

Board of Education  
Kelley Carey Report  
November 16, 2006

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Board Members Present: All except Mr. James Minyard

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Presenters:

**Rusty Gibson, attorney**

**Kelley Carey, demographer;** Mr. Carey had done a previous demographic study for the school board in 1996 when it made its 5 year facility plan while under the federal desegregation order

**Bill Snowden,** city planner (called in to present areas of projected growth based on land development prospects, inquiries and projections of new zoning ordinances)

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The presenters are introduced right before they speak. A list of their credentials is included in the introductions to allay any concerns of level of expertise. Attorney Rusty Gibson begins the presentation by talking about Kelley Carey and his earlier involvement with the school system.

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Notes: Mr. Gibson mentions that Kelley Carey was an expert witness and was involved in 1996 when the elementary school plan was approved.<sup>1</sup> Mr. Gibson said that at that time, they were to eliminate, to the extent practicable, a plan that removed the vestiges of segregation. He explained that that plan operated in the elementary schools now, not only for five years, but for ten years. Mr. Gibson then talked about the 1 cent sales tax amendment and the agreement the Board made with the City Council upon receiving the second supplemental funds.<sup>2</sup> Mr. Gibson mentioned several things about his involvement in the 1996 case and the fact that they had hired Mr. Carey to help with the demographic study needed at that time to come up with a plan, and that the plan had to include student assignment, building capacity, and growth.

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The following is transcribed from a tape recording of the proceedings. There are times when the tape recording was faint and the transcript may, thus, be incomplete:

Gibson: [tape recorder turned on] ...and we know we need to get one more year, this school year '06—'07 to utilize—to do some formulations and projections that will enhance them. Our charts sitting on this [stand] is fairly narrow up to this point, and that

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<sup>1</sup> *Comment: This was under the desegregation order. Your reporter believes it was necessary to approve of the construction of Rock Quarry because there was protest at that time that this would be a white school as it would be built in a white neighborhood. There had to be promises that the school would be racially integrated.*

<sup>2</sup> *Comment: Your reporter thinks this was the Board's borrowing of extra money that became necessary when it was discovered that some of the money earmarked for Central High School had been spent on Northridge athletic facilities leaving them with only 13 million—an insufficient amount for a high school.*

is, look at our assignment plans, look at our capacity issues. Are we experiencing growth? Where? And, as we'll soon get into later—is that growth of the zone or is it because you let the children transfer to other schools and all that. We will assume that your transfer policy is in line—to identify areas of growth, which is historic—which is the point we will come to now--address this. Now let me caveat that. This is the report obviously that you've just received. We want to go over that and yourselves need to go over that and--to assure that there is not some error or some loss that has transpired with the calculations. So we will listen to that. This probably will be the quote "final" of this—with this charge. And I'll address your questions a little bit later. But, I think at that point—I think you've pretty much heard me enough about where we are and we're ready to go. Okay. [hands over the meeting to Mr. Carey.]

Mr. Carey: [Pull out copies of report each one has] What I'd like to do is look it over again. First of all, what we did with this report is to refine what we did last time I was here. What I mean by that is the last enrollment projections that you gave to me last year were based on where the children in the district lived compared to what their enrollments were of the students. That's normal for any district. You asked some questions about the data at that time, of course, people will always be moving around a little bit. And you will find that that is true in everyday experiences. [inaudible]. And we did that. But we took a different tactic--we sometimes do, and that is, we actually looked at the zones and not the schools. And that can give you a different picture. And it may make a difference in the results in some cases. We did that because you have over 1,100 students out of the entire population that transfer among the schools. And it is a fairly large number. Some transfers are pretty common in any school districts [inaudible]. However, it is good, when you have growth especially--to be certain that your transfer policy is as narrow as necessary and that the programs are equitable and that at least when if you transfer it's for the reasons stated. So, with that--over a thousand transfers, we decided to look at the enrollment plots. So what we do is we go back historically--where each school zone is placed on the map and we put on a computer map who lived within that zone over time from the five years ago—we have five years maximum. So, that data is summarized in the report—you have various pages of that in here. From that, we've put that back into our overall projection. That is saying, if everybody in a school here—if they went to where they were zoned for. On top of that, the report includes the transfer of students. What I mean by that is that if fifty children were being transferred into this school and ten were transferred out, then we'd have forty sitting on top of the projection for that school. That's really a more accurate way to do it when you've got a lot of transfers, not that it's excessive, but it is a lot, because transfers can show growth. Like, if you had no transfers two years ago and then you had 25 last year, then it would look like you're growing in that zone for the next year--when in fact the zone itself isn't. So that allows the board to look at this, and staff, and see—see what the implications are and whether or not they want to... So the first block is you have the data. So, what I would represent to the court, in a large measure, are the building blocks and you know, the different solutions, so long as we clearly understand the problem for your projection.

So--we do have good projections by the school zones for the next five years. Good building blocks. From that, a recommendation that we saw earlier on the maps

here—that—some of them are here--One of them is that there is growth in the district and we have [walks over to point to large map on stand provided by the city planner—sections color coded of inquiries the city has received from developers for housing starts]. This is the depiction of planned development, whereas what you see on the wall over here, [three large city maps with dots to represent an address where a student live on wall opposite to where he is standing] there is an actual mapping of every child in the school district for the elementary, middle, and high school level, so you might want to look at that after the meeting to see how the district is spreading out—as compared to the zones. The zones are the district’s first building blocks. So--that helps you to understand that some zones have lots of kids on one side of them—nobody on the other. Or, what the distribution is and how they relate to where the students live in the zone. Now, our projection model holds true as an overview as we look at the track record of that school in “grade to grade survival”. That is, how many second graders last year become third graders this year and so forth. [When adjusting sound, tape gets turned off for about 6 seconds.] [summarizes that it is important to look at grade-to-grade survivors.] survivors. We considered births in the county—second, their age group—that’s here again. We relate that to number three--what the distribution patterns here are for the whole system. So, that enables us to move those data forward to project what we now see down here. [referring to pages in the report the board members have] That’s internal to the school district—that’s how you do the [inaudible].

There is another factor, and that’s the community. To put in plans—school district’s plans for increases and they’re a part of the plan. And that means—what’s happening out there will help us know more about what will impact the future of our schools. And that is why I present this map [indicates the city planner’s map he is standing next to] —and I’ll give credit to the city planner for furnishing this data. And you can look at this afterwards too—but it shows planned housing starts. Things that have already been in the plans to build and [inaudible]. But each of those--it’s a number like 494—some 494 from home lots are planned for that area of the city.<sup>3</sup> You can see the numbers spread around.

And we also discussed a little about what the future is beyond what some of what is here—a near term reality in itself. And it speaks to more development coming up here in the north of the map. [points to this part on map] So that—what we were speaking about, about growth up here in the northeast and growth down the southeast [points down at this part of map]. The projection curves clearly show that if this where it’s happening, there’s continued growth here. If THIS happens, then it’s OBVIOUSLY continued growth, and with the other things in the pipeline, as you can very well project off of this.

So you need to take that in the context of confirming what we’re showing for that school. Now what do we do with that? Our recommendations, of course, are a couple-of-fold. One of them I spoke to is transfers. These need to be modified, you look at your policies

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<sup>3</sup> *Comment: Note that distinction will be made in terminology—“lots” means an individual homeowner, and “units” an apartment—not home owner. This will be the greatest distinction with development for north and east vs. west and south.*

to see if there are inconsistencies there. And basically what that means as far as transporting some [inaudible—something about making sure that policy is narrow and that transfers are legitimate]. And how they weigh—that’s your negative box over here, so you can begin to use it. The other part is what to do with your investments. Well—anyone who is ordinary would tell you there’s only one solution. Most of the time solutions are not an all encompassing. But--there’s never one way to address growth [inaudible]. A couple of things come before you.

Clearly, one solution is an elementary somewhere up here [points to northeast corner of map] and then somewhere down here [points to far south east corner of map]. That’s a perfectly legitimate solution.

But the next [inaudible] right about here in this part. But--I’d like to put this into the context of everything because that’s just saying, that’s saying “This is growth—let’s just answer it, this is growth, let’s just answer this.” What happens behind it, though? I’m talking about all the rest of the school district. If you put it in that kind of context, you’ll see and hear all kinds of solutions to the problems you’re seeing projected for over the next years. The plan that you have behind you for this is one that was adopted ten years ago and was developed twelve or thirteen years ago under the desegregation case. It’s not to say that it’s a bad planning—there’s a plan. But in ten years, things happen. People move. I’ve had people build a school and say, “Why do you think we have a new school but we can only fill half of it? We can’t even fill the school.” And it’s, “Well, yes there was--but those people have all gone.” And that’s what happens.

So—what happens here after ten years is—my other recommendation is that consider—the possibility of a couple of the elementary schools, but consider the context of your whole school system before you make a decision. What are the remedies of potential problems? What other tools? New constructions, additions, openings, closures, different student assignment plans? All those and other things that schools can plan for will work. And--most—almost as important as what happens TO the school district is melding your plan with the community’s planning so that you know how it fits. If they’ve got the growth that they know is coming, we need to be careful with the answer. So if we’re not looking behind us to make most efficient use of our physical plants and of our student assignments—and we’re thinking we have the answers for growth only, we may have to come back in later and do things that might be more difficult to do when we really didn’t have to do that.

So—what I’m recommending is that the board and administration considers a short term planning process to develop some alternatives so that the entire school system will place this need with that plan [city planner’s plan—points to their maps]--so that you’re confident to examine three, or four, or five different ways to address THIS issue because that gives you a little [inaudible] spot to get your transportation in line with this issue of--we see a lot of—tremendous [lowers voice to barely audible] to lower transportation of students all over the city. That will mean the best use of a very scarce resource—which is money. It also means that we could be looking at the future in concert with the student growth of the overall system--at least to examine the alternatives that could help the

board right now--to answer [inaudible]. My recommendation is a short-term planning process to be sure that the solutions that you make here will fit our needs across the board. That's the overview. I will say that a great deal of information here is the complete enrollment projection model is in the back [inaudible--many flip pages as he speaks] that go back to [inaudible] to see where they've been in the last five years. There are lots of maps showing where the students that are, for a large part, from each school and charts as far as the transfers in the last five years students in large part transfers--how many transfer in and transfers out for every school. So what I consider this to be is, like I've said, the building blocks behind not just this recommendations but even other recommendations.

[Floor turned over the attorney, Rusty Gibson]

Rusty: Oh. Okay. I would think within a week, if there are any things that we find that might need to be corrected, typos or what have you, or that is incorrect, and certainly after a week from tonight, every one of you and Dr. Levey will get a copy of this—we will be providing you a copy of that--we just want to be sure that it's correct. Kelley is an engineer, architect, lawyer, Georgia Tech alum. And um, well-qualified from the [inaudible] on the planning. We also have another guy who lives here in Tuscaloosa who is also competent with that--with that ambition and with that skill and that's Bill Snowden. And he has graciously agreed to come tonight. We've been talking with him, meeting with him, living with the benefit from his talks, his data, and his planning department. Kelly made a comment to me yesterday—which, of course since last May they had started communicating and sending data by computer of the mapping of the city of Tuscaloosa—that Tuscaloosa has an extraordinarily high level of competence in that area. And it sure has helped that Bill—has worked through his office had [inaudible] . So they talked the Georgia Tech talk--and I just sit down. And Bill, I'd love for you to give some comments, because this information on what areas are GROWING—we've seen from Bill. Kelley's information—he has seen from our computer data base—and every dot is a student who lives in—wherever they live—some outside of the city, but who go to our school system. So, we know where the children are and where they live and we can pull up a name for every dot on that map. [points to the 3 maps on the opposite wall] And interestingly, every child that's attending a school or who has shown as a transfer or what have you--we can pull up their name and address and find out who they are and determine, are they really an employee's child—or special education, or No Child Left Behind, or Katrina. It is HIGHLY good information. But that just shows who's living in a house that's now built. And THIS [points to the projected land development map] we got from Bill Snowden, and Bill won't you—because--this is who's coming, I guess you could say--of our soon to be neighbors. Bill?

Bill Snowden: Thanks Rusty. I'm so glad to be here. And I'll begin by telling you a story about Kelly. He was in my office right here and ah Rusty had just brought him over and he sat in the chair and he just kept on looking at my hall of fame wall and -- [inaudible] he saw my diploma on the wall. And he says ah, "Did you go to Tech?" I said "Yeah." "When did you get out?" "76." "74-76"? "Mm hmm." "You see, that's the time I was there." The distinction is that only 20% at that time got out of that

computer programming—eighty percent didn't make it. But nobody made it through in two years—it took three years--but Kelly did that. It took me two and half to get out.

So, what I wanted to do was go over some of the areas we are presently going to consider. And this map over here is—if you all can see it—with all different colors. I just want to go over it with you very briefly. It's a detailed specific plan that we have for the city of Tuscaloosa. Then we'll go to the big map and show you the one large, comprehensive, city-wide plan that we're working on.

But this McFarland and 15<sup>th</sup> Street right there—[moves over to maps]. Right there, that's [Rusty—“Let me move this over so that more of you can see it.” Adjusts map towards board members.] Again, this was the part of the Neighborhood Plan that was adopted in 2003 as a result of that \$125,000 million dollar Midtown settlement that we had in frozen grant money. But about that same time the University was undertaking their master plan. I went over to see Dr. Witt and I figured that, you know, if you're going to grow this university by about 8,000 people why don't we plan for the area around there? Jimmy Powers was very involved in what led up to this—of the surrounding area around—called the University area. So we proposed zoning changes—requirements in that area that were—you know, we wanted to accommodate the kids—for 8,000 more kids. And we expected there would be shortages within the same neighborhoods that were in there—okay? All of that we took back to the council to explain the growth for 2005 and so far, well, it seems to be working.

At the same time--three things that we began to plan for [inaudible] at that side of the city. That big purple area right there is a hundred million dollar urban renewal area. That was going on about the same time these things with the Park Place and the University area. At the same—about six months later we started working on West Tuscaloosa and Alberta—Alberta being blue and West Tuscaloosa being green. And December the 5<sup>th</sup> at the MacDonald Hughes Center we're going to make our final presentation with Tuscaloosa. And about a month later we'll be making our final presentation on the Alberta plan. So we go back and four areas of the city are basically planned. One thing—that area here is known as the greater down town. Here we go to MLK on the west up to the river on the north down to 15<sup>th</sup> Street for these. ALL of these plans are input. And I think, in addition to the growth that Kelley was talking about that we're going to have a northern part of the river—north of the river and the southeast portion of Tuscaloosa pictured on this map. We're also going to have a lot of growth in the south end of Tuscaloosa. That's--the orange right there is a fifty million dollar project and [inaudible]. And down there we have already planned are the revitalizations [inaudible] and more details along Stillman Boulevard coming in along Stillman Boulevard. We're in the process of getting rid of junk yards along the roads and there is a prospect for good commercial development—we're going to designate the downtown Mallisham Parkway as an industrial corridor. I think, and the more I am seeing it is that we're getting more applications in this area right now [close to road past B.F. Goodrich] for planning and development for more single family residential houses, so you're going to see growth there. You're going to see growth around the down town area and over on the university area. And I'm not just talking about school kids. I'm talking about

condominiums that going on up over on Greensboro and Bryant and Millwood (?). Probably numerous residential development—we call the twin towers is going up on 4<sup>th</sup> Street between 21<sup>st</sup> and 23<sup>rd</sup>. And a few of those—you've got a few thousand--in the last few years we've had 2,000 condominium conversions in the city. We've had twelve hundred multi-family down here and we've had 1250 single families on here for reconstruction at that south end—this area.

But one additional point that I wanted to make is that I think, you know, we're about to finish up—for the first time since 1972—1973. You know, Walt would say—ah, Mayor Maddox would say, “How have things been going?” I would say, “I've only been married for two years.” That's a long time for a city to—you know--the home of The University of Alabama not have a comprehensive plan. BUT—we're having the steering committee meeting on the future plans that will encompass all the area. What you see there—in addition to the three mile area outside of the city. And each section is what the Planning Commission has on these various [inaudible]--all of the development in the city of Tuscaloosa in addition to it's marriage with the University of Alabama and that's part and parcel with part of this for the Board to incorporate into that. And I will do everything—everything to make sure that that people understand and it will probably about sometime in February--incorporate everything you plan to do with the growth of the students. As you all know, the driving force is—is the school system. And again, I want to emphasize the growth in the downtown, and I want to say the growth of West Tuscaloosa, also the growth of Forrest Lake and the growth that's around this area here. [inaudible] So let's put this--if you will--

Questions are asked by board members about the plans and growth, but voices were too far away to pick up on the audio tape.

Powell: Questions the number of families who have elementary aged children that could afford to buy an expensive house in the new development areas of North and East. Would this justify a new elementary school in that area before they even know the number of children who would live there?

Presenters questioned this as a problem.

Powell: Asked about enrollment vs. capacity of school buildings. It looked like the capacity of the schools could still handle the some 350 student increase projected in the demographic study. She also wanted a breakdown for the 3 levels—what those increases would that mean for elementary, middle and high school enrollment levels.

Carey: Was upset at this comment. He pointed out that the city planner's map indicated that there would be other growth because of the land development and that the board would be wise to pay attention to the outside context. He insisted that most school districts do not have the luxury of working with a city planner receiving this type of information that points to expected growth in the city. He also indicated it was not wise to wait for the increased population before buying land and building a school.

There was then talk back and forth about how enrollment numbers are arrived at—the 40 day attendance averages for each school. Members were directed back to the numbers projections. Meisner and others recognized that the building capacity for the old Central west building had been used, which skewed the high school capacity up.

Powell went back to if we only expect 350 more, there is adequate space to accommodate them and therefore no need to build any schools over the next 5 years. She will make the point that we need to concentrate on the quality of the education taking place WITHIN the schools, not just building new schools.

Carey: Frustrated, responds by saying that this is at the heart of what comprehensive planning is—the board now knows the growth for the city and can act accordingly in its five year plan. This was why they are listening to what the city planner says is not only in the immediate future, but coming down the pipeline as well.

Powell: Disagrees and expresses doubt since many buildings are not being used to capacity.

Carey: Told her not to let buildings get in the way—that they needed to look at the in and out migrations.

Powell asked about the use of zip codes—had they thought to use them to arrive at the numbers of live births in each area?

Carey: Zip codes are not used.

Powell asked if the numbers of live births could be calculated for to see what percentage end up at a school.

Carey: They do not use the small numbers of the schools but the overall numbers of the system (?). Carey said they look at how many are born and remain, they may not be the same people, but they look at the percentage of retention in general. The data is trended forward. They use a trend fraction over the five years. Historically, they go back and retrack the percentage that are born and stay. Census data for the city has not changed much, but people in the city have moved and that migration has been to the north and east of the city. What his demographic study does is to give a pulse of what happens. [Carey then stood and gestured to give his points] They are marrying these projections with city planning. He charges, “Don’t be insular as a district, oblivious” to the changes the city already is indicating will happen. Insists that they consider the city planner’s information in the growth they may expect for schools.

Ninette Cannon expressed concern for her neighborhoods in district 7. There are many houses that have been sold to landlords and now have many students living in them. She said that from complaints city police came over and found that 6 houses were in violation of the regulation that only 2 unrelated people can reside in the same household. There was mention of the housing values for surrounding single families, and concern about the

construction of apartments as opposed to homes owned by people. Also, she asked if there will be any new school in the future in that area. This brought out a clarification that the planners use the term “units” to indicate apartments and “lots” to indicate houses.

Tulane Duke asked about zoning so that more students live around their school rather than transporting students.

Carey: Responded that they needed to get past the idea of neighborhood schools, as in reality the school enrollments were generally comprised 3, 4, or 5 neighborhoods. Suggests the superintendent, planning staff, and board members use the data to put together 5, 8, 10, 12 options to out to the community to discuss. After community meetings, they could come up with some recommendations, which they could put out by February for a response.

Powell: Refers to page 37 and asks if it would not be wiser to build a middle school in the north rather than an elementary school.

Mr. Gibson: Suggests they get some talking points now with some broad level alternatives. I think he suggests Darryl Meyers as a good resource person to do this, as he is part of the city planning team.

Several recommend that they put together talking points and then organize community meetings like they did the last time. The time frame suggested was that meetings be held at each high school in March.