

DOCUMENT RESUME

ED 263 266

UD 024 539

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TITLE Politics and Expertise in an Emerging Postindustrial Community: Montgomery County, Maryland's Search for Quality Integrated Education.
PUB DATE Nov 85
NOTE 55p.; Presented at the Annual Meeting of the Southern Political Science Association (Nashville, TN, November 6-9, 1985).
PUB TYPE Reports - Research/Technical (143) -- Speeches/Conference Papers (150)

EDRS PRICE MF01/PC03 Plus Postage.
DESCRIPTORS Black Influences; *Board of Education Role; Community Influence; *Educational Policy; *Participative Decision Making; *Policy Formation; Politics of Education; *School Community Relationship; *School Desegregation
IDENTIFIERS *Maryland (Montgomery County)

ABSTRACT

The development, implementation, and modification of the Montgomery County (Maryland) Public Schools' Quality Education/Racial Balance Policy of 1975 provides the case example of how experts and the specialized knowledge they employ are part of the educational politics of a postindustrial community. In the existing literature, there are competing perspectives about the relationship between knowledge and power in the policymaking process. One view holds that in contemporary society experts dominate. An opposing formulation contends that politicians control. In Montgomery County, a growing confluence of politics and expertise was observed: policymakers and experts are becoming more interdependent. The county voluntarily terminated its dual public school system following the Supreme Court's Brown decisions, but by the late 1960s, dramatic social changes occurred. As the population became increasingly heterogeneous, many down-county schools experienced growing concentrations of black students, resulting in community conflict and interracial tension. The school system and county residents sought to devise an integration policy to reverse this pattern, resolve the conflict, and ease the tension. The county's integration policy and its implementation resulted from a convergence of politics and expertise as the county's affluent and highly educated civic activists interacted with educational specialists, legal experts, and the school board. From its inception, the policy has been surrounded by conflict, including ideological shifts on the school board and community discontent. The interrelationship between politics and expertise fits no simple pattern, but policymakers and community groups clearly assume that experts and their knowledge are essential to educational policymaking. (Author/KH)

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POLITICS AND EXPERTISE IN AN EMERGING POSTINDUSTRIAL COMMUNITY:
MONTGOMERY COUNTY, MARYLAND'S SEARCH FOR QUALITY
INTEGRATED EDUCATION

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Prepared for presentation at the 1985 Annual Meeting of the
Southern Political Science Association, The Opryland
Hotel, Nashville, Tennessee, November 6-9, 1985

UD 024539

ABSTRACT

This is a study of the roles that experts and formal knowledge play in the educational policymaking process of the emerging postindustrial community of Montgomery County, Maryland. It investigates the interrelationship between politicians and specialists in education. The central question is how elected officials and educational experts relate to one another. Do politicians dominate, do experts dominate, or is there another way of describing their interaction in the policy process? A parallel question deals with specialized knowledge itself -- the knowledge of the expert. It is woven into the way the community expresses its concerns and takes part in the education politics of the community.

The development, implementation, and modification of the Montgomery County Public Schools' Quality Education/Racial Balance Policy of 1975 provides the case example of how experts and the specialized knowledge they employ are part of the educational politics of a postindustrial community.

In the existing literature, there are competing perspectives about the relationship between knowledge and power in the policymaking process. One view holds that in contemporary society experts dominate. An opposing formulation contends that politicians control. The present study suggests a growing confluence of politics and expertise, as policymakers and experts are becoming more interdependent.

The county voluntarily terminated its dual public school system following the Supreme Court's Brown decisions, but by the late 1960s, dramatic social changes occurred. As the population became increasingly heterogeneous, many down-county schools experienced growing concentrations of black students, resulting in community conflict and interracial tension. The school system and county residents sought to devise an integration policy to reverse this pattern, resolve the conflict, and ease the tension.

The county's integration policy and its implementation resulted from a convergence of politics and expertise as the county's affluent and highly educated civic activists interacted with educational specialists, legal experts, and the school board. From its inception, the policy has been surrounded by conflict, including ideological shifts on the school board and community discontent. The interrelationship between politics and expertise fits no simple pattern, but policymakers and community groups clearly assume that experts and their knowledge are essential to educational policymaking.

Introduction

Following the Supreme Court's epic 1954 Brown decision, the nation undertook (often in an uneven fashion) the arduous task of implementing what would become a complex policy agenda of providing equal educational opportunity for all Americans. Notably, the term "desegregation" initially referred to the elimination of dual public school systems--one system for white children and a separate one for black children--an historic legally-imposed practice. In many southern localities, black children were bused to schools far from their neighborhoods, past nearby schools, because of racial discrimination. From its original meaning, however, the term desegregation has come to mean the elimination of any racial imbalance within a jurisdiction's public schools. Interestingly, many black and white children now are being bused to schools located far away from their homes to cure racially imbalanced schools. Thus, desegregation was transformed into integration and more recently into racial balance.

The research and opinion of experts have played an important role in this terminological and policy transformation. The Coleman Report, for example, contributed significantly to justifying the integration policy strategy of busing students to achieve racial balance in public schools. This approach was given effective legal legitimacy by the courts. While many educators, community groups, and some experts initially opposed the Coleman Report--Coleman has since repudiated the report's major findings--racial-balance busing was proclaimed the dominant solution to the complex problem of big-city public school segregation. In view of the emphasis that has been placed on measures designed to achieve a certain quantitative racial mixture of students in public schools, the fact that the Brown litigation was concerned with education seems to have been forgotten.

In recent years, opposing views of educational policy experts have reached center stage as difficulties persist in efforts to achieve quality education and equal educational opportunity for all Americans. The clash of policy preferences progressively has sharpened and appears to be characterized by greater ideological rigidity. That is, liberal experts tend to advocate racial-balance busing, and conservative experts tend to emphasize quality education. In the midst of this national debate among educational policy experts, and often under court orders, local school jurisdictions have sought effective measures to achieve quality integrated education.

Montgomery County is a good example of the importance of schools and the significance of education politics in the modern era. It is one of the early counties in Maryland to move to an elected school board; it has a high level of community participation; and it possesses an especially active PTA among other groups. The level of political interest in education in the county is very high; it is one of the first jurisdiction in which a political action committee was organized to elect school board members.

Montgomery County is an affluent suburban locality, residing within the larger Washington, D.C. metropolitan area. The county has the nation's highest proportion of professional, managerial, and technical personnel; well over half of its workforce is employed in white collar positions. Moreover, as an emerging employment center with a developing high-technology complex, Montgomery County has a claim in being a prototypical emerging postindustrial community. The region also is characterized by having the highest percentage of college graduates of any major metropolitan locale in the nation. The county has a political history of supporting liberal issues, policymakers, and social policies. It is further distinguished by its politically active residents.

As a county in which formal knowledge is widely diffused among its residents, there is a general assumption that experts and their knowledge are essential to enhancing the educational policy process. Nevertheless, the county's highly educated and politically sophisticated residents seriously guard their right to participate actively in the policy process. Citizens of Montgomery County, therefore, are not overwhelmed or intimidated by educational policy experts within the school bureaucracy. Rather, county residents use their own expertise or employ their educational specialists to counter the school system's experts.

The purpose of this case analysis is to examine the roles of experts and their knowledge in the public school policymaking process in Montgomery County, Maryland. The focus is on the interaction among educational specialists, elected officials, and community groups in regard to the development, implementation, and modification of the 1975 Quality Education/Racial Balance Policy. Primary data sources for the study include school system memoranda, official reports, and documents dealing with desegregation planning and implementation. The actions of community members and organizations are examined. A further step in the process includes interviews with former and present school board members, relevant administrators, and selected citizens involved in the desegregation process and the establishment of the Quality Education/Racial Balance Policy. Secondary sources include newspaper reports, monographs, dissertations, and other written reports about public school policy in Montgomery County, Maryland, and neighboring jurisdictions.

THE THEORETICAL CONTEXT: POLITICS, EXPERTISE, AND POLICY

The theoretical issue which underlies this paper has to do with the nature of the relationship between elected officials and educational experts in the educational policymaking process of an emerging postindustrial community. Do--so the question goes--experts and their knowledge dominate the policy process, or do elected officials control? Like most theoretical issues of some importance, this one is unlikely to fall neatly into such a simple dichotomous proposition, but it will help if we treat it as such for the time being.

In the existing literature, there are competing perspectives about the interaction between knowledge and power in the policymaking process. One view argues that in the evolving postindustrial order, knowledge, especially expert knowledge, dominates the policy process. This perspective can be summarized in terms of several key propositions:

1. Knowledge in postindustrial societies is an instrument of political power.
2. Social complexity and rapid rates of change have the effect of making existing forms of knowledge and information obsolete--particularly practical experience, common sense, or intuitive judgment.
3. The problems of postindustrial society require specialized knowledge and information. This establishes the primary role of experts.
4. The problems of postindustrial society are increasingly amenable to solution through the application of specialized knowledge and technical expertise.
5. Because of the technical complexity of most policy decisions, experts are increasingly brought into the policymaking process to provide specialized information and technical advice.
6. The political power of experts increases due to this special role. Politicians, because they depend on experts for knowledge and specialized information, witness an erosion of political power.
7. In the emerging postindustrial order, policy experts are agents of change and responsible for societal management.
8. Policy experts dominate the policy process because they monopolize knowledge necessary for making difficult technical choices¹ that are inherent in contemporary complex public policy issues.

An opposing formulation of the social roles of expert knowledge and policy professionals contends that they do not dominate the policymaking process. Rather, this view argues that the social roles of expertise and policy specialists are limited to the symbolic ratification of politicians' decisions. This perspective can be summarized in terms of the following major propositions:

1. The primary social role of experts is to legitimize policy decisions made by the real power holders.
2. Major policy alternatives pose value choices that are inherently conflictual.

3. Value disparities reflect the balance of power within the political system.
4. After the decision is made, policymakers often look for ways to legitimize their decisions. Technical explanations and justifications serve to diffuse conflict.
5. The image of the expert who is "above politics" is a useful legitimizing tool. Moreover, since they are expendable, experts serve as convenient scapegoats for policies that have failed.

While both sets of propositions appear reasonable and persuasive, they both suggest that the expert-politician nexus is an all-or-none situation in which either experts or politicians rule. It may not be that these propositions, taken separately, are necessarily incorrect; rather, it may be that they incompletely portray the complex character of the interrelationship between expertise and politics in the policy process.

In light of these apparent disparities, this study suggests the possibility of an alternative perspective regarding the roles of formal knowledge and the connection between elected officials and professional experts. It is possible that the policy process in contemporary society is a complicated one characterized by the convergence of knowledge and power. Hence, the major theoretical problem this paper seeks to deal with is whether there is a convergence of politics and expertise in the contemporary policymaking process.

To pursue this question, the present paper seeks to describe and analyze the role of policy-relevant knowledge in the process of public school decision-making in Montgomery County, Maryland. Additionally, since the literature on postindustrial development suggests the growing importance of professional experts in the policy process, this paper investigates the interrelationship between policymakers and policy experts and seeks to determine the grounds on which they interact with one another. In the case of Montgomery County, the focus is on the interrelationship between the school board and the central administration, and particularly the way in which educational administrators introduce professional research and ideas into policy deliberations. Finally, this paper examines the role of specialized knowledge with respect to local community concerns and assesses popular responses to and uses of policy-relevant knowledge. In particular, these issues are examined with regard to the development, implementation, and modification of the Montgomery County Public Schools' Quality Education/Racial Balance Policy of 1975. The approach is that of a case narrative.

Terminating a Dual School System

The circumstances surrounding the development and implementation of the Montgomery County Public Schools' Quality Education/Racial Balance Policy of 1975 are better understood if located within the historical context of ending the county's dual school system two decades earlier. On the eve of the Supreme Court's 1954 landmark decision in Brown v. Board of Education,³ the Montgomery County Public Schools consisted of two separate school systems, one for black students and one for white students, under the direction of one board of education.⁴ The county constructed no schools for its black residents until 1876, when the board of education "appropriated \$600 to build a black school in Rockville, and \$300 for one in Colesville."⁵

The initial desegregation process of the Montgomery County Public Schools transpired within the context of extensive discussion and planning, which included state officials, local public school authorities, and Montgomery County residents. Immediately following the 1954 Brown opinion (Brown I), and on the advice of the Maryland Attorney General, the Maryland State Board of Education issued a statement indicating its intent to follow the Supreme Court's mandate.⁶

The State Board of Education pointed out to local school districts that the initial Brown decision, in which the court set forth its fundamental opinion with respect to the illegality of school segregation, would be followed by a subsequent decision that would indicate actual implementation procedures. It was the view of the State Attorney General that Brown I was a court opinion and that the next decision was to be a court order. Therefore, Maryland law permitting racial segregation in the public schools was still considered to be in effect. The State Board, however, stressed the point that its cautious attitude toward instantly terminating school segregation did not "imply that the State Board of Education and the local school authorities, upon whom the major burden of solving the problem will fall, should delay in analyzing the situation and making plans for implementing the decision of the court." The State Board of Education stated that its own role in the desegregation process was

...not to set the detailed pattern of operation but to take an official position that the decision will be implemented with fairness and justice to all, and with due regard for the professional aspects of the program. ... [I]ts responsibility is to act in a general over-all supervisory nature to insure that⁸ standard, equitable practices are followed throughout the state.

Significantly, the State Board of Education acknowledged that the actual implementation of the Supreme Court's decision with respect to the detailed problems of school desegregation would be carried out by local school authorities. Hence, it was generally recognized that the programmatic requirements for desegregation would have to be adapted to the diverse jurisdictions within the state and that this reality necessitated the greatest degree of local school system and community initiative for the application of effective methods that were based on an understanding of these particularities.

Following the issuance of the State Board of Education's directive on desegregation, Dr. Thomas G. Pullen, Jr., State Superintendent of Schools, appointed a committee of superintendents. The committee's primary tasks were to work closely with the State Department of Education and the State Attorney General's Office in collecting data for use in preparing Maryland's brief to the Supreme Court and to develop a broad general statement of guiding principles for implementing the Brown decision.

The committee of superintendents made several recommendations. First, acceding to the Supreme Court's Brown I decision, the committee suggested the gradual implementation of public school desegregation procedures. Second, the committee advised the State Attorney General of the primacy of gradualism in filing its amicus curiae brief before the Supreme Court, which was to announce desegregation guidelines in its Brown II order. Third, in acknowledging local school board autonomy in managing local school activities, the committee recommended that the Supreme Court and the State Board of Education avoid specifying the details of desegregation implementation policies and procedures to be followed by local school jurisdictions. Finally, the committee recommended that local boards of education appoint citizens' advisory committees consisting of black and white members, establishing a link in the desegregation process between local school systems and local residents. Significantly, then, the experts made no claim of an exclusive right to provide solutions to the problem of racial integration.

It deserves notice that while the Supreme Court in Brown I clearly ruled against segregated public schools, the Maryland State Attorney General advised local jurisdictions that until the court handed down its guidelines for implementing desegregation (Brown II), Maryland law still sanctioned public school segregation based on race.

The Montgomery County Board of Education's response to the Supreme Court's Brown I decision against racially segregated public schools was largely shaped by the nature of the decision itself and by the advice of the Maryland Attorney General to the State Board of Education. That is, as noted above, Brown I was considered preliminary and the principle of gradualism would dictate desegregation strategy and implementation.

Immediately following the Supreme Court's Brown I opinion, Dr. Forbes H. Norris, Superintendent of the Montgomery County Public Schools, sent to the county board of education a statement dealing with the implications of desegregation for the county school system's capital budget. Additionally, Norris recommended revisions in the¹⁰ budget and strategies for initiating the desegregation process in Montgomery County.

The board responded by presenting to the county council a revised capital budget which stressed careful planning for housing students in a desegregated school system. Prompted both by the recommendation of state authorities and by the demands of county residents, the board also established an interracial Advisory Committee on Integration that was composed of Montgomery County Public Schools staff members and county residents.

In the meantime, other county voices spoke to the issue of public school desegregation. The Executive Committee of the Montgomery County Council of Parent-Teacher Associations advocated the desegregation of all county public schools, commencing with the 1955 fall term. After reviewing scholarly literature, the committee found that "...integration worked most smoothly and with least disturbance when it was effected completely, quickly and without undue delay, whereas, piecemeal integration led to confusion and uncertainty." In regard to desegregation policy development and implementation, the committee found that "...a clear cut policy, administered with understanding but also with resolution, seems to have been most effective in accomplishing desegregation with minimum of difficulty. Long-drawn-out efforts and fluctuating policies appear to have maximized confusion and resistance."¹² It also is significant that from the beginning, community groups felt fully entitled to take an active part in this issue, but in doing so, they were careful to equip themselves with expert knowledge or social research and to recommend a course of action they deemed in line with expert opinion.

In contrast and reflecting the advice of the State Attorney General to the State Board of Education following the Brown I opinion, Montgomery County's Advisory Committee on Integration recommended a gradual approach to school desegregation. The committee suggested that all county schools, starting at the kindergarten and first grade levels, were to be progressively desegregated on a year-to-year basis by adding a grade each year. In essence, this approach would take twelve years to accomplish.¹³ To be noted is that the school integration issue involves two different bodies of knowledge--social science knowledge about the integration experience itself and legal knowledge about what is permissible and what is constitutionally required.

Dissenting members of the Advisory Committee on Integration issued a minority report that was critical of recommendations of both the Executive Committee of the PTA Council and the Advisory Committee on Integration. The dissenter considered the one-year desegregation strategy unreasonable and unworkable. Moreover, they called the twelve-year gradual implementation period unacceptable because segregated schools would be maintained in the county. In their review of desegregation implementation practices in other localities, the dissenters found no evidence of implementing such a gradual approach. Moreover, they noticed that extended desegregation measures and shifting policies resulted in turmoil and discontent. Hence, the Advisory Committee on Integration's dissenting members recommended a desegregation timetable of three years,¹⁴ and they accompanied their recommendations with references to the integration experience of other areas.

After receiving numerous reports and correspondences from state officials, the Montgomery County Public Schools superintendent, and various citizen groups, the Montgomery County Board of Education unanimously adopted a "Statement of Policy on Integration," which set forth guiding principles in the desegregation programs for the county's public schools.¹⁵ The board acknowledged the primacy of the Supreme Court's decision in Brown I and indicated that it was conducting a study and analysis of the problems attendant to the desegregation process. Again, it is noteworthy that the board felt obligated to initiate a formal analysis of the problem. The board did not put forward a timetable for initiating or achieving desegregation, pointing out that this effort would have to await the Supreme Court's Brown II implementation order and the legal approval by the State Attorney General.

While the board would not proceed with implementing school desegregation until after Brown II, it continued to prepare plans and strategies for that purpose. One month before the Supreme Court issued its Brown II order, the Montgomery County Board of Education adopted its first resolutions which detailed the initial desegregation strategies to be implemented. These involved closing four black elementary schools, desegregating three down-county high schools, and merging Carver Junior College and Montgomery Junior College.¹⁶

Following the Supreme Court's Brown II ruling on May 30, 1955,¹⁷ Montgomery County began immediately to desegregate its public schools, utilizing the guidelines set forth in the board's resolutions as the desegregation plan for the 1955-1956 school year. State Superintendent Thomas Pullen reinforced these initiatives when he issued a statement to all Maryland superintendents pointing out that the State Attorney General acknowledged that the Brown II ruling declared racial discrimination in public education unconstitutional and, therefore, that all Maryland laws requiring segregated public schools were unconstitutional and abolished.¹⁸

Montgomery County's school desegregation design was a gradual one, but it was not an even and uneventful process. Since the guidelines specified closing only

black schools, which thus precluded white students from attending them, desegregation in effect was a one-way procedure. Moreover, black administrators and supervisors in the formerly segregated black schools initially were not reassigned to desegregated schools during the 1955-1956 school term. Additionally, Carver Junior College and Montgomery Junior College were not merged during this year. Indeed, near the end of the school year, Dr. Parlett Moore, Dean of Carver Junior College and Principal of Carver High School, resigned¹⁹ to accept the position of president at Coppin State College in Baltimore, Maryland.

By the beginning of the 1956-1957 term, the second year of desegregation, Montgomery County enrollment figures portrayed the changing racial composition of the schools. Out of a total of 2,031 black students enrolled in the Montgomery County Public Schools, 452 pupils or 22 percent attended desegregated elementary schools. Another 234 black students or 22 percent were enrolled in desegregated secondary schools. For the 1956-1957 school year, an additional 225 black elementary students and 150 black secondary students²⁰ were expected to be incorporated into the county's desegregated school system.

Montgomery County's school desegregation program faced its strongest resistance from the up-county Poolesville School community during the second year of implementation. The Poolesville PTA, school patrons, and community and outside participants expressed absolute opposition to the county's desegregation plan and demanded that school authorities reject the implementation of school desegregation in the Poolesville area. Poolesville segregationists labeled desegregation detrimental to the education and social programs at Poolesville School.²¹ It should be observed that this resistance in a small and traditional up-county neighborhood was not accompanied by social science analysis.

On September 4, 1956, the first day of school, a contingent of Poolesville parents tried to dissuade children from entering the school. Indeed, black students required police protection to enter Poolesville School. Many white parents withheld their children from school, protested vehemently at school board meetings, and picketed, demonstrated, called mass meetings, and participated in secret strategy sessions. All these efforts to thwart Poolesville School's desegregation occurred as late as December, 1956, when John Kaspar, a Tennesseean race agitator, unsuccessfully called on Poolesville residents to use violence to disrupt meetings of desegregation proponents. As the school year progressed into 1957, visible protests to school desegregation subsided, but the Poolesville disturbances clearly left an impact on the Montgomery County Public Schools. In May of that year, the school board appointed Dr. Charles Taylor Whittier the new superintendent of schools.²²

In each succeeding school year, the desegregation of the county's public schools progressed gradually until by September, 1959, approximately 53 percent of the school system's total black students were enrolled in desegregated schools. Similarly, black staff desegregation in the county schools increased to slightly more than 47 percent in the 1959-1960 school year. The desegregation process continued apace so that by the 1961-1962 school term, the Montgomery County Public Schools declared²³ all black students and teachers as participants in desegregated school settings.

The Challenge of Desegregated Education: Problem
Discovery and Policy Development

This section describes the general circumstances surrounding the development and formulation of the Montgomery County Public Schools' Quality Education/Racial Balance Policy of 1975. While the initial desegregation process of the 1950s was a response to the Brown decisions and sought to include traditional or indigenous black county residents into a single public school system for black and white students, the integration process in the 1970s responded to severe demographic shifts and the increasing demands of rapidly growing numbers of black and other non-white newcomers for educational services. Their influx into the county occurred largely as a result of the abolition of housing discrimination in Montgomery County in 1968.

As the county became more racially and culturally heterogeneous, the problem of maintaining desegregated public schools became more complex and complicated. This was the case in the late 1960s, as black and other non-white groups located heavily in specific county neighborhoods, particularly in the down-county or mature urban/suburban area near Washington, D. C. The following subsection looks briefly at the relationship between the changing nature of housing patterns and shifting trends in public school enrollment in the county during the 1960s and early 1970s. The next subsection focuses more specifically on the development and formulation of the county's school integration policy as a response to these rapidly changing circumstances.

Schooling and Housing in the 1960s and 1970s

During the 1960s, Montgomery County experienced a total population increase of approximately 65 percent. The proportion of the black population also changed. In 1950, the proportion of the county's black population was 6.4 percent, representing mostly traditional or indigenous residents. Rapid overall population growth during the next two decades lowered the percentage of black county residents while the actual numbers of black newcomers rose. Thus, in 1960, the proportion of the black population was 3.9 percent. It increased to 5.5 percent in 1970. The increase in the total population also accelerated the public school enrollment. The rise in total school enrollment went from 80,557 in 1960 to 121,449 in 1968, while the numbers of black students rose from 3,230 to 4,872 during the same period. However, the small and stable proportion of largely indigenous black students, who were dispersed within the previously all-white schools, perhaps contributed to the²⁴ maintenance of desegregated county schools during the 1950s and early 1960s.

There were some schools, of course, which reported black student enrollment of more than 25 percent. There also were several schools that reported having only one black student. These circumstances reflected the residential patterns within the school service areas following the Brown decisions against legally sanctioned dual public school systems based on race. As the county's black population increased during the late 1960s, racial discrimination in the sale of housing within Montgomery County affected the pattern of black residential location. First, housing discrimination helped to contain at low levels the proportion of black residential and school population. Secondly, this practice restricted black newcomers to traditionally black residential areas of the county's mature urban sections. This early constraint on black mobility into and within Montgomery County concentrated the black enrollment within specific schools and later became a fetter to the county's public school integration efforts in the 1970s.

The problem of racial discrimination in housing, however, became a major issue in Montgomery County during the 1960s. In 1962, a group of concerned residents formed an organization, Suburban Maryland Fair Housing, to advocate open housing and community stability in the face of social change.²⁵ By the mid-1960s, housing discrimination attracted growing public awareness as concerned citizen groups lobbied Montgomery County government officials. Moreover, it became increasingly evident that in-migrating black and other non-white groups were rapidly concentrating in the Wheaton and Takoma Park-East Silver Spring areas which abut Washington, D. C. Indeed, in response to outcries from Takoma Park-East Silver Spring residents--about overcrowding in the schools and the need for increased human services to the area because of the influx of non-English speaking children--the Montgomery County Board of Education urged the county council to pass open housing legislation.²⁶ The board also resolved to build a new school within Takoma Park which would provide both educational and community services. By August, 1968, the Montgomery Council enacted a new fair housing law following the invalidation of its 1967 open housing law by the courts. Nevertheless, the emerging pattern of constrained and concentrated black residential location, and the concomitant trend toward rapidly growing non-white school enrollment, in the Takoma Park-East Silver Spring area of Montgomery County during the 1970s made the issue of school desegregation increasingly complex and complicated.

In addition to Montgomery County's open housing law, other factors contributed to the developing trend toward greater black residential concentration in the county's mature urban/suburban area in the 1970s. Although a detailed discussion is beyond the scope and limitations of this paper, events in the District of Columbia resulted in a substantial "black flight" from that city into Montgomery County, and into neighboring Prince George's County as well. First, the Washington, D. C. riot, following Dr. Martin Luther King's assassination on April 4, 1968, resulted in the dislocation and relocation of large numbers of the District's black residents. Second, and directly related to this study, is the spillover effect resulting from disillusionment of many black Washingtonians who had participated in or observed the struggle against the District schools' track system and the decline of quality education in the 1950s and 1960s. Montgomery County's reputation for excellent public schools attracted many black newcomers from Washington, D. C. who sought²⁷ quality education for their children and improved life chances for their families.

The Complexity of Desegregated Schooling

The growth of black, Hispanic, and Asian student enrollment to nearly 60 percent at Rosemary Hills Elementary School in 1972, epitomized the pattern of changing population characteristics within a particular region of Montgomery County. Located in a middle and working class area of Silver Spring, the Rosemary Hills community also was racially and culturally diverse. Largely integrated middle to low-moderate income single family dwellings and apartment complexes comprised housing units in this community. Indeed, Rosemary Hills Elementary School had opened in 1956 as an integrated school with an integrated staff. As Table 1 shows, Rosemary Hills School enrolled 656 students in the 1965-1966 school year; black student enrollment constituted 9.8 percent. By the 1971-1972 school term, the enrollment had dropped to 434, but the proportion of black, Hispanic, and Asian students had risen to 36.9 percent, 10.4 percent, and 6.0 percent, respectively.

In 1972, upon recognizing the growing concentration of black students at Rosemary Hills Elementary School, Superintendent Homer O. Elseroad advanced a number of proposals for reorganizing the school aimed at countering this trend.

Table 1

Rosemary Hills Elementary School Enrollment
by Race, 1965-66 to 1971-72

| School Year | Total Enroll. | Black | | Hispanic | | Asian | | White | |
|----------------|------------------|-------|------|----------|------|-------|-----|-------|------|
| | | # | % | # | % | # | % | # | % |
| 1965-66* | 656 | 64 | 9.8 | | | | | | |
| 1966-67* | 579 | 71 | 12.3 | | | | | | |
| 1967-68* | 539 | 71 | 13.2 | | | | | | |
| 1968-69 | 525 | 72 | 13.7 | 48 | 9.1 | 9 | 1.7 | 396 | 75.5 |
| 1969-70 | 503 | 124 | 24.7 | 66 | 13.1 | 32 | 6.7 | 281 | 55.5 |
| 1970-71 | 490 | 145 | 29.6 | 54 | 11.0 | 30 | 6.1 | 261 | 53.3 |
| 1971-72 | 434 | 160 | 36.9 | 45 | 10.4 | 26 | 6.0 | 203 | 46.7 |

*Figures for Hispanic and Asian students were not compiled prior to 1968.

Source: Memorandum from Superintendent Homer O. Elseroad Members of the County Council, County Executive, and Community Leaders of Administrative Area 1, "Model School Plan for Rosemary Hills Elementary School," May 22, 1972, p. 2.

Included in these proposals were the adjacent closely associated elementary schools: Rock Creek Forest, Rollingwood, North Chevy Chase, Woodlin, and Woodside. These proposals to reduce the percentage of black students at Rosemary Hills involved:

1. redistricting and assigning a geographical segment of the Rosemary Hills Elementary School's service area to one of the neighboring schools so that no school would be serving a heavily black student enrollment;
2. infusing Rosemary Hills School with one or more adjacent schools whereby the primary grades would be served by one or two schools and the intermediate grades by another;
3. closing Rosemary Hills School and distributing its pupils to the four neighboring schools of North Chevy Chase, Rock Creek Forest, Woodlin, and Woodside; and
4. closing Rosemary Hills School as a standard elementary school (distributing its enrollment to adjacent schools) and converting it into a "model" school.

Of the proposals set forth, Superintendent Elseroad and his administrative planning staff favored the "model" school plan in which Rosemary Hills would be closed and then reopened as a magnet school.²⁸

In a series of public meetings both the Rosemary Hills PTA Executive Board and Rosemary Hills community activists vociferously opposed the effort to close their school, arguing that Rosemary Hills School was one of the few authentically integrated schools in Montgomery County. Additionally, opponents registered a strong desire to preserve their neighborhood school.²⁹ The major points of criticism of the superintendent's plan raised by residents included the following:

1. a feeling that the plan had been proposed without any community involvement or prior consultation, and that it was being "imposed"

- upon the community;
2. sympathy for the Rosemary Hills community in seeking to retain its neighborhood school;
 3. a one year moratorium in implementation to provide time for greater community involvement, and for developing a plan that would achieve greater community consensus; and
 4. expressions from schools to receive Rosemary Hills pupils that they had no strong objections to the plan provided that class size and the³⁰ quality of their schools' educational programs did not suffer.

To be noted is the absence of deference to the experts, and an explicit statement that the community expected the opportunity to participate in shaping policy. Amid strong community criticism and resistance, the superintendent recommended to the school board a modified plan for Rosemary Hills Elementary School.³¹ Reflecting a reliance on social research information to broaden further the rationale for recommending a plan that sought to integrate Rosemary Hills School by reducing its heavily concentrated black enrollment, Elseroad pointed out:

The Supreme Court in 1954 required the elimination of dual, segregated school systems to bring about equal educational opportunities for all persons.

Research since that time has shown that integrated educational environments can result in higher achievement, particularly for minority youngsters. This is because greater diversity in the school population widens student horizons.

The more diverse a school population, the more likely students are to be stimulated toward greater achievement. Where there is a high degree of similarity in a school population, the more likely it is that the status quo will be maintained in terms of academic stimulation...

Students from disadvantaged homes have a better chance of achieving well in school if they attend an integrated school with children representing a wide range of economic, cultural, and social backgrounds. Children from more privileged homes have the opportunity to learn from other students with different backgrounds and get richer educational experiences than if they³² go to school only with children from similarly privileged homes.

Following much public discussion and community opposition, as well as the recognition by school board members that the effectiveness and success of the Rosemary Hills plan would depend on strong community support, the superintendent withdrew the "model" school plan for Rosemary Hills School. Since some residents of the North Chevy Chase Elementary School service area expressed an interest in having a "model" school there, Superintendent Elseroad recommended the establishment of a "model" school at North Chevy Chase School.³³ The school board adopted the recommendation on June 26, 1972. On July 11, the school board acted to designate North Chevy Chase School as a "model" school beginning in September, 1972.³⁴ The board did not adopt any changes in the pattern of student assignment at Rosemary

Hills School.

In 1973, the non-white enrollment at Rosemary Hills Elementary School rose dramatically to over 70 percent. At this point the initiative was taken by a community group, and it drew upon its own source of expertise to put forward a plan of action. The school's PTA Executive Board became concerned not only with the probability of overcrowding but also with the impact of the influx into the community of a growing number of highly transient families of a lower socioeconomic class. In order to deal effectively with the special educational and social needs of pupils from these families, Rosemary Hills School requested and received additional resources from the Montgomery County Public Schools. However, persisting educational and social problems prompted the PTA Executive Board--with the aid of the NAACP's Legal and Education Defense Fund and University of Miami education expert, Dr. Gordon Foster, as chief consultant--to examine the Rosemary Hills School situation. The group then proposed that Rosemary Hills School either be paired or clustered with other Area I schools. The NAACP consultant recommended specifically that Rosemary Hills and Chevy Chase schools be clustered with Somerset or Rollingwood or both of these schools. The Rosemary Hills PTA Executive Board, utilizing a report prepared by Dr. Foster, rejected those plans and proposed the pairing of Rosemary Hills and Chevy Chase schools in 1975. According to this plan, Chevy Chase would house grades K-3 and Rosemary Hills would receive grades 4-6. Additionally, the PTA Executive Board, noting the inadequacy of singling out schools with high and rising non-white enrollment and then trying to rearrange this "racial imbalance,"³⁵ called for an over-all policy position regarding changing school enrollments.

Superintendent Elseroad indicated, after an analysis of the Rosemary Hills PTA Executive Board's report, that none of the proposals would provide a long-range solution to the complex problem of increasing non-white enrollment at Rosemary Hills School. He acknowledged that handling this problem would require the incorporation of additional schools in a larger geographical area than that envisioned in the Rosemary Hills PTA Executive Board's study. Agreeing in part with the PTA's major recommendation, Elseroad stated:

This conclusion highlights the need for a Board policy regarding desegregation. Assumptions made to analyze the Rosemary Hills study included a minority group enrollment in a school of up to 50% being acceptable and a black enrollment of up to 40% being acceptable. These are arbitrary levels and not established by policy.³⁶

The growing cultural, racial, and socioeconomic diversity of the Rosemary Hills community added to the complex nature of school desegregation there. It deserves notice that the Rosemary Hills Elementary School--located in the down-county area just beyond northwest Washington, D. C.--seemed to serve two distinct communities: (1) a group of apartment dwellers residing in the Summit Hills, Rosemary Village, Glen Ross, and Friendly Gardens developments; and (2) private home residents in the Rosemary Hills community. Apartment occupants rented their lodgings, frequently without leases, and they were far more mobile than private homeowners. Approximately 80 percent of the students at Rosemary Hills School lived in these apartments. Given the general differences in social class, length of residence, and types of educational and social needs between apartment occupants and private homeowners, a division emerged between Rosemary Hills parents as to how to deal with the continuing and increasingly complex problem of rising non-white enrollment at Rosemary Hills Elementary School.

The Rosemary Hills community initiated a series of weekend discussion and planning sessions or "charettes."³⁷ It deserves notice that the charettes' development is an example of a procedure derived from social science experts, but significantly a procedure designed to elicit community participation. In the process, community contradictions and dilemmas emerged. One faction, composed largely of non-white, working class apartment residents, advocated "community control" of Rosemary Hills Elementary School. This group also opposed any solution requiring busing children out of Rosemary Hills School. The other faction, which included mainly middle class homeowners and the Rosemary Hills PTA Executive Board, favored two-way or cross-busing between Rosemary Hills and adjacent schools.³⁸

In the county's long march toward arriving at a new desegregation policy, several series of events perhaps made a direct and significant contribution. One is the development of the county's Small Schools Policy. The complex problem of growing non-white school enrollment in the down-county areas was further complicated by the declining overall enrollment in these schools as a result of the reduction in the numbers of white students. Faced with the mounting problems of "racial imbalance" and declining total school enrollment, the board of education sought to establish a small schools policy.

In March, 1973, Superintendent Elseroad had appointed a task force to examine the declining elementary school enrollment and the increasing number of small schools (those with enrollments of 300 or less). Dr. Elseroad asked the task force to develop recommendations which could guide the school system during the coming decade in "reaching decisions and seeking community acceptance regarding the possible closing of a particular elementary school."³⁹

The task force included eight community representatives, three principals, two teachers, two area office staff members, five central office staff members, and two county government representatives. The group thus was a mixture of staff experts (7), teachers and administrators (5), community representatives (8), and non-education county officials (2). The task force completed its report in November, 1973. The role of expert knowledge was significant in the preparation of the report as the task force utilized five sources of information: (1) scholarly literature on educational program and school size, (2) data collected by the MCPS Department of Research in a community survey conducted in Areas 1 and 2 in February and March of 1973, (3) discussions with teachers and principals from Areas 1 and 4 on the issue of program quality and school size, (4) an informal survey of junior high school counselors, and (5) results of school-wide achievement tests.⁴⁰

The study included a general assessment of educational and financial matters related to school size. The report also examined measures for lowering the operating costs of small schools, conducted a simulation exercise that combined school enrollment decline under 300 to potential closure candidates resulting from increased operating costs, and recommended a process for dealing with specific small schools situations.⁴¹ The report concluded with a proposed school board policy on small schools.

The task force included in its simulation exercise socio-economic and racial balance as an important factor determining school closure decisions. In particular, this factor, which hinted at the future integration policy, set the planning guideline that:

Any consolidations should result in an acceptable socio-economic balance of students in the receiving school or schools. If racial integration has been achieved in the school whose enrollment may be transferred to another school, efforts must be made to insure a comparable situation in the

receiving school or schools. Long-range projections, while difficult to make, must be carefully considered in this important area.⁴²

Thus, the matter of racial balance was linked to the school board's policy on small schools. The issue was very complex, as then board President, Harriet Bernstein indicates:

Last spring, the Board was writing a policy to cover an equally hot issue--closing underenrolled schools--and at the same time the Rosemary Hills PTA was demanding immediate desegregation. We took no immediate action but promised that the Small Schools Policy we were drafting would provide the mechanism to address their problem. In the policy being developed, racial balance, along with eleven other criteria, would have to be taken into consideration before any school could be closed... [T]here was some grumbling from the community about our attempt to graft a desegregation policy onto a school closure policy... We were already so anxious about the upheaval we were generating in the community over school closures that we were unable to admit that another major issue had arrived. We couldn't cope with two, and the Small Schools Policy⁴³ was adopted with only subordinate mention of racial balance.

After a public hearing on the proposed policy in May, the school board adopted the Small Schools Policy and Guidelines in June, 1974: "...to maintain the quality of education in each school while not permitting substantial inequities in the allocation of resources arising from variations in school size."⁴⁴ In substantive terms, the policy established the criterion that when actual or projected enrollment drops below 300, a school would become a potential candidate for consolidation or closure.

To implement the new policy, the board of education established Area Planning Committees (APC) for Administrative Areas 1, 2, and 4. Each APC consisted of citizen and staff representation, whose task was to indicate schools or school clusters which might become subject to the Small Schools Policy. Each designated school was requested to organize a Local Evaluation Committee (LEC) that would review the preliminary work of the superintendent and APCs and then contribute to the development of specific recommendations.⁴⁵ This dual level community involvement strategy, combined with the inclusion of racial balance as a factor required for consideration with the school closure procedure, provided the opportunity for increased discussion and analysis necessary for later school board action.

A second major contribution to the development of a new public school desegregation policy was a civil rights complaint filed against the Montgomery County Public Schools. As Harriet Bernstein noted in her account, the Rosemary Hills PTA Executive Board continued to press the board of education for a policy that would deal with the "racial imbalance" problem at Rosemary Hills School. Frustrated with the board's progress in handling the increasingly paradoxical issue of non-white enrollment concentration at Rosemary Hills School, the Rosemary Hills PTA Executive Board filed a complaint with the Office for Civil Rights in the U.S. Department of Health, Education, and Welfare on November 23, 1974.⁴⁶

The complaint summarized the school's history and the Rosemary Hills community's changing residential housing trends and population characteristics. It presented data portraying changes in the total and non-white school enrollment from the school years 1965-1966 through 1974-1975. The complaint described the model school proposal that Dr. Elseroad submitted to the board of education and the negative community

response it received. The complaint criticized the Small Schools Policy as a weak response to the racial imbalance question at Rosemary Hills, pointing out that:

The only further action taken by the Board of Education to address the racial imbalance issue at Rosemary Hills was initiating a closed school policy which in effect disallows transfers from Rosemary Hills to other Montgomery County schools and vice versa, thus discouraging "white flight" from the school itself but perhaps encouraging flight from the community at large.

Finally, the PTA Executive Board chronicled its investigation and recommendations with respect to pairing Rosemary Hills School with Chevy Chase School, and indicated the school board's refusal to pass a resolution to examine the practicability of desegregating Rosemary Hills School by September, 1975. The PTA concluded that: "It is our view that the Board of Education will continue this pattern of delay and indecisiveness until it is apparent that a court action impelling them to desegregate Montgomery County Public Schools is forthcoming."⁴⁸

The Office for Civil Rights requested from Superintendent Elseroad an extensive and detailed report explaining the historical development of the changing racial composition at Rosemary Hills School, neighboring schools, and all schools in the county with a 20 percent non-white enrollment. The agency also asked for any plans the school system had for altering the growing non-white concentration in the Rosemary Hills area. Upon Dr. Elseroad's request, a staff member of the Office for Civil Rights made an on-site visit to investigate the Montgomery County Public Schools.

After a review and analysis of the pattern of rising non-white convergence in Rosemary Hills Elementary School and other county public schools, the Office for Civil Rights concluded that this trend resulted not from any deliberate effort by the school system to segregate students on the basis of race but from the county's changing population and housing patterns. Therefore, the agency acknowledged that Montgomery County was in compliance with Title VI of the Civil Rights Act of 1964. In his letter to Superintendent Elseroad, OCR Region III Director Dewey Dodds commended the school system for the school desegregation plans and the time frame for implementation.⁵⁰

A third major series of events contributing directly to the origin and development of a new public school desegregation policy in Montgomery County centered on the establishment of the Citizens Advisory Committee on Minority Relations and its issuance of a far-reaching final report on the nature of racial tension in the county's schools.⁵¹ It cannot be overemphasized that it is firm and consistent practice in Montgomery County education politics to draw extensively on community participation. Community groups are quick to insist on their right to be involved. It was natural, then, that increasing recognition of a problem would be accompanied by the appointment of community groups. Clearly, there is no pattern of technocratic dominance that is recognizable in the Montgomery County experience.

As a result of expanding racial tension and increasing numbers of racial incidents in the schools--particularly fighting between black and white students, together with mounting black student demands for programs to meet their special needs--black community leaders expressed concern about these symptoms of black student frustration with the educational system and demanded action by the Montgomery County Public Schools. On March 19, 1973, the school board responded by appointing a Citizens Advisory Committee on Minority Relations. The interracial committee was

composed of twenty-six members selected from a list of names compiled from community groups throughout Montgomery County and was representative of the citizens of the county. In addition, the director of human relations and the ombudsman/staff assistant to the board of education served as liasons between the committee and the school system.

Since this was a citizen committee with little time to conduct a thorough study, the school board provided the committee with a professional sociologist as project director. Additionally, in May, 1973, the school board negotiated a contract with a Virginia social research firm. This group served as supporting personnel for the study. Again, in line with established Montgomery County practice, community groups are expected to operate in such a way as to draw on the expertise of appropriate subject-matter professionals. While this pattern contains some potential for expert manipulation of the community as lay public, in fact, that hardly seems to be the case. To be noted is the fact that community representatives in Montgomery County are themselves highly educated, experienced in the ways of large organizations, and quite comfortable with either using or criticizing bodies of formal knowledge.

The Citizens Advisory Committee on Minority Relations' task was to investigate the nature and causes of student racial conflict and to recommend strategies for alleviating these problems. The in-depth study employed appropriate sociological research methods and data collection techniques, including computer-assisted educational literature search, Montgomery County Public Schools data banks and files, personal interviews with selected school system staff and administrative personnel, and survey questionnaires given to students and staff.

Following more than a year of investigation and analysis, the committee issued a sweeping and in-depth final report that identified some of the sources of racial difficulties in the county's schools. The report set forth far-reaching recommendations that had implications for the entire Montgomery County public school system. The report covered an array of issues, including staffing, academic grouping, vocational and career counseling, discipline, dropouts/early withdrawals, special education, black studies, guidance and counseling, black self-image, racial tension and student interaction, and extracurricular activities.

The committee's study noted the importance to black parents of county students and to the black community in general that their children complete their education with the ability to read, write, and perform mathematics effectively; be employable at a vocation if they wished; think logically; relate well to people of other races and cultures; have self-esteem; and know of the contributions of and be proud of their own race and culture as well as appreciate others. The committee pointed out that the attainment of these same qualities and achievements were significant generally to the Montgomery County Public Schools, the county, the state, and the nation. The report revealed, however, that far too small a proportion of the total number of black students completed their schooling in the county schools with these desired qualities and achievements. Charging the school bureaucracy with a strategy of avoiding recognition of these problems, the committee stated:

To date, the posture of the Montgomery County Public Schools has been to declare that everything is going well and that there are few, if any, signs of racial problems or tensions in our individual schools. To maintain this posture, middle management has had to keep the Department of Human Relations, the superintendent, and the Board of Education unaware of local pressure points; administrators have learned to disavow problems with racial undertones in an effort to preserve self-image and bureaucratic solidarity, but the problems persist.

This school system can no longer expect to solve problems of racial discrimination and racial misunderstanding by crisis measures. While schools must continue to be alert to the symptoms of racial problems, they must now also seek to understand and alleviate the causes through⁵² a positive, cooperative, constructive, and wholly involved effort.

Responding to the committee's report, the school system established six staff task forces. Each was charged with designing specific action plans to attack immediately the problems the committee identified. In December, 1974, the Montgomery County Public Schools task forces issued a⁵³ series of action plans based largely on the advisory committee's recommendations. The overall purpose of the action steps was to better the quality of education for black students and to improve race relations throughout the school system. The board and the administrative staff fully endorsed the "Black Relations Action Steps," as the recommendations were called.

The action plans, together with circumstances giving rise to the Small Schools Policy and the Rosemary Hills PTA Board's civil rights complaint, served in important ways to create the setting for the formulation of the Montgomery County Public Schools' Quality Education/Racial Balance Policy of 1975. To be observed is that expert knowledge played an important part in each of these contributors to the new policy's formulation, but the experts were not operating autonomously. Much of the initiative for action lay with community groups, and they were an integral part of each of the steps taken. Confluence rather than technocratic dominance characterized the background of the formulation of the 1975 policy.

Quality Education/Racial Balance:
The Conduct of Policy Formulation

By 1975 and faced with an assortment of mounting social and educational difficulties, Montgomery County was emerging as a growing multi-racial and multi-cultural community caught in the dynamics of racial and cultural crosscurrents. The issues of housing discrimination, increasing concentration of non-whites in down-county neighborhoods and schools, declining school enrollments, school budget contractions, down-county community demands for further school desegregation, racial turbulence between black and white students, black parental demands for quality education for their children, and the ever-present possibility of court-imposed desegregation orders all converged in a such a manner as to create enormously complex policy problems for the county's educational policymakers and residents.

It should be especially noted that members of the school board, who eventually were to establish the new integration policy in 1975, were a group of highly educated persons who had been active in civic affairs. Thomas Israel, a native of Montgomery County and holder of B.A. and M.A. degrees, was originally elected to the school board in 1968 and reelected in 1972. Before his election, Israel had gained substantial experience in school board politics by working as a precinct organizer in board elections. He also had served with an advisory group that had urged the school board to adopt a system of merit pay. Feeling that boards of education generally were becoming ineffective as a check and balance against the growing power of teachers' unions and superintendents, Israel used his extensive knowledge of education, finance, and public administration to enhance the school board's role as the educational policymaking authority in Montgomery County.

Marillyn Allen, who held a B.A. degree, also had been elected to the board on a slate with Israel in 1968. Because of a disagreement with Israel, she ran independently in 1972, and was reelected. Allen had grown up in Illinois and had

worked in public relations and lobbying. As a county resident, she had been involved with the PTA and other educational issues. She was a strong proponent of personal freedom and an opponent of any form of coercion. She championed greater public participation in educational policy development, more freedom for teachers, and student rights. She also favored greater attention to educational basics, more specialized assistance for disadvantaged and handicapped students, and greater opportunities for above-average students to advance in independent study programs. Allen upheld the right of parents to make choices about their children's educational development; this included opposition to racial-balance busing.

Harriet Bernstein had grown up in Texas. She held a B.A. degree and had worked as an art therapist with disturbed children and adults. She was elected to the board on a slate with Israel in 1972. She had a considerable interest in reading instruction and had helped establish a group that lobbied the Maryland State Board of Education to improve reading instruction in the schools. She also had been active with the PTA.

Herbert Benington held two B.A. degrees and was a former Rhodes Scholar. He had been a former science advisor to the Secretary of Defense. By 1974, he was Vice President for Washington operations of the Mitre Corp. He had grown up in Great Neck, New York. Benington had been active with the PTA and had managed the election campaign for Israel and Bernstein in 1972. In the school board election of 1974, Benington received the most votes of any candidate. He called for greater community involvement in educational policymaking and enhancing the role of task forces advising the school board.

Verna Fletcher, a native of Illinois and former elementary school teacher, possessed a deep interest in reading instruction. She held a B.A. degree. She had joined Bernstein in forming a lobbying organization to improve reading instruction. Fletcher had been an active participant in PTA and related educational activities. She was elected to the school board on a slate with Benington in 1974. Like her running mate, Fletcher championed increased citizen participation in public school decision-making.

Roscoe Nix was a native of rural Alabama and the only black member of the school board. He held a B.A. degree and worked for the Community Relations Division of the Department of Justice. He had gained extensive experience in community conflict resolution. Former Maryland Governor Spiro Agnew had appointed Nix to the Maryland Human Relations Commission, although the Governor's rightward political shift resulted in an eventual political division between them. Before coming to Montgomery County, Nix had been actively involved in community efforts to influence educational policymaking in Washington, D.C. He was elected to Montgomery County's school board in 1974.

Elizabeth Spencer, who held B.S. and M.Ed. degrees, had grown up in Kansas. She had taught high school math and later had been elected to the Ottawa, Kansas School Board in the mid-1960s. Active in Montgomery County civic affairs, Spencer became Vice President of the County Council of PTAs and also served on the Montgomery County Human Relations Commission before her election to the school board in 1974.

In sum, the members of this school board are an embodiment of the confluence thesis which forms the theoretical basis of this paper. Two members were professional educators by background; one was a professional in human relations; all held college degrees (two held advanced degrees); and all had extensive involvement in civic affairs, particularly in education. Therefore, they were not unfamiliar with or easily intimidated by professional expertise.

On March 14 and 15, 1974, the board of education, the superintendent, and selected members of his administrative staff participated in a retreat in Harpers Ferry, Virginia, to discuss the perplexing issues surrounding school desegregation in Montgomery County. Also participating were several consultants with specialized interest in school desegregation: an attorney, a university professor, and a human relations expert. Utilizing a prepared and wide-ranging agenda, the gathering discussed the rationale, process, implementation, and administration of public school desegregation in the county.⁵⁴

Then board member, Harriet Bernstein, recalled the comments and observations of each board member on the desegregation issue during the retreat.⁵⁵ Marillyn Allen suggested that black parents should have the freedom to choose whether to send their children to an all black school. Herbert Benington declared support for both neighborhood schools and desegregation, arguing that if students in predominantly black schools were learning up to expectancy, their schools should be left alone. He strongly advocated quality education. Nix commented on the advantages and disadvantages of segregation and integration. Bernstein recorded his remarks at length:

He noted that most of the black leaders in the United States have been educated in black institutions. He spoke of growing up in rural Alabama, attending segregated schools, and suggested that his background had given him a strong sense of his own blackness. His children, though, had gone to predominantly white schools in Montgomery County, and the stresses of that experience had caused his daughter to choose a black college. She was in search of her own identity, and a less complicated social life. She needed time, Roscoe said, to feel safe and nurtured in a black environment.

"Yet with all the penalties that integration has levied on black children in the last twenty years," he continued, "I still believe in desegregation, although I fear it too." As he spoke, there were painfully long pauses between sentences and beads of perspiration popped out on his upper lip. He conceded that there were two sides to the issue, and paid tribute to the agonies of blacks in a white society, but he concluded, nevertheless, that the agony should not be avoided.⁵⁶

Elizabeth Spencer supported school desegregation unequivocally. Although Verna Fletcher acknowledged that her daughter experienced positive effects from school desegregation--academic motivation, self-confidence, and competent interpersonal relations with students of different backgrounds--Fletcher chose not to take a position on the school desegregation issue until she received information from the community along with Local Evaluation Committee and Area Planning Committee reports.

Reviewing her own comments, Bernstein stated her belief that school integration was a necessary phase in the process of ultimately desegregating American society. She saw no viable alternative to achieving an integrated commonwealth. Thomas Israel, then the board's President, expressed his dislike for segregated schools but also pointed out his uneasiness about busing students to achieve racial balance. He wanted to discover an alternative to this approach.

Mrs. Bernstein recalled the somber character of the verbal exchanges among board members. Moreover, in conversation with Dr. Elseroad, she sensed in him a growing discouragement and profound weariness regarding the division in the school

board over deciding a desegregation policy for the county's public schools. As she remembered:

I had been too absorbed in the words and feelings of the last hours to even think about counting votes, but Homer [Elseroad] is a long-distance listener and had been hearing the sounds of a distant 4/3 or 5/2 split. It was so rare for him to make a personal aside to a Board member about the Board. It hit me that he must care very deeply about the issue--or perhaps he was⁵⁷ disappointed at the appearance of political cowardice on the Board.

It should be noted that in Bernstein's account there is no hint of dominance by the superintendent, but much evidence of a concern with community sentiment and community involvement. In line with the cross-national analysis, Bureaucrats and Politicians in Western Democracies by Joel Aberbach, et al., the superintendent, as professional administrator, seemed most concerned with how to make the policy workable.⁵⁸

Rather than deciding on the content and contours of a new integration policy at the Harpers Ferry retreat, the board agreed on some subsequent steps regarding the integration question. First, a conference report would be prepared and distributed to interested individuals and groups. Second, the board would seek legal counsel for advice on the school desegregation issue. Third, the administrative staff would prepare a study of the historical trends and current developments of school desegregation in Montgomery County and the board's past and present policies, priorities, and programs for maintaining and improving the quality of education and life-chances for an increasingly diverse racial, cultural, and socioeconomic student population. Fourth, the board would establish communication with the U.S. Department of Health, Education, and Welfare to assure board contribution to any study or recommendation issued by the Department.⁵⁹

The board accomplished these objectives in short order. However, Mrs. Bernstein's concerns about Superintendent Elseroad proved warranted. On the evening of March 19, four days after the Harpers Ferry meeting, Dr. Homer Elseroad called an executive session of the board of education and announced his resignation as of June 30, 1975. At a March 24, press conference, he publicly revealed his intended retirement. Although some board members expressed feelings of both frustration and esteem regarding Elseroad's administrative style, they considered him skillful, shrewd, powerful, and dedicated.⁶⁰

Following the Harpers Ferry gathering, the Montgomery County Public Schools also began the complicated and laborious process of preparing what was to become the board of education's "Policy Statement on Quality Education/Racial Balance." It is to be noted at this point that there is little evidence of antagonism between elected officials and educational specialists in this policy process. There is a division of labor--the board sets policy direction and staff work out details of specific plans. By April, the school system's central administrative staff had prepared an initial draft. It included the following key features: (1) the board of education's commitment to provide quality educational opportunity for all students; (2) an indication that racial and/or socioeconomic segregation diminishes quality education; (3) the board must "re-desegregate" some of the county schools as a result of changes in population and housing patterns; (4) school "re-desegregation" requires consideration of educational program, education as a subsystem, the heterogeneity of school enrollment, and the busing of students.⁶¹

The board had earlier retained E. Stephen Derby, of Baltimore, as attorney for desegregation. The board's legal expert on desegregation, Derby played a major

role in the school system's response to the H.E.W. Office for Civil Rights' inquiry following the Rosemary Hills PTA Executive Board complaint. Reviewing the preliminary draft of the board's policy statement on integration, Derby provided relevant legal knowledge, even in regard to the strategic use of concepts and the narrow delineation of feasible objectives. For example, he cautioned against the use of such terms as re-segregation, desegregation, or integration and suggested the term "racial imbalance." However, while Derby's role is important in the policy formulation process and while he introduces the use of the term "racial imbalance," his actions are defensive (how to defend the school board legally) and in support of a board-set policy direction. It may be that the term "racial imbalance" took on a life of its own, but this was not part of Derby's purpose.

For several months, board members, staff, and legal expert reviewed and revised the initial desegregation policy prospectus. At its June 26 meeting, the board unanimously endorsed a draft policy statement on school integration. A key feature of the draft was a policy goal of not more than 50 percent non-white enrollment in each school. Former board member Bernstein remembers the logic of the goal's development and approval. Because of their significance in formulating the policy statement, the following remarks are quoted at length.

Last night we had a spirited and honest debate in public about the policy statement. Roscoe presented a stunning concept, giving Herb credit for the idea. Our policy, he said, should set a goal that would allow no school to have more than 50% minority children. We all learn from each other, Roscoe said, and he had learned from Herb at their luncheon today that any goal other than 50% is a racist idea. Roscoe argued that H.E.W. guidelines for racial balance, which would result in an allowable minority percentage of 30 when applied to Montgomery County, rested on notions that were obsolete.

"If more than 30% minority children at a school are perceived as a threat to the white majority, then why doesn't it follow that more than 30% majority children in a black school would be perceived as a threat to the black majority?" he asked. Roscoe and Herb, coming from opposite ends of the desegregation spectrum, had agreed on a fundamental criticism of the concepts in the Brown decision. Their notion of 50/50 scratched something that had been itching all of us for some time.

The formulas that were constructed in the wake of the Brown decision may have been the only available compromise at the time, but they are nevertheless a racist remedy to a racist disease. The sliding scale of permissible black faces, adjusted according to the overall percentage of blacks in the school district, not only prickles the scalps of people who were victims of other quota systems, it also gives a vague feeling of discomfort to anyone who prefers that human problems be adjusted in a human rather than statistical way.

Roscoe suggested that our society had advanced partly because of the Brown decision, and that we were now ready to accept the notion of true equality, 50/50, and could dispense with the complicated formula that evolved from Brown. He reminded us that a Board of Education must be involved in teaching the public, and that as teachers, we must advocate an equality which declares that a half-black school is not racially imbalanced regardless of what the district-wide percentage of

blacks might be. In his graceful Southern way, Roscoe was telling us we could now live together without panic.

There was in Brown the implicit assumption that white children were a precious commodity. There was the suggestion that if you were a black child, and got to sit with white children, something wonderful would happen. White middle class speech and values would be transmitted by proximity. The beneficial rubbing-off would only happen if whites would accept it and not run away to the private schools. That required setting some limits on the number of black children that could sit next to white children.

...The harmony at last night's meeting is possible because we are still up in the stratosphere of general principles. When we get back down to schedules, criteria, and the details of educational planning, the unity will disappear again and we will be back to our ungainly stalemate. 62

While the school board debate was over general policy direction, the members were quite aware of the many policy nuances and their impact on the feelings of various groups in the community. The school board's view is not technocratic, and there is no reason to regard it as dependent on experts to be able to act.

As is customary in Montgomery County's public affairs, the board followed the adoption of the policy statement on integration by encouraging and receiving comments and recommendations from county residents. As usual also, county residents responded vigorously and comprehensively. The Area I Area Planning Committee (APC) suggested that the policy statement on integration contained wording that indicated the board's recognition that its educational decisions would affect both children and neighborhoods and also that the board would interact with other governmental agencies as appropriate. The Area I APC recommended that the policy specify a goal for minimum as well as maximum minority enrollments. 63

The Area 4 APC pointed out that the board's integration policy goal of 50 percent maximum non-white enrollment was subject to two interpretations. One was that the board saw nothing wrong with a 50/50 blend of racial and cultural backgrounds. The Area 4 APC supported this interpretation. It suggested that the policy goal also could be interpreted as a mechanism for avoiding handling possible educational difficulties in Areas 1 and 4 by lowering the number of critical schools to a minimum and continuing to use this as a device for delaying decisions and changes that should be made immediately. The Area 4 APC stated its unanimous support for 50 percent maximum non-white school enrollment. It also acknowledged that integration was a complex social as well as educational problem that deserved the board's priority consideration. 64

A report prepared for the board analyzing community responses to the preliminary integration statement indicated further the complexity of this issue. The report included community comments, such as the following:

1. Define "integrated education," to what extent does it include racial, ethnic, special education, regular educationally disadvantaged and/or other types of children? Does it include the entire county?
2. [The implication is] that the Board has prejudged that certain school with excellent programs and high minority enrollment will stay open. Is this true? If so, what are the specific criteria?

3. ...does wording [of the policy] imply that "minority children" and "educationally disadvantaged children" are one and the same or that they require similar programs?⁶⁵

The Citizens for Integrated Schools (CIS), a group composed of residents from the Chevy Chase, Rollingwood, Rock Creek Forest, Rosemary Hills, and Somerset School areas, expressed serious concern for the development of an equitable and effective desegregation plan for Rosemary Hills Schools. CIS pointed out that the local neighborhood school was deeply cherished in the Rosemary Hills cluster and, therefore, that a voluntary desegregation approach would prove inadequate. Moreover, CIS criticized the integration policy statement's silence with respect to the role of parents in the implementation process.

The Citizens for Integrated Schools put forward several recommendations with regard to the board's preliminary policy statement. First, CIS suggested that the Rosemary Hills cluster Local Evaluation Committee be asked to develop a cluster integration plan that would involve mandatory busing to integrate the cluster completely by September, 1976. Second, the policy should clearly preclude one-way integration. Third, the policy should require an enrollment in all cluster schools, established for the purpose of integration, of at least 20 percent non-white students. Fourth, the policy should call for the development of education programs that would (a) assure respect for the racial identity of each student, (b) enable students with different racial and ethnic backgrounds to cultivate relationships based on trust and mutual respect, and (c) meet the educational needs of each student. Fifth, the policy should call for parental involvement throughout the policy and program development process at all organizational levels in the school cluster. Sixth, the policy should state that supplementary educational programs would be used only in conjunction with programs involving full-time student integration.⁶⁶ As is indicated clearly, community involvement was no mere ritual. Community participants had very specific, substantive suggestions to make.

Once again, the board's attorney for integration cautioned on the strategic use of terminology in the integration statement. In fact, his suggestions hint at the origin of the final policy statement's title as well as a significant, but more subtle, mutation in developing an educational policy to handle the complexities of school integration in a multi-cultural and multi-racial community. "Desegregation" in the 1950s, which became "integration" in the 1960s, evolved into "racial balance" in the 1970s. This latter transition emerges in the observations of the board's legal expert on integration:

First, I suggest that the Board avoid use of such terms as integration, desegregation, and correction of racial isolation because these terms as used by the courts and by HEW have connotations which may not incorporate the Board's meaning. Also, they carry the connotation that a wrong has been committed which the Board has the responsibility to correct. A more accurate description...of what the Board is attempting to do is "to improve racial balance," to "address racial balance," or "to address racial disproportion."

Consequently, I would suggest that the title of the Board's statement be amended to read "Draft Statement on Racial Balance." ...I would suggest that the phrase "to foster integration" be amended to read "to improve racial balance" or "to address racial imbalance."⁶⁷

Furthermore, Attorney Derby recommended additional clarification and advice regarding the 50 percent non-white enrollment guideline:

The Board believes that, as a goal to be sought as soon as reasonably feasible, elementary schools with minority enrollments presently in excess of 50% should not exceed 50% minority group enrollment. At each...elementary school where the minority enrollment is approaching 50%, measures should be adopted to forestall minority enrollment from exceeding 50%. These goals should be interpreted as minimum goals to address those situations in which the greatest degree of racial disproportion from the countywide average exists. The Board will seek, and calls upon the APC's and LEC's to develop, feasible measures to lower further the proportion of minority students and to increase the proportion of majority students in all elementary school where minority enrollment exceeds, or is expected to exceed, approximately 31%, and to lower the proportion of majority enrollment and increase the proportion of minority enrollment in all elementary schools within the impacted areas where there is little or no minority enrollment.

Following receipt of the above and additional community and expert commentary and recommendations, the board of education met in early August to review and revise its policy statement on integration. The board made major alterations in a second draft statement which reflected substantially the legal expert's suggestions. The revised draft was entitled, "Statement on Quality Education/Racial Balance." The language regarding the 50 percent non-white enrollment guideline was expanded and clarified using fundamentally the same wording that Attorney Derby advised.

The board made other alterations. The new draft statement attempted to define the board's favored integration strategies:

The Board favors voluntary measures in any plan to improve racial imbalance, to promote more efficient and economical utilization of facilities and to improve educational programs in Montgomery County schools. "Voluntary" as it is used in the Small Schools Policy, in Board resolutions relating to the policy, and in the Statement on Quality Education/Racial Balance means voluntary choice by an individual parent for his own child as to school attendance. Voluntary measures should include provision for voluntary transfers which improve racial balance, with transportation provided.

Additionally, the board clarified the distinction between voluntary and traditional approaches to "improve racial balance." Voluntary methods would include alternative schools and supplementary educational programs. Traditional methods would include school consolidation, clustering, and pairing; boundary changes; and grade level reorganization.

At its September 4, 1975, meeting the board had before it a draft statement prepared by the staff working closely with board members Thomas Israel and Harriet Bernstein. The draft incorporated revisions made by the board in its August 4 meeting. Before adopting the policy statement, as recommended by Acting Superintendent Donald Miedema, the board distributed the new draft statement to the public and governmental agencies for their review and recommendations. The board received extensive comments from a variety of sources, including county-wide organizations, governmental agencies, PTAs, Local Evaluation Committees, and

individual county residents. In addition, the board's legal expert for integration, Derby, continued to review developments and advise the board on strategic and legal matters. The final policy position was very much a blend of expert and community opinion. Significantly, the key expert for the board was not an educational specialist, but a legal expert--concerned not with the latest social science knowledge but with the legal implications of various policy stances.

On September 30, 1975, after accepting amendments for inclusion in the draft statement the previous day, the board voted to approve the Montgomery County Public Schools policy statement, "Quality Education/Racial Balance." Harriet Bernstein recalls the evening and provides insight into the conduct of policy formulation and its future challenges in the complex policy implementation process:

The policy making chore has been long and hard because each and every word will be subject to intense scrutiny by the community. Wilder [Director, Department of School Facilities], Fisher [Director, Division of Planning], and Poore [Coordinator, Staff Team on Desegregation/Educational Alternatives] have written one revision after another, and each one has been combed by our attorney for legal snags. The amazing consensus we have achieved probably depends on the lofty nature of the statement. Staying on the level of general goals makes it possible for each of us to hold a universe of private definitions and interpretations. Common English words carry heavy emotional baggage when the subject is desegregation, and eventually we will have to define phrases such as "cultural pluralism" and "ethnic integrity." No doubt, some of our words and phrases will lead to renewed fighting when they are applied to specific desegregation plans.⁷⁰

One month later, the board unanimously approved a Supplementary Statement on Quality Education/Racial Balance. The purpose of this document was to address in more detail further issues attendant to the new integration policy statement. Included was a more precise definition of the term "minority," which had been recently agreed upon by the Office for Civil Rights, the Equal Employment Opportunity Commission, the General Accounting Office, and the Office of Management and Budget. "Minority" referred to the following categories: American Indian or Alaskan Native; Asian or Pacific Islander; Black, not of Hispanic Origin; and Hispanic. The supplementary statement also included a clarification of implementation procedures for the open transfer policy, clarification of Title I services for educationally disadvantaged students, and a summary of the legal advice that Mr. Derby provided the board in the process of approving its eventual policy statement on integration.

Racial Balancing and Busing: The Policy Implementation Process

By the mid-1970s, the nation's urban school systems were experimenting with a variety of educational and social policies and programs designed to bring about racial and cultural integration in the schools and society at large. The reforms put forward by educational policy experts and professional educators in the name of integration included transporting children from their communities and neighborhood schools to distant and unfamiliar schools and communities, establishing alternative schools, constructing school buildings without windows and classrooms without walls, instituting bilingual education programs, and changing requirements for school graduation. Some educational experts suggested voluntary integration plans, others advocated mandatory strategies, and still others called for metropolitan integration and approaches that might be either voluntary or mandatory.

Against this background of educational experimentation, Montgomery County sought to implement its own school integration plans. On October 1, 1975, the new

school superintendent, Dr. Charles Bernardo, took office. A basically liberal board of education had selected as its chief educational administrator a person of similar outlook who, they hoped, would implement a fundamentally liberal school integration policy. His task would prove complicated as a result of the operation of the county's large-scale school bureaucracy. Moreover, efforts to achieve school integration would be entangled in a community characterized by increasing racial, ethnic, and class conflict.

The organizational apparatus for planning and implementing the Quality Education/Racial Balance Policy had been established initially during Dr. Elseroad's administration. The mechanism's creation evolved further during Superintendent Bernardo's tenure. In April, 1975, Superintendent Elseroad had recommended and the board had established a Staff Team on Desegregation/Educational Alternatives. Dr. Thomas Poore, an experienced and highly regarded educational administrator (particularly in urban settings), was appointed Coordinator. His staff included two teacher specialists and a secretary. The staff team's responsibilities involved data gathering and interpretation, developing desegregation plans and strategies, communicating with county residents, and supporting other school system staff working on the integration issue. ⁷¹

In February, 1976, upon the recommendation of Superintendent Bernardo, the board created the position of Director of Quality Integrated Education whose broad responsibilities entailed overseeing the numerous activities regarding the logistical and educational program requirements necessary for implementing the board's integration decisions. Dr. Alan Dodd, a Montgomery County native and educator, was named director. His specific duties were the following:

1. to provide leadership and coordination for the Task Force on Quality Education;
2. to coordinate the Staff Team on Desegregation Alternatives;
3. to coordinate the Emergency School Assistance Act Team;
4. to maintain liason with the Interim Planning Unit in Supplementary and Alternative Education; and
5. to work closely with the Executive Staff and with area assistant superintendents in Administrative Areas 1 and 4 to meet requirements of the Small Schools and Quality Education/Racial Balance policies. ⁷²

Also in February, 1976, the board of education authorized the superintendent to submit a proposal related to quality integrated education plans to the United States Office of Education for funding in fiscal year 1977. Funding was requested under Title VII of the Emergency School Aid Act. The Quality Integrated Education Project's purpose was to enhance the quality of education for the county's children and to bring additional services and resources to assist the board's integration plans in several county schools. The proposal called for the creation of an Action Team for Quality Integrated Education that would assist the 1976-1977 integration implementation effort in twenty-one elementary schools. Special services would be provided in the areas of student, staff development, and community needs. The Office of Education approved the proposal in August, 1976. The initial staff of the Action Team included a coordinator, five teacher specialists, four aides, and one secretary. The staff later was expanded to include a multi-cultural specialist and three bilingual/English as a Second Language specialists. ⁷³ At the risk of being repetitive, it is again to be noted that expert and community

participation were blended.

In 1975, the school board established an Assessment Team on Quality Education consisting of school and central office staff, parents, and educational consultants or experts. The thirty-one member group's task was to determine the effectiveness of supplementary resource allocation in improving the educational program at four elementary schools with the highest percentage of educationally disadvantaged pupils. The team also was asked to determine the extent to which additional resources might be effective. The assessment team studied Woodside, Takoma Park, Rosemary Hills, and New Hampshire Estates elementary schools. The group concluded that the supplementary resources were effective in improving education for all the children in each of the schools and that the schools requested additional resources. The assessment team noted, however, that the effectiveness of supplementary resources required carefully chosen school personnel who were professionally qualified with good social skills.⁷⁴

If the desegregation issue set in motion school board, staff, and community discussion and analysis of measures to achieve a particular multi-racial and multi-cultural numerical mix of school children, it also gave rise to deliberations regarding the types of educational programs appropriate for promoting this mixture through mandatory and/or voluntary methods. Therefore, in 1976, Superintendent Bernardo established six staff committees whose assignment was to develop alternative educational prototypes appropriate for implementing the Quality Education/Racial Balance Policy. The committees developed five educational prototypes, which included the magnet school, the primary school, the upper elementary school, the alternative school, and the young people's learning center in the arts. A sixth paper assessed the feasibility of adopting and implementing these programs particularly in regard to school integration.⁷⁵

Following much board, staff, and community deliberation and investigation regarding the sensitive and complex issues of declining school enrollment and increasing numbers of non-white students--including comprehensive reports and suggestions from the Area Planning Committees and Local Evaluation Committees in Areas 1 and 4--Superintendent Charles Bernardo submitted to the board in January, 1976, his recommendations⁷⁶ for implementing the Small Schools and Quality Education/Racial Balance policies. The superintendent presented the recommendations in two parts:

1. The 1976-1977 Integration Plan--five options for resolving racial imbalance in Areas 1 and 4; and
2. Closure/Consolidation of Small Schools--three proposals affecting schools in Area 4.

The integration plan contained five alternatives: grade level reorganization, learning centers, community choice, cluster options, and alternative schools. The major objective of the plan was to reduce the growing proportion of non-white students in schools with more than 50 percent non-white enrollment. The options gave the board an occasion to review and approve varying methods for different combinations of schools. The integration plan included proposals for four school clusters and two school pairs. Superintendent Bernardo employed this strategy to allow the board a degree of flexibility in its decision-making task.

The Integration Plan's first option, grade level reorganization, was mandatory and contained four clusters of schools: Rosemary Hills Cluster (six schools), Woodside Cluster (four schools), New Hampshire Avenue Cluster (five schools), and

Takoma Park Cluster (four schools). Pairings of Rolling Terrace School with Oak View School and Montgomery Knolls School with Pine Crest School also were included in this option. The superintendent thought this approach had the best likelihood of meeting the board's Quality Education/Racial Balance Policy requirements and, therefore, should prove most feasible even though some amount of busing would be involved.

The learning center concept was the second proposed approach. It was designed to provide specialized instruction in certain curriculum areas. As recommended, implementing this option "would require mandatory mixing of pupils of different racial and socio-economic backgrounds for about 20% of each school week....Students would receive about 80% of their instruction in their neighborhood school and about 20% in another school where special programs would be available." This plan would involve the same clusters and pairs of schools as included in Option 1.

The third strategy, community choice, would allow each community to choose from five means of racial balancing as set forth in the Quality Education/Racial Balance Policy. The five techniques included school boundary changes, closure and consolidation, grade level reorganization, alternative schools, and learning centers. So that this approach would not be employed to delay the new policy's goals, the board would monitor any school cluster choosing the community choice option.

Fourthly, the cluster options would allow the board to treat each of the clusters or pairs of schools differently, depending on apparent needs, problems, and preparedness to work toward viable solutions to altering the concentration of non-white enrollment in certain schools. Specific techniques for racial balancing would incorporate elements of Options 1, 2, and 5.

The last option, alternative schools, necessitated a prolonged period of time for implementation due to the need for planning, development, and community participation. That is, parents and students would be encouraged to select an alternative program within a cluster of schools. It was anticipated that this option would take a year to implement.

After the superintendent presented recommendations for implementing the new integration policy, board, staff, and community debate and dialogue intensified. Early in its discussion, the board voted to eliminate the community choice option. At no point is there an indication that school board members blindly follow the superintendent's recommendations, even when the superintendent is regarded as ideologically trustworthy, which is the case here. The installation of school cluster (Rosemary Hills, Takoma Park, Woodside, and New Hampshire Avenue) and the Montgomery Knolls-Pine Crest school pairing, as implementation strategies, proved to be anything but a smooth process.

Serious community controversy arose in response to the Rosemary Hills Cluster proposal. Upon the board's request, and after public hearings, the superintendent submitted two plans, both of which expanded the number of schools in the cluster from the earlier proposed six to eight. One plan was mandatory with a choice element. A phased-in grade level reorganization would be mandatory. As a choice element, the school system would bus students to any school in the cluster if the transfer would not overcrowd or "racially imbalance" the sending or receiving school. The other proposal was a voluntary/mandatory plan. The voluntary elements involved choice in attending the early childhood center at Rosemary Hills, choice for Rosemary Hills students in grades 3-6 to attend one of five other cluster schools, and availability of alternative schools within the cluster. The mandatory dimension obliged students at Rosemary Hills and Rock Creek Forest to leave these

schools for grades 3-6 and 5-6, respectively. The superintendent favored the first plan as the most effective strategy, and the board concurred by adopting the measure. It was projected that the non-white enrollment⁷⁸ at Rosemary Hills School would be reduced from 96 percent to 40 percent by 1977.

The affluent Chevy Chase community responded by filing an appeal in court to overturn the board's decision, complaining that the board had acted arbitrarily and unreasonably. The court rejected these allegations and concluded that the board could undertake to racially balance schools even though not legally required to do so, that the adopted reorganization busing plan did not place an undue hardship on students involved, and that the board acted within the limits of its authority and discretion. The State Board of Education agreed with the court's decision. The Circuit Court for Montgomery County denied a later Chevy Chase community appeal in August, 1976, allowing the Rosemary Hills Cluster implementation in September, 1976.⁷⁹

Superintendent Bernardo's recommendation to pair Montgomery Knolls and Pine Crest schools also caused community discontent. Grade level reorganization accompanied the pairing; Montgomery Knolls would become a primary school (grades K-3) and Pine Crest would become an intermediate school (grades 4-6). Montgomery Knolls' non-white enrollment was 42 percent, with a projection of 56 percent by 1978-1979. Pine Crest's non-white enrollment was 6 percent and was expected to rise to 9 percent in 1978-1979. Since these schools are contiguous, pairing them was expected to produce a non-white enrollment of approximately 37 percent at Montgomery Knolls and 22 percent at Pine Crest in the initial year of implementation. The strategy, then, would maintain both schools within the Quality Education/Racial Balance Policy guidelines of 50 percent non-white enrollment. The board later modified the grade level reorganization plan. To attract more students, Montgomery Knolls was given a full-time day kindergarten program along with grades 1 and 2, while Pine Crest served grades 3-6.⁸⁰

In response to these developments, the Woodmoor-Pine Crest Citizens Association appealed to the State Board of Education, claiming, significantly, that the county board of education acted against community sentiment on the issue, did not inform the community of the ongoing process, and that busing contradicted the community's tradition of neighborhood schools. The hearing examiner found in favor of the local board, stating that it had followed its policies related to racial balance and community involvement. The Montgomery Knolls-Pine Crest pairing was implemented in September, 1977.⁸¹ It is to be noted that both sides in the controversy argued that they had honored the principle of community participation, a respected county political tradition.

Setting in motion the Takoma Park Cluster was not as contentious as implementing the other racial balance strategies. Following the board's review and recommendation regarding his plan, Superintendent Bernardo subsequently presented to the board a proposal calling for the expansion of the original four school Takoma Park Cluster to include three additional schools. This plan, then, eliminated the earlier Oak View-Rolling Terrace Pairing by including them in the new expansion. The new plan called for grade level reorganization, closure/consolidation, boundary changes, and alternative schools as racial balancing measures.⁸²

The Takoma Park Cluster Evaluation Committee rejected school closure because the school in question had an established alternative program (French Immersion) which could be valuable to the cluster by encouraging voluntary student movement. The board agreed with the community. As a result of its community survey, the Takoma Park Cluster Evaluation Committee recommended that the board of education establish magnet schools along with required assistance (publicity, transportation, and

transfer procedures) to improve chances of success. After studying the cluster evaluation committee's survey and suggestions for needed educational programs, the superintendent supported the group's proposals when he recommended to the board a three-year moratorium on cluster school closures, options for location of alternative schools, and a full-day kindergarten program for the cluster. Superintendent Bernardo recommended, however, that the cluster evaluation committee's liberal transfer policy be modified to take into consideration the impact of transfers on the racial mixture of the sending and receiving schools.

In March, 1976, the school board adopted a Takoma Park Cluster plan which included alternative educational programs, school pairings, grade level reorganization, and a stipulation for busing between cluster schools. The board would monitor the enrollments during the three-year period for the cluster program, which was to be implemented at the beginning of the 1977-1978 school year. Again, there is clear evidence of the importance of community participation in the policy process.

Implementing the Woodside Cluster presented a major challenge to the board, staff, and community right from the start. A non-white enrollment projected to exceed 50 percent in the 1976-1977 school term and overcrowded conditions made Woodside Elementary School the central focus in this cluster. Extensive dialogue and debate among members of the board, staff, and community proved unsuccessful in designing plans that would result in reducing non-white enrollment at Woodside School. Area Planning Committee I prepared a series of options (grade level reorganization, magnet schools, alternative schools, a learning center, even closing Woodside School). Superintendent Bernardo also presented to the board similar recommendations. Woodside's Local Evaluation Committee rejected the suggestion to close its school, stating that Woodside School was being penalized for its high non-white enrollment. The board finally decided to close another school in the cluster and reassign its students. To alleviate overcrowding at Woodside Elementary, its fourth and fifth grade students were reassigned to another school. In the final analysis, the board did not move to relieve the high non-white enrollment at Woodside for the coming school year. Woodside eventually would be closed. The community did have a short-term effect on policymaking.

The process of installing the New Hampshire Avenue Cluster and its programs for handling the problem of high non-white enrollment at New Hampshire Estates Elementary School proved complex and complicated for the Montgomery County Public Schools. Because of the community division surrounding the superintendent's initial recommendations regarding the cluster, the board decided to take an additional year to develop a cluster plan. In the meantime, the board did take preliminary steps to reduce the high non-white enrollment in one of the cluster schools by reassigning its students to another school. As in the case of other clusters, the affected community appealed the board's action to the State Board of Education. The hearing examiner supported the county board's decision, indicating that proper policy guidelines had been followed.

At the commencement of the 1976-1977 school year, a New Hampshire Estates School task force recommended to the board three magnet educational plans. Following the results of its survey, the New Hampshire Avenue Cluster Evaluation Committee indicated the community's preference for a basic skills program. Additionally, Superintendent Bernardo proposed closing New Hampshire Estates and Brookview schools; he also suggested grade level reorganization, boundary changes, and magnet programs as techniques for reassigning students. The closure recommendation met stiff community opposition.

The complexity of the problems and the communities involved, the nature of the solutions advocated, the magnitude of community discontent, and the high regard for the New Hampshire Estates School program in the community all constituted a major challenge for the board of education. The board, following community sentiment rather than the expert's recommendation, refused to close New Hampshire Estates. In April, 1977, the board did close two other elementary schools in response to declining enrollment in the cluster. The board decided to locate Head Start to grade three at New Hampshire Estates School, labeling it a primary magnet school. Included was a stipulation for the in-transfer of white students as the means for reducing the proportion of non-white students.

Back to Basics: Ideology and Policy Modification

The implementation of the liberal board's Quality Education/Racial Balance Policy was followed by a conservative challenge to that policy. The movement to reverse the county's integration policy is best exemplified in the meteoric rise to dominance of Marian Greenblatt and the conservative coalition on the school board.

Greenblatt's emergence as a community leader began in 1975, as a backlash to the school system's actions to plan and implement its racial balance policy. Numerous members of the middle class Cresthaven community, where Greenblatt resided, criticized the policy strategy of racial balancing and busing for the New Hampshire Avenue Cluster. As Harriet Bernstein recollects:

Three of the four communities to the north, Cresthaven, Hillendale, and Jackson Road, not only reject the idea of their children being bused out. They also reject the idea of children from New Hampshire Estates being bused in. Whereas the people in Chevy Chase seem to be saying "Call me a liberal but don't bus out my child," the people in Cresthaven seem to be saying something a little more old fashioned, "Never!" The Cresthaven community has thrust up an articulate leader who champions the neighborhood school, opposes busing, and appears only half-hearted about alternative schools. The leader, Marian Greenblatt, has catalyzed sentiments in the northern part of the cluster, and those sentiments are being freely expressed at the cluster meetings of representatives from each community.

Encouraged to seek election to the school board by Joseph Barse, a Republican and an economist who also was an antibusing candidate for the board, Greenblatt, then a Ph.D. candidate at the University of Maryland, cast her 1976 campaign as a crusade to save neighborhood schools. She was a former college instructor in Virginia. The "green machine," as her campaign organization came to be nicknamed, was well financed; it also was well managed by a professional political consultant. Greenblatt won in November, but Barse lost this time out. ⁹⁰

The 1976 school board campaign also witnessed the election of two additional liberal candidates. Daryl Shaw, who held an Ed.D. degree, had been a teacher and high school principal for thirty-seven years. He retired in 1975 to run for the school board. Blair Ewing, who had run unsuccessfully in 1974, held B.A. and M.A. degrees and had done course work toward the Ph.D. degree at the University of Bonn, Germany, and the University of Chicago. He was a member of Phi Beta Kappa, a former Woodrow Wilson Fellow, and a former University of Chicago Scholar. Ewing was Director of Planning and Evaluation in the Office of Planning and Management in

the Law Enforcement Assistance Administration. He also was a former college instructor. Ewing had been active in the PTA and other educational and civic affairs.

During her first two years as board member, Greenblatt found herself a conservative minority of one. In an affluent and highly educated county that prides and guards its liberal and cosmopolitan image, the relatively unknown Greenblatt was viewed by some county residents as a mishap, an antibusing challenger mistakenly elected in a progressive community. Indeed, her particularistic interest in defending her community and neighborhood schools against the board's perceived encroachment-- and the political support she received from her constituents--appear to contradict Montgomery County's self-portrait. Greenblatt's first term, therefore, was frustrating as she was rebuffed by liberal board members in her efforts to change their policy agenda and priorities.

In the 1978 election, Montgomery County residents reelected liberal board member, Elizabeth Spencer, and chose three new members who were philosophically, although not always personally, compatible with Greenblatt. Joseph Barse, Carol Wallace, and Eleanor Zappone owed their election success to Marian Greenblatt and her husband, Mickey, their campaign manager. Barse, an economist for the U.S. Department of Agriculture, held a B.A. degree and two M.A. degrees. He was active in the local PTA and other civic activities. Carol Wallace held a B.S. degree in Special Education and had taught elementary school before coming to the county. She also was active in educational and community affairs. Eleanor Zappone held no college degree. She had been active in community affairs.

One should note, then, that the school board's conservative faction generally had strong educational credentials and some claim to expertise, even though they came from organizational backgrounds different from their liberal counterparts. Similar to the liberal board which adopted the Quality Education/Racial Balance Policy in 1975, the conservative faction of the 1978 school board also exemplifies the convergence thesis of this paper.

Greenblatt gained tremendous personal influence on the board and, along with the 1978 conservative takeover, moved swiftly to interrupt and redirect the board's policy thrust. Elected board president, she set in motion a new board agenda: oust liberal Superintendent Charles Bernardo, abolish an in-service black culture and history course for teachers and staff, and revitalize neighborhood schools. Clearly, her agenda contradicted the idea of technocratic dominance or expert hegemony. It was more nearly, in this early stage, opposition to the experts.

Immediately following the 1978 conservative victory, and with herself now ensconced as board president, Greenblatt personally informed Bernardo that the board did not intend to renew his contract for the coming school year. After a lengthy lawsuit, Bernardo was forced to resign in 1979. Under the legal agreement reached at the time of Bernardo's termination, the board was directed⁹¹ to reply in a neutral manner if approached by any possible Bernardo employer.

Greenblatt then led the board in the abolition of a mandatory Human Relations in-service course that the liberal board had established in the 1975-1976 school year as part of the implementation of the new integration policy. H.R. 18, Black Experience and Culture, required of all county teachers and staff, was designed to educate them about black American history and culture. The Montgomery County Public Schools hired a Howard University professor as a consultant to design the course content and to train⁹² teams of instructors who would then teach the course to other teachers and staff.

The course grew out of increasing complaints by non-white students and parents, particularly black students and parents, of incidents of teacher and staff insensitivity. The reasoning behind the course was that through knowledge and appreciation of the black American experience teachers and staff would better understand and be able to deal with black students.⁹³ From its inception, however, H.R. 18 was controversial, especially because it was mandatory. Greenblatt had vowed during her earlier campaign to terminate the course. Although many teachers and staff wanted the course abolished, the conservative-dominated school board's action angered the county's black community and some liberals. These groups saw Greenblatt as the leader of this move. The board's action contributed to growing tension between the board (particularly Greenblatt) and the black and liberal communities.

Marian Greenblatt carried her aggressive image and her campaign theme of "traditional education" into the 1980 school board election. Montgomery County voters awarded her 127,000 votes, placing her first in the election. County residents even bestowed on her more votes than the 125,000 they gave to Ronald Reagan's successful presidential bid. Suzanne Peyser, Greenblatt's running mate, also managed by Greenblatt's husband, placed second. Blair Ewing, Greenblatt's arch rival, also elected for a second term, came in third.⁹⁴

Greenblatt's harsh tactics and demeanor--some county observers and activists considered her even machiavellian and ruthless--often resulted in turbulent board meetings, tension among board members, and alienated community leaders. Yet, even following a break⁹⁵ with former board president Carol Wallace, which left deep and bitter feelings, Greenblatt maintained considerable influence over the board. The conservative alliance abolished the board's Minority Relations Monitoring Committee after a heated board meeting in July, 1981. For many, this action represented a culminating point in the progressively deteriorating relationship between the conservative-dominated board and the black community in Montgomery County.⁹⁶

Significantly, Greenblatt championed a return to educational fundamentals: the three Rs, board-required homework, uniform county-wide final examinations, and strict classroom discipline. Moreover, she advocated neighborhood schools and fiscal responsibility. These were attractive positions, for some parents interpreted the board's⁹⁷ integration policy as the harbinger of the decline in the quality of education. Greenblatt's crusading posture also won the support of parents and residents who disliked the idea of racial-balance busing. Hence, Greenblatt expressed the hopes and aspirations of many county parents who wanted their children to obtain the best education the county could provide.

The school board's conservative coalition, dominated by Greenblatt's often acerbic temperament and tactics, sought to usher in a reversal of the board's policy on quality integrated education. Members of the conservative faction, acting without consultation with the liberal minority, wrote a letter on official stationery to the Reagan administration seeking support for efforts to repeal the racial-balance busing policy. The board further attempted to modify the integration and transfer policies in ways that would result, many liberal activists charged, in dramatically increased concentrations of non-white students in certain down-county schools. For example, the transfer policy stipulated that transfers between schools were to be allowed unless they would unnecessarily affect the racial and socioeconomic balance at the sending and receiving schools. The conservative school board, in effect, disregarded this policy. It raised the acceptable percentage of non-white students in county schools and altered school boundaries in such a manner that

black, Hispanic, and liberal groups complained that Greenblatt and her conservative collaborators were intentionally trying to re-segregate county schools.⁹⁸

The crescendo in the school board's assault on the Quality Education/Racial Balance Policy came in November, 1981, when its conservative coalition decided to close Rosemary Hills Elementary School and change the attendance patterns at Montgomery Blair High and Eastern Intermediate schools. Located in the down-county area of Silver Spring, each of these schools contained substantial proportions of non-white students; they also symbolized the county's attempt to achieve integrated schooling. The board's actions, which rejected Superintendent Edward Andrews' original recommendations to deal with this complex issue, signaled to many county residents that the school board intended to use the strategy of school closings and attendance pattern changes to erode further the accomplishments of integrated education.

In response to the conservative-dominated board's school closing decisions, the Montgomery County American Civil Liberties Union commissioned an impact study by a Catholic University researcher. The researcher's report made the following observations:

1. that the school board did not consider racial balance as a primary screening factor when making initial determinations on school closings or other changes,
2. that the school closings fell disproportionately upon non-whites, and
3. that the board's actions increased racial isolation in the county.⁹⁹

Thus, community opposition to the board entailed an attempt to draw on expertise and build a counter case based on formal analysis.

In the case of Rosemary Hills School, the Superintendent had recommended, as an alternative to closing the school, the closure of nearby Rollingwood Elementary. Rosemary Hills was part of a cluster of schools that fed ultimately into Bethesda-Chevy Chase High School. School board attorneys had argued that closing Rosemary Hills School would improve integration by dispersing the students among several other schools. In the Montgomery Blair High situation, Superintendent Andrews had suggested a strategy that would have added students from three predominantly white elementary schools located north of the Capital Beltway (which encircles Washington, D.C.), setting in motion a reduction of the proportion of non-white students at Montgomery Blair High from 58.6 percent to 50 percent. Based on an argument set forth by the board attorney, E. Stephen Derby, the board rejected the superintendent's recommendation and removed non-white students from Montgomery Blair High without adding more white students. With respect to Eastern Intermediate School, the board's actions would have increased the proportion of non-white students from 40 percent to 62.5 percent during the 1982-1983 school year. The superintendent's plan would have allowed an increase to only 44 percent.¹⁰⁰

In June, 1982, at the initiative of community groups, well-armed with technical analyses of county board actions and their consequences, the Maryland Board of Education took the unprecedented action of unanimously voting to invalidate the Montgomery County school board's decision regarding Rosemary Hills, Eastern Intermediate, and Montgomery Blair schools. While the nine-member body allowed several other local board closures to stand, the state board declared that the Montgomery County Board of Education had violated its own school integration policy and that its action would not alleviate the complex problem of non-white student

concentration but actually would exacerbate the problem by increasing the proportion of Asian, black, and Hispanic students in the affected schools.¹⁰¹

The county school board then appealed to the Montgomery County Circuit Court. In September, 1982, the court dismissed the county board's suit and upheld the state board of education's decision. The judge ruled that the Maryland State Board of Education had the legal right to reject the local school board's decision to close Rosemary Hills School. The court employed the same reasoning to support the state board's overthrow of the county school board's action regarding attendance boundary changes for Eastern Intermediate and Montgomery Blair High schools. The judge declared that state law and previous court rulings granted the state education board the authority to supervise the function of local schools. Further, in view of the fact that the county board had not complained that the state board's rulings were made fraudulently, or in bad faith, the judge pointed out that the courts had no inherent jurisdiction to review the county board's actions. The Montgomery County Board of Education later elected to discontinue its legal battle against the state board's decision.¹⁰²

Upon requests initiated by community groups, the Montgomery County school board's actions came before the Maryland Advisory Committee of the U.S. Commission on Civil Rights. In January, 1982, the advisory committee held a forum to learn from Montgomery County community representatives, school board members, and other local officials the affect of the board's actions in closing selected county schools. The civil rights advisory committee launched an investigation when county residents charged that the Montgomery County Board of Education's 1981 school closure and redistricting decisions repudiated the board's integration policy and would result in increased concentrations of non-white students in certain county schools.¹⁰³ The forum was a battle of formal analyses as well as ideological conflict.

The civil rights advisory committee received voluminous information from school board members, experts, and community activists and groups. In addition to the report commissioned by the ACLU mentioned earlier, the advisory committee also received a report prepared by the Montgomery County Public Schools' Department of Educational Accountability. The study, based on 1982-1983 school year enrollment projections, and utilizing sophisticated statistical analyses of integration and racial balance in the schools, amounted to a reaction to the ACLU study. The school system's experts concluded: "After performing all of these tests, it is clear that the board's closing decisions have not adversely impacted minority students in general, or black students in particular."¹⁰⁴ The staff report, therefore, buttressed the contention of the school board majority faction, which indicated that the primary determinants for school closure decisions were low enrollment, low utilization rate of a school's capacity, and poor building conditions. This contention continued to be attacked by school board member Blair Ewing and others on the basis of the ACLU report. Although Superintendent Andrews had originally proposed racial balance as a determining criterion for closure decisions, the majority faction on the school board rejected his recommendation. In so doing, the board majority ignored the board's own racial balance policy.

Board member Blair Ewing, drawing on the ACLU-commissioned report, rejected the staff report, characterizing it as a useless and misleading analysis. He made the following points about the report:

1. The analysis assumes that the racial composition of the schools will remain constant in the fall of 1982, but in fact the average annual increase in the minority percentage in the county schools in the six-year period from 1975 to 1981 was 1.86 percent, according to Dr. Frankel [Director, Department of Educational Accountability].
2. The analysis does not take account of the closing of Northwood High School or the truncating of the Blair High School boundaries, thus failing to take account of that impact on students in the Blair feeder area.
3. The conclusion that the Frankel paper draws, which says that "it is clear that the Board's closing decisions have not adversely impacted minority students in general, or black students in particular," is not based on enough data about the impact of school closings to warrant such a sweeping generalization, nor does the conclusion take account of factors not even measured by the data Frankel and his co-author consider.¹⁰⁵

Ewing voiced the sentiments of several community groups who submitted information to the civil rights committee. Among these community organizations were the county chapter of the NAACP, the Montgomery County Hispanic Coalition, the Montgomery County Council of Parent-Teacher Association, the Montgomery County Education Association, the county Human Relations Commission, the Governor's Commission on Hispanic Affairs, the school board's Minority Affairs Monitoring Committee, Northwood Community Solidarity, Blair High School PTSA, the county ACLU, the Takoma Park community, the Rosemary Hills community,¹⁰⁶ and the Coalition for Excellence and Equality in Education in Montgomery County.

The civil rights advisory committee issued its findings and evaluation in November, 1982. It acknowledged that the decline in student enrollment made school closures unavoidable. However, the committee was highly critical of the board's handling of racial integration. The committee found that the board's decision-making process did not sufficiently weigh either the racial and ethnic composition of the schools or the particular needs of the county's various non-white communities. The committee found that the school board ignored its own racial balance policy and that the board's actions would exacerbate the racial balance problems in some down-county schools. Further, the committee stated that the board's decisions disproportionately burdened non-white students.¹⁰⁷

The conservative coalition's attempt to reverse the integration policy and the community discontent which resulted had serious consequences for education policy and politics in Montgomery County. Moreover, the conservative faction on the school board had closed a large number of schools. The conservative group's unpopularity, therefore, was not solely a matter of pro-integration sentiment. Far from it. Indeed, many county residents felt that the conservative coalition protected its own communities from the negative effects of school closings. As will be seen, various sectors of Montgomery County's multi-cultural and multi-racial community saw the necessity to challenge fundamentally the school board's rightward drift and policy decisions that, in the view of many county residents, were destroying the public schools and integrated education. Community involvement continued at a high level throughout this period. Significantly, as staff experts produced reports in support of the school board majority, community groups countered with their own set of experts, fully credentialed in the area of integration.

From Equality of Educational Opportunity to the Art of
Controlled Access: Policy Performance and Political
Evaluation

This final section provides vignettes of recent developments in Montgomery County's integrated education policy and politics: (1) the 1982 school board election and the rising concern for academic achievement and (2) the black community's involvement in educational reform.

The Coming of the School Board and its Agenda

As the previous section indicated, the board's assault on the Quality Education/Racial Balance Policy and other actions resulted in severe community division and conflict. Much of this discontent was directed at the board's conservative majority. Indeed, many county residents believed that some of the school board's decisions and actions were leading to a dramatic decline in public confidence in and support for Montgomery County's public schools. In response to these circumstances, both individuals and groups stepped forward to challenge the school board and turnout its conservative coalition.

One of the groups that came together was the Coalition for Excellence and Equality in Education in Montgomery County (CEEE/MC). Publicly announcing its formation on August 19, 1981, the grassroots organization's goal was to restore popular confidence in and support for the county school system. According to its press release, the group aimed to help the school system regain the high esteem and reputation for excellence it formerly enjoyed.¹⁰⁸

The Coalition for Excellence and Equality in Education was disturbed about a number of the board's actions: the abolition of the Minority Relations Monitoring Committee, a fundamental shift in the school integration policy, school closings, and doubts about the capacity of the back-to-basics program to improve the effectiveness of the school system's educational program. In fact, CEEE/MC charged that the board's decision-making process, priorities, and programs contributed not to increased community and school cooperation but to mounting divisiveness and alienation between the community and school system. Additionally, CEEE/MC complained that the school board's actions pitted one school community against another.¹⁰⁹

Through a series of public forums and workshops CEEE/MC sought to facilitate citizen dialogue and examination regarding the school board's performance as a policymaking body. Often CEEE/MC sponsored educational forums with other community organizations, such as the Montgomery County League of Women Voters, the Montgomery County Council of Parent-Teacher Associations, and the Montgomery County Education Association. The gatherings, which occurred at local schools, provided settings where citizens were invited to participate alongside elected officials and members of the Montgomery County Public School staff in analyzing important educational issues facing the school system. CEEE/MC prepared written reports of the forums and subsequently distributed them to the public at large. Again, there is a heavy mixture of community involvement and formal analyses of educational programs.

As the 1982 school board campaign got underway, another organization emerged--the Education Political Action Committee (EDPAC). The Coalition for Excellence and Equality in Education can be described as a public education organization. The county's Education Political Action Committee clearly is a campaign management organization; its central objective was to oust the board's conservative alliance and replace it with a liberal majority. Well-financed and equipped with computer technology, EDPAC selected a team of highly educated professionals--who also had records of active participation in educational and other civic affairs--to challenge

the four conservative incumbents running for reelection. Two of the challengers possess the Ph.D. degree--Robert Schoenberg is an administrator at the University of Maryland, and James Cronin is a history professor at Montgomery College. Odessa Shannon, a black woman, holds a B.A. degree and was at the time a program manager in a federal agency. The fourth candidate, Marilyn Praisner holds a B.A. degree and is a policy analyst in the federal government.

A skillfully managed campaign to take advantage of community discontent with the incumbent conservative board majority, particularly over the way it had handled school closings, gave the EDPAC quartet an overwhelming victory in the November, 1982, school board election. The liberals swept all four positions at stake in the election. Only two of the conservatives remained, a carryover from the 1980 election. Greenblatt, who had made an unsuccessful bid for the U.S. Congress, and Suzanne Peyser would hold their seats until the 1984 election, when Greenblatt decided not run for another term. The remaining incumbent was Blair Ewing, a knowledgeable and highly respected champion for liberal educational policies and programs. He had been active in the EDPAC campaign organization.

The new board majority promptly launched its agenda.¹¹⁰ The immediate task was to recruit a new school superintendent to replace Dr. Andrews, who retired and joined the University of Maryland's School of Education faculty. The school board, utilizing the services of professional consultants, hired Dr. Wilmer S. Cody in July, 1983. Dr. Cody had been superintendent in Chapel Hill, North Carolina and Birmingham, Alabama; he is credited with managing successful school integration programs.

Another item on the new board majority's agenda was to heal the deep wounds between the school board and diverse segments of the Montgomery County community. The majority board members initially made gestures toward their remaining conservative colleagues, although relations later deteriorated, especially, with Marian Greenblatt. The new school board majority also sought to improve relations with the county's black community by being more accessible and willing to listen to concerns expressed by black civic and education activists. While that relationship improved significantly, some tension remained as a result of the board's support of the new Minority Affairs Advisory Committee which the past conservative school board majority created to replace the Minority Relations Monitoring Committee. The new committee apparently was designed to deal with issues of concern to the broader multi-racial and multi-cultural student composition as opposed to the particularities of the black community. The county's black leaders charged that the committee was ineffective and seriously compromised because some of its members were school system employees. The committee, they declared, served merely as a puppet of the board. It is significant, however, that the conservative-dominated board felt obliged to create a community-based group to represent minority concerns. That is, the tradition of community involvement is well respected in Montgomery County.

The new school board also has been faced with the complex problems of locating the necessary funding to operate and improve the quality of the school system's educational program. Related to this is the complicated matter of school closings and facilities changes. Significantly, the pattern of spatial and population growth and development in the county now is in the up-county new suburban growth area. Hence, the board faces the paradox of declining enrollment and aging facilities in the down-county mature urban/suburban area. Dealing with these issues is complicated even more by the unevenly distributed racial and socioeconomic composition of the student population.

Perhaps the most challenging item on the new school board's agenda has been the improvement of academic achievement for all of the county's students. The board recognized immediately the complicated and complex problem of devising strategies and programs to accomplish the policy goal of effective integrated education.

While prevailing liberal expert opinion, nationally and locally, has argued that racial balancing and busing are the best strategies for achieving quality integrated education, local realities suggest that such an indirect approach may not be adequate for solving this increasingly complex educational problem. In the case of Montgomery County, former Superintendent Edward Andrews issued a 1981 report evaluating the Takoma Park Cluster. The report concluded that the cluster's magnet school programs were operating well; that, compared to other elementary schools in the county, the magnet programs had accomplished significant educational results; that teachers and parents warmly supported the cluster schools and programs; and that cluster students' academic achievements were on par with those of students in non-magnet schools.¹¹¹

However, in regard to the major goal of achieving racial balance, the report declared that the magnet school concept had proved unsuccessful. As the report states:

Magnet schools are not advancing the desegregation of the cluster schools. Despite the quality educational programs operating throughout the magnet cluster, the minority compositions of schools in the magnet cluster are just as disparate as they were prior to the magnet program four years ago....

The magnet cluster design was not optimal for promoting desegregation in the Takoma Park cluster. The magnet school approach was not well suited to promoting desegregation in the particular cluster of schools selected, because not enough low-minority schools were mixed with the high-minority schools in the composition of the cluster. Further, the average minority composition of the cluster as a whole, even upon its formation in 1977, was already more than 20 percentage points above the MCPS average. Under the ESAA guidelines, schools are considered racially balanced only if their percentage of minority pupils falls within 20 points of the district average. Thus, even if the schools within the cluster had become perfectly balanced racially by the operation of the magnet program, then all seven of the schools would have been out of compliance with the ESAA criterion.¹¹²

The report on the Takoma Park Cluster points up a real paradoxical situation the board faces. Neither the school board (in any of its ideologically dominant complexions) nor the Montgomery County community has desired extensive and long-distance busing for racial balancing. However, increasing the size of the school cluster to include more predominantly white schools requires lengthy transportation schemes. The new board seemed to recognize this dilemma as it significantly has shifted to a greater emphasis on improving the quality of education for all of the county's pupils.¹¹³ This understanding is reflected in the school board's 1983 policy statement on Quality Integrated Education.¹¹⁴ It is revealed further in the school board's state goal of erasing the educational performance gap between black/Hispanic and white students and raising the performance level of all students by 1988.¹¹⁵

Nevertheless, as the board of education has sought to deal with the elusive goal of achieving quality integrated education, the efforts have been scrutinized

closely by education issue specialists within the county's black community.

Black Citizens and Educational Policymaking

It will be remembered that Montgomery County's reputation for quality education was a major factor attracting black newcomers to the county in the late 1960s and early 1970s. Some had been civic activists in Washington, D. C. and other localities, a background that prepared them for similar participation in Montgomery County's public affairs. Many of these civic activists, like their white counterparts, are highly educated professionals and managers who possess the requisite time and skills to develop specialized knowledge about educational policy issues. Hence, they are able to communicate intelligently with educational policy elites on the school board and within the school bureaucracy. Just as the school authorities and professional staff are familiar with and regularly utilize formal knowledge or social research information, black community participants are able to employ their own specialized knowledge as a lever to criticize, confront, or cooperate with the school board or the educational bureaucrats. In Montgomery County's highly educated community, therefore, there is not a great separation between educational policy elites and black community activists concerned with education policy. The black community in Montgomery County represents its own version of confluence, combining citizen involvement with a capacity to promote its policy concerns through the deployment of formal knowledge.

The independent actions of the Citizens' Minority Relations Monitoring Committee to challenge public schools officials in Montgomery County represent a formidable example of organized citizen participation in the county's education policy process. Almost immediately after the Greenblatt coalition abolished the board's Minority Relations Monitoring Committee in 1981, a group that had been in existence since 1973, an aggregation of black community activists formed the new organization. Starting in 1982, and continuing in each succeeding year, the Citizens' Minority Relations Monitoring Committee has issued an annual report which examines the school system's effectiveness in providing educational services to black students. 116 The reports have utilized the school system's own statistics and studies as documentation. Each annual report has found the school system seriously remiss in meeting the educational and extracurricular needs of black students. The reports have declared repeatedly that black students continue to experience racial discrimination. According to the committee, black students are suspended proportionately in greater numbers than white students; they are channeled into special education programs for the handicapped in disproportionate numbers; the percentage of black students labeled "emotionally impaired" is far greater than their percentage of the student population; and black and Hispanic students are denied fair and equitable opportunities to participate in the school system's Gifted and Talented Program.

Not only have black civic leaders voiced their concerns at school board meetings, they also have sponsored educational forums and workshops. The community convocation held on October 8, 1983, by Blacks United for Excellence in Education is of particular significance. The organization, a new coalition of black groups and individuals established to assist black students achieve academic success, sponsored an all-day conference on black students' educational development in Montgomery County. The objectives of the gathering included encouraging greater black parental involvement in the educational process and exploring various self-reliant strategies the black community could utilize to enhance black student educational performance. Conference workshops consisted of the following subjects:

school effectiveness; role of the family, school, and community; test-taking skills; academic achievement; Saturday school; discipline in the school; computer literacy; math anxiety; role of the church in developing educational excellence; and new political strategies for achieving educational excellence. As a result of the conference, the Saturday School was established and continues to serve as an example of black educational initiative and self-reliant development in Montgomery County. At the same time, the black community continues to press the school system for improved performance.

Conclusion

Theorists of postindustrial development have largely concentrated on social transformations and political dynamics at the national level of analysis. In contrast, scholars have given very little attention to the relationship between postindustrial change and the policymaking process at the sub-national level, particularly in local community settings. Scholars are not entirely clear about the roles specialized knowledge and professional experts play in the policy process of the emerging postindustrial order. Additionally, writers offer vague and inconsistent perspectives about the roles of educational experts and their knowledge in the educational policymaking process.

What, then, do the events chronicled in this case study tell us about the interaction between knowledge and power in the educational policymaking process of the emerging postindustrial order? Do specialist in education dominate the educational policy process? Do elected political officials still control the reigns of power? Or is there some other way of describing their relationship? The fundamental argument of this study is that in the emerging postindustrial community a form of education politics is evolving that is characterized by the convergence of knowledge and power in the educational policymaking process:

The interpretation of political events is itself a political undertaking. A writer brings his own perspective--largely influenced by prevailing paradigms--to the events he describes even as he attempts to portray them from the standpoint of the actors involved. It might be well to consider that the meaning ascribed to the character and development of the occurrences described in this study is one among other possible forms of meaning or interpretation. The study has sought to make some sense of or to clarify a variety of complex and complicated social phenomena related to the role of expertise in the educational policymaking process and the character and dynamics of the public school integration process in an emerging postindustrial community.

As a single case analysis, the present study cannot illustrate completely educational policy and politics in a suburban setting. It does supply an accumulation of facts, and in the case of Montgomery County, the facts suggest that in the educational policymaking process expertise plays neither a dominant nor completely subordinate role. Rather, there is indication of a growing convergence of politics and expertise. Montgomery County, as a developing postindustrial community, exemplifies the confluence thesis of this paper. In the county, where formal knowledge is widely diffused throughout a highly informed citizenry, it is assumed that experts and their knowledge are essential to the educational policymaking process. It is taken for granted that expertise makes this process more knowledgeable. The presumption is that policy development and implementation require systematic review and analysis of problematic issues along with recommendations to policymakers for alternative courses of action.

While formal knowledge or social research information about solutions to the complex problem of achieving quality integrated education served as a basis for developing and implementing the board of education's policy strategy of racial balancing and busing, and while the board's attorney provided legal expertise throughout the county's integration policy process, events, as interpreted by non-experts, demonstrated the limitations of formal knowledge and professional experts both within and outside of the school bureaucracy. The practice of racial balancing and busing to achieve quality integrated education in the county has not been successful. Policy experts just do not have all the answers or solutions to complex and complicated problems. Therefore, when expert knowledge is not strong enough, politics is called upon to fill the spaces left by incomplete knowledge.

In the postindustrial community of Montgomery County, Maryland, civic activists are members of a middle class of professionals and managers who ordinarily utilize formal knowledge or social research information. Additionally, these participants are generally familiar with the structure and dynamics of bureaucratic organizations and their politics. These community activists know the jargon or specialized discourse of bureaucratic experts and are capable of communicating with policy elites. Montgomery County education activists possess the requisite time and skills to develop specialized knowledge about educational policy issues and are able to use their own expertise as a lever to censure, challenge, or even cooperate with the county's educational policy elites. In a manner of speaking, community activists become policy analysts in knowledge-intensive postindustrial settings. Moreover, community groups readily employ their own experts to counter the educational policy elites' specialists.

Since the famous Brown Supreme Court decisions in the mid-1950s, the problem of providing quality education to black and other non-white students in Montgomery County (and throughout the nation) has grown increasingly enigmatic. Even the characterization of the issue has changed over time. In the 1950s, the term "desegregation" was employed; it referred to the termination of the dual educational system (the legally enforced separation of black and white students), guaranteeing equal education to all Americans. By the 1960s, the term shifted to "integration;" it suggested the affirmative move to mix students of different races and cultures. However, traditionally excluded individuals and groups no longer were guaranteed equal education; they had the opportunity to acquire equal education. The 1970s took this process further with "racial balancing and busing" as measures to insure a particular quantitative mixture of races and cultures. Increasingly, educational policy experts spoke of providing historically excluded individuals and groups access to equal educational opportunity. At each stage of this conceptual transition, the educational problem seems to become more complex and to create growing community discontent.

In the case of Montgomery County, Maryland, growing social change and the difficulties of trying to solve the manifold problem of public school integration gave birth to a complex of antagonistic social forces. It exemplifies the phenomenon of cultural crosscurrents in a multi-cultural community, with groups polarized on the basis of race, ethnicity, and class. In addition, ideology has played a significant role. Ideological positions among many school board candidates and community participants hardened during the school board elections of 1978, 1980, and 1982. The conservative-dominated school board sought to reverse the Quality Education/Racial Balance Policy and angered pro-integrationist community activists. Disenchanted voters replaced that faction with a liberal school board majority in 1982. The 1984 campaign was much less ideological than the three preceding ones, and the current school board seems to be striving for community

consensus rather than conflict. Achieving this goal is a powerful challenge.

The events in the development, implementation, and modification of the Montgomery County Public Schools' Quality Education/Racial Balance Policy weave a complex and multifaceted pattern of educational policymaking in an postindustrial community. Policies originate out of community concerns with problems--not from policy intellectuals and reformers with school administrators generating the agenda. In the early 1970s, it was the express concern of the Rosemary Hills residents about the changing racial and cultural nature of their community and school populations that motivated the school system to begin the task of developing a new school integration policy. This is also the case with the formulation of the Small Schools Policy, which was a response to popular concern about demographic changes in the county. Moreover, the Rosemary Hills PTA Executive Board's criticism of the Small Schools Policy, as an inadequate response to the problem of the increasing concentration of black students in certain county schools, and the group's complaint with the Office for Civil Rights served to pressure the school system to set in motion the process that eventually resulted in the new integration policy of 1975. Another example of the impact of community demands on policy development is the black community's growing concern about black students' performance on standardized tests. In response, the school system has announced the policy goal of closing the achievement gap between black/Hispanic and white students and improving the quality of education for all students by 1988.

Local policymakers may use nationally recognized experts and their ideas, but community activists may modify or even oppose them. This is true especially when experts do not agree. Often, the general policy recommendations of experts do not work smoothly and leave some problems unresolved. In the case of the school closing issue in Montgomery County, which came before the civil rights advisory committee in 1982, opposing sides marshalled experts and data. The official view of the board's majority faction was defended by a Department of Educational Accountability study that utilized sophisticated research techniques to argue that the board's school closing decisions did not adversely affect non-white students. Pro-integration and other concerned community organizations challenged the official view with the research findings of a Catholic University policy intellectual in an ACLU-commissioned report.

Additionally, the present case study indicates that community organizations and educational policymakers are willing to challenge experts and the policies they defend. For example, the Rosemary Hills community strongly challenged the school system's attempt to close Rosemary Hills Elementary School. Other examples include the Greenblatt-dominated school board's firing of Superintendent Charles Bernard and rejecting Superintendent Edward Andrews' advice on using racial balance as a criterion for school closure decisions. These observations suggest that successful school administrators, as educational experts, serve the school board and operate within certain boundaries. Again, the departures of Bernardo and Andrews seem to bear this out.

If bureaucratic administrators operate within the realm of concrete programmatic concerns, elected political officials sense the public mood and the flow of public sentiment. Moreover, while elected school board members sense and guide community sentiment, they are defeated when they do not adhere to community interests. In 1982, the overwhelming defeat of the conservative faction on the school board indicated how angry county residents had become with a board that no longer understood community concerns.

In the process of making public choices, policy intellectuals provide ideas and concepts for public debate. They help to put the issues in context. Policy experts make concrete recommendations and affect specifics, but experts are seldom in agreement with themselves and do not win the day necessarily against highly knowledgeable elected officials and community participants. It will be remembered that Montgomery County's school board members, whether liberal or conservative, also have been highly educated and have even included persons with the Ph.D. degree. They have possessed considerable backgrounds in educational and civic affairs. Board members have not been overwhelmed or intimidated by the expertise of educational policy professionals in the school bureaucracy. What is apparent is that policy experts do not operate effectively without being attached to a base of political support. Hence, there is confluence between the roles of elected officials and policy professionals in the policy process in the postindustrial community of Montgomery County, Maryland. What is significant is that politicians and experts bring different styles and approaches to the policymaking process. As Joel Aberbach and his colleagues point out:

[B]ureaucrats and politicians are both active participants in the policy process, but each responds to an audience different both in character and in size, and each imparts a distinctive orientation to the policy process. Bureaucrats are integrators, preferring tranquility, predictability, manageability, and tidiness. Politicians, on the other hand, are partisans who bring both visionary and particularistic elements to the process. They bring general direction, but rarely a concern for detail. Bureaucrats at times must persuade politicians to confront vague goals with intractable facts, and politicians, in turn, sometimes must stretch the incrementalist instincts of bureaucrats. These distinctions express the contemporary division of labor between bureaucrats and politicians.¹¹⁸

In the final analysis, however, this relationship is not always a smooth one. In the case of educational policymaking, the superintendent needs to be ideologically compatible with the school board to be effective. Depending on the situation, the superintendent is required to be an educational statesman or a pragmatic political strategist and thereby sufficiently sensitive to the school board members' leanings to provide policy alternatives attractive to them. Expert knowledge itself is diverse and can be mobilized behind contrasting policy approaches. Those policy professionals out of one organizational setting can locate another and mobilize ideas, evidence, and argument for their cause. What this study of educational policymaking in Montgomery County, Maryland, suggests is that experts and their knowledge are clearly essential to the policy process of the emerging postindustrial community. Experts and their knowledge, however, do not dominate that process; rather, they interact in complex ways with elected political officials and community groups to make the policy process more knowledgeable.

Notes

1. Theorists who set forth variants of these propositions include: Daniel Bell, The Coming of Post-Industrial Society, New York: Basic Books, 1973; Peter Drucker, The Age of Discontinuity, New York: Harper & Row, 1968; Jacques Ellul, The Technological Society, Trans., John Wilkinson, New York: Vintage Books, 1964; Amitai Etzioni, The Active Society, New York: The Free Press, 1968; John K. Galbraith, The New Industrial State, Boston: Houghton Mifflin Co., 1971; Ralph E. Lapp, The New Priesthood: The Scientific Elite and the Uses of Power, New York: Harper & Row, 1965; Jean Meynaud, Technocracy, Trans., Paul Barnes, New York: The Free Press, 1964; Dean Schooler, Jr., Science, Scientists, and Public Policy, New York: The Free Press, 1971.

2. Writers who put forward variants/^{of} these propositions include: Guy Benveniste, The Politics of Expertise, Berkeley: The Glendessary Press, 1972; Jeffrey Straussman, "Technocratic Counsel and Societal Guidance," in Leon Lindberg, ed., Politics and the Future of Industrial Society, New York: David McKay Co., 1976, pp. 126-166; Straussman, The Limits of Technocratic Politics, New Brunswick: Transaction Books, 1978.

3. 347 U.S. 483, 74 S.Ct. 686, 98 L.Ed. 873 (1954).

4. Richard K. MacMaster and Ray Eldon Hiebert, A Grateful Remembrance: The Story of Montgomery County, Maryland, Rockville: Montgomery County Government and the Montgomery County Historical Society, 1976

5. Ibid.; Nina H. Clarke and Lillian B. Brown, History of the Black Public Schools of Montgomery County, Maryland 1872-1961, New York: Vantage Press, 1978.

6. Maryland State Department of Education, "Statement, Supreme Court Decision," May 26, 1954.

7. Ibid.

8. Ibid.

9. William S. Schmidt, "Report of Committee of Superintendents," A Report to Dr. Thomas G. Pullen, Jr., State Superintendent of Schools, in preparing for the filing of Maryland's brief in the Supreme Court of the United States, November 10, 1954. (Mimeographed).

10. Memorandum from Superintendent Forbes H. Norris to members of the Board of Education, "Effects of Integration on Capital Budget Program," May 24, 1954.

11. Clarke and Brown, History of the Black Public Schools of Montgomery County.

12. Memorandum from Myron S. Issacs, President, Montgomery County PTA Council, Montgomery County PTA Council, to the Presidents of the PTAs in Montgomery County, "Recommendations of the Montgomery County PTA Council Committee on Integration," February 19, 1955.

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The term "Charette" comes from a French word the means "shopping cart." It is used to refer to a multifaceted planning process in which the people with the wares (ideas, resources, service, etc.) sit down with the clients or customers in the open market place and brainstorm, pick and choose, coalesce, define, and negotiate. The end result, if the Charette achieves its goal, is the dove-tailing of needs and resources into a plan of action.

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