A CASE STUDY OF INTRA-DISTRICT SCHOOL CHOICE POLICY IN A LARGE URBAN DISTRICT

A Record of Study

by

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ABSTRACT

Intra-district choice policy is a mechanism that provides parents the opportunity to apply to send their children to a portfolio of schools within a traditional school district in which the family resides by allowing students to transfer out of their assigned campus based on attendance zone. The impact of such policy has not been examined in the largest school system in Texas. The purpose of this policy analysis was to evaluate the impact of intra-district choice policy on the attrition and movement of two case study secondary schools. A longitudinal qualitative case study analysis was used to examine the subsequent impact on two secondary schools, JR Middle School and JJ High School (pseudonyms), from 2007–2013. Both schools were reconstituted as a result of declining enrollment and declining academic performance. The significance of the study is that little research has been conducted into the impacts of intra-district choice policy meant to create a market-based reform movement by school board members whose intent was to decentralize the nation's seventh largest school district and empower principals to create competitive environments resulting in parents having a portfolio of public schools from which to choose.

This policy analysis was conducted to provide a roadmap for superintendents and school board members seeking to implement policy reform by providing intra-district choice for students and parents. Results of this policy analysis can be used by practitioners and board members as they navigate a complex political environment that requires innovation and forethought as school districts become viable options for parents seeking the best educational opportunities for their children. The study adds to the literature on the impact of intra-district choice in the largest urban school system in Texas using a qualitative case study of a middle and high school.

DEDICATION

I dedicate this dissertation to my parents, Guadalupe and Enedina Cardona, who sacrificed considerably for me to succeed. My father passed away in 1998 and was never able to see what his influence fulfilled. To mom, you have always been my biggest cheerleader and my most significant admonisher. Through everything, you loved me unconditionally, even though I may not have deserved it at the time. If I am a success, it is because I am a reflection in your belief that education was the key to opening doors and to creating situations that would allow me to be successful. My parents exemplified true grit and determination and an unwavering belief that I could be successful with education and demonstrated their integrity always to do what is right for others. I also dedicate this dissertation to my ex-wife Leila Cardona. I thank you for your support in my pursuit of this advanced degree. My sons, Mac and Jack, have continued to inspire me even though I may have been absent during a portion of their formative years. Each of you possesses unique qualities and gifts that help guide me. I hope you both know how much I love you and appreciate you as extraordinary individuals. I dedicate this to my love Laura and my daughter Sienna who encouraged me to begin writing again and kept inspiring me to complete this project. I love you both.

Finally, I dedicate this to all my former students, parents, staff members, and colleagues in the San Antonio Independent School District, North East Independent School District, San Marcos Consolidated Independent School District, and Houston Independent School District for the positive impact on both my professional and personal life. This journey has taken its toll but is a fulfillment of a dream that began when I became a high school principal at Robert E. Lee in San Antonio, Texas.

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administrators from SAISD, NEISD, SMCISD and HISD, thank you for making me a better leader and for believing in our vision that students are only limited by the adults in the building. Finally, to Laura. You have been with me during this final period and have always been my biggest cheerleader. I thank you, and I love you more than I can show.

NOMENCLATURE

AE	Local School Board Policy equating to Educational Philosophy
AEIS	Academic Excellence Indicator System
EGA	Local School Board Policy equating to Curriculum Development – Innovative and Magnet Programs
ELL	English Language Learner
HISD	Houston Independent School District
JJHS	JJ High School
JRMS	JR Middle School
PUA	Per Unit Allocation
STAAR	State of Texas Assessment of Academic Readiness
TAAS	Texas Academic Accountability System
TEA	Texas Education Agency

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Contributors

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CHAPTER I

INTRODUCTION

Background to the Study

An enduring question within the field of education is whether excellent education is possible in every school within every neighborhood. Choice for this very reason has been a dominant theme in school improvement discussions during the modern policy era. The decades old idea is simple—academic achievement improves if students and parents in struggling school systems are afforded options (Özek, 2009). A former board member and superintendent of the Houston Independent School District (HISD), stated, "If we want to improve schools, we must give parents information, through testing, and the option to use that information by expanding parental choice. School districts are much more responsive to parents who have choices" (Paige, 2001, p. 174).

In the 1980s, school district leaders in Houston began experimenting with intra-district choice policies for parents (Mead, 2008; Özek, 2009). Intra-district choice policy is a mechanism that provides parents the opportunity to send their children to a public school within the district in which the family resides in lieu of the assigned school in the family's attendance zone (Mead, 2008; Özek, 2009; Strauss, 2019). School choice initiatives such as intra-district school choice provide parents alternatives to neighborhood schools (Pearman & Swain, 2017). Because school choice is a policy prescription, a program evaluation would typically follow the implementation of reform of such magnitude in a large urban school system (Heilig, Brewer, & Adamson, 2019). School boards, whether public or private, are responsible for helping their organizations become effective by establishing the school district's vision/mission, setting

educational policies for the district, maintaining accountability for student achievement, and evaluating the effectiveness of the board's policy decisions (Curry, Benoiton, & Noonan, 2018).

In this study, the researcher examined one form of school choice, intra-district choice, which has recently become a controversial topic of discussion in the HISD. From 1993–2007, over 3.1 million school-age children across the United States attended schools outside their designated schools (Pearman & Swain, 2017). This mirrored what was happening locally in the HISD as 32,700 students transferred out of their neighborhood zoned schools in 2019 (Carpenter, 2019). Choice policy, founded on free market theories, dictates that schools need to meet the needs of parents and students to remain competitive (National School Board Association, 2015). Don McAdams, the former board president for the HISD, alluded to the board's dissatisfaction with low student achievement on tests and how this tied directly to the election of several reform-minded members who desired to shake up the policy structure (McAdams, 2000). Table 1 shows the high school and middle school district scores during the 1989–1990 school year that in part helped contribute to the dissatisfaction with the academic outcomes in the HISD (Kellar, 1999; McAdams, 2000).

Table 1

HISD TAAS Score Comparison to the State of Texas

	State	District	African American	Economically-disadvantaged
TAAS 9th grade				
All tests % passing	49.2%	32.1%	20.2%	14.3%
Reading % passing	77.8%	69.5%	56.7%	40.6%
Writing % passing	68.0%	46.9%	31.3%	23.1%
Math % passing	59.1%	46.3%	31.0%	23.1%
TAAS 11th grade exit level				
All tests % passing	65.7%	50.6%	49.1%	36.4%
Reading % passing	88.3%	85.3%	79.6%	45.5%
Writing % passing	81.6%	62.2%	78.4%	59.1%
Math % passing	75.5%	71.2%	56.3%	50.0%
TAAS 7th grade				
All tests % passing	48.0%	36.9%	32.9%	38%
Reading % passing	60.4%	48.7%	46.3%	50.0%
Writing % passing	73.8%	67.9%	66.2%	70.1%
Math % passing	62.9%	52.3%	46.1%	52.2%

Note. Taken from Texas Education Agency Academic Excellence Indicator System Report (Texas Education Agency [TEA], 1990).

The accountability data in Table 1 show the largest district in the State of Texas fell below state averages in every category across all secondary schools during the prior year of instruction. Dissatisfaction with academic progress was a driver for the need for change that echoed from both the business community and from board members themselves (McAdams, Hess, & Viteritti, 1999). Neoliberal reformers argued that allowing parents to choose their children's schools would help alleviate opportunity gaps and help historically underserved

students find schools that would meet their needs, but this argument was based on the notion that all poor and minority students would relocate to the top-performing schools in the HISD (Webb, 2018b). In Houston, intra-district choice manifested as board members who espoused liberty and the right to choose and other board members who approached choice from a racial equity standpoint and viewed choice as a civil rights policy (Chubb & Moe, 1990; Scott, 2011).

The seminal case study entitled, *Fighting to Save Our Urban Schools and Winning… Lessons from Houston*, written by a former HISD board member served as a framework for this analysis and provided an archival record (McAdams, 2000). Don McAdams helped orchestrate major policy reform in the HISD and, as such, his personal document served as a rich source of data collection (Hays & Singh, 2012). On June 18, 1990, the HISD Board of Education, under Board President DM, adopted *A Declaration of Beliefs and Visions*, a policy that led to the creation of the board's education philosophy for the next 3 decades as referenced in Appendix A (McAdams, 2000, 2006). Rod Paige, a former board member and later superintendent of the HISD, felt school boards should make policy and increase parents' options through choice mechanisms (Cole, 2004). To HISD school board members, the dysfunction and lack of achievement called for bold policy interventions that would empower parents and intra-district choice seemed to be a viable solution to anemic academic productivity (Cole, 2004).

Policy discussions about choice have in large part focused on five types: charter schools, magnet programs, education savings accounts, vouchers, or inter-district choice policies (Ladner, 2012; Phillips, Hausman, & Larsen, 2012). Though intra-district transfer has not received the same amount of attention as other forms of choice in the academic literature, intra-district transfers are a popular mechanism for empowering parents and are used in over 32 states (Reback, 2008). Studies of intra-district transfers have shown both advantaged and

disadvantaged parents make similar choices (Phillips et al., 2012). The premise is that intra-district school choice increases the options available to parents from disadvantaged families by extending those choices beyond the traditional neighborhood zoned school (Lauen, 2007; Phillips et al., 2012; Reback, 2008). Torres and Hanson (2017) conducted a quantitative study of the use of intra-district magnet choice by parents with high and low social capital in the Western portion of the HISD and found parents of low social capital used choice to move their children away from their neighborhood schools. This evaluation of intra-district choice policy in one of the largest school systems in the country would yield valuable insights in the promise of scalability and administration of equitable policy (Mead, 2008; Strauss, 2019). The focus in this study was specifically to analyze the impact of intra-district choice interventions on two secondary schools from 2007 to 2013. This qualitative case study was based on the use of rational choice theory (RCT) by parents to contextualize the findings (Boyd, Crowson, & Van Geel, 1994).

The unique setting. One of the primary functions of school board policymaking is to advance student achievement through strong governance (National School Board Association, 2015). The HISD school board felt intra-district choice would alleviate segregation across schools and provide access for parents to send their children to higher performing schools across the district (Ouchi, 2006). Members of the HISD school board believed in and espoused the notion that it was their role to innovate the market by decentralizing the central office in the largest school system in the State of Texas (McAdams, 2000; McAdams & Breier, 2011). The decentralization process included expanding options for parents and diminishing the power of the largest bureaucratic organization. The eventual outcomes stemming from the decision to support non-traditional policy measures in the state's largest urban school system broaden the

understanding of both the effectiveness of intra-district choice as well as the dynamics that come into play when highly impactful ideas are introduced (McAdams, 2000; Scott, 2011). The decision to move forward with intra-district choice resulted in new policies and programs that altered the look of the state's largest school district. This policy movement led to the passage of intra-district choice policies and an educational policy intended to provide parents the opportunity to select from a portfolio of schools to meet the competition from charters like KIPP, Yes Prep, and private schools located in the surrounding area (Greene, 1992; McAdams, 2000; Scott, 2008). According to McAdams (2006), the implementation of policy requires some type of policy evaluation examining the impact of intra-district choice implementation on neighborhood schools.

Cullen, Jacob, and Levitt (2006) examined the positive impacts of open enrollment in Chicago Public Schools and found over half of the high school students took advantage of intra-district choice by attending a school that was not their assigned neighborhood school. Phillippo and Griffin (2016) examined the social geography of choice in Chicago and found students' choice processes were related to geographic conditions and favored families with high social capital. Families with low social capital encountered obstacles that included a lack of information about choices and transportation difficulties as they navigated the portfolio of options in Chicago. Choice is conjoined with social capital that in part shapes how students move through the educational system (Bell, 2009b). Ewing (2019) examined school closures in Chicago Public Schools and alluded to the impact of choice but through the lens of school closures. Phillippo and Griffin (2016) were specifically interested in how students make their choices within a confined geographical space but did not examine policy implementation. Ewing (2019), in a case study of Dyett Middle School in the Chicago Public School system, referenced

open enrollment as a form of choice that repurposed an old middle school into a new magnet high school, changing the traditional neighborhood school into an intra-district choice option. Ewing examined the expansion of choice in Chicago Public Schools that removed the neighborhood attendance zone; however, there is a lack of inquiry into the impact of board member created intra-district choice through the use of policy mechanisms. Chicago attacked choice through closing schools leveraging academic accountability policies, not market-based transformational policies (Menefee-Libey, 2010; Shipps, 2006). As in the HISD, funds followed the students as student movement led to student attrition that eventually forced school closures, as 48 schools shut down in 2013 (Phillippo & Griffin, 2016).

Lincove, Cowen, and Imbrogno (2016) examined the portfolio of schools model in New Orleans that allowed parents to find schools that best met the needs of their children. The researchers examined the value parents placed on diverse types of schools (charters, private, magnets) and the characteristics (academic outcomes) of the schools parents chose. They did not examine board policy. Dobbie, Fryer, and Fryer (2011) examined the impact of high-quality charters on low-income students and Betts and Tang (2014) conducted a meta-analysis that showed charter schools outperformed traditional public schools on state exams. None of these researchers examined policy decisions by reform-minded board members. Moon (2018b) examined the HISD's decentralization reform by ascertaining principal perceptions, but never examined or mentioned in the literature review *A Declaration of Beliefs and Visions*, which was the spark for weighted student funding and decentralization (see Appendix A).

The HISD. The HISD is the largest urban school district in Texas. Located in the Southeast region of Texas, the HISD encompasses 333 square miles; serves 214,000 students; and employs 30,000 full- and part-time workers. It is a complex educational system. Though it

has a reputation as both a progressive and innovative decentralized school system, its leaders have faced challenges and challenging times in recent years (HISD, 2016a). The HISD epitomizes the Texas saying, "Everything is bigger in Texas," with operating revenues of $1.9 billion (HISD, 2013c). Governance by a nine-member school board in this complex bureaucracy can lead to dramatic impacts on schools locally and influence policymaking at the state and national levels (Cuban, 2013). By all accounts, the variety of educational magnet programs, internal charters, stand-alone magnets, and comprehensive schools would seem to indicate the district has been providing families a bevy of educational options and yet the district has been in the spotlight in the past several years for considering a major redesign of those programs that have made the district a national model for choice policy (Bush, 2017; Ciaglo, 2017). Hess (1999) stated there is a cyclical history for reforms to rise and fall and ambitious reforms such as intra-district choice may follow a similar fate. These large reform experiments, which often trigger undesirable consequences and outcomes, usually come at a prohibitive cost. For this reason, it was the intention of the researcher in the current study to determine how the intra-district choice policy transpired in two secondary schools between 2007 and 2013.

The need to investigate school choice policy. Underlying school choice is the assumption that parents select educational alternatives to afford their students the best opportunity for success (Bifulco, Ladd, & Ross, 2009; Bush, 2017; Chubb & Moe, 1990) by comparing educational options based on productivity and product quality. Gooden, Jabbar, and Torres (2016), while examining the impact of vouchers on Black families, alluded to the need to further examine choice beyond academic opportunities for parents of color. They asserted policies such as vouchers ignore the racial components while focusing on arguments that incorporate RCT (Gooden et al., 2016). In their examination of vouchers, Gooden et al. found

voucher programs as a form of choice do not address the systemic policy issues and the underlying historical nature of segregationist tactics that included vouchers. The understanding of outcomes related to school choice derives primarily from a surfeit of research related to vouchers and charters that tends to ignore the historical, social, and legal contexts (Fowler, 2003; Gooden et al., 2016; Manno, Vanourek, & Finn, 2000). Even fewer studies have examined intra-district choice as a less controversial and more politically appealing alternative (Reback, 2008). Nevertheless, choice is a complex intervention largely because it is driven by contrasting beliefs of human behavior (Bell, 2009b).

Chubb and Moe (1990) suggested choice policies can be useful regardless of racial composition or resources. Proponents of choice assert that choice policies afford all parents the opportunity for equal access to the best schools and the best teachers (Bush, 2017; West, 2016). Parents from less advantaged populations do not have the access and are therefore limited in their ability to select from a wider variety of school choice options and intra-district choice helps to mitigate the disparity (Phillips, Larsen, & Hausman, 2014; Schneider, Teske, & Marschall, 2000). Yet, it is argued that choice policies exacerbate inequalities in schools, thereby threatening public school education and creating environments that punish neighborhood schools (Gooden et al., 2016; Lubienski & Lubienski, 2014; Phillips et al., 2014).

Rowe and Lubienski (2017) argued policies that promote choice are undercutting social cohesion and worsening the segregation occurring across schools. Though opponents acknowledge that school choice may be expanded, the assertion is that it does not guarantee all families will have equal and equitable access to the resources necessary to make rational and informed decisions (Phillips et al., 2014). Opponents further argue that choice tends to favor more affluent families because families of color face systemic barriers and lack the information

necessary to make salient choices for their students (Gooden et al., 2016; Phillips et al., 2014). Noreisch (2007) asserted choice policy creates a segregated schooling landscape, particularly in urban settings. Opponents of choice policy avow that choice policy monetizes students and creates an educational system that siphons monies away from neighborhood schools with negative impacts that disenfranchise poor and marginalized communities and lead to a weakening of the neighborhood and accelerated gentrification (Bifulco & Ladd, 2007; Strauss, 2019).

School reform is inherently political and polarizing. For instance, *A Nation at Risk*, a federal report commissioned in April of 1983, was influential in state and local policy and shaped the HISD's approach to market-based reform. The premise of the school board's actions was to empower parents while decentralizing the school district (Dudley-Marling & Baker, 2012; McAdams, 2000, 2006). Politicians and business stakeholders clamored for more intra-district choice and supported increased autonomy for campus principals' site-based decision-making teams (Kamenetz, 2018). In the HISD, the strategy of the reform-minded board membership was to reallocate the power structure from a centralized approach to a more decentralized school system, creating more intra-district choice for parents (McAdams et al., 1999). The HISD was, according to board members, at a time and place that required drastic interventions to move the educational system forward for all students (McAdams, 2000, 2006).

Hess (1999) researched why some policy proposals for educational reform are adopted and others are not. Hess specifically focused attention on the roles school board members play during policy implementation. Hess asserted there is a cyclical history for reforms to rise and fall. Hess's 2x2 matrix provides insight as to how board members and superintendents view the decision to adopt a reform policy. Hess contended reforms with significant political payoff are

more politically attractive for superintendents and school boards. Intra-district choice policy, as a current educational practice, has surfaced throughout the nation as a high visibility, high controversy policy reform. The policy encourages board members and superintendents to market to parents and students in an effort to increase the educational outputs by improving match quality between students and schools and exerting competition among schools (Archbald, 2004; Koedel, Betts, Rice, & Zau, 2009). Gilardi (2010) stated "policy diffusion, the idea that policy choices made in a given place in time are influenced by the policy choices made elsewhere" (p. 650), was crucial as part of policy implementation.

Rod Paige was a firm proponent of the choice policy plan, wanting schools to compete for students (Bryant, 1996; Chappell, 2001; Hood, 2002; McAdams, 2000; Sweany, 2000). It was central to his belief in improving school systems for students, particularly students of color (Chappell, 2001; Hood, 2002; Sweany, 2000). Paige often shared a sentiment that "parents who have the means and the money have a choice. Parents who do not have the means and the money should have the same choice" (Chappell, 2001, p. 174). Former board member Laurie Bricker echoed Rod Paige's sentiment, stating, "I see competition escalating. I'm looking for more school choice down the road" (Bryant, 1996, para. 17). The critical idea behind intra-district choice policy and practice is to enable diverse and politically charged policymakers and constituents to implement choice policy as intended and to evaluate the policy for effectiveness (Cohen, Moffitt, & Goldin, 2007).

Policies such as intra-district choice offer market-based incentives in the form of increased authority for principals as well as an increase in resources and budget allocations. However, the policy will only be effective if implemented with fidelity by the school practitioners and if the policy undergoes an evaluation to determine its effectiveness and

outcomes (Kamenetz, 2018). The policy design depends on the philosophical and ideological perspectives of the board members who wield the most power and influence (Scott, 2011). It is crucial that intra-district choice policy does not create a situation exacerbating inequities in a school system by advantaging some while disadvantaging others (Bancroft, 2015). There is a symbiotic relationship between policymakers and school practitioners, namely principals and parents who use the system to make choices for their children. The policymakers' legitimacy and political interests depend in no small measure on the practice of the policy by said practitioners (Lubienski, Linick, & York, 2012). Practitioners (principals) recognize the incentives and resources that accompany the policy. Elmore (1979) stated that "unless the initiators of policy can galvanize the energy, attention, and skills of those affected by the policy, the effects of the policy are unlikely to be anything but weak" (p. 611).

Problem Statement

There is a need for a deeper understanding of how intra-district choice unfolds beyond the polarizing narratives at the policymaking level and the administrative challenges faced in implementing such policy. Lacking are critical perspectives from the implementers or street-level bureaucrats who interact with the controversial policy (Evans, 2011; Lipsky, 1971). Lipsky's (1971) theory came from his interest in the intersection of politics and policy implementation. Although support for the policy was strong from the school board, did school personnel see the choice plan as viable and was it producing the desired outcomes and influencing parents' decision-making in expected ways? In Houston, the main proponents of choice policies argued that families should choose their type of education and school based on their needs (Archbald, 2004; Coleman, 1990; McAdams et al., 1999). Rod Paige, as superintendent, implemented voucher programs (contract placements) and the expansion of

HISD internal charter schools to increase choice at significant rates in the system (Chappell, 2001; McAdams, 2000). Choice policy falls into several categories that are not isolated and involve a co-mingling of ideologies that revolve around increased parental authority in choice as represented in Figure 1.

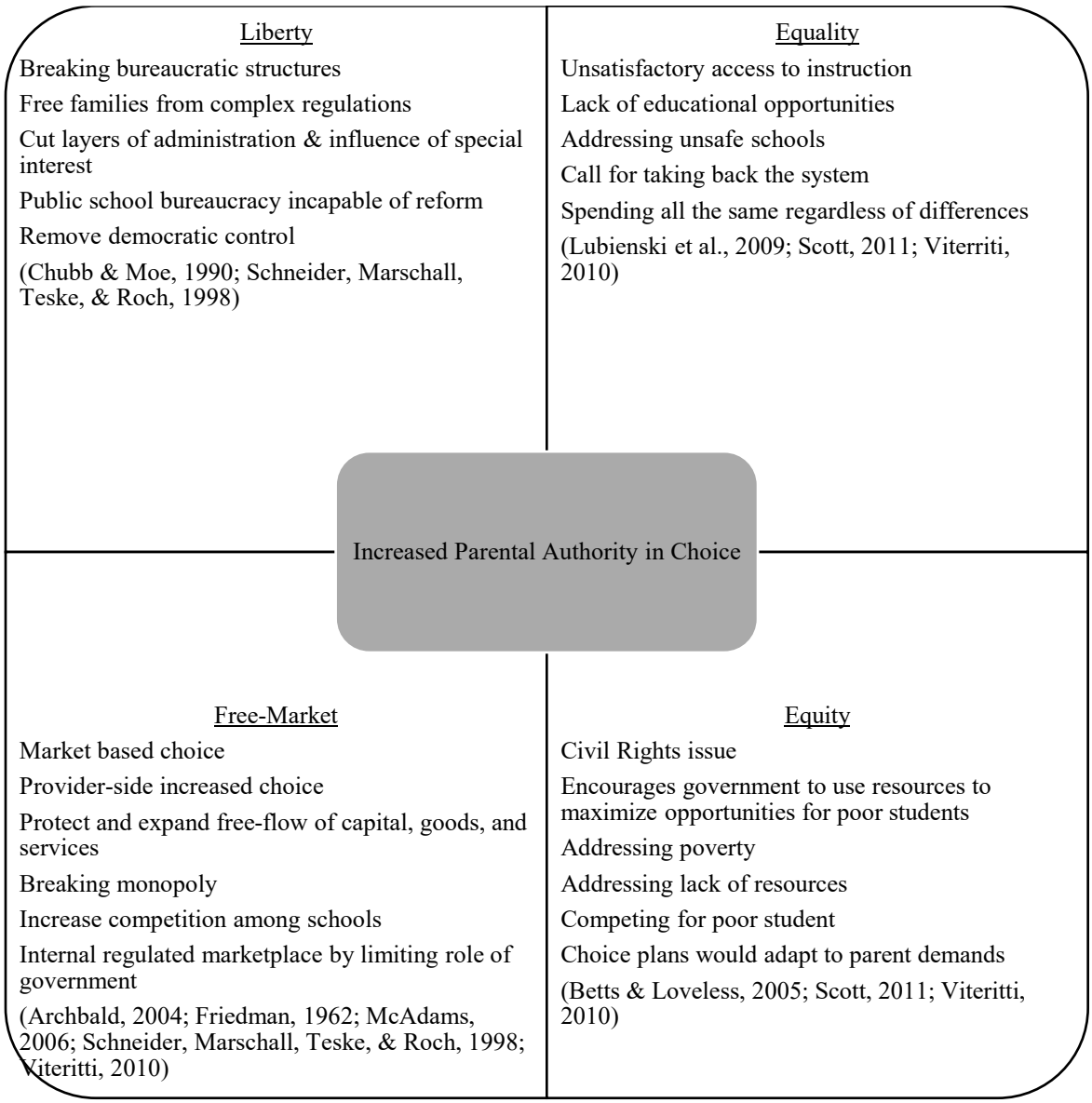

Figure 1. Choice policy ideologies.

By the 1980s, education reform in Houston mirrored what was taking place nationally (Kapalka, 2012; Resnick, 2006) and was based on the idea that choice would lead to more competition for students and increased efficiency by districts (Coleman, 1990; Friedman, 1962; Levin, 1991). The concept of intra-district choice operates on a similar presumption: (a) parents want expanded choice options beyond magnets or other novelty programs (Phillips et al., 2012; Schneider, Teske, Marschall, & Roch, 1998; Scott, 2011), and (b) parents want the power to choose from a menu of school options to find those that best suit the needs of their children (Carlson, Lesley, & Witte, 2011).

As educational leaders, it is important to disentangle intra-district choice policy as a rational organizational idea and study how it transpires in practice (Pearman & Swain, 2017; Torres & Hanson, 2017). It is critical to examine the coalitions of interest fighting to control the policy narrative and what it means for students because of policy enactment (Bolman & Deal, 2008; McAdams, 2000). How the actors address their differences in values, beliefs, interests, and perceptions is an inevitable but crucial dimension of this story. Thus, from a policy design and implementation standpoint, the knowledge gathered from this analysis can help provide valuable guidance on future intra-district choice policy to ensure greater benefits for all students (Bancroft, 2015; McAdams, 2006).

On June 18, 1990, just 4 months after a federal judge ruled the HISD had complied with desegregation orders, the HISD Board of Education unanimously approved *A Declarations of Beliefs and Visions*, a policy that alluded to the need for restructuring and reform of the entire school system (see Appendix A). In 2001, the reauthorization of *A Declaration of Beliefs and Visions* led to addendum that, coupled with magnet and charter choices, created a new dynamic for parents, particularly parents from marginalized communities in traditionally underserved

areas of the district (Boschma & Brownstein, 2016; McAdams, 2000, 2006; Torres & Hanson, 2017). *A Declaration of Beliefs and Visions* removed the neighborhood school as a barrier by providing parents the option for their children to attend schools outside of their neighborhood zones (Torres & Hanson, 2017). In the HISD, which is located in the most diverse city in the United States, school boards and superintendents must evaluate the impact of policy implementation to inform future policy decisions (Klineberg, 2015). The two schools included in this study are located in areas of the school district that have suffered losses in student population over a span of 6 years (i.e., 2007–2013).

As a result of having to reconstitute both case study schools, the question becomes one of events that led district leaders to make the decision to reconstitute schools in minority and impoverished areas of the city. During the many parent and community meetings facilitated by the researcher as a Chief School Officer for the HISD, parents would voice concerns over the district's decisions. The concerns raised mentioned the school board destroying the neighborhood schools and a sense of frustration could be felt as meetings turned to venting sessions about the failed policies of the HISD. As with any new policy or program, a policy evaluation or program evaluation should be standard practice to examine the impact on students (Bell, 2009b; Cullen et al., 2005; Yin 2018). In a system as large and diverse as the HISD, the lack of research on the topic of intra-district choice created an opportunity for reflection and to provide research on a topic of interest for practitioners, policymakers, and the community.

Purpose of Study

The purpose of this case study was to gain insight into the impact of intra-district choice policy implementation in a large urban school district on attrition and movement at two case study secondary schools. Strauss (2019) referred to intra-district choice as a method that allows

parents to send their children to a school within a district in which a family resides other than the one to which that child is assigned based on attendance zone. Levin (1991) asserted families should have the right to choose the type of school and education that meets their students' needs. Public school choice encourages schools to compete for students, particularly those who bring with them the most money and those who are the poorest (McAdams, 2006). In the HISD, students and parents choose and apply to schools based on interest and available space that may or may not include applications to the district's extensive portfolio of magnet, charters, or other programs and from a variety of other opportunities (Bell, 2009b; Bifulco et al., 2009; Creswell, 1994, 2003; Phillips et al., 2012). The intra-district choice options in the HISD for 2007–2013 (HISD Office of School Choice, personal communication, April 17, 2019) can be found below:

- Adequate Yearly Progress Transfer
- Appeals
- Boundary Options
- Career and Technology Transfer
- Contract Charters Transfer
- Dual Language Transfer
- ESL/Bilingual Transfer
- Grade 6/7/8 Transfer
- HISD Charter
- Homeless Transfer
- International Baccalaureate Transfer
- Majority to Minority Transfer
- Magnet Transfer

- Moved within Semester Transfer
- Not Available
- Out of District – Employee Magnet Transfer
- Public Education Grant Transfer
- Pending In-District Address Validation
- Principal Agreement Transfer
- Program Placement Transfer
- Space Available Transfer
- Special Education Transfer
- Violent Crime Victim Transfer
- Virtual Pilot School Transfer
- Withdrawal Code Deletion
- Withdrawal Code Edit
- Zoned Students
- Appeals Transfer

In addressing the purpose of the study, it is also crucial to understand the significance of the study, which is discussed in the next section. This school board activism created a complex interaction that superintendents and school board members needed to address while ensuring all students were afforded equitable access to effective schools (Bolman & Deal, 2008).

Significance of Study

This study was conducted to inform researchers, policymakers, superintendents, and community members about the assumptions and realities of intra-district choice (Archbald, 2004). The HISD is a complex educational system, the seventh largest school system in the

country, and the largest decentralized school system in the State of Texas (HISD, 2005, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c). The HISD school board members, historically, have been politically active in policymaking (Kellar, 1999). Their justification has normally been to minimize the undesirable impact that arise on occasion from communities, central office leaders, and centralization (McAdams, 2000, 2006). School choice decisions within the largest school system can have impact not only in Texas but also nationally as leaders in many large urban districts base their policies on district resemblance (Bifulco et al., 2009; Moon, 2018b). For this reason, a deeper analysis of campus response to this policy over a substantial period may offer valuable clues about the promise of some reform initiatives versus others (Mathis & Welner, 2018). Empirical studies on the impact of choice policy can provide a roadmap for policymakers, superintendents, and parents (Archbald, 2004; Bancroft, 2015). This study was designed to add to the literature an examination of the various types of intra-district school choice used from 2007–2013 and the impact on attrition and movement in two case study schools (Phillips et al., 2012).

Though there has been significant examination of choice, previous studies tended to include a focus on public charter schools or the use of vouchers or other state tax incentives to attend private schools (Arsen & Ni, 2008; Mead, 2008; Phillips et al., 2014; Saltman, 2010; Sunderman, Coghlan, & Mintrop, 2017). To date, current research has tended to emphasize the outcomes associated with choice that resembles vouchers, public charter schools, and private schools (Phillips et al., 2014; Scott, 2013). There has been little research examining urban school intra-district choice and the impact on traditional neighborhood schools in the HISD (Arsen & Ni, 2008; Reback, 2008; Scott, 2013). The HISD has an array of magnet programs but also has contracts with internal charters, external charters, virtual schools, and myriad other

options for parents. Though magnet programs have been in existence since the 1970s and were initially used to integrate schools, they were included in this study because parents in the HISD were making a decision to relocate their children from one magnet program to another within the school district (Mellon, 2013). McAdams (2000) alluded to parents using magnet programs to move children away from neighborhood schools (p. 60). According to McAdams, "This was the great game in southwest Houston. Hundreds of children from middle-class homes in the zones of 'unacceptable' schools would transfer" (p. 60). Local board policymakers implementing intra-district choice have not examined the impact on traditional neighborhood schools, thus providing an opportunity to assess the impact of policy implementation in the largest urban school system in Texas (Mead, 2008). For a district as large and diverse as the HISD, the implementation of policy that was designed to empower parents has the potential to create inequities in the system that advantage some while disadvantaging others (Bancroft, 2015).

In this case, a specific and limited instance of a phenomenon (Schwandt, 2007) in a real-life school district was examined within two settings, JR Middle School (JRMS) and JJ High School (JJHS; pseudonyms for both schools). Both schools are situated in highly demographically diverse communities (HISD, 2013c). Both are considered comprehensive neighborhood schools and have been greatly impacted by the intra-district school choice system (HISD, 2013c). Arsen and Ni (2008) asserted case studies hold promise in demonstrating a more subtle understanding of traditional public schools and a look at organizational practices. Figure 2 shows the number of intra-district choice totals during the 6-year period for JRMS and 7-year period for JJHS (HISD Office of School Choice, personal communication, April 17, 2019). For the purpose of this study, intra-district choice is a mechanism parents employed that incorporated completing a transfer with the Office of School Choice. The numberd in Figure 2 are the total

number of completed applications that resulted in students moving to other campuses within the HISD during this period of time for both case study schools.

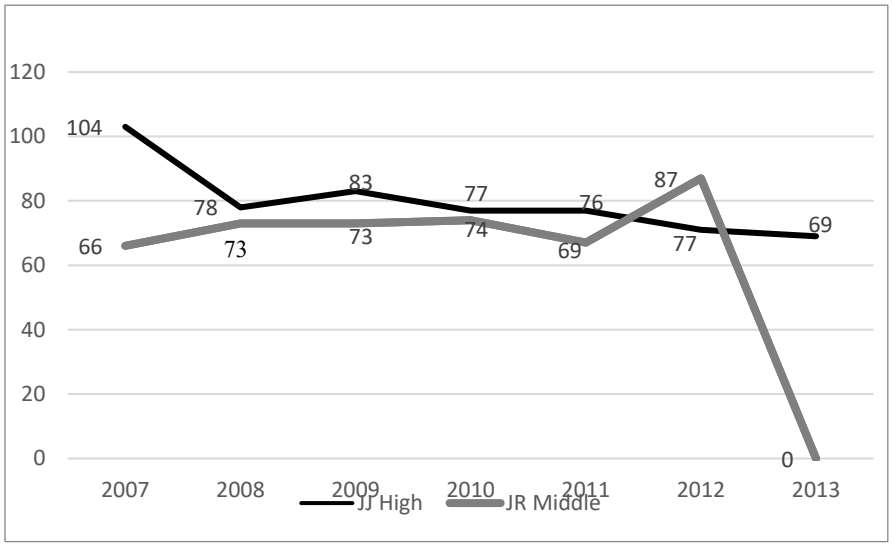

Figure 2. Intra-district choice totals 2007–2013.

Both JJHS and JRMS were subject to reconstitution—a practice of replacing a school's entire staff because of chronic academic deficiencies and declining enrollment (HISD Office of School Choice, personal communication, April 17, 2019; Mellon, 2012). Figure 2shows that in 2013, JRMS reflected zero intra-district choices as a result of the school being reconstituted, the process of redesigning schools where the principal replaces staff as a new middle school with a medical theme (Hamilton, Vasquez Heilig, & Pazey, 2014). The school began as a sixth-grade campus with a new attendance boundary that was the entire district. All students from this point forward were no longer considered transfers (HISD, 2013c). Given the bounded nature of the data, an analysis of intra-district choice policy in this setting has the potential to generate discussion points and recommendations for policy development. The significance of the study lies in developing recommendations that can serve as a roadmap for superintendents and board

members to consider when developing and approving policy (Klineberg, 2015). The next section offers an overview of the methodology.

Overview of Methodology

Figure 3 shows the logic behind incorporating a variety of evidence into this longitudinal case study analysis using archival research and documents (Hays & Singh, 2012).

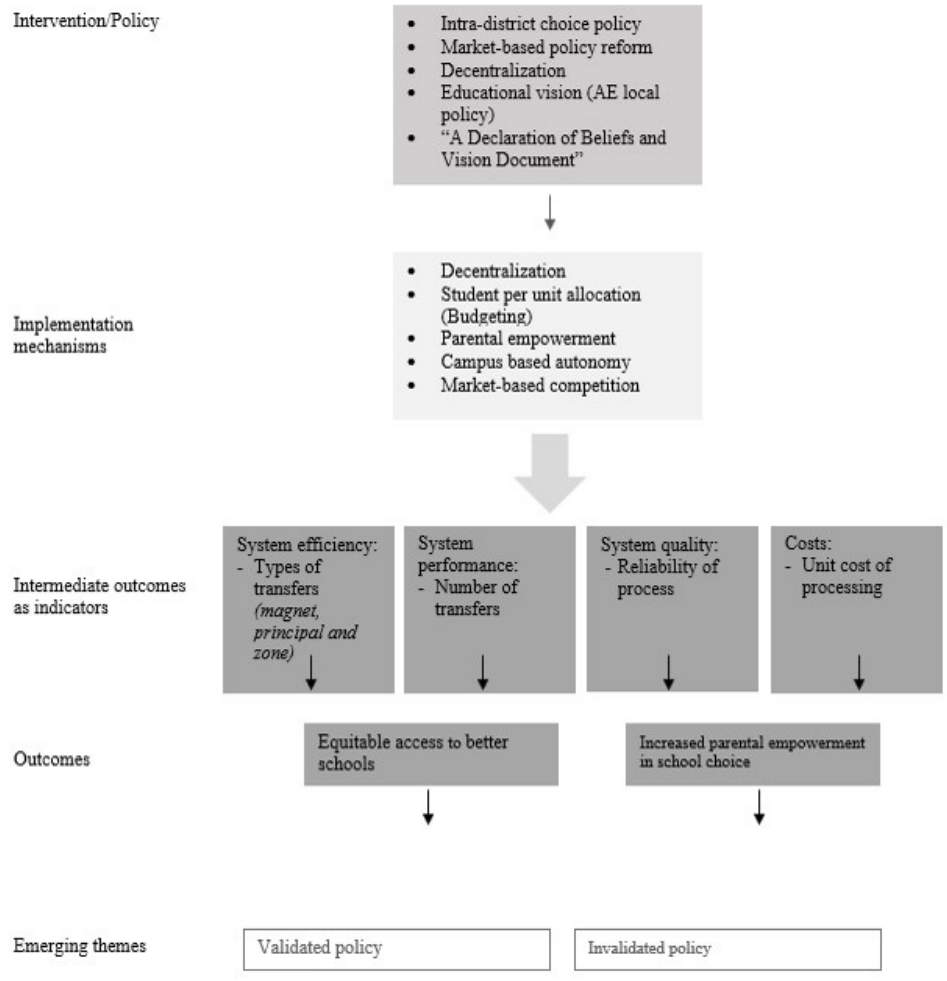

Figure 3. Intra-district school choice logic model (Bensch, 2019).

A longitudinal qualitative case study analysis was used to investigate the impacts of the intra-district choice policy on the two case study schools from 2007–2013 using RCT (Boyd et al., 1994). Yin (2003) defined case study research as an empirical inquiry used to investigate a phenomenon of relevance within a real-life context. An advantage of using the case study research method is the ability to incorporate a variety of evidence such as documents, artifacts, direct observations, and participant observation (Patton, 2002; Yin, 2018). A case study, using participant observation, allows a researcher to seek answers to how and why questions (Yin, 2003). Stake (1995) emphasized that the foremost concern within case study research is to generate knowledge of a specific subject of interest. According to Stake, case study research was a preferable means to examine and attempt to discern specific issues relevant to a case. As a participant observer, the researcher chose the two case study schools because the data collected offered information pertinent to examining the impact of choice policy implementation (HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c). As a participant observer, the researcher conducted numerous community meetings as the superintendent's representative. The researcher sought to examine the impact of intra-district choice policy and the effect on both JRMS and JJHS using district archival data, *Fighting to Save Our Urban School…and Winning!! Lessons from Houston*, participant observer notes, district data, and data from school board meetings and notes (McAdams, 2000; Yin, 2018). Member checking was incorporated to ensure validity and reliability in the interpretation and analyses of data (Creswell, 2007; Lincoln & Guba, 1985; Stake, 1995).

Qualitative data included archival video and notes from school board meetings, historical records such as district and school profiles, school-level data that included numbers and categories of choice, participant observer notes, newspaper articles, HISD board policy, and

school finance and media relations documents (HISD, 2013b, 2013c). The archival data included school board meeting notes and board meeting records (HISD, 2016b). Data examined consisted of student attrition rates within the HISD over a period from 2007–2013 and those who submitted intra-district choice transfers through the Office of School Choice, as well as demographic data of both case study schools (HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c). The case study design was used in this policy analysis to gain insight into the development of school policy, political and problem issues, and the meaning for all those involved in the development of policy designed to create a system of choice schools in a market-based reform movement (McAdams, 2000).

The case study schools were purposefully selected and the data gathered provided for an information rich in-depth case study (Patton, 2015). Both schools were selected as case study schools because the participant observer (i.e., the researcher) served as the Chief School Officer in the HISD overseeing the reconstitution of both schools. As such, the participant observer can provide the contextual conditions and information deemed relevant to the phenomenon under study (Yin, 2003). As a participant observer, the researcher had knowledge and conducted community engagement meetings to discuss possible school reconstitutions, met with school board members, kept notes on community meetings at both schools, and apprised the superintendent on courses of action and official recommendations to policy.

Research Questions

As the largest school district in the State of Texas with over 280 schools and 214,000 students, school board policy decisions in Houston have operated largely from a safeguarding perspective, as communities and schools are not affected by disruptive central office leaders (Greene, 1992; Kellar, 1999; McAdams, 2006). It is suspected that the implementation of the

intra-district choice policy contributed to schools losing students through attrition and movement as intra-district choice allowed parents not to be confined to the traditional neighborhood school zone.

The following research question and sub questions guided the analysis of the two case study schools:

- How did intra-district choice policy impact student attrition and movement at JR Middle School and JJ High School from 2007–2013?
    - What worked well?
    - What did not work well?
    - What were the surprising and unexpected outcomes from this intervention?

The research was designed to provide a roadmap using multiple sources to help inform decision making at various levels in the HISD (Yin, 2018). School choice has been a prominent component in the HISD, and the intra-district choice policy existed prior to this case study analysis. The study was intended to continue the dialogue about the impact of the intra-district choice policy on two case study schools in one of the most extensive urban school systems in the nation. The intent was to provide information that may be useful to school district leaders in the current state of school reform.

Objectives and Outcomes

The case study was designed to gain an understanding of the impact of the intra-district choice policy on two case study schools by examining attrition and movement in the HISD from 2007–2013 (Creswell, 2007; Hays & Singh, 2012; Patton, 2015). Specifically, the researcher examined the types of choice used by parents in the two case study schools to generate knowledge of a specific area of interest (Bell, 2009a; Stake, 1995). The results of this case study

can be used to inform practitioners, the superintendent, and school board members on how the policy has impacted neighborhood schools through attrition and movement. The purpose of this analysis was to provide insight based on an analysis of the outcomes from such policies and potential strategies when implementing policy. Examining the impact of policy decisions can guide superintendents and board members as they navigate systemic school reform initiatives aimed at providing options for students and parents, particularly in urban areas where resources are scarce and the opportunities available to marginalized student and parent groups are limited (Bell, 2009a; Mickelson, Bottia, & Southworth, 2008).

Limitations

The primary limitation to the study was researcher bias. As an employee of the district and participant observer, the researcher was limited in potential objectivity. The researcher encountered multiple limitations during this study, including using a purposive sampling method that limited the study to the two specific schools over a bounded and specific time (Leedy & Ormond, 2010). The time frame chosen was a snapshot dependent on the conditions during that time (Schwandt, 2007). The purposive sampling method limited the results to only these two case study schools and had the potential to introduce researcher bias that would restrict the ability to generalize findings across the district. Additional limitations included the use of archival data from the HISD, which were later purged by the district after the inception of this study. For example, *A Declaration of Beliefs and Visions* was removed from the district website in August of 2017 (see Appendix A). The researcher made attempts to obtain the information via open records requests, but the policy was transcribed by the researcher verbatim, which created the potential for incorrect transcription. The researcher was limited only to the information provided by the Office of School Choice that could not provide an overall scope and

motive behind the choices made (see Appendix B). Therefore, the researcher could not receive information or communication regarding why certain intra-district choices were made by parents and their rationale for the selection, limiting the ability to establish a cause/effect relationship (Mickelson et al., 2008). The information accessed from the Office of School Choice limited the researcher's ability to ask further questions because of the lack of records or exit surveys to capture data from parents who applied for transfers (see Appendix B). The data obtained only reflected which types of choice were used during the specific period from 2007–2013 (see Appendix B). The Executive Director for the Office of School Choice verified that records were sparse and several years of documentation were destroyed because of black mold in the storage warehouse (HISD Office of School Choice, personal communication, April 17, 2019). The Executive Director for the Office of School Choice also verified that the data only included those parents who were approved and did not include those who were waitlisted during the period of study (HISD Office of School Choice, personal communication, April 17, 2019). Access to specific parent desires was out of the researcher's control as the Office of School Choice did not seek the answers to why parents were using the district's office or why they were seeking optional educational alternatives. Finally, there was a potential limitation in the selection of member checkers. Just as the case study schools were purposefully selected, member checkers were selected based on their intimate knowledge of the operations of the district but their potential biases must be acknowledged at the forefront of this study.

Delimitations

Delimitations are characteristics that limit the scope and define the boundaries of a study as imposed by the researcher (Leedy & Ormond, 2010). Specifically, the researcher in this study made a purposeful decision to select the two case study schools based on experience as a

participant in the reconstitution of the two schools. Delimitations also included the choice to purposively sample the two case study schools that were in the researcher's control. The two case study schools sit in portions of the community that have for years seen losses in student populations (HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c). The researcher's positionality as Chief School Officer allowed for a personal perspective during the reconstituting and repurposing of both secondary schools. The researcher provided insight from the many parent/community meetings facilitated as a Chief School Officer where parents voiced concerns that the district was harming neighborhood schools. Parents also expressed their frustration in meetings that turned to venting sessions about the failed policies of the HISD.

Both case study schools are historical and political and thus provide a source of study. Selecting the two schools allowed the researcher to focus narrowly on the policy and the impacts based on the available data taken from board meeting minutes, video, and multiple sources. Delimiting factors included the specific research questions of this study that specifically targeted two specific schools in certain regions of the district to analyze the policy impact from a neutral standpoint. Delimitations also include that of activist policymaking by school board members who seek to disrupt interaction and policy governances. Examples were found in newspapers, social media, and school board meetings the participant observer cataloged.

Assumptions

An assumption within this policy analysis was that information was provided to parents to help them make rational choices for their students (Boyd et al., 1994). The HISD Office of School Choice has existed since choice programs were implemented (HISD, 2020). The office is responsible for providing parents and community members all the information necessary in their native language to make rational and informed decisions (Boyd et al., 1994; Phillips et al., 2014).

For example, one choice option was to permit transfers between magnet school programs and other magnet programs. Magnet programs have been in existence since the 1970s but they were included in this study because the researcher assumed the choice was made because of dissatisfaction with the current magnet program that caused parents to seek an alternative educational programming to meet their students' needs. A magnet-to-magnet transfer assumes some type of dissatisfaction that necessitated a move to another campus within the district. Furthermore, Don McAdams (2000), in *Fighting to Save Our Urban School…and Winning!*, alluded to parents using magnet school choice to escape neighborhood schools in certain parts of the school district after the adoption of *A Declaration of Beliefs and Visions*. Magnet programs are a source of considerable dialogue resulting in several attempts to reform magnet programming (HISD, 2014c, 2015b, 2018, 2019b). Assumptions reflect the idea that parents possessed the necessary information to select from the 28 choice options available to them. It is assumed that the school board intended to create a policy of market-based reform that was designed to expand the portfolio of school options.

Finally, the researcher made assumptions that there was an inherent tension between the Hispanic and African American communities in both case study schools. During community meetings, members of different races were observed to sit separately. African American community members made statements that the schools were African American schools and Hispanic community members would make comments that African Americans did not want Hispanics in their schools (personal communication, February 26, 2013). This led to assumptions that intra-district school choice transfers would reflect racial tendencies (personal communication, February 26, 2013).

Definition of Key Terms

Key terms are clarified as applicable to their use throughout this study.

Archival data – Hays and Singh (2012) referred to archival data as data collected by government described as raw data waiting to be used by the researcher (p. 288). LeCompte and Schensul (1999) referred to raw data as data sources that are available and unanalyzed. Archival data can be written statistics and are maintained by a variety of organizations.

Choice policy – Strauss (2019) referred to school choice as a method that allows parents to send their children to a school within a district in which the family resides other than the one to which their children are assigned per attendance zone. For the purpose of this study, choice is a policy aimed at enhancing parents' freedom and control over the education of their children and is based on the theory of the free market (Chubb & Moe, 1990; Schneider, Teske, Marschall, & Roch, 1998; Viteritti, 2010). Scott (2013) referred to choice policy as a form of parental empowerment. Among the various types of choice included in this study are boundary options, contract charter, dual language, Grade6/7/8, HISD charter, neighborhood schools, magnet schools, stand-alone magnets, specialty magnets, open enrollment, charter schools, in-district charter schools, virtual schooling, safety, adequate yearly progress, principal agreement transfers, majority to minority, moved within semester, public education grant, pending in district validation, virtual pilot, space available, and zoned student transfers (HISD, 2017c).

Closure – For the purpose of this study, closure is defined as the process of closing a school for either low enrollment or as a reform strategy to address the school's low academic performance (Hurdle, 2013; Jack & Sludden, 2013; Stroub & Richards, 2016).

Intra-district choice – During the 1980s, school district leaders began to develop intra-district choice policies for parents (Mead, 2008). Intra-district choice is a mechanism that

provides parents the opportunity to send their children to a school within the district in which the family resides but not to the one to which their children are assigned by attendance zone (Mead, 2008; Strauss, 2019). For the purpose of this study, intra-district choice is defined as a policy that allows parents to choose from a portfolio of school options that includes magnet schools, stand-alone magnet schools, other comprehensive schools, majority to minority transfers, intra-district charter transfers, transfers as a result of academic performance, safety transfers, principal agreement transfers, and space available transfers (Bifulco et al., 2009; HISD, 2017c; Mickleson et al., 2008). Intra-district choice is an incentive-based system that promotes competition for students as they transfer away from their neighborhood zoned schools (Bryant, 1996; Phillips et al., 2014).

Magnet school – Magnet schools often have unique and specialized curricular offerings designed to reduce racial isolation by attracting White students to high minority schools (Mead, 2008; Mickleson et al., 2008). These schools receive magnet funding and provide transportation to non-zoned students (HISD, 2013a). The designs of magnet schools are central to whether the schools are representative or will contribute to the resegregation of schools (Mickleson et al., 2008).

Neighborhood schools – Defined in EGA Local Policy, a neighborhood school serves its zoned population of students. A neighborhood school may offer specialized programming and can accept transfers if space is available but does not receive transportation or extra funding from the district (HISD, 2013a; Mead, 2008).

Neighborhood Vanguard programs/Gifted and talented (G/T) – As defined in *Curriculum Development – Innovative and Magnet Program* local policy, Vanguard programs

serve students identified as gifted and talented in neighborhood schools or as a stand-alone Vanguard campus. Vanguard schools are addressed in separate policies (HISD, 2014).

Reconstitute (Reconstitution) – Reconstitution changed the dynamics of the case study campuses by allowing the principals to replace staff and giving parents the choice to apply for the magnet schools they were interested in pursuing (Hamilton et al., 2014). In the case of JRMS, as part of the 2012 Race to The Top Magnet School Assistance Program grant, the school was reconstituted to become a medical middle school magnet that was a choice for parents throughout the HISD (HISD, 2012). JJHS was reconstituted in 2014 and made a dual-credit futures academy focused on providing students the opportunity to earn either an associate degree or certification in the Science Technology Engineering and Math (STEM) career and technology pathway (Mellon, 2014b). JJHS was no longer considered a comprehensive high school with extracurricular activities such as football, volleyball, basketball, baseball, band, orchestra, and softball.

Reform – For the purpose of this study, reform is defined as a mechanism that promotes a variety of organizational education system redesigns and provides parents choices in educational options (Chubb & Moe, 1990; Wong & Langevin, 2007).

Segregation – For the purpose of this study, segregation is defined as a policy that promotes keeping students of different races and socioeconomic status separate (Rowe & Lubienski, 2017). Rowe and Lubienski (2017) conceptualized segregation as an unevenness that creates a difference in the distribution of student populations. For this study, attrition and movement were examined to study the impacts of intra-district choice on two case study schools.

Vanguard Magnet – Though all district schools have Vanguard programs designed to serve the individual needs of gifted and talented students, schools can have a magnet program as

well. There is a separate application for Vanguard Magnet programs. Qualified students can apply and, once accepted, receive transportation (HISD, 2013a).

Summary

The HISD is a complex system. It is the largest school district in the State of Texas and the seventh largest in the nation. There are over 280 schools and over 100 intra-district choice options from which parents can choose (HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c). The school board members are activists who seek to ensure their communities and schools are not affected by disruptive central office leaders and who have an aversion to everything centralized. School board members and superintendents have made little effort to examine whether the policies implemented by reform board policymaking accomplished the market-based reforms started in the 1990s and to date no policy evaluation has occurred to determine the impacts of policy implementation in the HISD. McAdams (2000) alluded that choice reform options were at the heart of *A Declaration of Beliefs and Visions*. The HISD has always prided itself on being innovative regarding offerings and choice for students, hiring the superintendent, creating policy, and approving the budget. All of these factors contribute to the role of an activist board. Superintendents within this setting learn to navigate the complex interplay and movement between political environments (McAdams, 2006). Twenty years after the original change in board roles and the adoption of *A Declaration of Beliefs and Visions*, Binkovitz (2016) stated the school community has mostly failed to trust the district because the disproportionate number of school closures has affected Black and poor students. Stroub and Richards (2016) evaluated the HISD and focused on the effects of school closures on student achievement and found choice transfer policies rarely created situations in which impoverished children were transferring to Houston's highest performing schools. Torres and Hanson (2017)

stated parents with high social capital were less likely to exercise choice. Because of the HISD school board's move toward market-based reforms through policy implementation, the impacts of the implementation of *A Declaration of Beliefs and Visions* have not been examined. There has been very little political will to establish a full program evaluation ascertaining the impact of choice in the HISD. This qualitative case study was designed to examine intra-district choice policy, providing an empirical analysis and potentially a roadmap for school boards and superintendents seeking to implement their own similar policy reforms.

Chapter II, a review of literature, provides a historical context to the HISD, choice policy, intra-district choice policy, and the theoretical underpinnings for this qualitative case study.

CHAPTER II

REVIEW OF LITERATURE

Introduction to Review of Literature

Whether in Dallas, Milwaukee, New Orleans, Denver, or Houston, school boards and superintendents have had to deal with segregated school systems and find ways to create conditions that provide parents a choice and address the impacts of the growing poverty found in large urban school systems (Ben-Porath, 2012; Cullen et al., 2005; Lubienski, 2003; Lubienski, Gulosino, & Weitzel, 2009). According to Michael Hinojosa, Superintendent of the Dallas Independent School District, leaders in every major city in the United States must find a way to deal with the issue of school choice (Goldstein, 2017). This move toward a politically motivated board reform movement, as illustrated in *Fighting to Save Our Urban Schools…and Winning!! Lessons from Houston* (McAdams, 2000), formed the basis for this case study of the impacts of an intra-district choice policy enacted 20 years ago that continues today in the complex political arena of the largest school system in the State of Texas (see also Bancroft, 2015; Torres & Hanson, 2017).

Dating back to Milton Friedman's push in the 1950s to have tax dollars follow students and Coleman's (1968) concept of educational opportunity, school district leaders have dealt with school choice policies in many different forms and fashions (Fuller & Page, 2015; West, 2016). Friedman proposed market-based competition would force school districts to improve and this competition would break the monopoly held in urban districts (Chubb & Moe, 1990; Wong & Walberg, 2006). Coleman (1968) alluded to the public education's monopoly affording only those with money the ability to seek options outside the public education system. This movement by Friedman and Coleman reflected the initial steps toward choice policies linked to

neo-liberal educational reform. Choice policy was viewed as an economic good that was a crucial factor in providing freedom to parents and students (Levin, 1991). Choice policy was tied directly to school board governance, which provides a voice for communities on how the school system will educate children (Levin, 1991). Board members are stewards and the public elects them to fulfill certain obligations within the education system on their behalf (Black, 2007). School boards are an essential mechanism between education and democracy, providing a venue for community members to have a say in what their children are taught due to differences in local and national educational focuses (McAdams, 2000). By law, the charge of a local board of trustees is to design a process where school districts create a shared vision of education in the community by including all stakeholders through strategic planning and school improvement strategies (Hood, 2002), thus assembling the community around school issues to give people an opportunity to develop a broader view. However, this was not the case in Houston where the district faced many private school options and burgeoning charter networks. Leaders in the HISD wanted to address systemic issues aggressively and change the governance structure by employing proactive policy implementation and disrupting the governance structure that had been in place for decades (Curry et al., 2018).

This chapter includes a review of literature that informed this study on intra-district choice policy. There are a plethora of qualitative and quantitative studies examining the school choice methods in the large urban district selected for this study (Bancroft, 2015; Torres & Hanson, 2017). There are additional studies of how students perform in magnet programs compared to their counterparts, yet few studies included a focus on the outcomes of school board governance reform and the intra-district choice policy enacted to provide parents a choice (Bifulco et al., 2009; Moon, 2018a; Phillips et al., 2012; Torres & Hanson, 2017).

Choice Policy

There is an abundance of choice policy literature surrounding the characteristics of students who use choice but researchers have typically focused on private schools or charter schools and the various mechanisms to use choice (Bifulco et al., 2009; Education Commission of the States, 2018; Reback, 2008). There is also research examining the unintended consequences of choice policy. If choice policy is designed as a market-based reform strategy aimed at liberating families with low social capital from the burden of the bureaucratic structure of the educational system, recent research has shown it is affluent families who use choice to escape low-achieving neighborhood schools. Saporito (2003) examined the use of choice in selecting magnet schools in Philadelphia and found affluent students attending low achieving schools were more likely to use choice to attend non-neighborhood schools. Marcotte and Dalane (2019) stated choice creates a sorting mechanism that perpetuates socioeconomic segregation related to family income and education. Lauen (2007) contended that if affluent families use median income characteristics in determining enrollment for students, then school choice options could increase income-based segregation. Studies examining the unintended consequences of choice include a study of Chicago's choice policy, which was found to weaken the connection between residence and the zoned neighborhood school (Rich & Jennings, 2015). Cullen et al. (2005) examined intra-district choice programs in Chicago high schools and found more than half of the students opted out of their neighborhood schools to attend schools outside of their neighborhood attendance zones. Ewing (2019), in *Ghosts in the Schoolyard*, examined the Chicago Public School system and found choice tended to disadvantage poor Black families. While researching two case study schools, Ewing found families that lacked access to transportation and information could not access the marketplace and portfolio of schools in the

Chicago school system. Ewing sought answers to the long-term consequences for the neighborhood and for the students who remained in neighborhood schools (Ewing, 2019; Levine, 2016). Hastings, Kane, and Staiger (2006) researched choice in Charlotte and found higher achieving students were more likely to use choice than were low and moderate achieving students. Several researchers have studied the decision-making of parents who use vouchers in school systems that are highly segregated in states that include Minnesota, Louisiana, North Carolina, Wisconsin, and Ohio (Hastings & Weinstein, 2008; Jabbar, 2015). Arce-Trigatti, Harris, Jabbar, and Lincove (2015) studied choice from the parent perspective in the robust charter network in New Orleans after Hurricane Katrina. Their research showed parents would seek alternatives outside their neighborhood schools. Scott (2013) found market-based choice can also constrain parents who are not willing to move from their neighborhood schools. Incentivizing principals became an approach to create selective enrollment procedures that advantage some and disadvantage others. In prior research, the impact of choice have been examined in the HISD and other districts. However, there is no research regarding the transformative actions of the school board pertaining to the implantation of the intra-district policy, the impacts of the policy on school board relations, the tenuous relationship between the school board and the superintendent as a result of the policy, and the impact of the transfer policy within the school district.

Synthesis of Research

In order to understand the impact of intra-district choice policy in the HISD, one must understand the history of governance that helped shaped the district and places the context of policy development in perspective (Kellar, 1999; McAdams, 2000). *A Declaration of Beliefs and Visions* (see Appendix A) was the policy-based reform that led to the development of AE

and EGA Local Policy. These board policies empowered parents with intra-district choice as a means to improve educational outcomes for students and placed emphasis on the need for a critical examination of the research around intra-district choice policy (Jabbar, 2015; Olson Beal & Hendry, 2012). The analysis of the historical context of governance and policymaking in the largest school district in Texas through the lens of RCT on intra-district choice supports that choice options work in a complex and contradictory manner that empowers parents and disempowers neighborhood schools in market-driven reform. Such practices place school boards and superintendents in a delicate balance of enacting policy designed to provide parents a choice while maintaining the notion of neighborhood schools (Jabbar, 2015; McAdams, 2006; Olson Beal & Hendry, 2012).

There has been much research on inter-district choice and other forms of choice but the research on intra-district choice and the impact has thus far been relegated to school districts in New Orleans, Chicago, Philadelphia, Charlotte-Mecklenburg, Minnesota, and New York (Archbald, 2004; Jabbar, 2015; Levine, 2016; Phillips et al., 2012; Rickles, Ong, & Houston, 2002). The research around school reform based on choice has resembled business and market-based characteristics that make assumptions that parents will act as consumers, creating competitive environments that result in higher academic outcomes (Olson Beal & Hendry, 2012). The synthesis of research indicates that in the 1990s, the HISD school board and the superintendent created policy that encouraged competition based on RCT (McAdams, 2000; McAdams et al., 1999). This study into the impact of intra-district choice involved a focus on two schools whose socioeconomic make-up and racial composition were homogenous (HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c). The researcher in the current study did not take into account the parents' personal histories but focused on the types of intra-district choice

selected between 2007–2013 to analyze attrition and movement (Stake, 1995). This research coincides with Webb's (2018a) argument for the need to examine school choice that was exacerbating racial and economic segregation in one the most diverse cities in the United States.

This study was also grounded in an analysis framed using RCT, which has been prevalent in sociology, political science, economics, and organizational theory (Boyd et al., 1994). RCT, though not a new theory, is based on the notion that parents or other actors make choices after considering the costs and benefits of each option (Boyd et al., 1994; Webb, 2018a). Under RCT, parents have school preferences and make rationally calculated decisions to maximize their benefits at the least amount of cost (Boyd et al., 1994). According to RCT, parents create their preferences, develop strategies that account for positive and negative information, make their choices based on constraints, and wait for outcomes (Dixit & Nalebuff, 1991; Weiske, Pelzold, & Schad, 2015). It is assumed within RCT that parents (actors) have access to all information and opportunity and select an action (choice) that is the most promising in meeting the needs of the student and family (Weiske et al., 2015). A major advocate for RCT, Coleman (1990), asserted an actor's rational choice is purposively based on actions and outcomes that maximize benefits in the long term while minimizing costs. Coleman believed rational choice is only possible when actors (e.g., parents) are left to make their own choices. As such, the bureaucratic structure of educational institutions hampered this ability and resulted in parents conforming to a system that was inefficient and harmful for student achievement outcomes (Bancroft, 2015; Boyd et al., 1994). Coleman (1990) felt rational choice would enable minority students to achieve better academic outcomes because poor students would conform to middle-class standards of achievement (Yair, 2007). Because the HISD provides transportation for all students who use intra-district choice, parents had the ability to expand their options with the

HISD. Within RCT, actors are thought to be highly cognizant of their situations and plan for outcomes rationally (Yair, 2007).

Former board president Don McAdams and former board member and Superintendent Rod Paige viewed systemic reform that included intra-district choice policy to lift the entire system in the HISD (McAdams, 2000). The HISD's school board was intent on keeping intra-district choice and restructuring the per unit allocation so the money followed the student, and enticing parents and principals into accepting the adoption of *A Declaration of Beliefs and Visions* (McAdams, 2000). Though intra-district choice policy was a market-based inducement policy (Archbald, 2004; Boyd et al., 1994; Yair, 2007) and was proposed as an alternative model to involve parents as stakeholders, for the purposes of the current study RCT was the method used to examine the impact on the two case study schools. Research on school choice theory identifies school choice and magnet programs as tools to achieve desegregation (Archbald, 2004; Chubb & Moe, 1990; Lubienski, 2003). The theoretical underpinnings allow for poor children to escape their underperforming schools (Archbald, 2004; Chubb & Moe, 1990). Intra-district school choice policy rests on the notion that policymakers are providing a market-based approach to reform that will enable parents to make rational choices that benefit their students (Jabbar, 2015; Schneider, Marschall, Teske, & Roch, 1998). Though some research has shown White, higher income, more formally educated families use choice to leave their neighborhood schools, research has also shown parents from less educated and more impoverished areas incorporate choice to create options for their students (Bancroft, 2015; Jabbar, 2015; Olson Beal & Hendry, 2012; Webb, 2018b).

According to Archbald (2004), school choice will reduce economic segregation among children in public schools by creating access for lower-income families to schools outside their

zoned neighborhoods. The premise the HISD incorporated with intra-district school choice was to allow parents to choose from a portfolio of schools within a public school system that could compete with charter and private schools and also move money to the campus level where they believed the best decisions could be made (McAdams, 2000; Strauss, 2019). According to Scherrer (2004), Rod Paige, former U.S. Secretary of Education, stated:

> Choice makes public schools recognize that students will not have to stay if the school is not meeting their needs. It is the jolt that some schools need to put them on a path to improvement. I opened all schools in Houston to choice because I believed that the teachers, students, and parents are more engaged when they have all made the active decision to be there. (p. 21)

Choice policy is based on the assumption that magnet schools are made accessible to all families and that the school of choice is supported with transportation and all access opportunities (Torres & Hanson, 2017). As Young and Clinchy (1992) stated, intra-district plans like controlled choice, such as magnet schools, increase educational opportunities and equity for economically disadvantaged families by allowing them access to a district's schools.

Researchers have given considerable attention to the leadership role of superintendents and the obstacles they tend to face from activist school boards (Glass, Bjork, & Brunner, 2000). The HISD went through a reform movement during the 1990s that continues to affect board members and superintendents today (Carpenter, 2019). In March of 2016, Boschma (2016) identified Houston, Texas, as one of the cities with the largest gaps between Whites and all students of color attending low-income schools. Houston schools had been marginally integrated by a system of magnet schools until 1981 when the federal court declared the HISD a unitary integrated system (McAdams, 2000; *Ross v. HISD*, 1981). Urban board politics in Houston resembled other urban school boards that were consumed with localism and highly fractious politics (C. Stone, 1998). McAdams (2006), former HISD board president, alluded to the roles, responsibilities, and relationships under his reform governance framework between all

stakeholders that included developing core beliefs and commitments, creating theories of action for change, and creating reform policies.

Houston Independent School District

The HISD traces its beginnings to the early 1900s. Though the State Constitution established a system of free public schools in 1876, the reality was a system of private and parochial schools that afforded the elite access to education and segregated African American students to a system of schools known as ward systems (Hurley, 1966). The early board dynamics were fraught with racial bias that resulted in unequal funding and a perpetuation of separate but unequal policies and facilities in part created by continued right-wing scares that liberal board members were communists (Carleton, 1985). After the 1954 *Brown v. Board of Education of Topeka* decision, HISD's board sought to keep segregated schools and created policy perpetuating segregation by building new Black and White schools. However, the African American community was determined to gain equal access to all facilities within the HISD (*Brown v. Board of Education of Topeka*, 1954; Carleton, 1985; Kellar, 1999). April 30, 1956, was a seminal moment in HISD policymaking addressing segregation that directly affects the current trends seen in the fight to save neighborhood schools. Dr. Walter W. Kemmerer, former University of Houston President, proposed policy that would meet the requirements of the federal mandate and comply with the U.S. Supreme Court rulings on segregated school systems (Kellar, 1999). Dr. Kemmerer's response during this time provides a glimpse of what superintendents navigate in board governance. Dr. Kemmerer stated, "I think for the Superintendent to operate and work, he must know the intent of the Board" (Kellar, 1999, p. 11). Intrinsic to this study is the resulting effect on schools that were built in the boundaries of the HISD that continued a segregated system. Currently, schools now suffering losses in enrollment

as a result of intra-district choice policy were created because historically White activist majority boards wanted to continue the segregation of students while espousing the notion that the system was complying with a federally mandated court order (Kellar, 1999).

As schools across the nation were experiencing violent protests, Houston was dealing with racial integration in its own Texas way (Kellar, 1999). January of 1957 saw a conservative board move to respond to *Ross v. Houston Independent School District* by appointing community members to study integration (Kellar, 1999). Ultimately, the HISD school board kicked the desegregation plan to 1959 using school construction as the reason to wait to address desegregation. It was during this time that the board made an example of the first African American high school principal in the district by demoting him to junior high principal in 1958 (Kellar, 1999). Why is this important? The board demoted the principal to JRMS, which would become a case study school. The significance of a board demoting a principal because that principal did not support the policies of the board was an early indication of the uniqueness of the HISD as an organization.

In the early 1960s, the HISD school board and superintendent made a token attempt to comply with *Brown v. Board of Education of Topeka* by placing 12 first-grade students in three schools. Out of a population of 241,000 students, only 12 students of color met the policies and regulations imposed by the superintendent and board. By 1964, that number had jumped to 1,395 students of color in Grades 1–4 in 18 schools (Kellar, 1999). By the mid-1960s, the HISD had implemented a "freedom-of-choice" policy that allowed parents to enroll their children in any school per building capacity but that policy was ruled inadequate by U.S. District Judge Ben C. Connally in 1970 (Kellar, 1999). Judge Connally specifically said the HISD's plan did not

constitute a good faith attempt at compliance with previous orders of the court but was a sham designed only to accomplish further evasion and delay (Kellar, 1999).

Historical context of A Declaration of Beliefs and Visions. *A Declaration of Beliefs and Visions*, in the HISD, traces its origin to several reform-minded board members in the late 1980s (see Appendix A; McAdams, 2000). Don McAdams, a former State Board of Education candidate and former university professor, ran with a slate of reform-minded board members in 1989 (McAdams et al., 1999). McAdams, who was one of the founding proponents of *A Declaration of Beliefs and Visions*, was openly dissatisfied with the state of education and with the TEA (McAdams, 2000). Backed by the business community, McAdams, along with two other board members, was elected to the school board in the late 1980s. The last comprehensive evaluation of magnet programs was conducted in 1989 when the district was still under a court order to desegregate (HISD, 2002). The process of policy reform by reform minded-board members began with developing and writing *A Declaration of Beliefs and Visions*, a policy change that was not without controversy (McAdams, 2000). In January of 1990, a retreat was held involving the four new board members, the four returning board members, and Superintendent Raymond (McAdams, 2000). During the retreat, Superintendent Raymond became uncomfortable and stated, "I'm an experienced superintendent, one of the best in the country. I'm in control. I know exactly what needs to be done. Just leave things to me" (McAdams, 2000, p. 4). Superintendent Raymond continued to push back, forcing the board members to congregate outside of the scheduled meeting times to develop the new direction of the district (McAdams, 2006). In February of 1990, the federal court system ruled the HISD was no longer subject to a court order to desegregate, paving the way for a new era of market-based reform (Kellar, 1999). Over a period of several months, variations of the document were

created, but not without opposition (McAdams, 2000). At one point in the process, Superintendent Raymond rewrote the entire document, which the board rejected (McAdams, 2000). Eventually, Superintendent Raymond exited the school district and the road was cleared for the school board and new superintendent to begin the implementation of intra-district choice policy.

The decision to begin the process of finding a new superintendent was not without controversy. Even among the African American community there was controversy in the selection of the newly appointed superintendent as members of the Baptist Ministers Association and the Black Heritage Society argued about the lack of transparency in the process (Markley & Zuniga, 1994). Hispanics alluded to the board making one of the most important policy decisions in secret and away from a transparent eye and the board acknowledged that by hiring an interim Hispanic superintendent (Markley, 1994). Former board member Cathy Mincberg stated, "The board made a symbolic move here, trying to give a feeling to the community that we are sincere, that we care very much about how all segments of the community feel" (Markley, 1994, para. 5). Community activist Guadalupe San Miguel, a professor at the University of Houston, stated, "She's a one-week superintendent. It's an effort to confuse the issue. We know this is an effort just to placate the community" (Markely, 1994, para. 8).

On June 18, 1990, the HISD adopted *A Declarations of Beliefs and Vision*s, which led to a continued shift in the roles of the board and the new superintendent (see Appendix A). As elected members of the community, this adoption by the HISD school board created a new movement that would continue to guide policy implementation by superintendents in subsequent years (see Appendix A). For the purpose of the current study, the educational vision is represented as the letters AE Local Policy (HISD, 2020a). According to AE Local Policy

(HISD, 2020a), the HISD shall provide innovative and engaging programs. Explicitly, "The District's magnet schools embody the mandates for change on school choice, decentralization, school empowerment, and meaningful engagement" (HISD, 2020a, p. 3). The move to decentralize the district was a form of administrative culling designed to move decision-making from central administration to school campuses and communities (Saltman, 2010). This decentralization, coupled with the budgetary impacts, allowed money to follow students within the district and created a new dynamic that reform board members sought (McAdams, 2006). The intra-district choice policy implementation created competition among colleagues who were now recruiting for students within the district and for the dollars that followed them (HISD, 2020a). The HISD school board and superintendent navigated the process of creating systems of intra-district choice options that allowed parents to have a portfolio of school options intended to compete with private schools, public charter schools, and the ever-growing suburban school districts (HISD, 2020b; Phillips et al., 2012).

Intra-district choice. The HISD had a prior history of magnet schools, stand-alone schools, school within a school magnet program, contract charters, and other program transfers that created intra-district choice, but most magnet or specialized schools were clustered in affluent neighborhoods (Armor & Peiser, 1997; HISD, 2016b). Though Milton Friedman advanced the notion of choice in *Capitalism and Freedom*, intra-district choice policy has evolved over time. The premise behind Freidman's choice model is that educational options for students and parents should be increased through alternatives and market-based competition (Viteritti, 2010). According to Viteritti (2010), Friedman fundamentally believed poor families would benefit from a competitive school system more than the existing monopoly owned by the public education system.

Intra-district choice plans helped shaped the view the school board was taking in working toward improving the system of schools and outcomes for students (HISD, 2020a). Choice in the HISD became both a liberal and conservative cause that allowed both community alternatives and market solutions to address the inefficient educational system and increase parental authority over the educational decisions for their children (Ben-Porath, 2012; Reese, 2005). Intra-district choice allows parents to select the school that best meets the needs of their students while not constricting the parents to the neighborhood school (Levin, 1991; Phillips et al., 2014; Scott, 2013).

Betts and Loveless (2005) proposed good schools would compete for students in order to improve or would be subject to closure through low enrollment, depending on how they adapted to parents' needs. To create intra-district choice policy, the HISD began the process of closing schools to create opportunities for new choice programs (Dowdall, 2011; Stroub & Richards, 2016). Initially, school closures were a method that allowed the HISD to create alternate intra-district choice possibilities while seeking to maintain a balanced budget while responding to the community in providing intra-district school choice options that could compete with public charters, suburban school districts, and private schools (McAdams, 2000). Choice, specifically intra-district choice, expanded educational opportunities for parents and families. The policy debate regarding intra-district choice centers on whether the policy was effective or ineffective.

In their study of school choice in North Carolina, Bifulco et al. (2009) found advantaged students used choice to move out of neighborhood schools when the schools contained large numbers of disadvantaged students. Torres and Hanson (2017) examined the use of a parent's social capital in magnet school utilization and attendance in the Western part of the HISD and analyzed what type of parent used choice to attend magnet schools, but did not examine the

policy that created choice mechanisms. Stroub and Richards (2016) examined the effects of school closures in the HISD and found school closures disproportionately affected Black and poor students. Strauss (2019) examined the impact of inter-district choice, or open enrollment school districts, in Michigan that was considered market-based reforms. In Michigan, the money follows the student to outside districts; this model resembles the structure in the HISD (Strauss, 2019). The inter-district choice policy was a market-based reform but Strauss did not examine intra-district choice. Owens (2017) examined the impact of neighborhood segregation and the outcomes of parents using choice within residential neighborhoods across the United States.

The intra-district choice policy enacted by the HISD school board created a dynamic that no longer tied parents to neighborhood schools (Education Commission of the States, 2018; Merrifield, 2008; Phillips et al., 2012). Similar to Scott (2013), choice was viewed in the HISD as empowerment policy. Many proponents of school choice view these polices as a means to address equity by acknowledging parents' rights to have their children in schools that meet their needs and values (Carlson et al., 2011; Reback, 2008). Critics of choice policy argue that such policy disadvantages the poorest in districts and creates issues of segregation, leading to unequal schools. Ewing (2019) found the portfolio option upon which choice was built favored advantaged families and left Black families behind in the new neoliberal market-based approach. Stroub and Richards (2016) examined the impact of school closures between 2003 and 2010 and found the HISD's school closures disproportionately affected students of color and poor students. The HISD was caught in a complex interplay between addressing neighborhood schools while providing parents options that competed with public charters, private schools, and suburban school districts (Stroub & Richards, 2016).

A Declaration of Beliefs and Visions was enacted as an empowerment policy designed to disrupt the bureaucratic monolithic 19th century industrial model of education (McAdams, 2000; Webb, 2018b). At the center of intra-district choice policy debates are assertions the HISD was creating a weakening of neighborhood schools, particularly in African American and Hispanic areas of Houston (Pearman & Swain, 2017; Webb, 2018b). Pearman and Swain (2017) examined school choice alternatives that provide parents options to traditional neighborhood requirements and the impact on neighborhood schools. Pearman and Swain found the impact of choice were to weaken the neighborhood schools and create racially isolated and segregated communities in large urban areas. Though Pearman and Swain analyzed gentrification, the literature is relevant and provides value in examining two schools as a case study in the HISD. Opponents of choice assert that school choice reforms such as *A Declaration of Beliefs and Visions* contribute to inequality though market-based segregation (Orfield & Frankenberg, 2013).

Choosing to leave a school requires a variety of tools that include access to information, time, social capital, and financial resources and as such is susceptible to creating an environment that will lead to further inequities in access by families who lack the resources and social capital (Rich & Jennings, 2015). It is crucial to examine the policy in terms of student attrition and movement through a study of how market-based reform impacted two case study schools in the largest school system in Texas.

Critical analysis. It is crucial to understand that school reconstitutions were a byproduct of the initial attempts by previous school boards to avoid desegregation (Boschma, 2016; Kellar, 1999; Webb, 2018b). Though desegregation was not the focus of this case study, it is relevant in understanding that 50 years later the same schools that were built to avoid integration were now the subject of closures as the policy intended to empower parents was being used to the detriment

of neighborhood schools with large minority populations (Bancroft, 2015; Levine, 2016; Torres & Hanson, 2017; Webb, 2018b). If the intra-district choice policy enacted by the HISD school board was meant to increase efficiency in the school system by allowing parents to choose the schools that best met the needs of their students, the lack of program evaluation was at odds with policy implementation (Schneider et al., 2000). Intra-district choice quickly surfaced as potentially having the same impact of inter-district choice that many in the HISD claimed was hurting the school district (Schneider et al., 2000; Webb, 2018a). It must be acknowledged that the context in which school choice takes place is important in determining the degree to which choice results in forms of further segregation or resegregation in schools (Levine, 2016; Phillips et al., 2014).

Research conducted on the motives of the HISD school board and superintendent contributes to the context of the historical nature of the governance structure in the HISD. The school choice policy was developed to empower parents and create competition but an examination of the policy and how it potentially sorted students has not been undertaken (Marcotte & Dalane, 2019; McAdams, 2000). Most relevant research conducted pertained to the impact of choice policies in the context of public charter school expansion and competition versus private schools and the growing suburban school systems (Bifulco et al., 2009; Phillips et al., 2014).

Conclusion of Literature Review

It is suspected that intra-district choice policy implementation contributed to schools losing students through attrition and movement as intra-district choice allowed parents not to be confined to the traditional neighborhood school zone (Greene, 1992; Kellar, 1999). This study

was conducted to examine the impact on two case study schools. The research question guiding this study included several sub questions:

- How did intra-district choice policy impact student attrition and movement at JR Middle School and JJ High School from 2007–2013?
    - What worked well?
    - What did not work well?
    - What were the surprising and unexpected outcomes from this intervention?

The researcher examined the history of the HISD governance to provide context to the political nature of the policy development and reforms enacted (Kellar, 1999; McAdams, 2000, 2006; Yair, 2007). The literature focused on a theoretical framework grounded on RCT and the assumption that parents have the best information available to make decisions about selecting schools using uncontrolled choice, and that the educational opportunities are extended to disadvantaged students to attend the best schools their parents believe will meet their needs (Hoxby, 1998; Phillips et al., 2012; Yair, 2007). The literature review focused on the historical context of HISD, the conceptual framework, the premise of the theoretical framework, and the competing perspectives of choice implemented in 1990 (Kellar, 1999; McAdams, 2000). Chapter III contains details of the methods incorporated in this qualitative case study of the impact of intra-district choice policy.

CHAPTER III

METHODS

Introduction

The purpose of this longitudinal case study was to analyze the impact of intra-district choice policy in two schools (JRMS and JJHS) within one of the nation's largest school districts (the HISD). Although school choice has been previously investigated in Texas, the focus has been primarily on charter schools and private schools as the most common alternatives for parents (Phillips et al., 2014; Torres & Hanson, 2017). As mentioned earlier, the decision to institute an intra-district choice policy in the HISD was motivated largely by a document entitled *A Declaration of Beliefs and Vision* (see Appendix A) which at its core espoused the need to incorporate market-based reform ideas (McAdams, 2000, 2006). According to Lubienski (2003), most education policy discourse is presented as market-based innovations intended to disrupt traditional bureaucratic education systems, but little empirical research has been conducted into what this looks like from a school board implementation level. It is not disputed that various forms of choice have been a prominent method for parents in Houston and this policy analysis is intended to continue the dialogue about the impact of intra-district choice on attrition and movement (Stroub & Richards, 2016; Torres & Hanson, 2017).

The case study method employed in this analysis allowed for the use of diverse types of information to construct a rich story over a period of approximately 6 years (Yazan, 2015). The sources of information were archival records, which included school demographics and profiles; newspaper articles; social media posts by board members; participant observer notes from meetings; open recordings of school board meetings via videos and printed agendas; open public records from TEA data; and records from the Office of School Choice (Merriam, 1998; Stake,

1995). Information and archival documents were bound to two secondary schools in the HISD (Creswell 2003, 2007; Stake, 1995). The case study schools, one middle school and one high school, were selected in part because the researcher was a participant observer throughout the process of reconstituting both schools, which provided additional context (Merriam, 1998). According to Merriam (1998), a participant observer is able to bring a construction to reality or interpret the phenomenon being studied. If, as the "Declaration" (McAdams, 2000) document suggests, school choice might alleviate social and educational problems, empower parents, and disrupt the bureaucratic system, then this study would need to include multiple sources of data (Merriam, 1998; Stake, 1995) to capture a more convincing understanding of whether the policy implementation can be validated or invalidated.

Research Perspective

The researcher used a constructivist commitment to understand the impact of intra-district choice policy (Creswell, 1994; Merriam, 1998; Schwandt, 2007; Stake, 1995). This policy analysis research was based on the ontology of what beliefs and ideas exist in the social world and the assumptions regarding the form and nature of the social realities. The ontology of universal truth was the basis for the participant observer and to guide researchers and practitioners (Creswell, 2003; Lincoln & Guba, 1985; Schwandt, 2007; Yazan, 2015). The epistemological understanding of this case study approach was based on Stake's (1995) belief that the researcher possesses a strong motivation for discovering the meaning and understanding of experiences in context (see also Schwandt, 2007; Yazan, 2015). The case study approach is specific and complex, encompasses integrated systems, has a specific boundary, and is suited for social science studies (Yazan, 2015). The findings of this study reflect knowledge on the two case study schools and the impact of intra-district choice policy implementation between 2007–

2013. The research was observed and measured through the analysis of records, media, documents, and data (Merriam, 1998; Stake, 2005). Axiology results from value independent judgments and can be used by practitioners seeking to enact choice policies (Lincoln & Guba, 1985). The research methodology demonstrated internal validity, external validity, reliability, and objectivity (Creswell, 2003; Schwandt, 2007).

Research Design

The study incorporated a case study approach as the two schools under examination provided a specific, unique, and bounded system (Creswell, 2007; Merriam, 1998; Stake, 2005; Yin, 2003). In educational research, case study methodology is still one of the most frequently used qualitative research methodologies to identify and examine issues and problems through an in-depth understanding of a case (Creswell, 2007; Merriam, 1998; Yazan, 2015). The two schools in question provided distinct boundaries of time and place for the analysis and the impact of the policy (Merriam, 1998; Stake, 1995). Stake (1995) asserted case study permits researchers to examine the complexities of a single case and come to understand the case's activity within important circumstances (p. xi). Stake conceived of case study research as a mechanism that allows researchers to interpret multiple sources of data to construct multiple perspectives of reality. Stake referred to these as holistic, empirical, interpretive, and emphatic characteristics that allow for flexible design. Holistic characteristics allow the researcher to consider the interrelationships between the phenomenon and the context (Yazan, 2015). Empirical characteristics allow the researcher to base the study on observations in the field. Interpretive characteristics allow the researcher to use intuition and see the research as an interaction between the researcher and the subject. Emphatic characteristics allow the researcher to reflect the vicarious experiences of the case from the native perspective (Stake, 1995; Yazan, 2015).

The case study model allowed the researcher to examine the policy phenomenon on a level that provided relevant information for practitioners and researchers studying intra-district choice policy (Merriam, 1998; Stake, 2005). Merriam (1998) stated a case study can be useful for the evaluation of programs and policy and for helping school boards to inform policy. The case study approach also allows for information to be replicated within other school districts where schools have closed or have been reconstituted, and potentially in other large urban systems (Hays & Singh, 2012). The results of the case study provide a better understanding of the two case schools and the potential impact of the policy reform over a time period ranging from 2007–2013 (Merriam, 1998; Schwandt, 2007).

Archival data allowed the researcher to examine historical longitudinal data collected by the HISD over a specific period and allowed for an examination of one of the most well documented case studies, *Fighting to Save Our Urban Schools…and Winning!! Lessons from Houston* (McAdams, 2000). Yin (2018) alluded to *Fighting to Save Our Urban Schools…and Winning!! Lessons from Houston* as being one of the most readable case studies that incorporated local news articles and analyzed a personal account and narrative of a board member in the HISD who was crucial in the policy reform movement. Archival materials provided unobtrusive measures for the study (Hays & Singh, 2012; Patton, 2002). Archival data and research consisted of data obtained from the Office of School Choice for both case study schools, as well as other historical documentation such as board meeting notes, videos, news articles, journals, demographic reports, state documentation, and interviews (Hays & Singh, 2012; Yin, 2018). Archival research allows for an examination of historical information and data. The archival data created opportunities for the researcher to analyze, read, and measure; and either validate or

invalidate the research questions. Figure 3 visually represents the logic process behind this study.

Research Questions

This study was designed to capture a deeper understanding of how intra-district choice unfolded in a large urban school district setting. The researcher explored this policy issue using the following questions:

- How did intra-district choice policy impact student attrition and movement at JR Middle School and JJ High School from 2007–2013?
    - What worked well?
    - What did not work well?
    - What were the surprising and unexpected outcomes from this intervention?

Subject, Participants, Population, and Sample

A purposive sampling method was selected because it provided the ability to gather data from a variety of resources for the two case study schools (Creswell, 2007; Merriam, 1998; Patton, 2002). Purposive sampling allowed for a robust examination of the intra-district choice policy and constrained the study in a bounded system that was readily accessible (Schwandt, 2007). Schwandt (2007) stated there are two critical issues in a purposive sampling method. First is the explicit establishment (and explanation) of a relevant criterion (or criteria) based on which the selection of units will be made. Second is the use of strategy to ensure the units one is using are not chosen simply because they support the developing account. A purposive sampling method allows the researcher to analyze data from a variety of sources (Merriam, 1998; Stake, 1995). Miles and Huberman (1994) asserted that the understanding of "the case as a phenomenon of some sort occurring in a bounded context" (p. 24) would allow research to focus

on a group, a program, or specific policy. Merriam's (1998) broader interpretation of a case provided the necessary flexibility for this research.

Research Variables

The independent variable for this study was the intra-district choice policy, a controversial policy platform designed to empower parents and principals by providing the ability for parents to select schools from a portfolio of schools (McAdams, 2000; Scott, 2011). The policy, initially adopted in 1990 under the title of *A Declaration of Beliefs and Visions*, has been reauthorized twice, with the last revision occurring in 2010 (HISD, 2010b). The policy has been stable and a mainstay in board governance guiding school boards and superintendents in the HISD since 1990 (Cramer & Howitt, 2004; see Appendix A).

The purpose of the research was to describe and explain the impact between the independent variable and dependent variables, the two case study schools, and to provide further explanation of the resulting themes and patterns that emerged as a result of the inquiry (Penslar & Porter, 2001; Stake, 1995). In particular, the researcher examined the impact of intra-district choice policy on student attrition and movement through a review and analysis of the types of choice used from 2007–2013.

Units of Analysis

The focus of this research study was on the impact of intra-district choice policy implemented as a market-based reform on two case study schools in the HISD (McAdams, 2000; Torres & Hanson, 2017). This study was designed to examine policy decisions and their potential impact, if any, in two neighborhood campuses in which the participant observer was part of the reconstituting of schools (Merriam, 1998; Stake, 1995). Qualitative data provided information to help determine whether the policy implementation had the desired effect of

providing parents with opportunities to select schools that met their children's needs. As Creswell (2007) pointed out, a case study allows a researcher to examine an event—in this case, intra-district choice—and the impact on attrition and movement on two schools. Up to this point, the academic vision of the district AE local policy has not been analyzed or evaluated to assess its impact on schools (Curry et al., 2018). Both secondary schools in this case study were optimal choices as they both provided a specific and bounded homogenous population of students (Hays & Singh, 2012; Merriam, 1998; Stake, 1995). The following section contains a description of the data collection and procedures incorporated.

Data Collection and Procedures

The researcher in this study examined data collected between 2007–2013 for two case study schools in an urban school setting in Texas. Data collection derived from multiple sources that included data from the Office of School Choice, archival records from a variety of HISD departments, newspaper articles, video recordings, and participant observer notes from June of 2012 through 2014 and allowed the researcher to capture the case study in its complexity (Creswell, 2007; Merriam, 1998; Stake, 1995; Yazan, 2015). *Fighting to Save Our Urban Schools…and Winning!! Lessons from Houston* was used as an archival record (McAdams, 2000; Merriam, 1998). *Fighting to Save Our Urban Schools…and Winning!!! Lessons from Houston* is a detailed personal narrative of a former board member and school board president relevant to the study (McAdams, 2000; see also Merriam, 1998; Stake, 1995). *A Declaration of Beliefs and Visions* (see Appendix A), the policy adopted that precipitated intra-district choice, was retrieved from the HISD website (http://www.houstonisd.org). In August of 2017, the document was removed from the district's website after a school board meeting in which the seven minority

board members voted for its removal (HISD, 2017a). Per the 2017 HISD Board Meeting Minutes:

> While that commitment has remained constant, subsequent Boards of Education have differed in their approach and strategies for delivering the best outcomes for HISD students. Differences were reflected in revisions to *A Declaration of Beliefs and Visions* that were made in 2010. The 2017 Board of Education recommends novel changes to the vision and beliefs, and the addition of a mission statement, constraints, and goal progress measures. (HISD, 2017a, p. 3)

During the data collection, the declaration along with other artifacts that included notes and PowerPoints were downloaded by the researcher and stored in an encrypted computer system (Stake, 1995). *A Declaration of Beliefs and Visions* was transcribed verbatim by the researcher to remain consistent with this record of study and provided a good source of information, which allowed for robust interpretation (see Appendix A; Stake, 1995). Data were also collected through a series of requests for information through the HISD's Public Information Office (PIO). Participant observer notes as a former Chief School Officer served as a form of archival information. Records and documents from various departments within the HISD, agenda and board meeting notes from the HISD, and video retrieved from the school district's website were also housed in a secured cloud-based platform. Data were collected from the TEA's Public Education Information Management System (PEIMS; TEA, 1990). All information downloaded was stored on password encrypted computers and password encrypted cloud services such as Google and Dropbox. Additionally, records were provided by the HISD Media Relations Department during a purge of the hard copies of campus profiles and demographic report profiles to serve as additional archival records (HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c, 2014). Campus and district data were stored online throughout the research process and maintained on password encrypted devices and password encrypted cloud storage platforms.

The Office of School Choice and Budget Departments from the HISD provided archival data pertaining to the case study of two schools identifying the type of intra-district choices made from 2007–2013 (see Appendix B; Yin, 2003). The data for intra-district choice were delivered in an Excel spreadsheet. The spreadsheet identified the HISD's method for tracking parent/guardian use of the district policies and procedures to initiate transfers within the school district or to a contracted charter school (HISD, 2017c). The researcher made the decision to exclude alternative, district alternative education placement, and juvenile justice alternative education placement as those were a result of a school district discipline violation or a legally mandated placed by the legal system and as such were not intra-district choice for parents and students (see Appendix B). A request for information was sent to the PIO to get copies of the application process for secondary schools. The PIO sent the wrong years (i.e., 2010–2020) instead of the requested time period of the record of study. A second attempt was made but was not completed by the PIO. The budget information was download from the district's website (HISD, 2016d).

The researcher also used the Texas A&M University System Library and Google Scholar search system with keywords that included archival data, archival records, choice, Don McAdams, intra-district choice, Houston Independent School District, history of Houston Independent School District, JR MS Houston ISD, JJ HS Houston ISD, governance, school board governance, liberation model, rational choice theory, Rod Paige, HISD school closures, HISD choice policy, JR MS, JJ HS, segregation, resegregation, and case studies. The researcher included mainstream media outlets such as the *Houston Post*, *Houston Chronicle*, KPRC, KRTK, and local papers such as the *Houston Press*. The researcher accessed archival records using similar search terms to maintain consistency in the search process. NewsBank was also used to

search for archival records as illustrated in one example (see Appendix C). NewsBank is a search platform that consolidates current and archived information from thousands of newspaper titles as well as newswires, web editions, blogs, videos, broadcast transcripts, business journals, periodicals, government documents, and other publications. Appendix C illustrates one search incorporating NewsBank and the process to retrieve newspaper articles from the *Houston Chronicle*.

Critical analyses and observations from the member checkers were stored in the cloud in a Google Drive that was secured with a two-step verification process (Stake, 1995). Member checkers were provided access to a Google Form with nine questions aligned to the record of study along with the unedited record of study and tables (see Appendix D). The storage of data on the drive ensured all responses were kept anonymous and allowed for centralized storage from multiple devices. The answers to the member checker questions were embedded into Thought Exchange (https://www.thoughtexchange.com), a web-based platform that allows simple data visualization that presents themes and differences (see Appendix D). The Thought Exchange platform creates heat maps that compare and contrast responses generated by users and assists in identifying themes and patterns of similarities and differences. The main themes identified were equity, funding, intra-district choice, policy, student population, and transfers.

Data Analysis

An analysis of existing research and scholarship on school governance was retrieved from a variety of sources that provided information about notions of school governance and the use of RCT to make decisions (Archbald, 2004; Bell, 2009a; Bifulco et al., 2009; Chubb & Moe, 1990; Gooden et al., 2016; Greene, 1992; Lubienski, 2003; McAdams, 2000, 2006; Mickelson et al., 2008; Moon, 2018a, 2018b; Wong & Langevin, 2007). During the 2013 school year, the

HISD school board authorized the superintendent of schools to reconstitute JRMS, followed by the reconstitution of JJHS in 2014 (Mellon, 2012, 2014a). The basis for the decision used the following rationale: low enrollment, low academic achievement, and the need to institute new curriculums as explanations for change (Markley, 1990; Mellon, 2014a). Both case study schools had dwindling enrollment and central administration was funding a significant percentage of essential services in teacher allocations (HISD, 2013c, 2014). Binkovitz (2016) asserted parents were making choices to enroll their children in other schools. Both schools, located in politically sensitive areas, revealed data for this study that were relevant, accessible, and showed declining enrollments. At JRMS, reconstitution discussions with the community had occurred for 5 years prior to the board approving the reconstitution in 2013 (Mellon, 2012). The campus demographics of the case study schools, JRMS and JJHS, from 2004–2013 are reflected in Table 3.

Table 3

Houston Independent School District School District and School Profiles 2004–2013

	Campus enrollments and demographics									
	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
JJHS	1109	1077	1011	895	842	822	696	574	537	497
African American	55%	58%	66%	69%	69%	73%	69%	71%	72%	69%
Hispanic	44%	40%	33%	30%	30%	27%	30%	28%	27%	30%
Special education	17%	17%	20%	20%	20%	23%	23%	22%	23%	23%
Economically disadvantaged	78%	82%	78%	69%	75%	81%	77%	76%	76%	76%
Academic rating	A	AU	AU	A	AU	AU	AU	AU	N/A	IR
Per unit allocation				$3,085	$3,246	$3,379	$3,474	$3,246	$3,330	$3,367
JRMS	708	556	581	633	498	389	364	329	305	272
African American	89%	84%	83%	85%	82%	84%	84%	83%	84%	84%
Hispanic	10%	15%	16%	14%	17%	15%	13%	16%	16%	15%
Special education	23%	26%	23%	21%	22%	28%	25%	20%	21%	24%
Economically disadvantaged	92%	93%	91%	80%	85%	91%	95%	92%	95%	95%
Academic rating	A	A	AU	AU	A	AU	A	A	N/A	IR
Per unit allocation				$3,096	$3,282	$3,415	$3,510	$3,282	$3,367	$3,366

Note. A = Acceptable Rating, AU = Academically Unacceptable IR = Improvement Required.

JRMS and JJHS were both neighborhood schools with magnet programs housed within the comprehensive schools (HISD, 2013c, 2014). Both schools had populations of students that, given the HISD's decentralization and funding models, would have allowed the schools to run efficiently (McAdams, 2000). Both schools were in the majority African American regions of

town where any policy decision regarding neighborhood schools were historically highly political (HISD, 2013c).

Yin (2018) asserted a case study's strength is the ability to deal with a variety of evidence that includes documents, artifacts, direct observations, and participant observation. The array of documents revealed factors that allowed the researcher to apply straightforward interpretation to assess the policy implemented (Hays & Singh, 2012; Patton, 2002; Stake, 1995). This policy analysis included direct observations and interpretations and previous participation in school board meetings, community meetings, parent meetings, meetings with students, demographic data, and the development of policy recommendations (Merriam, 1998; Patton, 2002; Schwandt, 2007; Stake, 1995). Schwandt (2007) proposed that witnessing social interactions is critically important in answering how and why questions based on fieldwork activities. Stake (1995) asserted the researcher's impressions are crucial in collecting data and making sense of those impressions as the analysis. Stake believed the collection and analysis of data should occur simultaneously.

Additionally, artifacts analyzed included video-recorded school board meetings to generate data (HISD, 2016b, 2016c). Yin (2003) recommended six types of information to collect in case studies: documents, archival records, interviews, direct observations, participant observations, and physical artifacts. This study incorporated the examination of all six types of data previously mentioned. Data collection and analysis continued throughout the process of the policy analysis to include the most recent documents (Stake, 1995). The researcher sought to incorporate what Stake (1995) called the four forms of data analysis and interpretation: (a) categorical data aggregation where one looks for issue related meanings that will emerge, (b) direct interpretation where the researcher looks at data and draws meaning from them without

looking for other examples, (c) pattern identification between two or more categories that includes developing tables, and (d) naturalistic generalizations in which the researcher learns from the case to apply to the learning or to apply to other similar case studies.

The themes identified from the Thought Exchange program and the archival records were divided into Stake's (1995) four forms of data analysis. The researcher's scrutiny and own reflection were documented as each artifact, video, document, board agenda, and written policy were analyzed to gain a holistic view and interpret the meaning of intra-district choice within the HISD. The continued interactive process was in part guided by the research questions notating which category to place the data; the member checking participants then reviewed and provided critical feedback regarding the accuracy of the data (Merriam, 1998; Stake, 1995). At some point, the interpretation of data could be altered pending review by member checkers providing critical observations.

Setting and Environment

The Houston Independent School District, which sits in the city of Houston, Texas, encompasses a large portion of Harris County. Houston is considered the energy capital of the United States and also contains the largest medical center in the United States, and is the most diverse city in the United States (Klineberg, 2015). This research study involved an analysis of the HISD school board's adoption of *A Declarations of Beliefs and Visions* that has been a major policy in the way the HISD approaches education achievement by students—allowing the expansive use of intra-district choice policy (McAdams, 2006). The history of the HISD, one of the largest school systems, cannot be understated and the current research provides an excellent longitudinal qualitative case study to analyze the impact of intra-district choice policy on two schools in the most diverse city in the United States. As the researcher was in the process of

transitioning to a new position with the HISD, the setting and environment were conducive to gathering robust data and provided an opportunity to add to the literature surrounding intra-district choice policy and the impact of policy decisions made by school board members and superintendents (Curry et al., 2018). The research was intended to help guide the work of board members and superintendents as they navigate the complexities of creating policies that impact students and school communities.

A policy implementation has three unique qualities: the policy changes people's lives, the policy is developed for the people in the community, and the policy draws on public resources (Bell, 2008a). School board members must make policy decisions ideally that serve the best interest of the community they serve (Crum & Hellman, 2009). The HISD is an anomaly in that board governance and policymaking have always been political along racial lines and reflect competing interests typically aligned to racial and socioeconomic stances (Kellar, 1999; McAdams, 2000). Controversial policy impacting schools requires school superintendents and school boards to be unified for the policy to be successful but this has historically been complicated in the HISD (Binkovitz, 2016). This interdependence should be grounded in mutual respect, but in Houston, there has been a definite divide in roles and responsibilities between superintendent and school board members (McAdams, 2006). The HISD provides rich and valuable information that can be a guide to both board members and superintendents.

In the HISD, school choice, intra-district school choice, open enrollment, and magnet programs are critical components for a portfolio school district meant to provide parents choices (see Table 2; HISD, 2013c). The HISD has over 100 magnet schools, charters, virtual schools, contract charts schools, and other forms of choice that provide opportunity for families (see Table 2; HISD, 2016a).

Mathis and Welner (2016) stated choice can give children the opportunity to attend school outside of highly segregated neighborhoods. The HISD was an ideal setting in which to review the policy and actual practice. In particular, a study of the impact of the intra-district choice policy on two schools has not been undertaken to examine whether the policy accomplished what it was intended to do (Curry et al., 2018). This study was not intended to advocate for or against intra-district choice but to examine the impact of a policy implemented that has no policy evaluation mechanism attached.

As a participant observer during this study, the researcher was immersed in policy implementation and the impact of policy decisions (Yin, 2018). The daily lived experience of holding town hall meetings to discuss the reconstitution of both case study schools provided valuable insight from both the perspective of those affected by the policy and those who had approved the policy (i.e., the board members; Hays & Singh, 2012). Before the Tuesday February 11, 2014, meeting at JJHS, a trustee for the HISD indicated the need for change to the participant observer and researcher but also informed the researcher that during the meeting she would be very critical of central administration's recommendation. This dynamic presented valuable information about potential votes regarding the reconstitution of JJHS. The benefits of being a participant observer included the ability to recall the information accurately and to collect archival data and research that provided the groundwork for this policy analysis (Hays & Singh, 2012, p. 370). The participant observer began employment in June of 2012 and by July of 2012 had held the first of five meetings with the JRMS community and would later be asked to conduct the meetings for the high school reconstitution. While the participant observer was the Chief School Officer for Middle Schools, the participant observer was directed to conduct the three community meetings for both the middle school and the high school. As part of the data

collection, the participant observer also met with parents, students, and staff to discuss the reconstitution plan, which provided valuable data.

Bias and Error

One of the advantages of a longitudinal qualitative case study is that the researcher is immersed in the setting as a participant observer and has access to data that outsiders do not have (Hays & Singh, 2012; Yin, 2018). Participant observation allowed the researcher to study the bounded system from within the district, which provided valid data for the policy analysis (Yin, 2018). Furthermore, the researcher had complete access to school board meetings from 2012–2016 and was able to collect data through participant observation of the phenomenon of board members creating magnet policy during the research study (Schwandt, 2007).

This ability to examine and listen to the intent of board members was also a potential bias that must be reported for future researchers to include and must be a consideration of the participant observer in acknowledging the potential for bias and error. Researchers observe and interpret data, and that interpretation of data is typically based on the researcher's previous history and frame of reference (Hays & Singh, 2012). It is important for researchers to continue to evaluate the case study to keep bias free (Hallbrook & Ginsberg, 1997). Though the researcher endeavored to stay value-free, the researcher was a participant in changing the direction of the two schools in the case study by conducting town hall meetings, meeting with staff, meeting with students, and meeting with parents as part of central administration and on behalf of the Superintendent of Schools. Norris (1997) asserted bias and error is a humanistic activity that is going to be found in quantitative and qualitative research. The reality is that researchers are prone to be fallible and mistakes are a part of the naturalistic process of research requiring constant self-reflection by the participant observer (Hays & Singh, 2012). According

to Norris (1997), there are no solutions to eliminate bias and error. Researcher bias can be mitigated by ensuring validity and reliability. As such, validity and reliability were ensured through a variety of methods that are examined in the next section.

Validity

Though researchers in quantitative studies typically rely on measurement and data, case study researchers rely on conducting an in-depth analysis of a phenomenon in a real-world setting (Merriam, 1998; Stake, 1995). This allows researchers to develop converging lines of inquiry (Yin, 2003, 2018). The researcher in this case study analysis incorporated Yin's (2018) three tactics for ensuring validity: the use of various sources of evidence, the establishment of a chain of evidence, and the drafting of the case study review by key stakeholders to help in the triangulation of data (Stake, 1995). Stake (1995) acknowledged that there is no best was to validate data. It is important that researchers seek to minimize misrepresentation or misunderstanding when analyzing data. Member checking, as a method to gain confirmation of the data, was used as feedback that ensured the interpretation of the data was valid (see Appendix D; Stake, 1995). Using construct validity, the researcher sought input from key members of the HISD to review the case study (Merriam, 1998; Stake, 1995). Member checkers carried an array of experiences as a former Chief Academic Officer, principal, Assistant Superintendent for Human Resources, a parent from HISD who also worked for the *Houston Chronicle*, and the former Chief Executive Officer of a public charter school system and agreed to participate in reviewing the research and answering a series of questions to generate responses (see Appendix D). To keep anonymity, the five member checkers were identified as Member Checker #1, Member Checker #2, Member Checker #3, Member Checker #4, and Member Checker #5. At the conclusion of the research study, the member checkers reviewed the information to affirm their

views were depicted accurately. This form of review served as member checking to validate the findings and provide the reader with enough detail to show the researcher's conclusions make sense (Merriam, 1998, p. 199).

The key member who helped validate the record of study included the former superintendent of schools during the period of the study. The superintendent worked intimately in policy development during the time of the case study. Research indicates seeking feedback from respondents is critical to validating and corroborating findings while assuring they are valid and meet the criterion of confirmability (Guba & Lincoln, 1989; Mays & Pope, 2000; Schwandt, 2007). The use of multiple sources, including videos, newspaper articles, board meeting minutes, archival research data, and member checking, helped to ensure validity (Hays & Singh, 2012; Yin, 2018). The personal narrative account from a board member who helped draft and create the policy also served as a reference to ensure validity (Hays & Singh, 2012; Mason, 2002; McAdams, 2000). In a seminal case study example, Yin (2018) referred to *Fighting to Save Our Urban Schools…and Winning*! *Lessons from Houston* as one of the most readable and well-documented case studies of the personal narrative and lived experience of a former HISD board member who led the market-based reform. Walonick (2005) alluded to the accuracy and truthfulness of measurement in establishing a valid research study. The researcher attempted to develop a logical policy analysis by incorporating member checking, triangulation, repeated observations of school board meeting videos, and peer scrutiny of data and reports (Guba & Lincoln, 1989; Merriam, 1998; Tobin & Begley, 2004).

Trustworthiness

The researcher in this policy analysis attempted to establish trustworthiness by incorporating Lincoln and Guba's (1985) proven methods through triangulation that will lead

other researchers to substantiate the credibility, transferability, dependability, confirmability, authenticity, and coherence of data (Hays & Singh, 2012). The researcher must convince the audience that the research is worthy of being examined or credible. It is the researcher's responsibility to ensure there is truth to the findings, the results can be applicable in other contexts, the findings can be replicated, and the researcher maintained neutrality in reporting the results resulting in transferability (Lincoln & Guba, 1985; Morrow, 2005; Stake, 1995). Other archived materials used were considered public documents and subject to scrutiny by the media, community, and scholars. The researcher established dependability by ensuring the research could be completed and the findings could be repeated in other similar studies (Hays & Singh, 2012; Lincoln & Guba, 1985; Yin, 2018). As a qualitative process, triangulation of research was used to verify multiple sources of data, field notes, artifacts, and transcripts of board meetings (Stake, 1995; Yin, 2018). Hays and Singh (2012) identified criteria for establishing trustworthiness that are represented in Table 4.

Table 4

Criteria and Strategies of Trustworthiness

	Credibility	Transferability	Confirmability	Authenticity	Coherence	Sampling adequacy	Ethical validation	Substantive validation	Creativity
Field notes/Memos	X		X	X				X	
Member checking			X	X		X	X	X	
Persistent observation		X			X			X	
Triangulation	X	X	X	X		X		X	X
Simultaneous data collection and analysis	X		X	X		X		X	

Note. Xs indicate key strategies of trustworthiness per criterion (Hays & Singh, 2012).

This study was designed to benefit board members and superintendents not only in establishing policy in the HISD, but other districts with similar populations and demographics. In the next section, the development of reliability and credibility is provided.

Reliability and Credibility

Using multiple sources of evidence increases a researcher's ability to replicate the case study and establishes reliability and credibility (Schwandt, 2007; Stake, 1995; Yin, 2003, 2018). The strength of using documentation is that newspaper articles, district documentation, archival notes, and video footage are stable and can be reviewed over and over (Yin, 2018). Direct observation increases reliability and credibility because it covers the phenomenon in real time and is contextual in nature (Creswell, 2007; Stake, 1995; Yin, 2018). The researcher in this study controlled for bias by relying on documents and data that allowed for unbiased interpretation and conclusions (Lincoln & Guba, 1985). The study was member checked by

educational peers, former board members, and other education professionals within the HISD to provide the most effective feedback (Guba & Lincoln, 1989; Hays & Singh, 2012; Mays & Pope, 2000).

Summary

The HISD is a complex system and largest school district in the State of Texas with over 280 schools and a variety of intra-district choice options for parents to select for their children (HISD, 2017c). There has been very little attention given to whether the policies implemented by the school board accomplished the intent behind the market-based reforms (Torres & Hanson, 2017). McAdams (2000) asserted choice reform options were at the heart of *A Declaration of Beliefs and Visions* for the HISD. Leaders of the HISD have always prided themselves on being innovative regarding program offerings and choice. The school board's role in hiring the superintendent, creating policy, and approving the budget has been primarily that of an activist board, which requires superintendents to understand the complex interplay and movement between political environments (McAdams, 2000, 2006).

This case study policy analysis involved examining the impact of intra-district choice policy on two secondary schools that went through a reconstitution to continue operating. Both schools in the case study were reconstituted but not without controversy and continuous calls for them to return to neighborhood schools. Before their reconstitution, both schools experienced declining student populations that placed an enormous budget strain on the schools and school district (HISD, 2013c). Evaluating the impact of intra-district choice policy was intended to enable superintendents, school board members, community members, and researchers to understand the potential impact of policy implementation and provide a future roadmap for creating policy.

Chapter III contained details of the study design and methodology. The policy analysis centered on the case study schools for the interpretation of data resulting from the policy implementation of the HISD school board and the superintendent in the 1990s. Chapter IV contains the results and answers to the research questions posed in Chapter I regarding the impact of intra-district choice policy on the two case study schools.

CHAPTER IV

REVIEW OF FINDINGS

Introduction

Intra-district choice policy, in the HISD, at its core, was about market-based reform and competition for parents and students (Kahlenberg, 2001). The notion that students were academic free agents was a crucial piece to then superintendent RP allowing students to attend schools of their choice, given space availability (McAdams et al., 1999). Parental empowerment, the prominent motivation for the original introduction of intra-district choice policy, allowed school board reformers to disrupt the HISD's poor academic performance by ensuring parents would not seek other education alternatives (Scott, 2013). Major components of parent empowerment assume parents use rational choice, are highly cognizant of their situations, and plan for outcomes based on empirical data (Yair, 2007). The results of this dissertation support that magnet school programs, principal agreement, and zoned student transfers in both case study schools reflected a purposeful action over time. Though the original intent behind the HISD's intra-district choice policy was to empower parents, it is apparent for the two case study schools that choice was used extensively over a period of time (Webb, 2018b). Both schools saw significant numbers of students who used intra-district choice to attend other in-district schools, creating losses in both student population and in the per unit allocation funding. Choice proponents contend that intra-district choice policy helps break the link between the school and neighborhood, thus liberating poor and minority families and providing options for parents to send their students to schools they view as better (Archbald, 2004; Chubb & Moe, 1990; Friedman, 1962; Scott, 2011; Torres & Hanson, 2017; Viteritti, 2010). The former principal of Jack Yates High School in the HISD, stated, "Open-enrollment created avenues for kids to leave

but not a pathway to return" (Webb, 2018b, para. 23). Examining the impact of intra-district choice on neighborhood schools, traditionally thought of as critical components to successful neighborhoods, provided a robust research environment (Charles, 2003; Torres & Hanson, 2017). The body of evidence used to examine the impact of intra-district choice consisted of archival data and records collected from the Office of School Choice in the HISD to generate narratives on the impact of intra-district choice, leading to the identification of patterns and themes (HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c; Merriam, 1998; Stake, 1995).

Organizing the Results of This Chapter

This chapter is organized around the initial research question and subsequent follow-up questions that guided this analysis. The research question related to the impact of intra-district choice on student attrition and movement:

- How did intra-district choice policy impact student attrition and movement at JR Middle School and JJ High School from 2007–2013?
    - What worked well?
    - What did not work well?
    - What were the surprising and unexpected outcomes from this intervention?

Findings for JJ High School

Results for JJHS show over 559 students used some type of intra-district choice (see Table 5). Further research determined two precipitating events were likely contributors to declining enrollment and are discussed below.

Table 5

Intra-District Choice Options Totals 2007–2013 for JJ High School

	2007	2008	2009	2010	2011	2012	2013	Total
Enrollment	895	842	822	696	574	537	497	(398)
Intra district choices								
Adequate yearly progress	1	3	1	1	1	0	1	8
Career and technology	1	1	1	2	2	1	4	12
Contract charter	7	3	6	6	6	4	4	36
HISD charter	5	6	7	6	6	6	6	42
International Baccalaureate	1	1	1	0	0	0	0	3
Majority to minority	1	1	2	1	0	0	0	5
Magnet	23	24	24	20	22	23	22	158
Moved within semester	3	5	5	6	5	6	1	31
Not Available	1	1	0	0	0	0	0	2
Out of District – Employee Magnet	0	0	0	1	0	1	0	2
PEG grants	0	1	0	0	0	0	0	1
Pending in-district validation	4	0	0	0	0	0	0	4
Principal's agreement	9	13	15	15	14	11	9	86
Space available	7	6	6	5	4	4	6	38
Special education	6	5	5	4	2	3	4	29
Violent Crime Viction	0	0	0	0	1	0	0	1
Withdrawal code deletion	8	0	0	0	0	0	0	8
Withdrawal code edit	16	0	0	0	0	0	0	16
Zoned students	11	8	10	10	13	13	12	77
Total intra-district transfers	104	78	83	77	76	72	69	559

	2007	2008	2009	2010	2011	2012	2013	Total
Per Unit Cost	$3,096	$3,282	$3,415	$3,510	$3,282	$3,367	$3,366	
Per unit allocation $ loss	$321,984	$255,996	$283,445	$270,270	$249,432	$242,424	$232,254	$1,855,805

In 2002, the HISD, in a move that angered community activists, relocated the gifted intra-district Vanguard magnet program from JJHS (HISD, 2002). The Vanguard program was a major influence in the school since its creation in 1977 (Mellon, 2014a). Students in the Vanguard magnet program were moved to the former Carnegie Elementary School located near downtown (HISD, 2002). These students were not only high performing but provided a form of demographic and socioeconomic integration (HISD, 2001, 2002; Webb, 2018a). Mickelson et al. (2008) pointed out that intra-district choice magnet programs like Carnegie Vanguard were intended to provide diversity as compared to the surrounding neighborhood and, as such, the removal created a form of resegregation (Levine, 2016). A total of 173 students were relocated, leading to an immediate decline in the student population at JJHS. From a demographic perspective, the White student population went from 6% to 1% in 2002 (HISD, 2003; Merriam, 1998; Stake, 1995). This loss in student population also resulted in a loss in the operating budget for the school. As participants in the member checking process noted, the loss in student enrollment was attributed to intra-district choice (Merriam, 1998; Stake, 1995; Yin, 2018). Member Checker #2 stated there was a:

> Decline in overall enrollment and an increase in the eco-disadvantaged students. Both schools also saw major impacts with students choosing to transfer out to other schools. All of this led to a loss of funding and a decline in academic achievement. (personal communication, September 30, 2020)

Member Checker #3 also expressed concern over student attrition and enrollment, claiming "the declining enrollment resulted in lower funding for both schools and they struggled to provide

adequate resources for remaining students" (personal communication, September 30, 2020). Member Checkers #2 and #3 validated the finding that student attrition and movement had negative consequences for JJHS and supported the longitudinal data presented in Table 5. Former principal and current State Board of Education board member stated this event was the beginning of the end for JJHS. Table 5 shows the negative impact of student attrition through choice, demonstrating the loss in per unit allocation amounted to a minimum loss of $1.85 million in funding for the school.

A second major incident was the effect of Hurricane Katrina in 2005 (Mellon, 2014a). A major episode drew national attention to JJHS, as a major fight broke out on campus that pitted students displaced from New Orleans against Houston-born students (Radcliffe, 2005). In the aftermath, it was determined that the HISD central office made the decision to zone all Katrina impacted students who were at the old Astrodome facility to JJHS (Radcliffe, 2005). The incident sparked outrage among community activists and promoted JJHS as an unsafe school (Radcliffe, 2005). Later, it was revealed that JJHS was chosen to house the refugees because of low enrollment (Mellon, 2014a). JJHS received over 200 students, which created multiple situations leading to crisis (HISD, 2006; Radcliffe, 2005). Students from all over New Orleans were resettled into one high school in the HISD. It was as if someone thought all Black students were the same or would have similar academic needs (Stake, 1995). JJHS was in a downward spiral that was in all practicality initiated by the centralized bureaucracy of the HISD. For some in the community, JJHS became the tale of a school that fell victim to the changing demographics in the neighborhood, academic failures, and a reputation that continued to contribute to the decline in enrollment (Mellon, 2014b; Radcliffe, 2005). Former superintendent

TG alluded to complexities school choice creates by people sending their children where they have better opportunities (Downing, 2014).

Figure 4 shows the number of intra-district choice totals for JJHS during the period of the study. Between 2007–2013, JJHS saw a significant number of parents who used intra-district choice yearly (HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c; Mellon, 2010a). As shown, 559 students completed transfers with the Office of School Choice.

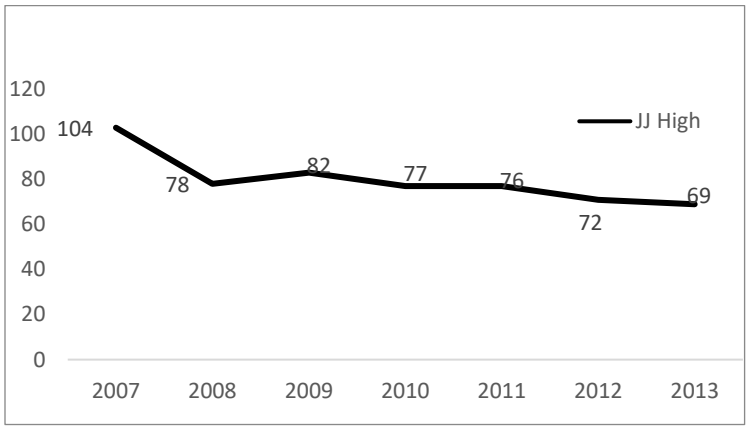

Figure 4. JJHS choice totals 2007–2013.

Figure 4 shows the number of total choice options used for each year, meaning parents went into the central office to complete the necessary paperwork. For example, in 2007, the data show 102 parents used some type of intra-district choice to move their children out of JJHS. There were a variety of intra-district transfers that included magnet school to magnet schools, safety transfers, principal agreement, zoned student transfers, and Public Education Grant transfers (HISD, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c). Because market-driven intra-district choice was a primary goal of the HISD's school board in 1990, the data show 158 (28%) students completed magnet-to-magnet transfers (HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c, 2017f; Moe, 1995; Stake, 1995). The premise for market-based choice is increased competition among

schools and a natural internally regulated marketplace (Archbald, 2004; Chubb & Moe, 1990). As scholars have noted, schools capable of adjusting to the new model would adjust. The schools that could not adjust or compete would be subject to closure as parents made selections that best fit their needs (Archbald, 2004; Chubb & Moe, 1990; McAdams, 2006). For a school district whose leaders were seeking to compete with external competition and with schools academically failing, intra-district choice was viewed from the perspective of freeing families from complex regulations and failing neighborhood schools (Friedman, 1962; Scott, 2013). Hastings and Weinstein (2008) contended the goal of choice was to help increase academic achievement for disadvantaged students. As an example, Webb (2018b) identified NM, a 15-year-old freshman student who used intra-district choice to attend a comprehensive high school located outside JJHS's attendance zone. NM stated:

> Schools on the other side of town seem to have a better education system than the ones on our side of town. The ones on our side of town are being closed and don't have the same resources. They don't make us their priority. (Webb, 2018b, para. 4)

The data show parents at JJHS did make the decision to move their students (Jennings, 2010; Mellon, 2010a; Stake, 1995). Within RCT, it can be asserted that parents analyze and select schools that meet their students' academic needs (Goldstein, 2017). Mellon (2010a) stated:

> Thousands of Houston ISD students take advantage of the district's policy that allows them to transfer schools outside their neighborhood. Data from the district's high schools reveal that some schools, such as Westside, are wildly popular among neighborhood students while others, such as Jones, lose large numbers of children to other campuses. (para. 30)

By February of 2013, JJHS had fewer than 500 students in attendance and was underperforming academically (HISD, 2014; TEA, 2016). The corresponding loss in per unit allocation due to attrition equated to approximately $1.8 million lost per unit allocation funding for JJHS during this 6-year stretch (Stake, 1995; Yin, 2018).

The data show principal agreement transfers was the next largest group of transfer requests as 85 parents completed the necessary paperwork at the Office of School Choice to move their students from their zoned neighborhood schools (HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c; Merriam, 1998; Stake, 1995; Yin, 2018). This is no easy task given the size of Houston and for a campus in which 69% of the families qualified as economically disadvantaged. Research has shown choice tends to favor affluent families who have the knowledge, time, skills, and resources to evaluate schools that meet their children's needs (Saporito, 2003; Torres & Hanson, 2017). However, the data indicate families used principal agreement transfers to seek alternative educational settings for their students (Stake, 1995).

By February of 2014, the participant observer conducted the last of the community meetings in the JJHS auditorium. Approximately 300 parents, students, community members, and alumni were in attendance. In 2014, school district leaders hired the district's first demographer, who began the process of plotting the transfers in and out of schools throughout the district. It was the first attempt by school district leaders to assess the impact of movement and attrition. The *HISD Campus Population, Enrollment, and Transfer Report*, created by the Department of Student Support Services, was a critical piece the researcher discovered that helped calibrate what some students were saying during conversations as a Chief School Officer (HISD, 2014b). During the meeting, information presented alluded as to why parents were choosing other options. Figure 5 shows transfers within the HISD campuses, specifically for JJHS, during the 2012–2013 school year.

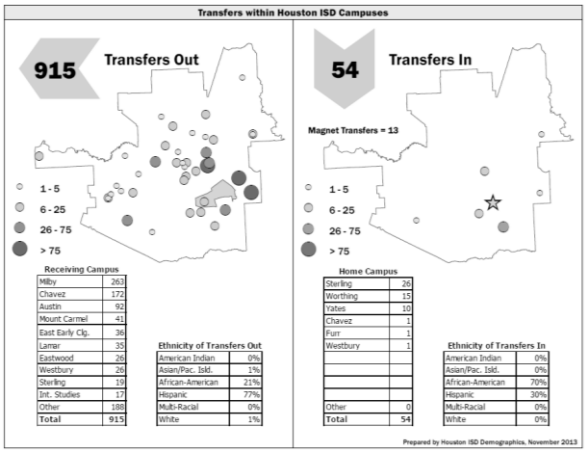

Figure 5. Transfers in/out report JJHS (HISD, 2013d; 2014b).

Specifically, the data snapshot presented on JJHS indicated parents were making different choices on where to send their students. Hispanic families accounted for 77% of the 915 transfers according to the Transfers In/Out Report (see Figure 5). The data show a significant number of Hispanic families were making choices to attend a variety of high schools within the HISD (HISD, 2014b).

In April of 2014, school district leaders surveyed 896 students who were zoned to JJHS but were attending other schools in the district to ascertain their perceptions on returning to JJHS (personal communication, April 30, 2014). A total of 474 students in Grades 9–12 responded to the survey. The district uses SurveyMonkey to survey the students in its current high schools. The data from the survey showed approximately 50% of the 479 students indicated that if JJHS had a stronger perception they might return. Accorsing to the results, of the students who answered the initial question identifying their current school, 166 (81%) were from Milby, 150 were from Chavez, and 67 were from Austin. Question 3 asked the students which options (i.e., peer influence, family influence, clubs and organizations, athletics, academic course offerings, and options in career and technological education) would have encouraged them to attend JJHS. The students were allowed to answer all that applied. The responses ranged from a high of

41.77% (*n* = 198) indicating academic course offerings to a low of 28.90% (*n* = 137) answering family influence. The second highest response was for options in career and technical educational options 38.61% (*n* = 183; personal communication, April 30, 2014). Question 4 asked "would you attend JJ High School if the following were available." The selections changed to opportunity to earn a workforce certificate, opportunity to earn an associate of applied science degree, clubs and organizations, athletics, academic course offerings, options in career and technological education courses, and strong school perceptions. Students were allowed to select all that applied and results ranged from strong school perceptions 49.79% (*n* = 236), to options in career and technical education options 40.72% (*n* = 193), academic course offerings 42.83% (*n* = 203), athletics 37.34% (*n* = 177), clubs and organizations 35.86% (*n* = 170), opportunity to earn a workforce certificate 35.23% (*n* = 167), and opportunity to earn an associate of applied science degree 29.32% (*n* = 139). Question 5 asked what options the student considered when deciding to attend their current high school. Students were allowed to select all that applied. The results showed the following: academic course offerings 62.66% (*n* = 297), clubs and organizations 52.74% (*n* = 250), strong school perceptions 51.11% (*n* = 247), options in career and technical education courses 48.73% (*n* = 231), family influence 43.67% (*n* = 207), peer influence 40.93% (*n* = 194), and athletics 40.72% (*n* = 193). The major limitation of this survey was breaking down by demographics and attempts were made to identify the department that conducted the survey (personal communication, April 30, 2014). However, the survey results indicate students felt academics and school perceptions were critical to their decision making, which was further validated by the findings of the district demographer (HISD, 2014b).

Though the initial purpose of the current study was to examine the impact of intra-district choice on attrition and movement in two specific schools, it was discovered Hispanic parents

were using additional methods in seeking other educational options for their students at JJHS, thus raising other questions not originally a part of this study (HISD, 2013d, 2014b; Webb, 2018a). During this same period, data show only 54 students were transferring in from other campuses (see Figure 5). Webb (2018b) found families leaving zoned schools were using choice and JJHS was emblematic of this problem. This finding confirms Torres and Hanson's (2017) finding that parents with lower social capital were far more likely to use choice and select another school to attend. Hispanic families were seeking options away from schools they perceived to be predominantly Black and that the community perceived to be predominantly Black (HISD, 2013d; Webb, 2018b). As part of the principal agreement transfer process, principals required parents to bring attendance, discipline, and grades as a means of accepting potential transfers. In a true choice system, these types of barriers would not be present. This discovery potentially places certain parents at a disadvantage in using choice and further creates potential inequities in the choice system and policy.

According to Russ Whitehurst, a senior fellow at The Brookings Institute's Center on Children and Families, the HISD's choice system privileges parents with the motivation and time, as affluent parents have the determination to navigate the choice system (Webb, 2018b). Accordingly, the data contradict previous research that showed choice only benefits affluent families within the HISD (Hastings & Weinstein, 2008; Lauen, 2007; Marcotte & Dalane, 2019; Saporito, 2003). In a 2011–2012 examination of the west side of the HISD, Torres and Hanson (2017) found parents from lower social capital families also exerted choice more than parents from higher social capital families. Torres and Hanson (2017) identified similar results to those in this case study (Merriam, 1998; Stake, 1995). The data in *Changing Demographics & Enrollment and Mobility Trends* also indicate a majority of students transferring away from JJHS

were Hispanic families (77%) attending Milby (*n* = 263), Chavez (*n* = 172), and Austin (*n* = 92) High Schools (HISD, 2013d, 2014b).

Findings for JR Middle School

In May of 2012, JRMS was slated for closure at the end of the academic school year (Mellon, 2012). During the town hall meeting, former Chief School Officer Dallas Dance stated approximately half of the students zoned were attending schools outside the JRMS zone (Mellon, 2012). Students and parents were given a reprieve as the school closure was stopped and delayed until 2013 (see Figure 6). JRMS was reconstituted as a new magnet school with a focus on medicine and with open boundaries in 2013 (HISD, 2013c). As such, there was no district transfer in/out report created by the district's demographer as there was in the case of JJHS. Second, unlike JJHS, there were no attempts made by school district leaders to survey current and former students and the community (personal communication, February 26, 2013). The community discussions around reconstitution centered on the lack of services being provided to students and the subsequent cost to the district to continue maintaining the current services the district was funding out of the general funds that included four core academic teachers, one fine arts teacher, one general clerk, and the computer lab (Mellon, 2010b; personal communication, February 26, 2013). During the community meetings, the participant observer indicated the need to address equity by providing students at JRMS the same academic and fine arts opportunities available at other comprehensive middle schools. The HISD presented a budget-based perspective with the formulas HISD leaders used to identify that any middle schools with enrollments below 750 students would have difficulty providing the necessary services, elective course offerings, and other extracurricular programs that larger comprehensive middle schools could offer. The HISD presented a narrative that the district had to cover funding through the

small school subsidy that included lending the campus an assistant principal, split funding the school nurse, and reducing athletics to only football and basketball (personal communication, February 23, 2013). During the years that JRMS was under 750 students, the district would cover an additional $850 per student in funding up to a maximum of $228,480 (HISD, 2016d).

Data for JRMS indicated large numbers of parents used intra-district choice to seek educational alternatives elsewhere (HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c; Merriam, 1998; Stake, 1995). During the member checking process, Member Checker #3 said:

> Many parents of children zoned to the two schools were able to take advantage of opportunities to enroll their children in other schools that they felt provided a better learning environment. In the case of JRMS, the reconstituted campus became a high performing, popular choice school for parents. (personal communication, September 30, 2020)

Further research showed that over a 6-year period, JRMS had 442 students who used some form of choice (see Table 6). Parents did use choice to seek other educational options, removing the neighborhood school as a viable option (Scott, 2011; Stake, 1995). Though the policy did promote parent empowerment, the positive or negative impact of choice have not been examined.

Table 6

Intra-District Choice Options Totals 2007–2012 for JR Middle School

	2007	2008	2009	2010	2011	2012	Total
Enrollment	633	498	389	364	329	305	(328)
Adequate yearly progress	0	2	2	1	2	2	9
Appeals	0	0	0	0	0	1	1
Boundary option	0	0	1	0	0	1	2
Contract charter	5	6	7	7	7	5	37
Dual language	0	0	0	1	1	1	3

	2007	2008	2009	2010	2011	2012	Total
ESL/Bilingual	0	0	0	0	1	1	2
Grade 6/7/8	1	0	0	1	1	0	3
HISD charter	1	1	0	0	0	1	3
Homeless	0	0	0	0	0	2	2
Majority to minority	1	2	2	1	1	2	9
Magnet	20	20	19	16	17	22	114
Moved within semester	1	4	4	5	6	5	25
Out of District	0	0	0	0	1	0	1
Out of District – Employee	0	0	0	0	1	0	1
PEG grants	0	0	3	2	2	0	7
Pending in-district validation	1	0	0	0	0	0	1
Principal agreement	10	14	15	19	16	19	93
Program placement	0	0	0	1	1	1	3
Space available	6	5	4	1	0	1	17
Special education	1	2	4	3	2	4	16
Virtual school pilot	0	0	0	0	0	1	1
Withdrawal code deletion	1	0	0	0	0	0	1
Withdrawal code edit	4	1	0	0	0	0	5
Zoned students	14	16	12	16	10	18	86
Total	66	73	73	74	69	87	442
Per Unit Cost	$3,085	$3,246	$3,379	$3,474	$3,246	$3,330	
Per unit allocation loss in dollars	$203,610	$236,958	$246,667	$257,076	$223,974	$289,710	$1,457,995

After aggregating the data to create pattern identifications, the three most prevalent forms of intra-district choice were magnet school to magnet school transfers, principal agreement

transfers, and zoned students transfers (Stake, 1995). Data show that out of 442 total intra-district choice transfers, 66% (293) used magnet, principal agreement, and zoned student transfers (see Figures 6 & 7). At an average per unit allocation of $3,313.5877 during this 6-year period, not only did JRMS lose 442 students, it also lost approximately $1.45 million in per unit allocation funding that followed the student transfers to other district schools (see Table 6; see Figure 7). The central theme behind the choice policy ideology was that parental authority was central in choosing what schools their children should attend (Archbald, 2004; Chubb & Moe, 1990; Scott, 2013). The assumption remained that if parents were provided expanded choice options, they would make the choice that best suited the needs of their children (Carlson et al., 2011).

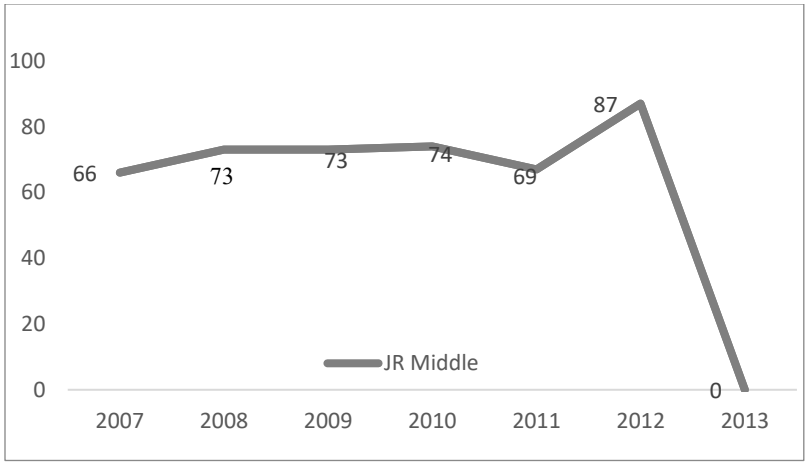

Figure 6. JRMS choice totals.

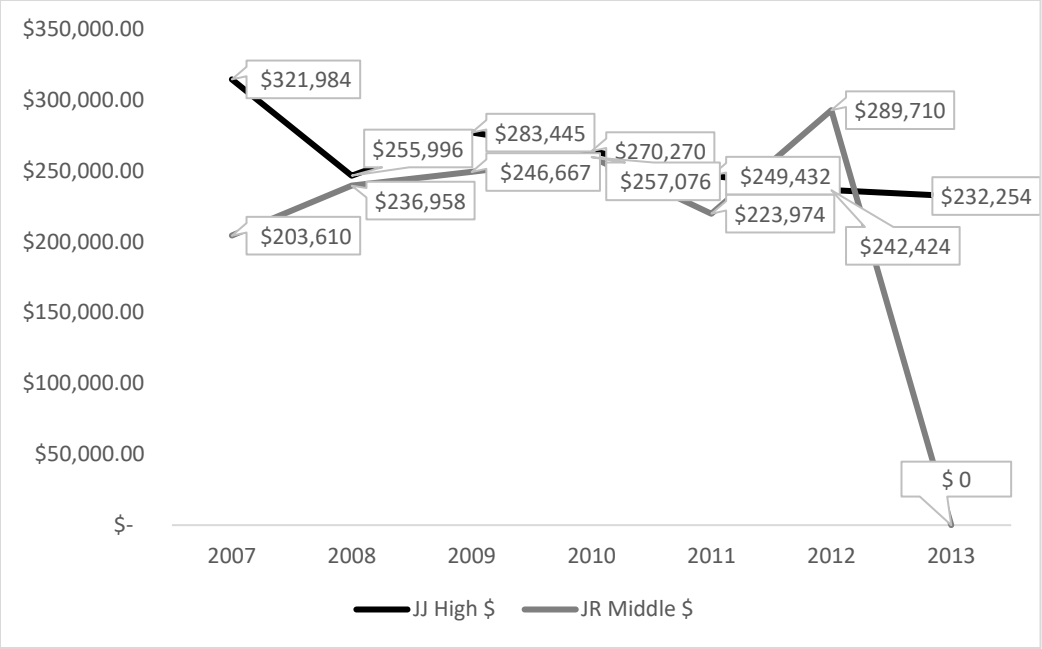

Figure 7. Per unit allocation lost revenue.

Arsen and Ni (2008) asserted that fidelity in how choice policy is implemented will impact the outcome of the policy. If parents have complete information on school alternatives, choice will be effective.

The HISD expends significant resources in the Office of School Choice to ensure parents have access to information in their native language (HISD, 2017c). In the case of JRMS, student attrition and movement data indicated parents were moving for specific choices that included magnet-to-magnet transfers, principal agreement transfers, and zoned student transfers (see Table 6; Stake, 1995). According to RCT, parents seek the best outcome by weighing the costs and benefits to select the best school (Yair, 2007). Though motives were not ascertained in this study, the assumption is that parents who sought a magnet school to magnet school transfer did so because they were seeking an alternative to the current magnet program at JRMS. Data showed 114 students moved from JRMS to another magnet program (see Table 6). JRMS had a student population below 675 prior to the beginning of the study in 2006. Enrollment by intra-

district choice reduced by 442 students was accompanied by a loss in revenue that was difficult to overcome (see Table 6). The data indicate some type of parental motive that confirms the idea behind RCT and the selection process of schools (Archbald, 2004; Chubb & Moe, 1990; Stake, 1995). If the premise of the policy was parent empowerment, then for the purpose of this study, intra-district choice was used to provide parents a choice but with major budgetary ramifications that crippled both schools in terms of student attrition and movement that resulted in a substantial loss in funding for both case study schools (Archbald, 2004; Scott, 2013; Stake, 1995; see Figure 7).

What Worked Well? What Did Not Work Well?

Stake (1995) stated analyzing issue-related meanings that emerge from the data enables a researcher to examine data and draw meaning without having to examine other examples. During the period of this study, patterns emerged from both schools that the researcher placed into tables to allow for naturalistic generalizations (Stake, 1995). Data from both case study schools demonstrated parents used several major forms of intra-district choice, thereby validating the original intent of board reform choice policy (Stake, 1995; see Table 7). The themes identified were magnet school to magnet school transfers, principal agreement transfers, zoned student transfers, HISD charters, contract charters, space available, and moved within semester. Table 7 summarizes the top five choices for both case study schools with the resulting loss in per unit allocation for each case study school.

Table 7

Intra-District Choice Results by Theme

	2007	2008	2009	2010	2011	2012	2013	Total
JJHS								
Enrollment	895	842	822	696	574	537	497	(398)
Magnet	(23)	(24)	(24)	(20)	(22)	(23)	(22)	(158)
Principal agreement	(9)	(13)	(15)	(15)	(13)	(11)	(9)	(85)
Zoned student	(11)	(8)	(10)	(10)	(13)	(13)	(12)	(77)
HISD Charter	(5)	(6)	(7)	(6)	(6)	(6)	(6)	(42)
Space Available	(7)	(6)	(6)	(5)	(4)	(4)	(6)	(38)
PUA	$3,096	$3,282	$3,415	$3,510	$3,282	$3,367	$3,366	
PUA loss	($170,280)	($187,074)	($211,730)	($196,560)	(190,356)	($191,919)	($185,130)	($1,333,049)
JRMS								
Enrollment	633	498	389	329	305	272	NA	(361)
Magnet	(20)	(20)	(19)	(16)	(17)	(22)	NA	(114)
Principal agreement	(10)	(14)	(15)	(19)	(16)	(19)	NA	(93)
Zoned students	(14)	(16)	(12)	(16)	(10)	(18)	NA	(86)
Contract Charter	(5)	(6)	(7)	(7)	(7)	(5)	NA	(37)
Moved within Semester	(1)	(4)	(4)	(5)	(6)	(5)	NA	(25)
PUA	$3,085	$3,246	$3,379	$3,474	$3,246	$3,330	NA	
PUA loss	($154,250)	($194,760)	($192,603)	($218,862)	($181,776)	($229,770)	NA	($1,172,021)

(HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c)

Though a major limitation of the study was an inability to establish parent intent, parents created preferences, developed strategies, and made their choices to achieve outcomes that benefitted their students in some form or fashion (Dixit & Nalebuff, 1991). Intra-district choice was an empowerment policy adopted that manifested decades later during this study as parents used

choice transfers to move students from the two case study schools (Scott, 2013). Intra-district choice theme results mirrored the type of market-based inducement policy Archbald (2004) proposed as allowing parents an alternative model to select schools.

From a policy perspective, intra-district choice created market-based reform and provided 1,001 students from these two schools a mechanism to use the policy and move campuses (Bast & Walberg, 2004; Yair, 2007). Policies designed to push educational options to empower parents manifested between 2007–2013 (McAdams, 2000). In terms of pure policymaking, intra-district choice allowed parents to select schools that met the needs of their students while not constricting the parents to their neighborhood schools (Archbald, 2004; Bast & Walberg, 2004; Phillips et al., 2014). As a former principal in the district stated, "Open enrollment created avenues for kids to leave but not a pathway to return" (Webb, 2018b, para. 24). Member Checker #1 affirmed this notion regarding open enrollment, stating, "Parents who did their research around school quality eventually chose a school where their students were taught by better teachers. However, the magnet schools contributed mighty to the inequities in the district" (personal communication, September 30, 2020). Member Checker #3 concurred, stating, "Intra-district transfers put both schools on a path toward failure as they lost students and had no real means for drawing them back" (personal communication, September 30, 2020). Given that a significant impetus for governance is the institutionalization of market-based reform, the researcher contends the policy accomplished its intended mission and became an institutionalized part of the culture of the HISD that continues to manifest today in a much more subtle yet still controversial form. Based on empirical evidence, parents chose schools for their children based on available information and the presence of options in a portfolio system (Bast & Walberg, 2004).

What did not work well was determining whether all parents had access to allow for seeking educational alternatives for their students. Member Checker #4 stated:

> Not all families had access to the information to help them make informed choices for their students. Students who were 504/SPED had difficulties submitting completed applications, and those students who had other challenges often were not given a fair chance in the application process. (personal communication, September 30, 2020)

It became apparent there were inherent obstacles for families of students who were affected by academic grades, attendance, and discipline. Intra-district choice assumes all parents have the same opportunity, but the district's transfer application required that parents submit paperwork if students were categorized under the 504 Rehabilitation Act, special education, or as an English language learner. Students who had attendance and discipline issues were automatically at a disadvantage in the system as they were not allowed to seek transfers. Another obstacle was a lack of access to private dance or other fine arts tutoring. When applying to one of the selective fine arts programs, students from certain elementary and middle schools who did not receive a robust fine arts education did not audition at the same caliber as those with previous fine arts instruction.

Examples of restrictions placed on families included district-implemented regulations meant to limit the applicant pool. Examples of such limitations were evident in the Vanguard and Carnegie magnet programs. If schools did not offer the prerequisite academic offerings that some magnet programs mandated in the application, students applying were at an automatic disadvantage. Carnegie's admission process was split between applicants who were already identified as gifted and talented (G/T) in the HISD and those who were not already identified as G/T. Prospective students were required to complete the Carnegie Vanguard and HISD application, in addition to providing proof of residence within the HISD (HISD, 2020b). Students already identified as G/T in the HISD submitted with the application their HISD G/T

Middle School Identification Matrix (or G/T profile sheet) and a copy of their G/T status report (Joe, 2013). Students not already identified as G/T in the HISD, or those who attended a private school, submitted along with the application their previous year's final report card and a Teacher Recommendation Form. If available, students also submitted their most recent Stanford/Aprenda results (within the last 12 months) and Naglieri (NNAT-2) results (current year). If a student currently attended an HISD school but was not considered G/T, then the student completed the NNAT-2. If a student currently attended a private school, then the student completed both the NNAT-2 and the Stanford test. Qualified applications were then placed into a lottery if the number of applications outnumbered the number of available positions at Carnegie. The school reserved 20% of its openings for applicants whose siblings were currently enrolled and gave additional weighted points to students who were of low socioeconomic status (Joe, 2013). The impact associated with intra-district choice may be related to the robustness of the open enrollment within a district as analyzed in the application process for both the Vanguard and Carnegie programs.

It was also discovered that the processes and protocols employed by district leaders were not uniform for both case study schools. Surveys were conducted for JJHS that included the community, current students, and former students whereas there were no surveys for JRMS. Second, the presentations to the community for each school varied depending on which department in the HISD put the presentations together. The HISD's Office of Communication was more involved for JJHS School, which provided varied archival data to review. The fact that in one case study school there were greater attempts to survey families and students as opposed to the other case study school identifies inequitable systemic issues potentially leading to flawed policy recommendations.

What Were the Surprising and Unexpected Outcomes From This Intervention?

Though it was implicitly assumed that intra-district choice was used prior to the time period covered within this study, the impact were completely underestimated. In terms of both student loss and loss in per unit allocation, the results were crippling for both schools (Stake, 1995). Table 8 shows the results of official forms of intra-district choice in totality.

Table 8

Intra-District Choice Totals

	2007	2008	2009	2010	2011	2012	2013	Total
JJHS								
Enrollment	895	842	822	696	574	537	497	(398)
Intra-district total	(104)	(78)	(83)	(77)	(76)	(72)	(69)	(559)
Percent loss	12%	9%	10%	11%	13%	13%	14%	12%
PUA loss	($321,984)	($255,996)	($283,445)	($270,270)	($249,432)	($249,432)	($242,424)	($1,855,805)
Intra-district total								
JRMS							NA	
Enrollment	633	498	389	364	329	305	NA	(328)
Intra-district total	(66)	(73)	(73)	(74)	(69)	(87)	NA	(442)
Percent loss	10%	15%	19%	20%	21%	29%	NA	19%
PUA loss	($203,610)	($236,958)	($246,667)	($257,076)	($223,974)	($286,380)	NA	($1,457,995)

(HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c)

Overall, JJHS lost on average 12% of its student population, resulting in over $1,855,805 in lost funding (see Table 8). This is a base allocation that does not include other forms of weighted funding associated with being gifted and talented or in career and technology classes (HISD,

2016d). Losing 552 students, equivalent to the enrollment of a small elementary school, was detrimental and significant to the funding allotment. Academic program changes and a loss of staff as a result of intra-district choice, as well as low performance and failure as a result of a lack of resources, were all contributors to the monetary and enrollment declines. Though JJHS experienced events that impacted enrollment, the use of choice was a major factor that led to school reconstitution. Data show JRMS suffered a 19% average loss over the course of the six-year period that resulted in $1,457,995 in per unit allocation losses (see Table 8). As a percentage, the impact required the district to assume a greater percentage of budgetary compensation from its general fund balance. As the former Chief School Officer, the researcher walked into meetings when JRMS was below 300 students in enrollment. At no time during the researcher's tenure in the HISD was an audit conducted to ascertain the impact of the in and out movement regarding intra-district transfers. The lack of verification to determine the use and effectiveness of the policy was also apparent in the member checking responses. Member Checker #4 stated his beliefs regarding the role of the school board:

> The board should have a limited role in policy development. The school board serves as the voice of the community and asks questions and ensures that any policy will ultimately serve as a way to better the entire district. Sadly, many board members view themselves as superintendents and they use their position to shape policy that will benefit only those schools and students who reside in their district, and this simply creates further problems. (personal communication, September 30, 2020)

Member Checker #2 also stated the superintendent's responsibility to the board is to:

> Ensure the board has all of the facts, data, etc. to make an informed policy; ability to present pros and cons of such policy development; ability to work with the board to create policies that are in the context of larger goals and to take into account potential barriers. (personal communication, September 30, 2020)

The researcher concluded through these findings that policy recommendations to the superintendent and school board should be based not only on quantitative data but qualitative data that impact schools. The intra-district choice policy and central bureaucratic structure,

namely the Office of School Choice, is creating an imbalance between policy and practice that effectively inhibits the robustness of choice as described by one participant during the member checking process:

> Intra-district transfers put both schools on a path toward failure as they lost students and had no real means for drawing them back . . . the intervention did not fully address the needs of students who remained at their under-enrolled schools. (Member Checker #3, personal communication, September 30, 2020)

Former board president Don McAdams and architect of *A Declaration of Beliefs and Visions* espoused the ideals of Chubb and Moe (1990) and Coleman (1990), whereas former board member and newly elected superintendent Rod Paige fell into the equality camp; in particular, his belief centered around poverty and parental authority (Boyd et al., 1994; Goldstein, 2017; Lubienski et al., 2009). Together, they created a policy that combined interests and comingled ideologies, leading to the divergence of policy and practice years later (Ben-Porath, 2012). Rod Paige believed choice would not constrict students to their neighborhood schools if the schools were not meeting the students' needs. It was the jolt needed to improve school quality (Scherrer, 2004). Paige stated, "Parents should not be locked into a particular school because they don't have the financial means to do otherwise. The idea is wherever children can get the best education, that's where they should go" (Chappell, 2001, p. 174). Intra-district choice policy converged around the idea of parent authority by taking ownership for decisions, but the policy was impacted, in large part, by the Office of School Choice and the cumbersome application process (Ben-Porath, 2012). The processes and inequities continued to emerge in the member checking discussion. Member Checker #2 expressed the following:

> The policy worked in terms of creating market-based reform and change, however, it only worked for parents who had access to information and could make an informed decision based on the transfer rules. Parents who did not have access to such, students who had a discipline issue, identified as Exceptional Needs, and other factors were clearly had a disadvantage. It also created a methodology for student enrollment to

> decline in lower performing schools and created greater racial imbalances in schools. (personal communication, September 30, 2020)

Choice policy is based on the assumption that all parents will be treated the same, but certain schools have rubrics with different academic cut score requirements, tryouts/auditions, and prerequisites that eliminate certain students and families from applying and create situations inhibiting equity (Cullen et al., 2005).

Summary

Choice policies are intended to drive market-based reform and aimed to empower parents by enabling them to determine what schools best suit the needs of their children. However, it is necessary to evaluate and examine whether the policy accomplished its intended effect (Archbald, 2004). Over the past several years, transfer options arose from the No Child Left Behind Act of 2001 (NCLB) and subsequent reauthorization of the Elementary and Secondary Schools Act of 2015. Intra-district choice programs became available and offered a multitude of educational settings (Chakrabarti, 2013; Lovenheim & Walsh, 2017). Policies intended to create equity rely on the premise that parents have all the necessary information to make informed decisions that may result in a lack of robustness in choice opportunities. Equipping parents with the material to rationalize options not only empowers them in their decision-making, it resembles advocacy for choice (Scott, 2013; Torres & Hanson, 2017). The HISD school board members in many ways advocated for choice policies that would allow parents to have a portfolio of options, thus creating a department to ensure equity within the school system. However, the unintended consequences that emerged years later show issues of equity and segregation within these policy initiatives. The HISD now has a school board where minority members represent the majority and are now seeking to correct what some members of the current board see as inequities that hurt marginalized communities (HISD, 2016b; Mellon, 2016a). The constraints placed on open

intra-district choice such as entrance exams and tryouts effectively inhibit the robustness of choice.

Chapter V provides recommendations for policy that superintendents and school board members can use as they navigate the complex nature of school choice. The recommendations are not meant to be a panacea for policy implementation as the uniqueness of school communities and the political nature of decision-making limit the practicality that any recommendation would be adhered to by both the superintendent and school board members.

CHAPTER V

INTERPRETATIONS, RECOMMENDATIONS, AND CONCLUSION

Introduction

The impact of intra-district choice and open enrollment is not a widely researched topic despite the popularity in both Houston and other regions (Cullen et al., 2005; Webb, 2018b). The initial intent in conducting this study was to examine student attrition and movement in two case study schools as a result of policy reform. A need remains to further examine which specific students have access to intra-district choice within the HISD, a district that has established itself as a portfolio school district with an emphasis on equity (HISD, 2020a). Such a review will require both a policy evaluation and an evaluation of the current internal administrative practices that may prevent families from accessing intra-district choice as intended (Scott, 2011; Torres & Hanson, 2017; Webb, 2018a).

The HISD is at a crossroads when it comes to intra-district choice policy (Archbald, 2004; McAdams, 2000). The 2019–2020 HISD Campus Demographic Report showed JJHS is now considered a choice program that has no zoned students designated to this campus, which is a problem district leaders have yet to address (HISD, 2014c, 2015b, 2019a). The current student population of 359 shows the building is at 26% utilization (HISD, 2019a). The facility has a capacity to serve 1,403 students. Students who were attracted to other district school programs used intra-district choice to leave their designated schools, leaving the neighborhood high schools underutilized for those who remained and creating inefficiencies in terms of both budgeting and programming (Ewing, 2019; Scott, 2011; Torres & Hanson, 2017). JRMS became an open-enrollment middle school that was created using Magnet School Assistance Program (MSAP) federal funds, producing a more integrated middle school. Several years after

opening, the school was awarded the top honor by Magnet Schools of America as the best school in America (HISD, 2015a; Radcliffe, 2015). JRMS also has a designation of no attendance zone, which contributes to the inability to effectively ascertain the impact of choice as district leaders are no longer tracking movement to this school. The result is a conflict between the choice model and attendance zone that permeates the district, leading to overcrowding in some schools and underutilization in other schools (HISD, 2014c, 2015b, 2016b; Webb, 2018b).

This study focused on how intra-district choice impacted attrition and movement in two case study schools between 2007–2013. The researcher examined previous board members' approach to market-based reform in the HISD (Kellar, 1999; McAdams, 2000). If the HISD choice policy in 1990 relied on knowledgeable parents to drive competition and make market-based decisions, did such policy act as an incentive for parents to become more informed? The evidence is clear that intra-district choice did impact the two case study schools (Opp, 1999). In both cases, the three top intra-district choices were the same: magnet-to-magnet, principal agreement, and zoned student transfers. Parents who could, transferred their children (HISD, 2006, 2007, 2008, 2009, 2010a, 2011, 2012, 2013c). Don McAdams (2000) once stated, "Where did white students go? Many were able to obtain transfers to magnet programs in other HISD schools. This was the great game in southwest Houston. Hundreds of children from middle-class homes in the zones of 'unacceptable' schools transferred to 'acceptable' school" (p. 60). D. Stone (2012) asserted public policy is about community engagement in its highest form. Proponents of choice and a market-based reform could convincingly argue that parents in a separate geographic region of Houston did indeed vote by choosing educational options that met the needs of their families and children. Opponents of choice could argue that the district used an unequal treatment for the two marginalized communities in its approach to school

reconstitutions leading to potentially flawed policy implementation. Table 3 showed that for both schools the number of students lost was not only significant but the accompanying loss in the per unit allocation funding was significant as well.

Implications for Further Research

Prior to, during, and after this study, several attempts have been made to examine intra-district choice; magnet programming, and funding specifically (HISD, 2014c, 2015b; Radcliffe, 2006). In 2006, a committee examined the impact of magnet schools and made recommendations for improvement (Radcliffe, 2006). In 2011, HISD school board trustees ignored an audit report that called for a new funding model for choice programs after parent and community backlash (Mellon, 2011b). During a meeting at Lamar High School, one parent stated, "Neighborhood schools aren't popular" (Morris, 2011, para. 10). The magnet consultants agreed, recommending that 20% of students should come from outside the neighborhood zone but former superintendent Terry Grier stated, "If we are excluding children from having an equal opportunity to apply and participate in programs, I think we have to stop and question our actions" (Mellon, 2011a, para. 24). In 2014, the HISD administration presented its *Annual Magnet Review* to the school board that indicated the current status of magnet programs and supports in place (HISD, 2014c). No action was taken to amend the policy. In February of 2015, the HISD administration presented magnet recommendations to the school board that were not implemented (HISD, 2015b). In a July 2017 presentation to the board by then superintendent Richard Carranza, the board was notified that the current magnet and choice systems were creating inequities in schools and pointed to the current choice and transfer policy (HISD, 2017e).

At the time, one third of the 212,354 students were using magnet school transfers, or some other form of transfer, to leave neighborhood schools across the district (HISD, 2017e). As part of the recommendation, trustees were asked to come to a consensus and update board policy on a student choice model that would meet the needs of the community. Board members were asked to prioritize feeder patterns with low percentages of zoned populations and to engage families in surveys to seek information about why they were transferring. They were asked to redesign how students were assigned to ensure all families were truly represented. The board was asked to remove the gatekeeping that was taking place and that had been identified by an independent third party.

Board President WA took a new pathway for board governance and policymaking in adopting the Lone Star Governance Model (TEA, 2017) and removing *A Declaration of Beliefs and Visions*. According to item B-4 in the August of 2017 meeting, Trustee WA stated:

> The document *A Declaration of Beliefs and Visions* has served as a roadmap to success since it was outlined in 1990. It is a statement of HISD's instructional and operational philosophy and has been the cornerstone of the district's efforts to improve student achievement, operational efficiency, public support, district culture, and facilities. The basic tenet is HISD's commitment to focusing all of its resources on students and schools. While that commitment has remained constant, subsequent Boards of Education have differed in their approach and strategies for delivering the best outcomes for HISD students. Differences were reflected in revisions to *A Declaration of Beliefs and Visions* made in 2010. The 2017 Board of Education recommends new changes to the vision and beliefs, and the addition of a mission statement, constraints, and goal progress measures. (HISD, 2017a, p. 13)

The major component of the new policy is the Board of Education's mission to equitably educate the whole child (HISD, 2017a).

Recent boards have examined district policy through the lens of equity. It is incumbent that all policies are audited. Former superintendent Richard Carranza attempted to address the inequity of the choice policy and magnet programs but exited the school district after a year and a half, once again leaving a void in program evaluation. Though there are undoubtedly

constraints in the new mission that deviate from the original intra-district choice policy, there are precise measures that align with Don McAdams, who stated school reform works best when policymakers provide clear objectives and the environment to be achieved. Jenkins (2017) alluded to the continuing drama shrouding the district, stating, "Watching school board meetings over the past two years has often felt like standing in front of a burning house and seeing firefighters intermittently stop their work to argue about who gets to hold the hose" (para. 4).

In February of 2018, the HISD presented the *Magnet Program Proposed Changes* to the school board that included recommendations on a variety of topics that ranged from established and sunsetting magnet programs, funding allocation models, the identification of magnet students, transportation, and timelines (HISD, 2018). Specifically, there was a recommendation to evaluate all current programs. The HISD school board did not take action to implement the proposed changes for the remainder of the 2018 school year.

In February of 2019, the *Recommendation of the Magnet Program Evaluation Review Committee* provided recommendations to the school board on the current state of the magnet program (HISD, 2019b). This committee comprised parents, community members, school and district leadership, and researchers from Rice University and Texas Southern University and the recommendations resulted in no measurable action by the HISD school board for the remainder of the 2019 school year (HISD, 2019b). Until the board takes action and amends policy, the current inequities in a complicated system will continue to advantage some families over others.

Further research needs to include the impact of attrition and movement districtwide in conjunction with a comprehensive policy analysis that results in actionable policy decision-making. This will enable superintendents to make policy recommendations to board members that capture both the qualitative and quantitative stories of schools in the HISD. Understanding

the impact of attrition and movement can provide valuable policy insight for superintendents. Fifteen years after former school board member Greg Meyers stated, “I’m for school choice. How you do it is the crux of the issue. You need to have a long-range strategic plan on how you deal with it, and maybe in the past HISD hasn’t” (Spencer, 2005, para. 35), the HISD has the opportunity with a new superintendent to finally tackle intra-district choice.

Interpretation of the Study

The focus in this case study was on the impact of intra-district choice policy on attrition and movement for two case study schools examining intra-district choice from 2007–2013. The record of study provides a potential policy roadmap for those who seek to incorporate the portfolio approach for educational systems. The resulting blueprint from this case study can be used by superintendents as they navigate the complex interactions that take place in different political school climates. The intent was to create conversations by examining all relevant information, including the historical context of the school district, to help superintendents and board members as they navigate policymaking. Reeves, Joo, and Whitehurst (2017) asserted school segregation is the direct result of residential segregation and, as such, school boards and superintendents should be cognizant of the potential positive and negative impact of intra-district choice policy on school communities. Reeves et al. contended that though most schools look like their neighborhoods, in Houston, Black and Hispanic students tend to be more overrepresented in certain public schools. The segregation that results from the use of choice has systemic societal implications that extend far beyond what the intended policy was designed to address (Davis, 2016). Former board member Rhonda Skillern Jones alluded to the systemic issues with choice, stating, “You systemically take away all the children who would uphold the standard of achievement in their home school to concentrate them together to create a school

that's high flying. We are pitting neighborhoods against each other" (Webb, 2018b, para. 52). Whitehurst, Reeves, Joo, and Rodrigue (2017), in *Balancing Act: Schools, Neighborhoods and Racial Imbalance*, did not conclude whether minority density leads to more homogenous schools or whether White flight fueled the resegregation of schools; however, policymakers should debate the impact of intra-district choice policies. Ben-Porath (2012) asserted that without an active evaluation of policy, schools will often not remain integrated as choice may lead to ineffective decision making by policymakers, leading to flawed decisions by parents based on inaccurate information and data.

The impact of attrition and movement for JRMS and JJHS from 2007–2013 were affirmed during the member checking process with five previous HISD administrators who served in various roles within the district. Member Checker #4 stated:

> The effect of attrition were devastating, as the researcher points out during the seven years in question, the two schools saw a combine 1,044 students enroll in other HISD schools. This meant that both campuses were losing out on funding that could have allowed them to hire more teachers and offer more programs that might have made the campus more attractive to students. The research has provided strong evidence that allows me to conclude that had these policies not been in place both campuses would have been dramatically different and would be thriving academically. (personal communication, September 30, 2020)

Choice cannot easily be broken down into a win/loss category between the proponents and the opponents of choice policy (Powers & Cookson, 1999). Proponents of intra-district choice policy will point to the vast portfolio of schools as an example of market-based reform that has made the HISD a model for choice by empowering parents to make selections that best meet their students' needs and removing the neighborhood school concept as a barrier to parent freedom of choice (Archbald, 2004; Ben-Porath, 2012; Chubb & Moe, 1990; McAdams, 2000; Scott, 2013). Opponents will point to the same policy as an example that the HISD has simply continued a policy that benefits affluent White families in selecting choice magnet schools

(Downing, 2016; Radcliffe, 2005). According to Member Checker #3, the policy was intended to encourage school redesign to improve performance and to compete for students as they had the ability to choose a school they believed offered the best education for their children. The theory was that free-market competition would lead to higher quality education (Member Checker #3, personal communication, September 30, 2020). School choice was designed to empower parents, particularly those whose children were attending low-performing schools based on their attendance district. However, research shows districts with abundant choice and a portfolio of schools are often associated with greater racial segregation (Ben-Porath, 2012). Both proponents and opponents would recognize that implicit obstacles would need to be evaluated to ascertain the true impact of choice and the effectiveness of policy.

Though this policy analysis did not contain a focus on race, make no mistake, race was prevalent in all conversations and all policy decisions. Historical literature shows district leaders were intentional in keeping a segregated system in place through the use of policy and the construction of facilities (Kellar, 1999; Radcliffe, 2005; Webb, 2018a). Both schools in the case study covered a majority of the African American population prior to the study. During the 2014 community presentation for JJHS, the data showed 915 students were transferring out of the zone and 77% of those students were primarily Hispanic students attending two majority Hispanic high schools nearby (HISD, 2013c, 2014a; see Table 8). This notion was also validated by member checking. Member Checker #3 stated:

> Student attrition and movement from 2006–2013 caused significant declines in overall enrollment at both campuses. Hispanic students, particularly, were very likely to seek alternatives to these schools, which were historically African American. The declining enrollment resulted in lower funding for both schools and they struggled to provide adequate resources for remaining students. (personal communication, September 30, 2020)

Member Checker #1 also verified that "both schools became more segregated along socioeconomic factors" (personal communication, September 30, 2020).

School choice advocates eschew the idea of regulating school demographics and most choice advocates rely on parents to make the determination around the makeup of the student body (Ben-Porath, 2012). The policy statements made during public board meetings led the researcher to determine that a coalition of board members was seeking to change board policy and override the internal bureaucratic structures (HISD, 2016c). Public statements created the basis for the assumption, backed by policy implementation, that board members were acting contrary to the interim superintendent and the recommendations of central administration (HISD, 2016c). Trustee JJ stated, "Let's not sit here and pretend that this school board has been fair and the policies that have been set in place have been followed for all of HISD . . . equity matters" (Downing, 2016, para. 4).

According to Member Checker #1, the HISD school board "made sure that the magnet policy included provisions that guaranteed White and affluent students received preferential magnet placement" (personal communication, September 30, 2020). Though addressing a systemically flawed policy is commendable, simply creating new programs without addressing the root causes for the creation of the inequities continues the cycle of dysfunction that ultimately hurts students and families. It is incumbent upon educational policymakers to recognize the impact of institutionalized racism and the impact of policy and practice. Member Checker #2, a former magnet school administrator in the HISD, reflected the following:

> I can speak to the positives this policy had in one school. The level of diversity was tremendous as the school demographics had no racial or ethnic majority. In addition, students came from many zip codes and helped to create a positive culture built on acceptance, care, and teamwork. As a district leader in future years, after being promoted on several occasions, I clearly saw the disadvantages of the policy, specifically for neighborhood schools with no identified academic programming. These schools

> struggled to keep students and struggled academically. The policy was clearly designed to get the results it was getting . . . for some parents and students, but not for all. (personal communication, September 30, 2020)

Pearman and Swain (2017) examined the impact of choice and the weakening of the neighborhood school connection resulting from expanded choice offerings in the HISD. The relevance creates potential for further studies on the impact of intra-district choice on the composition of neighborhoods that many urban systems are experiencing today. Pearman and Swain's study can help inform policymakers who are interested in examining the impact of choice and open enrollment but the internal structures of the district need to be examined in addition to the policy.

From a policymaker perspective, whether board member or superintendent, it is critical to understand that families with socioeconomic capital are more capable and willing to move into neighborhoods they value, knowing they can use choice to attend schools outside their zoned schools (Charles, 2003). Neighborhood racial composition matters less to affluent families (Pearman & Swain, 2017) because of the choice afforded them in selecting schools for their children. School district policymakers need to create conversations with city officials as policies are developed and implemented so school district leaders can determine the benefits and consequences on neighborhood schools. A similar concern was shared by Member Checker #3:

> I became convinced that the harm to children attending neighborhood schools outweighs the benefit of having a small number of boutique schools serving the elite. My perception is that HISD will never achieve equity and excellence as long as affluent students are allowed to self-select into specialty schools while leaving poor students to fend for themselves in underfunded, under resourced schools. (personal communication, September 30, 2020)

Though no one can argue that the HISD has numerous nationally recognized programs, intra-district choice policy has never been fully evaluated in terms of the impacts on neighborhood schools in traditionally marginalized areas of Houston.

Recommendations

Choice policy, traditionally used as a market-based reform to provide choice for parents and as a means for school board members to create the sense that they represent the needs of their constituencies, particularly in urban settings, needs to reflect a well thought out process that incorporates program evaluation (Gartner Consulting, personal communication, 2017; Moe, 1995). Leaders in the HISD began the move toward a market-based approach during the late 1990s under a wave of reform-minded board members who were cognizant that changes were necessary to attract a population of students and parents who were relocating to Houston and to keep students in the district (McAdams, 2000). Figure 8 illustrates the decades-long decline in White and African American populations that in part led to policymaking to expand choice.

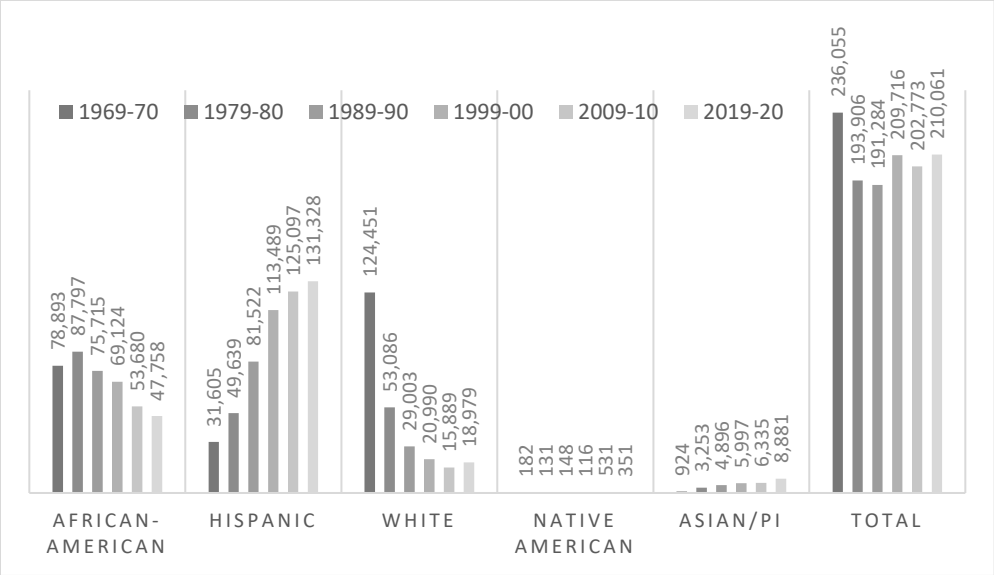

Figure 8. HISD enrollment by demographic 1969–2020.

Superintendents and board members have to be able to diagnose the political realities, political agendas, network building, negotiating, and bargaining that must take place for policy to be effective and to be implemented with fidelity (Bolman & Deal, 2008).

In the case of choice policy, the political will of active affluent parents has to be addressed by board members and administration working together or parents will flee (see Figure 8). The main idea for any policy and practice is how to enable diverse policymakers and constituents to do as the policy dictates (Cohen et al., 2007). There is a symbiotic relationship between policymakers and practitioners. The policymaker's legitimacy and political interests depend in no small measure on the practice of the policy by said practitioners. Practitioners have a vested interest in ensuring policy is enacted because of the incentives and resources attached to the policy. As educational leaders, it is imperative to understand that policy and practice are involved in a tug of war. It is critical to understand the notion of coalitions of interest fighting to dictate policy that impacts students (Bolman & Deal, 2008). Understanding that there will be differences in values, beliefs, interests, and perceptions of reality is inevitable. Conflict is inevitable but leaders must be cognizant that students are the primary drivers for successful policy implementation. Neal McCluskey, Director for the Center for Educational Freedom at the Cato Institute, argued for a "school of thought," or evidence-based opinion that leads to civil discourse in discussing choice options (Slavin, Boser, & McCluskey, 2017). In a poll that garnered 2,806 responses, McCluskey and others pointed to the polarity when it comes to discussing choice. The question simply was, "Can there be strong public schools and choice?" The answers were evenly split with 47.93% saying no and 52.07% saying yes.

During the research study analyzing choice for the two case study schools, another question arose that has not been addressed. Did the creation of a dual system of schools in the HISD create the current crisis that is exacerbating the impact of choice used by parents? As a former African American board member stated:

> The schools were opened in minority neighborhoods decades ago in an attempt to keep black and brown children from integrating nearby white schools. What the board did

> then was to overbuild schools and they stuck a school wherever they found a minority population. We cannot afford underpopulated schools. (Spencer, 2005, p. 1)

Binkovitz (2016) interviewed community activist AH as part of Rice University's Kinder Institute for Urban Education study. Mrs. H, a longtime parent activist whose child attended JRMS, spoke about the issues surrounding the school. According to AH, "It is just not a good experience for a community to lose a school, it creates so much negative impact on communities" (Binkovitz, 2016, para. 9). Examining staff attrition, academic outcomes, and budget ramifications in schools with low enrollment are a potential area for further research that may help to identify the impact of policy implementation.

In a study of the HISD, the Kinder Institute's Houston Education Research Consortium examined the impact of school closures between 2003–2010 (Stroub & Richards, 2016). According to their research, Black and poor schools were disproportionately affected by school closures, which makes sense considering schools built in the 1950s were designed to keep Black and brown students away from White students (Stroub & Richards, 2016). In their study, Stroub and Richards (2016) found 52% of the students who transferred attended schools in the bottom third of math achievement. In both JJHS and JRMS, the students were moved by the school district to nearby schools that struggled academically (Stroub & Richards, 2016). Though parents were provided the opportunity to apply for intra-district choice programs, not all choice schools were present at magnet recruiting fairs. Specifically, those magnet school programs considered to be the elite choice schools were not present at those recruiting fairs.

Effective policy requires the board to have uncomfortable conversations about the state of current intra-district choice policy and the perpetuation of systemic forms of oppression that manifest in unequal access to choice schools for some families. Policymaking is an inherently political process that requires both board members and superintendents to have access to all the

information when creating policy. Don McAdams (2006) asserted good policy created by boards and superintendents would help districts achieve better results.

Choice creates a unique situation with which both board members and superintendents must contend as they run an organization as large and diverse as the HISD. Though Houston can be praised as a model for choice programs, the policy created a tenuous relationship and has led to inequities currently exemplified in poorer Black and brown areas of Houston. The HISD has a plethora of choice options that provide parents numerous opportunities. Most recently, those options have come under scrutiny from the new school board as they begin board governance under the purview of the Lone Star Governance Model the TEA is promoting (HISD, 2020b; TEA, 2017). There continues to be healthy debate regarding funding that will see an increase in activism, but a program evaluation of magnet school funding and programs is long overdue as a practice that has permeated other aspects of the district. Mathis and Welner (2018) contended that:

> When schools shift from democratically run to privately run institutions, their very purpose itself can shift toward merely serving the private interests of customer parents. In that context, success is often realized by wooing more students who are lower cost and higher achieving. (p. 1)

Though cause and effect would be difficult to prove in this record of study, the anecdotal qualitative evidence shows there are factors leading to declining populations at both case study schools.

As leaders of the HISD examine magnet funding and choice policies, the question becomes to what extent will board members' predispositions interfere with administration's recommendations moving forward. D. Stone (2012) contended policy is political in nature and analysis is a politically motivated process that precludes politicians from excluding biases. What the HISD community decides on is a matter of meaning for the community and part of the

democratic process governing locally controlled educational institutions. There is a constant struggle to determine the policies that affect student outcomes and provide parents an optimal learning experience for their children (D. Stone, 2012). Whether that opponent is the status quo, opposition tends to become a part of the process that both the superintendent and the school board members must contend with as they grapple with implementing a new policy. Ultimately, there will have to be an allocation of scarce resources after a great deal of bargaining, negotiating, and jockeying for position (Bolman & Deal, 2008). At stake is a current system that has spent $20 million on magnet school programs. The amount spent does not include the $11 million in transportation costs and the $115 million budget shortfall the district has accrued (Mellon, 2016b). Whatever form of funding leaders of the HISD seek to establish and whatever policy is derived from the adoption of the new vision and mission, educating low-income students costs more than educating affluent students (Barshay, 2018). District leaders face the difficult task of addressing inequities in the current system while not marginalizing those who have made the district a model for success (Lubienski et al., 2012). Choice policy is not absent school design, budget implications, enrollment policies, and governance and any changes to the system must examine all possible repercussions. Leadership, whether the superintendent or the school board members, has an ethical obligation to ensure all systems are in symmetry. The HISD board members and current administration have the unenviable task of balancing policy that has created some of the best schools in the United States with the need to ensure equitable access for all families and students.

Mathis and Welner (2018), in *School Choice, Segregation, and Democracy*, provided some practical recommendations that both the superintendent and school board members should incorporate as they are contemplating policies specifically around choice to address equity. One

recommendation includes creating policies in the context of the larger societal goals districts have for schools. Specifically, choice policies should include constraints on stratification and racial imbalance and protections against any barriers to schools. A second recommendation includes ensuring any choice policies created are viable and create integration that is applied equally across the district. A third recommendation, which is one that most districts fail to incorporate, is understanding current housing patterns so district leaders understand the socioeconomic and racial diversity in the housing plans and codes. During the member checking process, Member Checker #2 alluded to this same recommendation by mentioning, "The superintendent, in the case of school choice policies, should be able to educate the board and public about assurances to seek integration and housing patterns" (personal communication, September 30, 2020). It is also recommended that district leaders ensure any policies created result in equal and integrated opportunities for all families regardless of their residential zip code (Mathis & Welner, 2018).

A key limitation of this study was the inability to track the academic outcomes of students who used choice or who were moved to other campuses as a result of the reconstitutions of schools. Though a recommendation was made to conduct another audit examining the impact of policy and choice in the HISD, policymakers must review policies, practices, and structures and remove potential barriers that disadvantage students of color (Bustamante, Nelson, & Onwuegbuzie, 2009). Institutional practices in the HISD that advantage some at the expense of other groups manifest in the procedures and practices presented as barriers in this study. Educational leaders must possess the knowledge, skills, desire, and capacity to fix something as complex as intra-district choice in the HISD (Smith, 2005).

Conclusion

JRMS and JJHS are examples of schools that were transformed into intra-district choice options for parents in the HISD, though the impact of those reconstitutions came with varied results per the community. There is an argument among community members as to whether JRMS, now the Baylor College of Medicine Academy (BCMA), was a successful transformation. Community members of the Third Ward Houston region make the argument that a neighborhood school was decimated and can never be regained. Some arguments can be made that trust with the district was completely destroyed (personal communication, February 26, 2013). In an April of 2016 agenda preparation meeting, Trustee Jolanda Jones wanted to know why the district was investing so much money in BCMA:

> When the kids leave BCMA they don't even go to the High School for Health Professions. They end up going to private schools, Duchesne, Second Baptist. So why are we investing all this money in kids who come in and gentrify a neighborhood and then they go and use the knowledge and the money we spent on them and HISD doesn't even benefit from it? I'm extremely offended. (Downing, 2016, para. 9)

BCMA has achieved remarkable results academically. Throughout the turbulence, the school has drawn students from all over the district and has attracted national attention as a model program to be replicated (HISD, 2017b).

As a participant observer, the researcher sat in numerous tours of the BCMA. Groups interested in the BCMA model included the Governor's Office and school leaders from across the region, state, and nation. In 2017, the school was awarded the top magnet school nationally and continues to attract national attention as a model that can be replicated (HISD, 2017b). "We are very excited to receive the Magnet School of Excellence Award," said the school's principal Dr. Jyoti Malhan, "Every day, I see our faculty and collaborators going above and beyond for our students, stepping in for coworkers, and making sure that our campus operation is seamless, and instruction is uninterrupted. I am fortunate to work with Team Awesome" (HISD, 2017b,

para. 2). The impact for BCMA fall in line with research conducted by Linn and Welner (2007) that showed the more racially integrated a school, the more the positive effects on achievement for African American students. Racial diversity also increases socioemotional and cultural tolerance among racial groups in schools that are purposefully integrated (Kurlander & Yun, 2001).

Opponents of intra-district choice point to the fact that before reconstitution, JRMS was a comprehensive and historical African American school that was decimated and sacrificed for affluent families not living in the neighborhood (personal communication, February 26, 2013). Downing (2016) quoted Trustee Jolanda Jones who stated, "It's very, very frustrating for the people who live around JR that their kids cannot go to JR. I'd like to know how much money we're spending on busing" (para. 10). Much like those who advocate for equalized funding for all schools regardless of choice, opponents argue that the district needs to allocate more resources to provide equal opportunities for families in schools being considered for reconstitution (Godwin, Leland, Baxter, & Southworth, 2006). Opponents of choice argue their local schools would be successful if provided adequate facilities, effective curriculum, and high-quality instruction (Alonso & Dunn, 2011; Dunn, 2008). The budget conversations regarding funding at JRMS became heated and controversial and will continue to create friction in the HISD for both proponents and opponents of choice. The political will to address a policy entrenched for decades will have to involve multiple stakeholders to create a win-win situation in a district as large and politically diverse as the HISD (Mellon, 2016b).

The Futures Academy at JJHS draws considerable debate as it continues to struggle gaining enrollment as a dual-credit high school campus. Since reconstitution, the school continues to struggle with attracting students as it expands into a Grade 9–12 campus. In July of

2017, analysis pointed to the problem facing JJHS as being low enrollment with a low percentage of zoned students attending the school (HISD, 2017e). There have been great strides, such as in the 2016–2017 school year the campus added athletics to its course offerings as a move to attract students. During the 2019–2020 school year, 359 students attended JJHS though the campus footprint was being utilized at 26% of its capacity (HISD, 2019a). This places enormous financial pressure related to heating and cooling the entire footprint designed for 2,000 students while only housing 359 students. Proponents of choice policy would note that in the most recent *Washington Post* rankings, the Futures Academy at JJHS was ranked 98th in the nation as one of the most challenging high schools in the United States (HISD, 2017d). Opponents of intra-district choice could rightly point to Don McAdams's own words to prove that the policy was a detriment to neighborhood schools and students of color in particular. McAdams wrote in 2000:

> Most of the white children in District Five schools were there because their parents wanted them there. Many of these parents could afford private school tuition, but they believed in public education. As long as HISD could provide reasonable assurances that their children were safe and received high quality academic instruction, they kept their children in public schools. These parents wanted their children to go to school with minority children, but not too many minority children. And they wanted those minority children to be mostly from middle-class homes. Also, they wanted their children separated into ability groups for instruction. For most white parents, class was more important than race. African-American parents who sought transfers for their children were frequently middle class-parents who were involved in the education of their children. Very poor black children were more likely to stay in their neighborhood schools. (p. 59)

McAdams made no bones about appeasing to a constituency who was his political base and opponents would argue the board president created a policy benefitting some students and families in the HISD while disenfranchising families along class and racial lines. RCT generally begins with the consideration of the choice behavior of one or more individual decision-making units, in this case parents (Bell, 2009b; Boyd et al., 1994; Cecchi & Bulte, 2013).

In this record of study, the HISD school board in 1990 presumed families would continue to use intra-district choice options to select the best option for their children and that these decisions would be representative of what the majority of neighborhood families wanted in this particular choice market (Chung, 2015). Leaders of the HISD have always sought to create schools where there are no patterns of differences in academics or treatment among students grouped by race, ethnicity, culture, neighborhood, income of parents, or home language; however, there can be no mistake that schools in certain areas struggle academically as a result of the current system of choice (Binkovitz, 2016). Again, various concerns emerged throughout the member checking process regarding depleting neighborhood schools of their students. Member Checker #2 stated the following belief:

> In addition, students came from many zip codes and helped to create a positive culture built on acceptance, care, and teamwork. As a district leader . . . I clearly saw the disadvantages of the policy, specifically for neighborhood schools with no identified academic programming. These schools struggled to keep students and struggled academically. The road ahead for the Houston Independent School District will be filled with many highs and lows but the superintendent and school board must continue the current debate around intra-district choice policy and the effects on segregation and resegregation. (personal communication, September 30, 2020)

Houston has always been a community that is bold, innovative, and forward thinking. The HISD must become another shining example for what can go right in public education if the board and superintendent address the problems with intra-district choice the HISD is currently facing. Politics aside, district leaders must ensure the needs of the students are maintained above the political interests of adults. In the words of Scheurich and Skrla (2003), districts must strive to to create schools that serve all student populations.

Leaders of the HISD need to address the reality that over 33% of students attend non-zoned schools, thereby creating situations of inequity and turbulence in an educational system

that pits areas of the city against each other (HISD, 2017e; Webb, 2018b). A former principal summarized their perception of the policy equity by stating:

> It creates hardships for your school regarding how it performs. It does help when high performing kids stay in our community; they become role models and examples for other students. They push schools to raise both the academic floor and the academic ceiling. But now, it seems like we're always looking at the floor. (Webb, 2018b, para. 46)

In the end, if the current board and interim superintendent are truly about their new governance model, they will revive the recommendations made in 2017 to address the inequities that hurt the families they are supposed to serve. The board will act on the *Recommendation of the Magnet Program Evaluation Review Committee* which provided several recommendations to the school board (HISD, 2019b). District leaders cannot label their educational philosophy around equity knowing the current policy and practices are creating inequities, especially for families of color and poor families. The idea behind the original policy reform was that parents would be able to choose the schools that best met their children's needs, but the reality is the policy created and subsequently amended has created a barrier, namely the school district, that fundamentally lets the schools/district choose and not the parents. Parents who are excluded because their students are classified under certain student groups, such as special education, 504, academic and attendance difficulties, discipline history, or homeless, should not be left out of educational equity opportunities and school choice options. Instead, all students should be represented and given a voice for choice by the school boards and administration entrusted to represent them (Scott, 2013). The potential for equitable empowerment through democratic governance is at stake in the largest urban school system in Texas (Scott, 2013).

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APPENDIX A

MINUTES OF A SPECIAL MEETING OF THE BOARD OF EDUCATION OF THE HOUSTON INDEPENDENT SCHOOL DISTRICT AND THE TASK FORCE ON RESTRUCTURING

June 18, 1990

MEETING HELD – MEMBERS PRESENT

The Board of Education of the Houston Independent School District (HISD) held a special meeting on June 18, 1990, beginning at 1:00 p.m., in the school auditorium of Lanier Middle School, 2600 Woodhead, Houston, Texas.

Members Present:	Dr. Cathy Mincberg, President Dr. Melody Ellis, Vice President Mr. Wiley Henry, Assistant Secretary Mrs. Paula Arnold Mr. Felix Fraga Mr. Ron Franklin Dr. Don McAdams Dr. Rod Paige
Members Absent:	Mrs. Olga Gallegos, Secretary
Others Present:	Dr. Joan M. Raymond, General Superintendent Mr. Les Sumrall, Assistant Superintendent, Board Services HISD Administrators, citizens, and representatives of the news media

MEETING CALLED TO ORDER – PURPOSE

Dr. Mincberg called to order the special meeting of the Board of Education of the Houston Independent School District and declared the Board convened to consider matters pertaining to the Houston Independent School District as listed on the duly posted meeting notice.

DECLARATION OF BELIEFS AND VISIONS FOR THE HOUSTON INDEPENDENT SCHOOL DISTRICT ADOPTED

Dr. Paige, chairman of the Task Force on Restructuring committee, gave and overview of how the committee went about coming to this point. Dr. Paige concluded by moving the adoption of Beliefs and Visions for the Houston Independent School District. Dr. McAdams seconded the motion. Comments and discussion among Board members continued.

On motion by Dr. Paige, seconded by Dr. McAdams, the foregoing recommendation was approved by the following board members: Mrs. Arnold, Dr. Ellis, Mr. Fraga, Mr. Franklin, Mr. Henry, Dr. McAdams, Dr. Mincberg, and Dr. Paige. Mrs. Gallegos was absent from the meeting.

DECLARATION OF BELIEFS AND VISIONS FOR THE HOUSTON INDEPENDENT SCHOOL DISTRICT ADOPTED (continued)

At this time, Dr. Mincberg formally commended the document to Dr. Raymond. Dr. Raymond accepted the document with enthusiasm. She announced she would be travelling all across the country to visit districts that have restructured and have site-based management.

Dr. Mincberg requested that the Board adopt the final document in the fall, and Dr. Raymond concurred.

ADJOURNMENT

There being no further business to come before the board, the Chair declared the meeting adjourned.

MINUTES APPROVED

The foregoing minutes of the special meeting of the Task Force on Restructuring of the Board of Education of the Houston Independent School District held on June 18, 1990, in the Auditorium of Lanier Middle School, 2600 Woodhead, Houston, Texas, were duly approved at a meeting held on July 19, 1990.

ATTEST:

Olga R. Gallegos
Mrs. Olga Gallegos
Board of Education, Secretary
Houston Independent School District

Cathy Mincberg
Dr. Cathy Mincberg
Board of Education, President
Houston Independent School District

Transcribed from June 18, 1990 Minutes, Houston Independent School District

HOUSTON INDEPENDENT SCHOOL DISTRICT 1990 A Declaration of Beliefs and Visions Including the	**A DECLARATION OF BELIEFS AND VISIONS** By the 1990 HISD Board of Education

2001 Addendum

and HISD's

PURPOSE,
STRATEGIC INTENT,
GOALS, AND CORE VALUES

This publication presents the core ideology of the Houston Independent School District. It outlines the direction of the school district and the expectations we hold for all employees. By defining our organization's purpose, we define what we are. Our core values define who we are, and our strategic intent and goals define what we intend to do to achieve our purpose.

The 1990 **Declaration of Beliefs and Visions** *of the Board of Education is included to provide the foundation for all that we strive to do to ensure the highest-quality education for Houston's children. Also included is the* **Addendum to Beliefs and Visions** *that the board approved in May 2001 to reaffirm the* **Declaration's** *philosophy and vision and proclaim HISD's continued pursuit of the goals and ideals set forth in 1990.*

Each one of us in the HISD family should have an understanding of our purpose, core values, strategic intent, and goals and conduct ourselves accordingly. By putting them into daily practice, everyone can help HISD truly make a difference in the lives of the children and the community we serve.

----------HISD BOARD OF EDUCATION----------

1990 (Original Document)	**2001 (Addendum)**
Cathy Mincberg	**Jeff Shadwick**
PRESIDENT	PRESIDENT
Melody Ellis	**Kevin H. Hoffman**
FIRST VICE PRESIDENT	FIRST VICE PRESIDENT
Olga Gallegos	**Laurie Bricker**
SECRETARY	SECOND VICE PRESIDENT
Wiley Henry	**Arthur M. Gaines, Jr.**
ASSISTANT SECRETARY	SECRETARY
Paula Arnold	**Karla Cisneros**
Felix Fraga	ASSISTANT SECRETARY
Ron Franklin	**Esther Campos**
Don McAdams	**Olga Gallegos**
Rod Paige	**Lawrence Marshall**
	Don McAdams

FOREWORD

Responding to the important need to improve student performance in the Houston Independent School District (HISD) and the increasing awareness of the linkage between the effectiveness of the district and the well-being of all the citizens of Houston, the HISD Board of Education (Board) seeks to improve student performance through district reform and restructure measures. As a starting point for restructure and reform planning, the Board issues this "Declaration of Beliefs and Visions."

The Board has strong confidence in, and appreciation of, district personnel. The need to reform and restructure has its roots in the rapid changes in our society and the escalating educational needs of our economy. We believe that the problem lies in the system's structure, not in the people.

It should not be concluded that by releasing this Declaration of Beliefs and Visions that the Board feels that the district alone can address successfully the education problems of our city. Far from it, the Board realizes that in order to be successful in its restructuring effort, a new coalition of support for public schools is needed—one that joins business, labor, and civic leaders with parents, educators, and school boards.[1]

The Houston Independent School District wants your feedback and help with the implementation.

Declaration of Beliefs and Visions for the Houston Independent School District

To improve the performance of Houston students significantly, we, the trustees of the Houston Independent School District, commit ourselves to a fundamental restructuring and reform of the district.

We acknowledge the effective work of thousands of talented, dedicated teachers, administrators, and other educators who have made HISD one of the premier large urban school districts in the United States. We believe, however, that the district's performance can and must be improved

We realize also that the serious urban problems which characterize most of America's largest cities also exist in Houston, and spill into schools. We realize that HISD has two large minority populations whose educational needs present special challenges, and that even our best schools are not performing at world-class levels.

We further realize that HISD students represent great diversity in terms of culture, ethnicity, language, and economic status. We believe that this rich cultural diversity requires flexibility to achieve improved learning, and that a highly centralized hierarchical system of governance cannot meet students' needs.

We believe that:

. the overall achievement level of our students must be improved,
. the dropout rate is unacceptably high,
. the schools are overly regulated,
. school safety must be improved,
. the level of parental involvement is too low in many schools,
. some communities feel that the district is not responsive, and
. the image of the district must be improved.

We do not believe that we can respond to these challenges by modifying the traditional public education structure. The time has come for dramatic restructuring and reform. A new educational structure is required that:

(1) is built on the relationship between the teacher and the student;
(2) is decentralized and features shared decision-making;

II. HISD must decentralize. Effectiveness requires that decision-making be placed as close as possible to the teacher and the student. Schools are where decisions should be made; accordingly, we believe principals must be the leaders of that decision-making process.

. The Board of Education must provide guidance and support to local schools by establishing clear goals, high standards, and effective systems of evaluation, while at the same time giving schools maximum freedom to develop and implement the methods that best achieve those goals.

. The central office must turn the traditional management pyramid upside down and become an enabler rather than an enforcer. Its role must be training, consulting, providing resources, and evaluating.

(3) is focused on performance, not compliance; and

(4) requires a common core of academic subjects for all students.

As a Board, we have developed the following outline of our vision for an improved HISD.

MANDATE FOR CHANGE

I. HISD exists to support the relationship between the teacher and the student. W. D. Stevens advises, "The quality of the adult relationship in a child's life is a critical determinant of his or her academic performance, and of the later adult life to which that child aspires.[2]

Accordingly, we believe that:

- The personal and face-to-face contact between teacher and child is the central event that the education system exists to support. The district's structure, governance, and policies must promote the quality of this relationship.

- Teachers must redefine their roles and relationships to create more effective learning environments. The teacher's role will become one of a coach who helps the student learn, and the student's role should be that of the worker who must accept responsibility for his or her own learning.[3]

- HISD must provide professional levels of compensation, empowerment, and accountability for its teachers, administrators, and other educators.

- The most powerful use of the public school organizational structure is to set the size of the school learning environment at the point at which every adult can be expected to know each student personally.

. The individual school must be the unit of accountability and improvement.

. Schools must be responsive to their communities, providing parents and members of the community (and where appropriate, students) with formal, structured input into decision-making.

. Schools must be given control over budgets, curriculum, teaching methodologies, and personnel, provided they:
  – are led by a strong and effective principal,
  – function as a team, and
  – collaboratively develop a vision and a plan to achieve that vision.

III. HISD must focus on performance, not compliance. District-level policies must focus on educational outcomes rather than on the fine details of the educational process. Accordingly, we believe:

- Individual schools should be evaluated based on objectives established at the school level by administrators, teachers, and parents, and approved by the administration and Board of Education.

- School evaluation must be based on improvement trends.

- Schools should not only be allowed to innovate, they must be encouraged to innovate. Specific incentive systems must be established to reward innovation and improvement.

- Compliance with massive state or district rules restricts innovation. Schools must have the authority to ask for waivers of policy requirements that are proved to have an adverse effect on a school's goal as negotiated with, and approved by, the Board.

IV. HISD must require a common core of academic subjects for all students. As stated by the Carnegie Council on Adolescent Development, "All students must be required to complete a core of academic courses that results in students who are literate, including in the sciences, and who know how to think critically, lead a healthy life, behave ethically, and assume the responsibilities of citizenship."[5] Accordingly, the restructured district must:

- ensure that the "academic achievement of students is at a level that will enable them, upon graduation from high school, to enter college or the work force fully prepared to be successful and not need remediation"[6];

- establish high standards and expect all students to meet them; and

- evaluate students through alternative demonstrations of mastery of the required curriculum.

THE CHANGE PROCESS

As trustees, we pledge ourselves to work openly with administrators, teachers, parents, and community leaders to implement these changes. We accept our responsibility as elected trustees to mandate change.

We also recognize that effective school reform cannot be implemented from the top down but must be built from the bottom up. The reality is that unless teachers and principals are at the center stage of any restructuring efforts, and unless they buy into and are trained for the new structure, the effort will fail. Those who will be most affected by restructuring must be involved in designing the new structure, and changes must be implemented in careful stages.

The general superintendent shall initiate a process for the development of a plan to implement the beliefs detailed in this declaration.

Declaration of Beliefs and Visions 2001 Addendum
By the 2001 HISD Board of Education

Since 1990, this statement of Beliefs and Visions has been the policy of the Houston Independent School District. With this vision illuminating the way, successive boards of education, two superintendents, community and business leaders, and the people of HISD have tried to build a new educational structure. We have not yet created the district we envisioned in 1990, but we have started HISD down a new path.

We still have a long way to go. It is time for us, the Board of Education, to reaffirm our commitment to Beliefs and Visions. With this addendum, we make this pledge. We also, in the light of our experience and the learning of others, wish to expand our vision and clarify our theory of reform.

Our vision, implicit in Beliefs and Visions, is that American democracy promises equal opportunity for all and that as long as there is any achievement gap between rich and poor, between white children and children of color, the American promise has not been kept. We want to make explicit our vision that however broadly student achievement is defined and by whatever methods it is measured, any statistically significant gap between student groups is unacceptable. We accept the responsibility for high levels of achievement for all students.

We know this will require, in addition to everything outlined in Beliefs and Visions, unequal resources for unequal needs, a significant investment in prekindergarten education, and safe, modern, well-equipped schools for all children. We also know that HISD must focus more sharply on building, continuously improving, and effectively using a precision instructional management system. Every child deserves instruction designed to meet his or her unique learning needs.

Beliefs and Visions implies a theory of reform for improving Houston's public schools. We wish to make explicit our belief that the enduring reform of urban schools requires the reform of school districts with a focus on whole systems change.

We believe this is most effectively done by focusing on results and aligning policies and management systems to support accountability, empowerment, and capacity. Accountability starts with rigorous curriculum standards, high performance standards, and high-stakes tests and includes school accountability, employee accountability, and promotion standards. Empowerment aligns authority and resources with responsibility and places a high value on choice. Building capacity gives everyone the resources needed to perform at high levels.

In 1990, the Board of Education concluded Beliefs and Visions with a pledge to work openly with administrators, teachers, parents, and community leaders to implement change. We reaffirm that pledge, with an even greater recognition that it takes a city to reform an urban school district. Accordingly, we invite all who care about children and the future of this great city to join us in making the education of Houston's children our highest civic responsibility. We still have a long journey before us.

END 1 **NOTES**

1 "Investing in Our Children: Business and the Public Schools," A Statement by the Research and Policy Committee of the Committee for Economic Development, 1985.

2 W. D. Stevens, "Joining in Reform of Elementary and Secondary Education in Texas": The Challenge for Business Leadership.

3 Theodore R. Sizer, Horace's Compromise: The Dilemma of the American High School, Houghton Mifflin Company, Boston, 1985.

4 Turning Point: Preparing American Youth for the 21st Century, The Report of the Task Force on Education of Young Adolescents, Carnegie Council on Adolescent Development, Carnegie Corporation of New York, June 1989.

5 op. cit. "Education that Works"

6 op. cit. "Turning Point: Preparing American Youth for the 21st Century"

PURPOSE:

The **Houston Independent School District** exists to strengthen the social and economic foundation of Houston by assuring its youth the highest-quality elementary and secondary education available anywhere.

STRATEGIC INTENT:

To earn so much respect from the citizens of Houston that HISD becomes their K–12 educational system of choice

GOALS:

Goal 1: Increase Student Achievement
HISD student performance will demonstrate gains as evidenced by scores on TAKS, SAT, and other state and national tests, while performance gaps between minority and nonminority students will narrow.

Goal 2: Increase Management Efficiency
HISD will have in place a decentralized organizational structure with operational practices and procedures that distinguish between the school district's pedagogical and business aspects and employ best practices with proven business and administrative operational principles for efficient delivery of services and goods to the schools.

Goal 3: Improve Public Support and Confidence in Schools
The local, state, and national public will view HISD as a large urban district in which achievement is primary, performance is high, educators accept responsibility for student learning, administrators and support services personnel exist to support the relationship between teacher and student, accountability exists at all levels, and there is respect among all segments of the community. Concomitantly, public confidence in public schools will improve.

Goal 4: Create a Positive District Culture
HISD will have a clearly articulated purpose, with specific goals and objectives that support it. Those will serve as the catalysts for creating a powerful sense of community and shared direction among HISD personnel, parents, students, and the public.

Goal 5: Provide Facilities-to-Standard Program
There will be in place a program designed to make all necessary repairs and renovations to bring HISD facilities up to standard. The plan will include the level of long-range and preventive maintenance necessary to keep the buildings properly up to standard.

CORE VALUES:

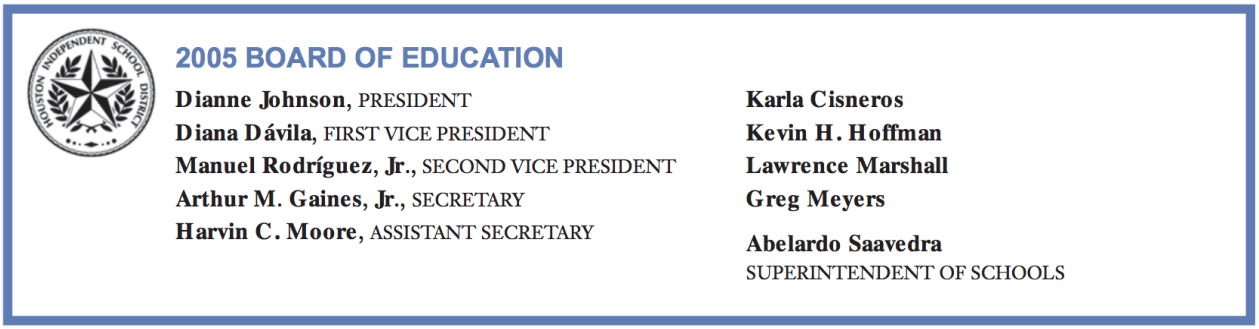
Safety Above All Else: Safety takes precedence over all else. A safe environment must be provided for every student and employee.

Student Learning is the Main Thing: All decisions and actions, at any level, focus on and support "the main thing": **effective student learning**.

Focus on Results and Excellence: Each employee focuses on results and excellence in individual and organizational efforts.

Parents are Partners: Parents are valued partners in the educational process, serving as the child's teacher in the home. All school and district activities will give proper consideration to the involvement of parents.

Common Decency: All members of the organization, both students and employees, deserve and must receive respectful and courteous treatment.



Beliefs and Visions

by the 2010 Board of Education FOREWORD

In recognition of the essential role that public education plays in the Houston community, we, the Board of Education of the Houston Independent School District, firmly recommit ourselves to providing all children with a high-quality education that aspires to the highest academic standards. In doing so, we acknowledge, respect, and appreciate the many educational reforms and restructure methods of previous boards and administrations to improve student performance in HISD. However, the work is far from finished. Effective reform is an ongoing process that requires constant attention and assessment, given the dynamic social and economic environment that is public education. To that end—after significant deliberation and review of current research and progress—we reaffirm our commitment to the children of Houston by establishing a *2010 Declaration of Beliefs and Visions*.

We view this *Declaration of Beliefs and Visions* as the next iteration of change in HISD as we address the many challenges in education that we face today. In 1990, the Board of Education first released *A Declaration of Beliefs and Visionss*, which established the guiding principles for HISD's significant academic progress and organizational restructuring. The 2001 Board of Education issued its *Addendum to A Declaration of Beliefs and Visions*, reaffirming the guiding principles, recognizing progress, expanding the vision, and clarifying its theory of reform. We gratefully acknowledge this foundational work that formally put our schools front and center by focusing on the student-teacher relationship, decentralization, performance over compliance, a common core of academic subjects for all students, accountability, empowerment, and capacity.

We believe that successful educational reform requires the entire Houston community— business, labor, civic leaders, parents, educators, and school boards—to come together as a coalition to support public schools. Active engagement and involvement are required. The Board of Education pledges to work openly with the community to implement a shared vision for HISD. We agree that it takes a city to reform an urban school district. Accordingly, we invite all who care about children and the future of this great city to join us in making the education of Houston's children our highest civic responsibility.

2010 Board of Education
Greg Meyers, PRESIDENT
Paula M. Harris, FIRST VICE PRESIDENT
Diana Dávila, SECOND VICE PRESIDENT
Carol Mims Galloway, SECRETARY
Anna Eastman, ASSISTANT SECRETARY
Michael L. Lunceford

Lawrence Marshall
Harvin C. Moore
Manuel Rodríguez Jr.

2010 Declaration of Beliefs and Visions for the Houston independent School district

The importance of a high-quality education in an individual's success cannot be overstated. The world is changing rapidly, and students must be prepared to live and work productively in a new economy with new technology, new competition, and new expectations. The Houston Independent School District is recognized as one of the premier large urban school districts in the nation; therefore, in light of its past record of progress, we believe that it can and must do even more to keep pace with change. Many of our schools are not yet performing to the high academic standards we expect them to meet.

Our diverse, vibrant student population, reflecting Houston's international standing, is an asset. We must ensure that every student, regardless of culture, ethnicity, language, or economic status, has both equal opportunity and equal access to high-quality education evidenced through results of growth and accountability ratings.

That promise is based on the beliefs that:

. The overall student-achievement level must be improved so that after each school year, every student makes, at a minimum, one year of instructional progress.

. There can be no achievement gap between socioeconomic groups and/or children of ethnic diversity.

. Recruitment and retention of highly effective teachers are the keys to enhancing the quality of education and increasing student achievement.

. The dropout rate is unacceptably high and must be reduced.

. Our schools must be able to earn autonomy.

. The level of meaningful parental engagement must be increased.

. The community has a legitimate voice in reform, and responsiveness to community concerns must be improved.

These beliefs shape our vision of what the Houston independent School district should be—an educational system that:

- Empowers schools to be autonomous and accountable for performance
- Offers school choice while ensuring equity of resources
- Values and cultivates the knowledge and skills of personnel
- Seeks meaningful engagement with the community in all major decisions

It will require an unwavering commitment to a shared course of action to make our beliefs and visions a reality. Above all, the results of all reform must have a positive impact on the important relationship between the teacher and the student.

MANDATE FOR CHANGE

HISD's greatest strength is its human capital. The personal, face-to-face contact between teacher and child will always be the central event in education. Changes in the district's structure, governance, and policies underscore the importance of this relationship; that is, through reform, they exist to support the relationship. In addition, HISD sets high expectations for school leadership to inspire creative thinking and innovative approaches that lead to instructional and operational excellence.

- Employees identified as high performers by using value- added data should be rewarded. HISD must establish levels of compensation and differentiated salaries driven by performance, value-added data, and accountability for all employees.
- Reform measures must focus on higher standards for recruitment and selection, job performance and compensation, and professional development and career planning, and pro- vide employees viable career paths within the organization.

Schools must be empowered to develop and implement the methods that best achieve their unique and individual instructional goals. HISD is fully committed to a decentralized system of schools, giving principals the authority over the educational and operational systems. In such a system, the Board of Education remains accountable to the public for high-quality educational services for all children. e board provides guidance and support to schools by establishing clear, consistent districtwide goals, high standards and expectations, and effective systems of evaluation; but the individual school is held accountable for innovation and instructional results within those districtwide parameters.

- Principals are the leaders of the decision-making process affecting their schools, and their leadership is measured not only by results but also by their collaboration with teachers, parents, and the community.
- Recognizing that schools are where decisions should be made and that successful decentralization is a function of

• HISD must be proactive in the early identification of schools that may have too few students enrolled to provide adequate resources. e district must be ready to provide the school with appropriate interventions.

Meaningful engagement is defined as actively listening to constructive input, collecting and exchanging information,

leadership capacity at the school level, the district will establish a tiered system of differentiated autonomy focusing on instructional competencies, budgets, and business operational systems. Schools demonstrating higher levels of student performance, innovation, and operational excellence (including school safety) are further empowered with greater autonomy and decision-making flexibility. However, other schools may need greater support and guidance; and until they reach acceptable levels of performance, the district must manage for them critical areas such as curriculum, professional development, and operational systems. When guidance over decision-making is needed, structured interventions will help develop the competencies toward greater autonomy. Annual performance monitoring of instruction, operations, and attractiveness to the community served will determine the level of principal autonomy or central office intervention at the school.

School choice must remain an integral part of the HISD system. School choice ignites the spirit of competition, motivates excellence, promotes innovation, and empowers parents to match their children with the schools that best meet their children's needs. It is important for HISD to focus more on developing, improving, and using innovative educational tools so that every child at every school has access to the instructional program that best suits his or her unique interests.

Equal access to instructional excellence requires adequate and equitable allocation of resources. That, in turn, requires fair funding formulas. For decades, HISD has been a district of choice and a system of schools rather than a school system where every campus offers the same programs.

- HISD will offer a portfolio of schools to meet the needs of its diverse community of students. All schools, whether they are specialty, Magnet, or neighborhood, will be accountable to identified educational and programmatic standards, including a common core of academic subjects, approved by the administration and the Board of Education. All students are expected to meet those standards.
- Achievement gaps between student groups are unacceptable. Closing achievement gaps requires unequal resources for unequal needs. Weighted funding allocations address individual differences, allowing the money to follow the child in accordance with his or her unique instructional needs and thereby ensuring access to the resources that enhance student achievement.

and sharing outcomes. The Board of Education under- stands and appreciates the need for constructive engagement with both the community and district employees and will aggressively solicit their opinions and ideas without relinquishing its responsibility as an elected body. As a publicly funded entity, HISD must maintain open and respectful relationships, both internally and externally, and be a model for a service-oriented culture. Schools belong to the people; communities will be engaged in the decision-making process.

- Everyone in HISD, including the board and the superintendent, shall be responsive to the district's diverse com- munities. Consistent, meaningful two-way communication with those who support the district as well as those with differing philosophies is essential to establishing public trust and confidence. HISD shall provide parents and the public (and, where appropriate, students) with formal, structured systems for input into decision-making that sets high achievement standards for all children.
- All employees shall be encouraged to play a more active, visible role in representing the district to the community.

THE CHANGE PROCESS

For nearly two decades, the Houston Independent School District's Board of Education has been guided successfully by an uncompromising statement of its beliefs and its visions for improving education in Houston. We, the 2009 Board of Education, will continue to move the district forward. We will work openly and creatively with administrators, teachers, parents, and community leaders to put into action this new mandate for change.

Change is essential if we are to make our children's education our very highest priority. We, alone, cannot affect school reform; and we, alone, cannot simply demand it. As our predecessors clearly understood, meaningful improvement is not a top-down exercise. It must include and involve everyone at all levels of the organization and the community. We pledge to seek input and ownership by those who will be most affected by reform and restructuring in HISD, and we will guide the superintendent to ensure that HISD is collaborative on issues of such importance to the entire community. This is a solemn pledge, and it is a privilege to accept this great responsibility on behalf of the children of Houston.

PURPOSE The **Houston Independent School District** exists to strengthen the social and economic foundation of Houston by assuring its youth the highest-quality elementary and secondary education available anywhere.

STRATEGIC INTENT To earn so much respect from the citizens of Houston that HISD becomes their prekindergarten through grade 12 educational system of choice

GOALS The *district's primary goal is to increase student achievement.*
Primary Goal 1: Increase Student Achievement—HISD student performance will demonstrate gains as evidenced by scores on TAKS, SAT, and other state and national tests, thus narrowing the achievement gap, and graduating students who are college- and career-ready.
Additional goals are established in support of increasing student achievement, as follows:

Goal 2: Improve Human Capital— The district seeks to create a performance culture that values employees who are results-oriented, talented, innovative thinkers; individuals who strive to increase student achievement and contribute to the reformation of public education.

Goal 3: Provide a Safe Environment— The district shall create a safe environment conducive to learning for all students and provide safety and security measures at district schools and facilities, and while attending district-related events.

Goal 4: Increase Management Effectiveness and Efficiency— The district shall have a decentralized organizational structure that will promote autonomy and innovation in schools. With a districtwide commitment to performance over compliance and a shared accountability system in place, the district shall employ best practices of administrative principles to make optimal use of district resources and taxpayer dollars.

Goal 5: Improve Public Support and Confidence in Schools— The schools belong to the people; hence, the board, administration, and support staff are public servants who exist to support the schools and the relationship between teachers, students, and parents. Public confidence will increase as the district increases transparency, accountability at all levels, and meaningful engagement of the community.

Goal 6: Create a Positive District Culture— The district's clearly articulated purpose will serve as the catalyst for creating a powerful sense of community and a shared direction among personnel, parents, students, and the public. Because the district realizes the value of investing in human capital, the district will work to attract and retain the best teachers and staff members, and create working conditions in which their talents can flourish.

CORE VALUES
Safety Above All Else: Safety takes precedence over all else. A safe environment must be provided for every student and employee.

Student Learning is the Main Thing: All decisions and actions, at any level, focus on and support "the main thing": effective student learning.

Focus on Results and Excellence: Each employee focuses on results and excellence in individual and organizational efforts.

Parents are Partners: Parents are valued partners in the educational process, serving as the child's teacher in the home. All school and district activities will give proper consideration to the involvement of parents.

Common Decency: The district shall be responsive and accountable to the public and its employees. Community members and employees shall receive respectful and courteous treatment.

Human Capital: rough recruitment, retention, dismissal and professional-development programs, the district will work to make sure students are served by the top talent available, from teachers to superintendents.

HISD is an equal opportunity employer.
It is the policy of the Houston Independent School District not to discriminate on the basis of age, color, handicap or disability, ancestry, national origin, marital status, race, religion, sex, veteran status, or political affiliation in its educational or employment programs and activities.

Transcribed from HISD 1990 *Declaration of Beliefs and Visions* with 2001 Addendum reauthorized in 2005, 2007, and 2010

APPENDIX B

INTRA-DISTRICT CHOICE RAW DATA

SCHOOL_YEAR	ZONED_SCHOOL_DESC	AER_REASON_DESC	Transfer Type
2013	JJ High School	Adequate Yearly Progress	1
2013	JJ High School	Career and Technology	4
2013	JJ High School	Contract Charter	4
2013	JJ High School	DAEP Referral	1
2013	JJ High School	HISD Charter	6
2013	JJ High School	Magnet	22
2013	JJ High School	Moved Within Semester	1
2013	JJ High School	Principal's Agreement	9
2013	JJ High School	Space Available	6
2013	JJ High School	Special Education	4
2013	JJ High School	Zoned Students	12
2012	JJ High School	Alternative	1
2012	JJ High School	Career and Technology	1
2012	JJ High School	Contract Charter	4
2012	JJ High School	DAEP Referral	1
2012	JJ High School	HISD Charter	6
2012	JJ High School	Magnet	23
2012	JJ High School	Moved Within Semester	6
2012	JJ High School	Out of District - Employee Magnet	1
2012	JJ High School	Principal's Agreement	11
2012	JJ High School	Space Available	4
2012	JJ High School	Special Education	3
2012	JJ High School	Zoned Students	13
2012	JR Middle School	Adequate Yearly Progress	2
2012	JR Middle School	Alternative	2
2012	JR Middle School	Appeals	1
2012	JR Middle School	Boundary Option	1
2012	JR Middle School	Contract Charter	5
2012	JR Middle School	DAEP Referral	1
2012	JR Middle School	Dual Language	1
2012	JR Middle School	ESL/Bilingual	1
2012	JR Middle School	HISD Charter	1
2012	JR Middle School	Homeless	2
2012	JR Middle School	Majority to Minority	2
2012	JR Middle School	Magnet	22
2012	JR Middle School	Moved Within Semester	5
2012	JR Middle School	Principal's Agreement	19

2012	JR Middle School	Program Placement	1
2012	JR Middle School	Space Available	1
2012	JR Middle School	Special Education	4
2012	JR Middle School	Virtual School Pilot	1
2012	JR Middle School	Zoned Students	18
2011	JJ High School	Adequate Yearly Progress	1
2011	JJ High School	Career and Technology	2
2011	JJ High School	Contract Charter	6
2011	JJ High School	DAEP Referral	1
2011	JJ High School	HISD Charter	6
2011	JJ High School	Magnet	22
2011	JJ High School	Moved Within Semester	5
2011	JJ High School	Out of District	1
2011	JJ High School	Principal's Agreement	13
2011	JJ High School	SH – Principal Agreement	1
2011	JJ High School	Space Available	4
2011	JJ High School	Special Education	2
2011	JJ High School	Violent Crime Victim	1
2011	JJ High School	Withdrawal Code Edit	1
2011	JJ High School	Zoned Students	13
2011	JR Middle School	Adequate Yearly Progress	2
2011	JR Middle School	Alternative	1
2011	JR Middle School	Contract Charter	7
2011	JR Middle School	DAEP Referral	1
2011	JR Middle School	Dual Language	1
2011	JR Middle School	ESL/Bilingual	1
2011	JR Middle School	Grade 6/7/8	1
2011	JR Middle School	Majority to Minority	1
2011	JR Middle School	Magnet	17
2011	JR Middle School	Moved Within Semester	6
2011	JR Middle School	Out of District	1
2011	JR Middle School	Out Of District - Employee	1
2011	JR Middle School	PEG Grants	2
2011	JR Middle School	Principal's Agreement	16
2011	JR Middle School	Program Placement	1
2011	JR Middle School	Special Education	2
2011	JR Middle School	Zoned Students	10
2010	JJ High School	Adequate Yearly Progress	1
2010	JJ High School	Alternative	2
2010	JJ High School	Career and Technology	2
2010	JJ High School	Contract Charter	6
2010	JJ High School	DAEP Referral	1
2010	JJ High School	HISD Charter	6

2010	JJ High School	International Baccalaureate	1
2010	JJ High School	Majority to Minority	1
2010	JJ High School	Magnet	20
2010	JJ High School	Moved Within Semester	6
2010	JJ High School	Out of District - Employee Magnet	1
2010	JJ High School	Principal's Agreement	15
2010	JJ High School	Space Available	5
2010	JJ High School	Special Education	4
2010	JJ High School	Zoned Students	10
2010	JR Middle School	Adequate Yearly Progress	1
2010	JR Middle School	Alternative	1
2010	JR Middle School	Contract Charter	7
2010	JR Middle School	DAEP Referral	1
2010	JR Middle School	Dual Language	1
2010	JR Middle School	Grade 6/7/8	1
2010	JR Middle School	Majority to Minority	1
2010	JR Middle School	Magnet	16
2010	JR Middle School	Moved Within Semester	5
2010	JR Middle School	PEG Grants	2
2010	JR Middle School	Principal's Agreement	19
2010	JR Middle School	Program Placement	1
2010	JR Middle School	Space Available	1
2010	JR Middle School	Special Education	3
2010	JR Middle School	Zoned Students	16
2009	JJ High School	Adequate Yearly Progress	1
2009	JJ High School	Alternative	3
2009	JJ High School	Career and Technology	1
2009	JJ High School	Contract Charter	6
2009	JJ High School	DAEP Referral	1
2009	JJ High School	HISD Charter	7
2009	JJ High School	International Baccalaureate	1
2009	JJ High School	Majority to Minority	2
2009	JJ High School	Magnet	24
2009	JJ High School	Moved Within Semester	5
2009	JJ High School	Principal's Agreement	15
2009	JJ High School	Space Available	6
2009	JJ High School	Special Education	5
2009	JJ High School	Zoned Students	10
2009	JR Middle School	Adequate Yearly Progress	2
2009	JR Middle School	Alternative	2
2009	JR Middle School	Boundary Option	1
2009	JR Middle School	Contract Charter	7
2009	JR Middle School	DAEP Referral	2

2009	JR Middle School	JJAEP Referral	1
2009	JR Middle School	Majority to Minority	2
2009	JR Middle School	Magnet	19
2009	JR Middle School	Moved Within Semester	4
2009	JR Middle School	PEG Grants	3
2009	JR Middle School	Principal's Agreement	15
2009	JR Middle School	Space Available	4
2009	JR Middle School	Special Education	4
2009	JR Middle School	Zoned Students	12
2008	JJ High School	Adequate Yearly Progress	3
2008	JJ High School	Alternative	3
2008	JJ High School	Career and Technology	1
2008	JJ High School	Contract Charter	3
2008	JJ High School	DAEP Referral	1
2008	JJ High School	HISD Charter	6
2008	JJ High School	International Baccalaureate	1
2008	JJ High School	Majority to Minority	1
2008	JJ High School	Magnet	24
2008	JJ High School	Moved Within Semester	5
2008	JJ High School	N/A	1
2008	JJ High School	PEG Grants	1
2008	JJ High School	Principal's Agreement	13
2008	JJ High School	Space Available	6
2008	JJ High School	Special Education	5
2008	JJ High School	Zoned Students	8
2008	JR Middle School	Adequate Yearly Progress	2
2008	JR Middle School	Alternative	1
2008	JR Middle School	Contract Charter	6
2008	JR Middle School	DAEP Referral	2
2008	JR Middle School	HISD Charter	1
2008	JR Middle School	Majority to Minority	2
2008	JR Middle School	Magnet	20
2008	JR Middle School	Moved Within Semester	4
2008	JR Middle School	Principal's Agreement	14
2008	JR Middle School	Space Available	5
2008	JR Middle School	Special Education	2
2008	JR Middle School	Withdrawal Code Edit	1
2008	JR Middle School	Zoned Students	16
2007	JJ High School	Adequate Yearly Progress	1
2007	JJ High School	Alternative	3
2007	JJ High School	Career and Technology	1
2007	JJ High School	Contract Charter	7
2007	JJ High School	DAEP Referral	1

2007	JJ High School	HISD Charter	5
2007	JJ High School	International Baccalaureate	1
2007	JJ High School	Majority to Minority	1
2007	JJ High School	Magnet	23
2007	JJ High School	Moved Within Semester	3
2007	JJ High School	Pending In-District Address Validation	4
2007	JJ High School	Principal's Agreement	9
2007	JJ High School	Space Available	7
2007	JJ High School	Special Education	6
2007	JJ High School	Withdrawal Code Deletion	8
2007	JJ High School	Withdrawal Code Edit	16
2007	JJ High School	Zoned Students	11
2007	JR Middle School	Alternative	1
2007	JR Middle School	Contract Charter	5
2007	JR Middle School	DAEP Referral	1
2007	JR Middle School	Grade 6/7/8	1
2007	JR Middle School	HISD Charter	1
2007	JR Middle School	JJAEP Referral	1
2007	JR Middle School	Majority to Minority	1
2007	JR Middle School	Magnet	20
2007	JR Middle School	Moved Within Semester	1
2007	JR Middle School	Pending In-District Address Validation	1
2007	JR Middle School	Principal's Agreement	10
2007	JR Middle School	Space Available	6
2007	JR Middle School	Special Education	1
2007	JR Middle School	Withdrawal Code Deletion	1
2007	JR Middle School	Withdrawal Code Edit	4
2007	JR Middle School	Zoned Students	14

APPENDIX C

DATA COLLECTION PROCEDURE

Search Engine	Search Years	Search Terms	Search Results
Texas A&M University Libraries	1985-2021	Houston Independent School District	41, 105
Newspapers Houston Chronicle NewsBank	1990-2020	○ School Board	13,254
		○ School Board Governance	198
		○ School Choice	2074
		○ Intra-district Choice	0
		○ Magnets	73
		○ Open-enrollment	121
		○ Rod Paige	1089
		○ Don McAdams	305
		○ Jesse Jones HS	142
		○ James Ryan MS	330
		○ *A Declaration of Beliefs and Visions*	8

A total of 64 newspaper articles were downloaded from this search.

APPENDIX D

MEMBER CHECKING PROTOCOL

Research Questions	Categories	Member Checking Questions
How did intra-district choice policy impact student attrition and movement at JR Middle School and JJ High School from 2007–2013? o What worked well? o What did not work well? o What were the surprising and unexpected outcomes from this intervention?	Attrition and Movement Categorical Data Aggregation Direct Interpretation from Data Pattern Identification Naturalistic Generalizations	What were the effects of attrition and movement for JRMS and JJHS from 2006-2013? What worked well? What did not work well? What were the unintended outcomes for this policy intervention? What was the board policy AE Local Policy trying to accomplish? What are the roles of HISD board members in policy development? What is the role of the superintendent in policy development? What assumptions did you make about this record of study? What is the significance of intra-district choice policy? What perceptions do you have about intra-district choice policy from your time in the HISD?

The answers to the member checker responses were downloaded from Google Forms into a Microsoft Excel spreadsheet and stored on a password-protected Google Drive.