formerly Integration) | 18,557,754 | 23,318,367 | 16,284,459 | 16,630,324 | 14,330,324 |
| Sb 466 Math/Literacy Professional Development | - | - | 4,021,260 | 1,712,832 | 1,359,594 |
| Eng Lang Intensive Literacy | - | 5,656,493 | 6,371,845 | 4,445,574 | - |
| 9th Grade Class Size Reduction | 619,650 | 1,667,871 | 1,163,736 | - | 343,000 |
| Foundation For Improvement Of Ed | - | 963,050 | 977,517 | - | - |
| Found In Math & Science Ed | - | 440,800 | - | - | - |
| Eng Lang Acquisition Prgm | - | 1,018,008 | - | - | - |
| Gov's Math Initiative | - | 165,000 | - | - | - |
| Begin Teacher Support & Assessment | 1,500,000 | 1,500,000 | - | - | - |
| K-4 Classroom | 629,391 | 605,972 | - | - | - |
| Gov's Reading Initiative | 2,059,800 | 1,928,175 | - | - | - |
| Instr Matls Block | 329,832 | - | - | - | - |
| Library Act | 671,236 | - | - | - | - |
| Peer Assistance & Review | 1,008,000 | - | - | - | - |
| **TOTAL STATE** | **42,273,614** | **52,019,542** | **52,924,997** | **31,189,659** | **23,588,567** |
| **FEDERAL** | | | | | |
| Title I - (Compensatory Ed Pgms) | 18,815,792 | 28,920,191 | 41,092,780 | 31,648,678 | 20,556,017 |
| Title II - Improving Teacher Quality | - | - | 3,100,000 | 3,000,000 | 3,000,000 |
| 21st Century | - | - | 403,746 | 403,746 | - |
| National Science Found - USP | - | 55,499 | 361,890 | 361,890 | - |
| Eisenhower | 453,729 | 93,908 | - | - | - |
| **TOTAL FEDERAL** | **19,269,521** | **29,069,598** | **44,958,416** | **35,414,314** | **23,556,017** |
| **LOCAL** | | | | | |
| Community Based English Tutoring | 131,604 | 221,604 | - | - | - |
| Capital Facilities | - | 1,100,000 | - | - | - |
| Math Renaissance | - | 144,501 | 72,000 | - | - |
| **TOTAL LOCAL** | **131,604** | **1,466,105** | **72,000** | **-** | **-** |
| **PRIVATE FOUNDATIONS** | **295,000** | **14,543,339** | **10,247,974** | **5,434,462** | **6,800,000** |
| **CARRYOVER FROM PRIOR YEAR** | - | - | - | - | **4,260,494** |
| **TOTAL BUDGETED FUNDING** | **$ 61,969,739** | **$ 97,098,584** | **$ 108,203,387** | **$ 72,038,435** | **$ 58,205,078** |

## Exhibit 5 (continued)

| STRATEGIES | FINAL BUDGET SY01 | SY02 | SY03 | SY04 | TENTATIVE SY05 |
|---|---|---|---|---|---|
| **SALARIES** | | | | | |
| Accelerated & Enhanced Literacy / Math Teachers[1] | $ 4,857,000 | $ 22,710,960 | $ 20,378,456 | $ 4,299,086 | $ 4,758,996 |
| Algebra Exploration / Math Explor/PreAlgebra/Pilot Teachers | 0 | 3,681,593 | 4,293,549 | 3,046,278 | 1,640,994 |
| Early Literacy Support Resource Teachers | 0 | 1,950,000 | 4,275,000 | 9,961,188 | 9,321,832 |
| English Teachers for Class Size Reduction | 0 | 1,403,772 | 1,751,187 | 1,944,392 | 1,001,916 |
| Extended Day Programs Hourly Pay Reading/Math/Science/CAHSEE [1] | 3,113,669 | 8,231,481 | 8,805,340 | 4,311,228 | 2,671,897 |
| Genre Studies / Literacy Block Teachers for Class Size Reduction | 5,767,000 | 3,042,652 | 2,957,264 | 927,396 | 915,984 |
| Secondary Site Content Administrators - Literacy/Mathematics/Science | 0 | 5,228,984 | 4,260,480 | 5,748,820 | 4,632,702 |
| Literacy Support/Early Lit Support Teachers | 0 | 0 | 87,550 | 1,618,510 | 1,637,860 |
| Math Resource Teachers / Specialists | 2,616,125 | 4,457,861 | 6,661,392 | 6,460,523 | 4,605,045 |
| Peer Coach/Site Staff Developers | 14,766,031 | 16,799,103 | 16,974,200 | 14,238,206 | 14,788,440 |
| Sr. High Guidance Administrators | 0 | 0 | 376,437 | 0 | 0 |
| Sr. High Science Administrator/Resource Teachers | 0 | 0 | 549,012 | 1,087,950 | 412,890 |
| **TOTAL SALARIES** | **31,119,825** | **67,506,406** | **71,369,867** | **53,643,577** | **46,388,556** |
| **PROFESSIONAL DEVELOPMENT** | | | | | |
| Special Ed Site-Based Learning Centers and DRT's | 0 | 0 | 3,008,113 | 2,146,987 | 0 |
| Summer School/Intersession / Enrichment | 21,297,746 | 21,669,124 | 25,358,436 | 11,364,332 | 6,582,376 |
| CAHSEE Exit Exam Prep - Integrated Lit/Math | 0 | 0 | 0 | 172,741 | 173,065 |
| Demonstration Classroom / Literacy Supervisors/Training Room | 3,278,164 | 1,886,866 | 802,736 | 243,410 | 0 |
| GATE Professional Development/ Resource Teacher | 0 | 0 | 80,837 | 86,500 | 95,000 |
| Educational Development Leadership Academy | 1,054,000 | 1,054,000 | 1,054,000 | 1,150,865 | 1,210,606 |
| Math Lab Teachers Professional Development | 0 | 0 | 0 | 0 | 245,052 |
| Principal Math Training K-12 | 0 | 0 | 0 | 115,190 | 0 |
| Summer/Intersession Literacy/Math Professional Dev Institute | 0 | 2,350,000 | 2,521,243 | 0 | 0 |
| **TOTAL PROFESSIONAL DEVELOPMENT** | **25,629,910** | **26,959,990** | **32,825,365** | **15,280,025** | **8,306,099** |
| **MATERIALS** | | | | | |
| Benchmark Books | 400,000 | 0 | 0 | 0 | 0 |
| Curriculum and Instruction | 0 | 0 | 176,502 | 176,402 | 283,573 |
| Extended Learning Central Support | 0 | 290,468 | 290,468 | 290,468 | 89,703 |
| Mathematics | 3,092,000 | 0 | 235,015 | 126,017 | 54,275 |
| Physics / Chemistry / Biology | 0 | 0 | 959,892 | 214,024 | 0 |
| Reading Recovery - Central | 0 | 380,000 | 384,558 | 150,000 | 0 |
| **TOTAL MATERIALS** | **3,492,000** | **670,468** | **2,046,435** | **956,911** | **427,551** |
| **OTHER** | | | | | |
| Indirect Costs | 0 | 0 | 0 | 0 | 31,600 |
| Monitoring, Accountability& Assessment/Program Evaluation | 1,173,500 | 1,173,500 | 1,173,500 | 973,500 | 929,371 |
| Parent Involvement / Communications / Activity Liaison | 554,504 | 788,220 | 788,220 | 1,184,422 | 2,121,901 |
| **TOTAL OTHER** | **1,728,004** | **1,961,720** | **1,961,720** | **2,157,922** | **3,082,872** |
| **TOTAL BUDGETED EXPENDITURES** | **$ 61,969,739** | **$ 97,098,584** | **$ 108,203,387** | **$ 72,038,435** | **$ 58,205,078** |

Source: SDCS Office of School Site Support, Financial Operations, Budget Operations, May 7, 2004.

[1]The majority of these allocations paid for salaries, but a relatively small percentage was/is used for materials.

**Exhibit 6** Change in SDCS Certificated Personnel, SY97–SY04 ($ million)

| Position | SY97 Total Budget = $708,972,420 | | | SY04 Total Budget = $1.1 billion | | |
|---|---|---|---|---|---|---|
| | No. of Positions | Expenditure | Percent of Budget | No. of Positions | Expenditure | Percent of Budget |
| Classroom Teacher | 5,332 | $241,113,774 | 34.0% | 5,845 | $321,536,219 | 29.2% |
| Special Education Teacher | 917 | 43,945,341 | 6.2% | 1,296 | 73,339,350 | 6.7% |
| School Principal or Vice Principal | 301 | 21,246,511 | 3.0% | 324 | 28,463,753 | 2.6% |
| School Nurse, Librarian, Counselor, Other | 383 | 18,680,381 | 2.6% | 367 | 21,446,180 | 2.0% |
| Central Office Instructional/Operations | 169 | 14,904,195 | 2.1% | 189 | 14,073,256 | 1.3% |
| Classroom Teacher Assistant | [a] | 14,707,228 | 2.1% | 0 | 0 | 0 |
| School Peer Coach | N/A | N/A | N/A | 149 | 9,653,975 | .9% |
| Central Office Manager/Instructional Leader | 58 | 4,735,030 | .7% | 66 | 7,222,240 | .7% |
| Child Development Center | 129 | 4,224,867 | .6% | 150 | 6,654,035 | .6% |
| School Resource Teacher | 83 | 3,944,678 | .6% | 95 | 5,583,986 | .5% |
| School Secondary Content Administrator | N/A | N/A | N/A | 56 | 4,484,059 | .4% |
| **TOTAL** | **7,372** | **$367,502,066** | **51.9%** | **8,537** | **$492,457,055** | **44.8%** |

Source: SDCS Office of School Site Support, Financial Operations, Budget Operations, May 2004.

[a]These positions were paid hourly, and the number of positions was not reported by SDCS.

**Exhibit 7** Average Amount of Discretionary Restricted Funds Redirected to the *Blueprint* per School in SY01 ($ thousand)

| School Type | Average Amount of Restricted Funds Redirected to the *Blueprint* per School [a] | | | Average SY01 Blueprint Allocation per School [b] | Average Net Gain per School in Resources SY00 to SY01 |
|---|---|---|---|---|---|
| | *Federal Title I* | *State Integration* | *Total* | | |
| Elementary Focus School | $240,166 | $231,508 | $471,674 | $1,156,725 | $685,051 |
| Elementary School | 79,393 | 32,210 | 111,603 | 253,240 | 141,637 |
| Middle School | 125,121 | 54,102 | 179,223 | 427,387 | 248,163 |
| Senior High School | 126,059 | 56,953 | 183,012 | 381,153 | 198,141 |

Source: Adapted by casewriter from SDCS files.

[a]Prior to SY01, these funds were part of school site's discretionary restricted funds. Following the *Blueprint*'s implementation in SY01, SDCS redirected these funds to support *Blueprint* programs offered at the school site.

[b]After the *Blueprint* was implemented in SY01, this is the average value of the *Blueprint* allocation received by each school site, by grade level, to support *Blueprint* programs offered at the school site.

**Exhibit 8** Estimated Annual Redirection of Restricted Funds to the *Blueprint*, SY00–SY02 ($ million)

**BLUEPRINT FOR STUDENT SUCCESS**

**DISTRICT FUNDING ALLOCATIONS: AMOUNT REDIRECTED TO PREBLUEPRINT/BLUEPRINT STRATEGIES**

| | SY00 | | SY01 | | SY02 | |
|---|---|---|---|---|---|---|
| **Funding Source** | **Final Allocation** | **Redirected** | **Final Allocation** | **Redirected** | **Final Allocation** | **Redirected** |
| Title I – State Compensatory | $29,131,238 | $0 | $33,992,797 | $18,815,792 | $34,334,602 | $28,986,719 |
| Integration (TIIG) | 54,720,000 | 4,796,248 | 57,274,000 | 18,557,754 | 60,904,361 | 22,170,205 |
| Hourly Programs | 7,268,205 | 7,265,517 | 17,270,632 | 16,897,951 | 15,976,852 | 15,567,157 |
| Beginning Teacher | 2,500,002 | 0 | 2,193,075 | 1,500,000 | 2,200,000 | 1,500,000 |
| K-4 Classroom Libraries | 637,279 | 0 | 629,391 | 629,391 | 629,391 | 633,417 |
| Library Act | 3,735,378 | 0 | 671,236 | 671,236 | 3,611,608 | 0 |
| CBET | 2,941,442 | 0 | 1,387,319 | 131,604 | 1,387,319 | 221,604 |
| PAR | 1,008,000 | 0 | 1,008,000 | 1,008,000 | 0 | 0 |
| Pew Grant | 220,000 | 220,000 | 0 | 0 | 0 | 0 |
| 9th Gr. Class Size Reduction | 1,224,555 | 0 | 1,894,820 | 619,650 | 2,500,833 | 1,055,982 |
| Instr. Materials Block Grant | 2,914,496 | 2,584,664 | 329,832 | 329,832 | 0 | 0 |
| Eisenhower Grant (Title II) | 849,650 | 0 | 829,869 | 453,729 | 830,000 | 93,908 |
| Governor's Reading Initiative | 0 | 0 | 2,059,800 | 2,059,800 | 0 | 0 |
| Edna McConnell Clark | 900,000 | 0 | 75,000 | 75,000 | 0 | 0 |
| Capital Fund | N/A | 0 | N/A | 1,000,000 | N/A | 1,100,000 |
| ELAP | 1,590,800 | 0 | 1,508,600 | 0 | 1,508,600 | 991,314 |
| FIMSE | 0 | 0 | 1,736,085 | 0 | 1,098,671 | 440,800 |
| ELIP | 0 | 0 | 0 | 0 | 10,000,000 | 5,707,459 |
| FIE – Federal Blueprint Grant | 0 | 0 | 0 | 0 | 998,791 | 963,050 |
| Governor's Initiative Math | 0 | 0 | 0 | 0 | 83,200 | 165,000 |
| Philanthropic Organizations | 0 | 0 | 0 | 0 | 15,000,000 | 200,000 |
| **TOTAL** | **$109,641,045** | **$14,866,429** | **$122,860,456** | **$62,749,739** | **$151,264,228** | **$94,796,615** |

Source: SDCS Office of School Site Support, Financial Operations, Budget Operations, July 6, 2001.

**Exhibit 9** SDCS Student Achievement Data, SY98–SY03

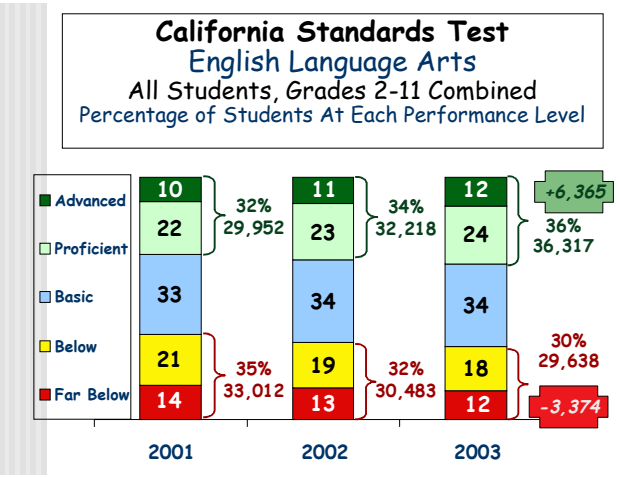
Research and Reporting

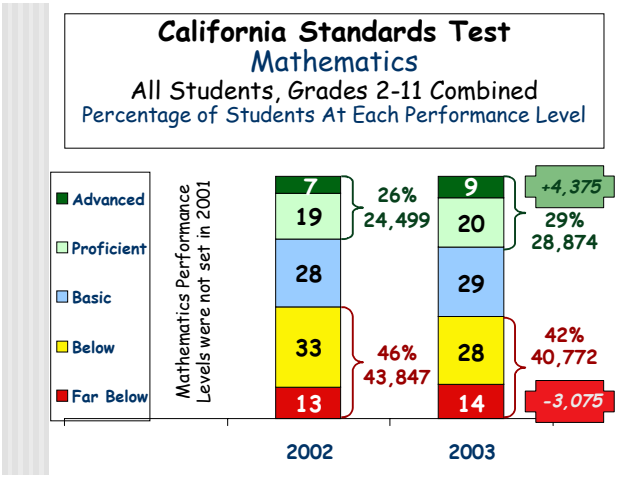
# 1998-2002 SAT 9 Test Results

## All Students

### Percentage of Students Scoring At or Above the 50th Percentile by Grade Level

| School | Grade | Reading | | | | | | | | | | Change from | | Mathematics | | | | | | | | | | Change from | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 1998 | | 1999 | | 2000 | | 2001 | | 2002 | | 2001 | 1998 | 1998 | | 1999 | | 2000 | | 2001 | | 2002 | | 2001 | 1998 |
| | | N | % | N | % | N | % | N | % | N | % | % | % | N | % | N | % | N | % | N | % | N | % | % | % |
| District Totals | 2 | 9632 | 43.5 | 9987 | 49.6 | 10040 | 56.5 | 10843 | 55.3 | 10979 | 61.1 | 5.8 | 17.5 | 10472 | 49.7 | 10502 | 56.5 | 10396 | 63.5 | 11154 | 61.4 | 11198 | 64.5 | 3.0 | 14.7 |
| | 3 | 9775 | 40.6 | 10501 | 47.0 | 10475 | 51.8 | 10943 | 48.7 | 10800 | 52.5 | 3.8 | 12.0 | 10020 | 45.9 | 10596 | 56.7 | 10584 | 63.9 | 11003 | 60.6 | 10920 | 64.2 | 3.6 | 18.3 |
| | 4 | 9151 | 41.3 | 9866 | 42.4 | 10459 | 48.4 | 10604 | 48.6 | 10453 | 50.7 | 2.1 | 9.5 | 9620 | 42.2 | 10229 | 46.3 | 10653 | 55.8 | 10766 | 52.0 | 10528 | 55.0 | 3.0 | 12.8 |
| | 5 | 9057 | 43.7 | 9548 | 44.3 | 9841 | 44.4 | 10570 | 46.6 | 10342 | 49.1 | 2.5 | 5.4 | 9319 | 45.4 | 9758 | 47.0 | 9955 | 50.5 | 10640 | 52.5 | 10365 | 54.9 | 2.5 | 9.5 |
| | 6 | 9005 | 42.6 | 9239 | 45.1 | 9429 | 47.0 | 9960 | 47.5 | 10335 | 49.2 | 1.7 | 6.6 | 9202 | 46.6 | 9421 | 49.8 | 9543 | 52.8 | 10036 | 51.6 | 10351 | 54.8 | 3.1 | 8.2 |
| | 7 | 8701 | 43.9 | 8972 | 44.2 | 8962 | 47.4 | 9252 | 47.6 | 9616 | 48.3 | 0.7 | 4.4 | 8666 | 42.3 | 9012 | 42.3 | 8969 | 45.4 | 9194 | 46.8 | 9504 | 49.9 | 3.1 | 7.6 |
| | 8 | 8465 | 45.4 | 8486 | 48.2 | 8687 | 50.9 | 9044 | 51.2 | 8793 | 51.7 | 0.5 | 6.3 | 8474 | 40.3 | 8471 | 42.9 | 8667 | 44.5 | 9018 | 42.9 | 8803 | 45.9 | 3.0 | 5.6 |
| | 9 | 8502 | 35.8 | 8675 | 35.9 | 8429 | 39.6 | 8943 | 37.5 | 9151 | 36.7 | -0.8 | 0.9 | 8647 | 47.9 | 8718 | 49.3 | 8513 | 54.5 | 8969 | 52.8 | 9044 | 53.2 | 0.4 | 5.3 |
| | 10 | 7591 | 34.4 | 7859 | 35.5 | 7831 | 36.7 | 7906 | 37.4 | 8635 | 34.4 | -3.0 | -0.0 | 7731 | 41.5 | 7892 | 45.4 | 7895 | 51.3 | 7928 | 46.5 | 8614 | 44.9 | -1.6 | 3.4 |
| | 11 | 6636 | 37.2 | 6735 | 38.1 | 7093 | 39.3 | 6912 | 36.7 | 6947 | 39.1 | 2.4 | 1.9 | 6748 | 44.7 | 6748 | 48.7 | 7159 | 54.8 | 6930 | 47.3 | 6900 | 48.8 | 1.4 | 4.1 |
| | Total | 86515 | 41.0 | 89868 | 43.4 | 91246 | 46.7 | 94977 | 46.4 | 96051 | 48.0 | 1.6 | 6.9 | 88899 | 44.8 | 91347 | 48.8 | 92334 | 54.1 | 95638 | 52.0 | 96227 | 54.3 | 2.2 | 9.5 |



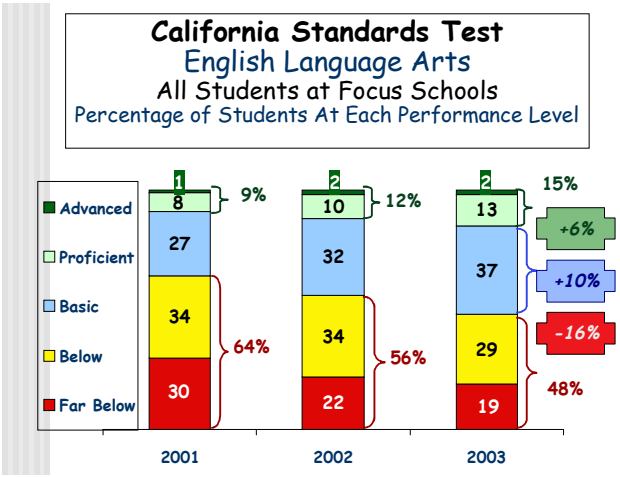
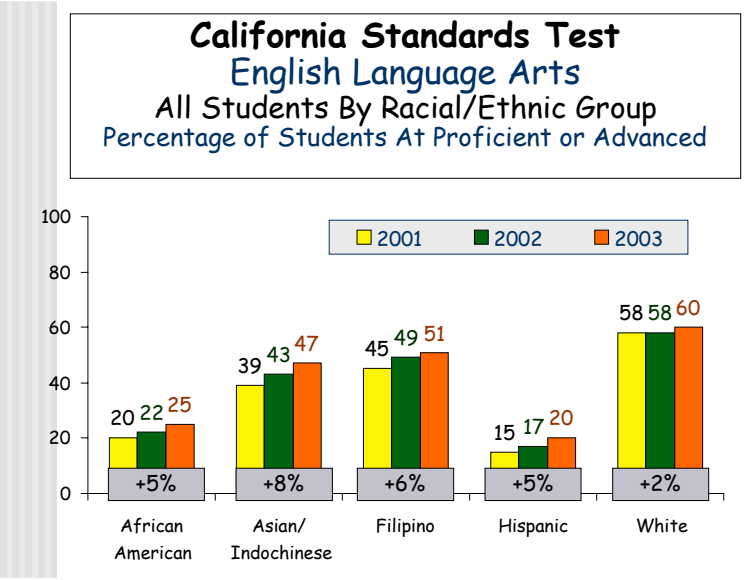
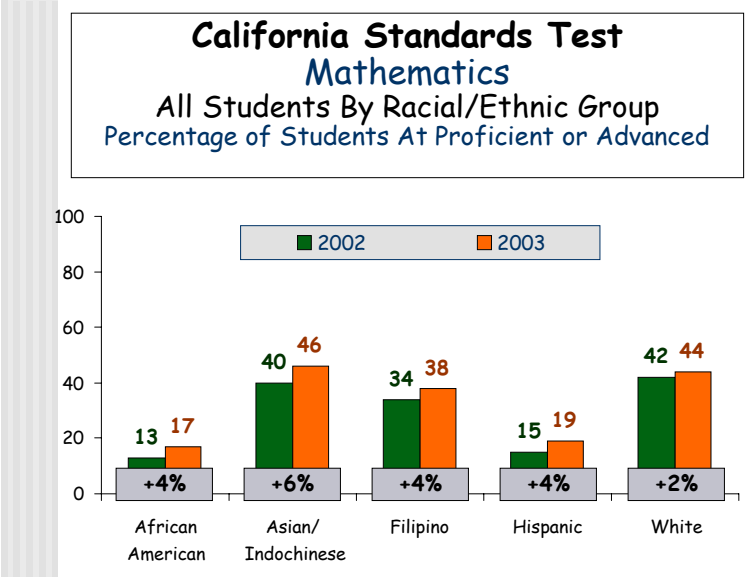
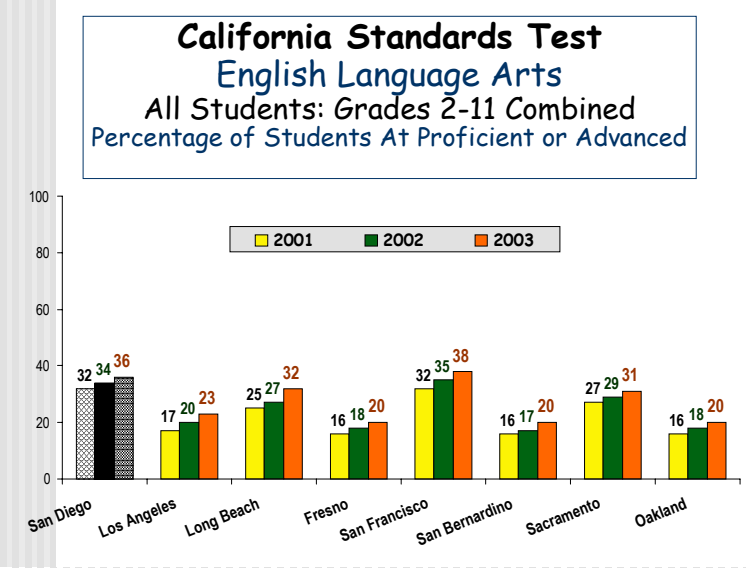
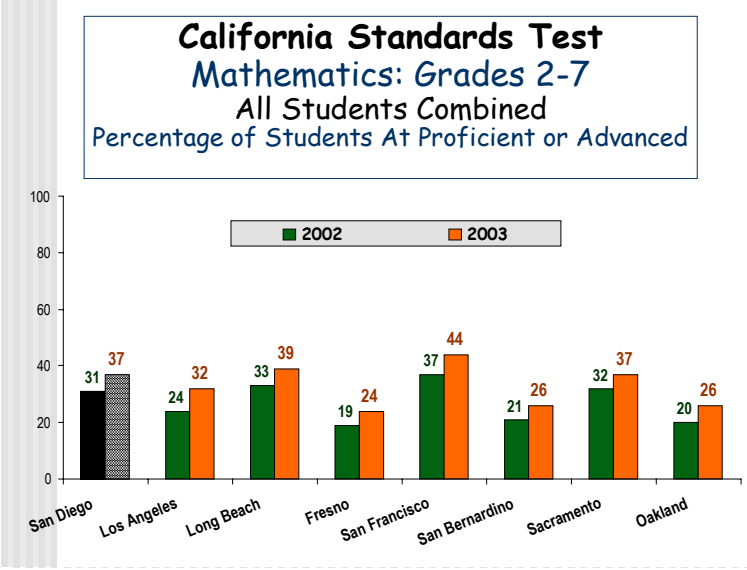



**Exhibit 9 (continued)**




Source: SDCS Office of Standards, Assessment, and Accountability.

## Exhibit 9 (continued)

**Reading Composite**
Grade 4
Average Scale Score—All students in grade

| Jurisdictions | Number of Students | Average Scale Score |
|---|---|---|
| Charlotte | 1676 | 219 |
| National Public | 179013 | 216 |
| New York City | 2403 | 210 |
| San Diego | 1732 | 208 |
| Houston | 1889 | 207 |
| Boston | 1445 | 206 |
| Large Central Cities | | 205 |
| Chicago | 2162 | 198 |
| Atlanta | 1645 | 197 |
| Cleveland | 1660 | 195 |
| Los Angeles | 2806 | 194 |
| District of Columbia | 2713 | 188 |

**Reading Composite**
Grade 8
Average Scale Score– All students

| Jurisdictions | Number of Students | Average Scale Score |
|---|---|---|
| Charlotte | 1385 | 262 |
| National Public | 146351 | 261 |
| Boston | 1268 | 252 |
| New York City | 1707 | 252 |
| San Diego | 1236 | 250 |
| Large Central Cities | | 249 |
| Chicago | 1900 | 248 |
| Houston | 1660 | 246 |
| Atlanta | 1470 | 240 |
| Cleveland | 1038 | 240 |
| District of Columbia | 1922 | 239 |
| Los Angeles | 1963 | 234 |

**Mathematics Composite**
Grade 4
Average Scale Score– All students

| Jurisdictions | Number of students | Average Scale Score |
|---|---|---|
| Charlotte | 1761 | 242 |
| National Public | 184325 | 234 |
| Houston | 2303 | 227 |
| San Diego | 1739 | 226 |
| New York City | 2284 | 226 |
| Large Central Cities | | 224 |
| Boston | 1515 | 220 |
| Atlanta | 1640 | 216 |
| Los Angeles | 2978 | 216 |
| Cleveland | 1749 | 215 |
| Chicago | 2225 | 214 |
| District of Columbia | 2748 | 205 |

**Mathematics Composite**
Grade 8
Average Scale Score– All students

| Jurisdictions | Number of Students | Average Scale Score |
|---|---|---|
| Charlotte | 1372 | 279 |
| National Public | 147600 | 276 |
| New York City | 1694 | 266 |
| San Diego | 1239 | 264 |
| Houston | 1684 | 264 |
| Boston | 1264 | 262 |
| Large Central Cities | | 262 |
| Chicago | 1956 | 254 |
| Cleveland | 1125 | 253 |
| Los Angeles | 1921 | 245 |
| Atlanta | 1501 | 244 |
| District of Columbia | 1888 | 243 |

Source: U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics, National Assessment of Educational Progress (NAEP), 2003 Assessments.

Note: The NAEP Reading and Mathematics scales range from 0 to 500. Observed differences are not necessarily statistically significant.

The census defines "large central cities" as populations of 250,000 or more.