

The Quest to Improve K12 Education: The Changing Face of Student Performance in North Carolina

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Abstract

The modern era of K12 education began in the 1960s with the desegregation of the state's public schools following *Brown v. Board of Education*. Prior to integration, North Carolina, like every other southern state, operated dual systems that were separate and not equal. Thus to discuss the major policies and players that helped shape student performance in the 21st century, the logical place to start is with integration during the tenure of Governor Terry Sanford (1960-64).

North Carolina is a state that has long enjoyed a national reputation for K12 education efforts, largely due to the ongoing election of progressive Governors who often were cited as strong proponents of K12 education. However, the stark reality was that student performance was dismal in North Carolina for the majority of the 20th century and did not make significant improvement until the middle of the 1990s. In fact, North Carolina's national reputation took a major hit in 1989, when the average SAT score dropped below that of South Carolina, and was thus the lowest SAT average in the nation.

This dismal performance record occurred in spite of serious, committed leadership by the state's elected officials to turn things around. North Carolina's efforts to change this performance record resulted in what has been titled by the Public School Forum as a "State of Disconnectedness" during the 1980s because of policymaker willingness to try any new idea that came along. It seems everyone was looking for the 'magic bullet' to pull the state up to a new level of student performance in the K12 public education system.

Yet in spite of the efforts of many, North Carolina's performance did not 'break through' to a level of national competitiveness until the final decade of the 20th century. In this regard the leadership of the state's preeminent "education Governor"- James B. Hunt, Jr.- and the policies he advocated and then implemented, helped the state achieve breakthrough performance in areas heretofore were thought unattainable.

Governor's Hunt's education policies focused on the following;

- Early childhood education
- Teacher quality
- Safe Schools
- Accountability
- Community Support

Today these policies are often accepted as "givens" by policy makers across the nation attempting to improve K12 performance. Yet it was Governor Hunt who took all of these policy areas and built a new approach through the Excellent Schools Act and the ABCs of Education that now stands as a model of the role of policy in improving performance.

During the decade beginning in 2000, new areas of focus have evolved, driven mainly by new federal initiatives and the ongoing financial and governance factors constantly in play in education. These areas of focus include;

- School finance- the ongoing battle over resources between counties that are low wealth and other counties with a richer, strong tax base.
- School governance- the ongoing battle over resources between county commissioners and school boards.
- Student performance- the connection between school finance, school governance, facilities and performance.
- Career readiness issues- 21st century skills, the glaring dropout rate, and the “Two North Carolinas” dilemma of performance based on race/socio-economics
- Federal initiatives- NCLB (Bush era) and Race to the Top/Innovation Fund (Obama era) and their impact on performance.

As the state moves forward into 2010 and beyond, the future issues in K12 education that will likely need to be addressed include the following;

- The dichotomy of performance based on where a child lives and the socio-economic background of that child. From school finance to construction, a child’s socioeconomic and demographic backgrounds often correlate with performance. As the state becomes increasingly diverse, how policymakers address these factors through policy and funding will impact dramatically on future generations.
- The need for a more modern curriculum based on 21st century skills related to the state’s competitiveness of the work force in the global economy will be increasingly important in the future. The tug will come from those who want to maintain a ‘basic’ curriculum of reading, writing, science and mathematics vs. those who believe these basics are not enough.
- The use of technology, the digital divide, online/virtual learning and a whole host of non-traditional issues that impact education will require enormous time and energy as the state grapples to become more effective and efficient in K12 education.

Taken together, the issues of the first decade of the 21st century and the issues the state faces in the future, produce two distinct themes regarding K12 educational policy and practice that are highlighted in this report;

- Theme #1- The Quest to Achieve Breakthrough Performance- accountability, assessments and standards- through Higher Expectations
- Theme #2- The Battle of the “Two North Carolinas”- how resources, funding and the dichotomy of rural/urban impact the quality of education throughout the state.

North Carolina has come a long way since the 1960s and is now considered a leader in performance improvement in the United States. It took strong leadership and appropriate public policy to create the right conditions for improvement, yet we know what worked in the 1990s may not meet the demands of 2010 and beyond. How the state responds to new demands will help determine the future success of students in the public schools of the state.

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(Note- Special recognition is given to the Public School Forum of North Carolina, and specifically John Dornan and Kendall Jordan for their help in providing advice, research materials and documentation to help make this effort as accurate as possible).

Introduction

North Carolina, like every other southern state, was steeped in the culture and practice of segregation of public schools through the first 60+ years of the 20th century. With the Supreme Court decision in *Brown v. Board of Education* (1954) and the federal actions in the early 1960s, the era of desegregation finally came to fruition.

North Carolina's education system was abysmal at best during the early years of the 20th century. Statistics tell the story: at one point North Carolina spent \$0.50 per pupil per capita on education, a mere 18% of the \$2.84 national average, and tied for lowest in the nation with Alabama. At the same time, the school year averaged 70.8 days compared to a national average of 144.6 days. Not surprisingly, the illiteracy rate during this time frame was 19.4%, second highest in the south. (Christensen, *Tar Heel Politics*, p. 42).

Suffice to say that public education during the first part of the 20th century was fraught with inequality, poor financing and dismal literacy rates. It would take a significant amount of strategic work, strong leadership and critical policymaking to wrest the state's public school system from the less than stellar historical trend and into one of the nation's models by the dawn of the 21st century.

The history of the modern era of K12 education policy and practice began with the election of Terry Sanford in 1960. The election of a moderate, progressive Governor, combined with federal actions, brought a close to an ugly era in the state's history- an era where separate and unequal was not only tolerated, but celebrated by many of the state's elected and appointed leaders.

This report on K12 education policy, practice and key influencers begins with the modern era, from 1960- current. Over the course of the past half-century, North Carolina has emerged as one of the models of K12 education reform based on standards, assessments and accountability. Yet the state continues to struggle with many issues related to the dilemma of the "Two North Carolinas". In short, much progress has been made, but not enough to say "job well done".

1960- 1972: From Integration to Growth and Stability

Governor Terry Sanford, who campaigned for office on a platform supporting segregation, abruptly changed course and became one of the leaders in the quest to integrate public schools in North Carolina. While such Governors as George Wallace in Alabama and Lester Maddox in Georgia garnered national headlines opposing integration, North Carolina quietly moved forward, albeit with a fair share of ups and downs as integration took place.

The contributions Governor Sanford made in the area of education were among the most far-reaching and visionary of any Governor in North Carolina history. Given the uproar over integration that was taking place throughout North Carolina and the south, the accomplishments of Governor Sanford are even more meaningful.

The philosophy, policy and actions of Governor Sanford can best be summed in the following quote:

“The hopes of NC, the hopes of America and the hopes of our world will rise higher from the desks of the classrooms than from the launching pads at Cape Canaveral.” (UNC-Chapel Hill, 11/21/1960)

While serving as Governor from 1960-64, new education programs/practice begun under his reign reflected a public policy of expanded opportunities for all students. His most significant actions related to the founding of the Governor’s School at Winston-Salem and the founding of both the NC School of the Arts and the Advancement School.

Governor Sanford also believed that integration meant a policy of education for all. This was highlighted in the following:

“We need our own and a new kind of Emancipation Proclamation which will set us free to grow and build, set us free from the drag of poor people, poor schools, from hate , from demagoguery....This kind of proclamation can be written in one word: Education.”(Mitchell, *Messages*, 301)

Perhaps not as widely known, but undoubtedly one of Governor Sanford’s most outstanding policy successes in education, relates to his early vision to create a state-wide Community College System for students not going to the university level but needing further education. It was Governor Sanford who first explored this idea, along with State Board Chair Dallas Herring. Today’s vibrant 58-member Community College system is a symbol of the vision Governor Sanford espoused in the area of education.

Profile of Dr. A. Craig Phillips

Craig Phillips was elected to the State Superintendent of Public Instruction role in the 1960s and served in that role for two decades, making him the longest serving elected State Superintendent in North Carolina history. A former school superintendent in various school systems in North Carolina, Dr. Phillips was an unabashed supporter of education for all children, with a special focus on both the arts in education and early childhood programs. His support for expanding early childhood was clearly ahead of its time, and eventual arguments to support expansion of these efforts often mirrored the original position of Dr. Phillips. His support for the creative arts in schools was both unequivocal and relentless. Dr. Phillips tenure as the state’s highest elected education official and his strong support for education were key factors as North Carolina began the transition from an economy of agriculture and textiles to a more diversified work force.

Profile of Dudley E. Flood

Dudley Flood was a mid-level state government employee when the integration of schools took place across North Carolina. As an African-American educator, he teamed with colleague Gene Causby, and together these two individuals traveled the state helping defuse explosive racial issues. Without question the role Dudley Flood played during this intense period helped North Carolina avoid the pitfalls of most other southern states around integration of schools. Dr. Flood has served in numerous leadership capacities in the state, including Executive Director of the School Administrators Association and a current member of the UNC Board of Governors. His quick wit and outstanding communication skills make him a favorite on the speaker's circuit, and those who lived through the integration years will always remember Dr. Flood's role at that time.

1972-1984: The Movement Towards Accountability Becomes State-wide Policy

In 1972 North Carolina elected the first Republican Governor in the 20th century- James Holshouser of Boone, North Carolina. At the same time a visionary leader from Wilson, North Carolina, was elected Lieutenant Governor- James B. Hunt, Jr. Together these two men, from opposite parties, worked cooperatively to create major new initiatives in K12 education and to push the state's schools towards ever increasing accountability.

Governor Holshouser's accomplishments in education personify the moderate, vision-oriented progressive nature of his leadership. Among a variety of policy initiatives, he served during a time when the following occurred;

- Policies supporting early childhood education
 - Expansion of kindergarten programs to make them inclusive to all five-year olds in the state (80,000+) (previously only available to 3,427 pupils.)
(**Special note**- this effort was so far ahead of other states at the time. In 2010, for example, some states (i.e. California) still do not have full-time kindergarten programs. Gov. Holshouser's policies were 30 years ahead of states such as California)
- Policies enhancing teacher working conditions and instruction
 - Increased teacher salaries and extended the teacher year to 200 days
 - Supported a law setting maximum class sizes for teachers
 - Supported special education program expansion

The following quote, shared during his Inaugural Address, sums his philosophy and belief in education:

“When we build for the future, we know that the cornerstone will bear the name ‘Education’.” (Inaugural Address, January, 1973)

Following the tenure of Governor Holshouser, a bright, young visionary was elected to the Governor's office- James B. Hunt, Jr. During his first two terms as Governor (1976-84), a number of initiatives were implemented, from early childhood efforts to increased emphasis on teacher professional development. From a policy perspective, there were two areas that stood out as revolutionary at the time. These two visionary ideas help form the focus of K12 education over the next 30 years;

- An emphasis on state-wide student accountability- the movement to holding students accountable for performance and publishing the results widely.
- The connection of K12 policy to jobs in North Carolina

In short, Governor Hunt envisioned a state that became a leader in the south in the recruitment of jobs, jobs, jobs, and the strategy to achieve this leadership status was to dramatically raise the level of expectation of the state's K12 education system!

Together these two areas of focus propelled North Carolina into the leadership arena and helped North Carolina earn the enviable position as being one of the top states in the nation in job recruitment and climate from 1995-2008 (*Site Selection* magazine). Furthermore, this kind of success clearly demonstrates the impact of vision and policy implementation for the betterment of the state's citizenry.

The first policy initiative around student accountability sent shock waves through the state's education establishment. North Carolina developed the first state-wide accountability plan in the South and began the quest to tie K12 education with quality of life factors and recruitment of jobs to North Carolina. Governor Hunt saw the connection of improved K12 education and the need to diversify the industrial base of the state. To achieve this first policy, a series of strategic programs were implemented by Governor Hunt's administration, including:

- Primary Reading Program- provided a teacher's aide in every K-3 classroom, with the purpose of teaching every child to read by third grade.
- Annual Testing Program- annual tests in grades 3, 6 and 9 were required, and a statewide Annual Testing Commission was created to implement this new requirement.
- Competency Testing Program- a Competency Testing Commission was appointed to develop appropriate tests to measure minimum competency for every student graduating from a NC High School
- North Carolina School of Science and Mathematics- a residential high school for students from every county with a focus on math and science.

The second policy initiative centered around the connection of K12 policy to job growth in North Carolina. In literally every future K12 policy effort- from early childhood to higher standards for students to raising teacher salaries to the national average- the underlying rationale for these efforts was to make North Carolina more competitive in the increasingly sophisticated recruitment and retention of jobs in the state. The strategies Governor Hunt implemented around this second policy initiative included:

- Business Committee for Math/Science Education- this group of business leaders was the first formal and permanent statewide non-profit housed in the governor's office and designed to improve K12 education, particularly math and science teaching.
- Public schools Business Liaison- with the aide of the state's business leadership, the position of the public schools/business liaison was created with the aim of getting business support for securing necessary resources for potential changes in public schools.
- Education Commission of the States Task Force on Education for Economic Growth- As chair of this national organization, Gov. Hunt's major initiative was around this task force and included a call for a strong partnership between education and the business community in states and localities across the nation.
- North Carolina Commission on Education for Economic Growth- one of the last strategies employed by Gov. Hunt prior to leaving office was to create this Commission, patterned after the previously-mentioned Task Force, to develop proposals for making radical changes in the public schools. This Commission's recommendations were far reaching, and the impact of this strategy on future state policy was unprecedented.

Jim Hunt's Relentless Focus on Jobs, Jobs, Jobs! - A Story.....

In the late 1970s and early 1980s, North Carolina became an early leader in the quest to recruit foreign industries to the soil of North Carolina- and to create jobs for citizens leaving the rural areas seeking work. The chief European-based recruiter for the Commerce Department during this time was Davis Bunn, who today is a leading fiction writer with a global following. He tells the story of how Jim Hunt would head to Europe to recruit industry and how all he wanted to talk to the prospective industry heads was how much K12 education was improving in North Carolina. Mr. Bunn recalled then Governor Hunt's relentless focus on improving public schools, and how to this day he remains amazed at how successful Governor Hunt was in selling the strategy of qualified workers available in North Carolina because of the new testing program and the connection of education and jobs, jobs, jobs. (Bunn interview- 9/26/09, Oxford, England)

Profile of National Teacher of the Year Donna Oliver

Dr. Donna H. Oliver was selected National Teacher of the Year in 1987. A biology teacher in Burlington, NC, Dr. Oliver was the first and only African-American National Teacher of the Year from North Carolina and has gone on to distinguish herself in higher education as Provost and Vice President for Academic Affairs at Edward Waters College. Dr. Oliver has earned advanced degrees through studies at various universities including Harvard, UNC-Greensboro, and North Carolina A+T State University. She has been honored by Presidents, Governors, Congressmen and University leaders for her long and distinguished service to children and higher education.

Profile of William States Lee

As North Carolina began to transition from an agrarian and textile-based economy, government leaders sought help from the state's business leaders to convince citizens of the tough challenges ahead. William States Lee, former CEO of Duke Power in Charlotte, North Carolina, helped lead the charge. The grandson of the original founder of Duke Power, he studied civil engineering and was a Phi Beta Kappa graduate of Princeton University. In his biography the following statement appears; "Perhaps his greatest commitment was to education, supporting everything from preschool programs to the building of top engineering programs at UNC Charlotte." His passion, oratorical skills and community stature prompted people to listen, and when Bill Lee spoke about the economic transition and the need to upgrade education, his message carried the day.

1984-2000: From a 'State of Disconnectedness' to Breakthrough Improvement

In September of 1995, the Public School Forum released a report on the lack of alignment in mathematics and science in K12 education. The report even included the word "Disconnectedness" in the title, and was clearly talking about the lack of alignment between teacher preparation, curriculum programs and accountability tied to curriculum that had been in place during much of the 1980s.

From 1985-1993, the state was led by Governor James E. Martin, and it was during this period of time the state's education system was unintentionally caught in "A State of Disconnectedness" (Public School Forum)- or as local educators referred to this time frame—"A State Of Zig-Zag Reform". The General Assembly and Governor, even though from opposite parties, often worked together on a variety of education policy initiatives, yet little seemed to move the state out of the quagmire of poor performance. In spite of the state's best efforts and enormously hard work by educators, student performance reached the depths of low support via public opinion in 1989, when the state's SAT average score dropped below neighboring South Carolina, to the lowest average score in the nation (site source).

The state's response to this crisis was the passage of Senate Bill 2, a far-reaching effort with the potential to revolutionize the public schools. The passage of Senate Bill 2 was a clear admission by the state's leaders that despite best intentions, North Carolina's K12 system had to make substantive changes to improve performance. And it was also a recognition that many of the policy efforts in the past had not resulted in the desired and/or expected increases in student performance.

Senate Bill 2 was revolutionary at the time of passage. It is notable that long before the federal No Child Left Behind legislation, North Carolina became one of the first states to put in place statewide testing, accountability, public release of information on performance data, and the establishment of a core curriculum.

Whereas North Carolina's level of student achievement has been less than acceptable for many years, the passage of Senate Bill 2 set North Carolina on a new path towards national recognition for improvement, and how policy can combine with practice to dramatically impact how well students learn. In essence Senate Bill 2, and similar efforts in Texas, led to the passage of No Child Left Behind a decade later- a real testament to the core work of educators, policymakers and state politicians/ stakeholders in North Carolina.

The Hunt years, terms three and four.

When former Governor James B. Hunt, Jr., announced his decision to run for an unprecedented 3rd term as Governor, it was clear from the outset that his primary focus would be on education. While terms one and two were highlighted by education initiatives, the experiences of Governor Hunt while out of office convinced him more than ever that substantive, significant reform was needed if North Carolina was ever going to breakthrough the shackles of history, culture and expectation that defined so many southern states when it came to K12 education improvement.

Governor Hunt either led or served on the nation's major education reform boards while out of office from 1984-1992. Among the national efforts were the following;

- Carnegie Group of Twenty- the President of the Carnegie Corporation of New York convened a group of twenty leaders in science, government, education and business. The purpose was to discuss next steps in the national effort to draw America's attention to the link between economic growth and the skills and abilities of the American work force. This discussion led to the next opportunity to serve for Governor Hunt—
- The Carnegie Forum on Education and the Economy- established as a program of the Carnegie Corporation and growing out of the "Group of Twenty's" discussions, this initiative focused on the key aspects of education and economic growth. The first Task Force focused on teaching as a profession.
- The Task Force on Teaching as a Profession- Governor Hunt served as a key member of this task force. Among its recommendations was a proposal that a national board for the upgrading of the teaching profession be created to establish and maintain high standards for teaching.
- The National Board for Professional Teaching Standards- Governor Hunt was named to chair the Planning Group for the National Board, which resulted in the establishment of the National Board for Professional Teaching Standards, with Governor Hunt serving as the founding chairman of the Board.

These experiences, combined with both previous experiences and a passion for education, helped drive Governor Hunt's relentless commitment to transforming the state's public schools and achieving breakthrough performance. This vision, viewed by many as 'pie-in-the-sky' thinking, became Governor Hunt's main focus as he began term #3 in January of 1993.

One initiative that was proposed even before Governor Hunt was formally sworn into office in January, 1993, was the creation of an Education Cabinet designed to bring the major leaders of each of the state's education organizations- K12 education, Community Colleges, UNC system and private colleges- together on a regular basis to discuss issues, build collaborations, and expand opportunities for students. This P-16 council was established long before other states and the federal government considered such a step to be of value. Today the Education Cabinet continues to meet, and the state's Governing Boards are legally required to meet annually around initiatives to improve communication and collaboration.

Senate Bill 2 was the precursor to many of the initiatives of Governor James B. Hunt, Jr., during his third and fourth terms in offices (1992-2000). During the term from 1993-1997, Senate Bill 2 was the foundation upon which Governor Hunt built momentum and support for the truly revolutionary changes that were to come following his re-election in 1996.

North Carolina, the "State of Zig-Zag Reform", using the policy initiative of Senate Bill 2 as a bridge, moved to a new policy arena unimaginable at the time- the Excellent Schools Act of 1997. From the outset, the Excellent Schools Act as a policy lever led to dramatic, consistent and sustained efforts that resulted in major performance gains for students in literally every area of testing across the nation.

As Governor Hunt ran for reelection in 1996, he continued to emphasize his commitment to education, beginning with Smart Start and continuing through K12 education. He ran for reelection on his record of accomplishments and his pledge to push forward with an even greater emphasis on school reform in his fourth, and last, term as Governor of the state.

One Man's Vision—The Golden Age of Education in North Carolina- A Story

In December of 1996, following his reelection to a fourth term as Governor, the Senior Education Advisor Tom Houlihan and the Chief of Staff Ed Turlington to Governor Hunt were convened in the library of the Executive Mansion. Amidst all the majesty of the Mansion in full regalia for Christmas, Governor Hunt began by talking about his thoughts about his inaugural address a few weeks later. He told these two trusted advisors that he wanted to hold the inauguration at a public school- Broughton High School (Raleigh, NC)- as both a symbol of his passion for education reform and as a precursor for the inaugural address he would make pledging major reform of the public schools.

Governor Hunt went on to describe his vision for finally bringing excellence to the state's public schools. He wanted to propose a major new effort for the public schools- the compilation of all he had learned over the years and centered around the bedrock values and beliefs he had about improving schools. In short, he wanted to create a major piece of legislation that would be unimaginable to most North Carolinians and would focus on raising teacher salaries to the national average within four years, creating a new accountability model with real rewards and real consequences, addressing leadership preparation programs, raising standards and expectations, and building public and business support tying improvement to the economy.

Then he dropped the bombshell- he wanted to propose that all of this be done through a new investment of \$1 billion of new state funding!! "I was dumb-founded," stated Senior Education Advisor Tom Houlihan. "\$1 billion was beyond- way beyond- any level of new funding for K12 education in the history of the state," he went on. "I always thought of myself as being a visionary educator, but I wasn't even at first base compared to where Governor Hunt was going," Houlihan concluded.

The eventual policy effort of this conversation in the library of the Executive Mansion was the passage of the Excellent Schools Act of 1997 and what has become to be known as the "ABCs of Public Education". The House and Senate passed the Excellent Schools Act by wide bi-partisan margins, including the \$1 billion price tag to raise teacher salaries and a whole host of accountability and reform measures. All told the Excellent Schools Act was over 1,000 pages in length, the largest and most complicated education legislation in the history of the state.

K12 education would never be the same again.....

The Excellent Schools Act was the most comprehensive education policy initiative ever passed by the General Assembly. The Act contained literally every major idea or belief Governor Hunt held about K12 education;

- Excellent Teachers- raising teacher salaries to the national average along with changes in tenure, teacher performance and rewards for National Board of Professional Teaching Standards certification.

- Higher Performance for Students- providing consequences for student performance, including performance bonuses for successful student achievement as well as consequences if student performance did not increase.
- Accountability and Community Involvement
- Schools of Education- new initiatives and alternative efforts to prepare school leaders at all levels. The Principals Executive Program was established to train principals in new ways to view and implement leadership and was the result of the findings of the Economic Development Commission's recommendations at the end of Governor Hunt's 2nd term in office.

One has to ask: "Did any of these efforts make a difference in student performance?", or to ask in a different way; "Does K12 education policy really impact student performance, and how do we know?" The answer is a resounding **yes**, as pointed out by the Rand Corporation report of North Carolina and Texas showcased later in this report.

Profile of Jay Robinson

Few, if any, North Carolina citizens have had more of an impact on education than Dr. Jay Robinson, former Superintendent, University of North Carolina Vice President and Chair of the State Board of Education. A classic 'mountain fellow' with a twangy voice that evoked his folksy demeanor, Dr. Robinson was one of the most strategic, brilliant crafters of education reform in the state. He was further successful because of his ability to make legislators, governors and educators both comfortable and supportive of change in education. Dr. Robinson retired from the General Administration for the UNC Board of Governors and was soon tapped by Governor Hunt to lead the State Board of Education. His vision, folksy ways and relentless focus on reform were critical in the passage of the Excellent Schools Act- he was widely respected by both Democrats and Republicans, a critical factor in creating bipartisan support for far-reaching reform. When Jay Robinson shared an idea, everyone listened.

Profile of John Dornan

John Dornan has been at the heart of every major policy decision in education since the 1980s. The former Executive Director of the North Carolina Association of Educators, John was tapped to be the Executive Director of the North Carolina Public School Forum in 1986. Since that time, the Forum's work in the public policy arena laid the foundation for major legislative initiatives including the Teaching Fellows Program, state-wide standards and accountability, supplemental funding for low-wealth and small schools, and a statewide School Technology Fund. Perhaps the single most important accomplishment of the Forum was John's leadership in helping craft, advocate and implement Senate Bill 2. The Public School Forum is the leading non-profit 'floating peace conference' of state-level policymakers, educators and business executives in the United States, and John Dornan's leadership has been the key driver in the Forum's success since 1986. Without the role of the Public School Forum, and John's masterful leadership, it is highly unlikely that North Carolina would have emerged as a leader in K12 education in the United States during the 1990s and beyond.

2001- Today: The Challenges of a New Century

During the decade that began in 2000, performance of K12 students has seemingly plateaued- performance levels achieved in the 1990s have been sustained, but there have not been the kind of rapid gains experienced from 1992-2000. New challenges have evolved in the state, and the overriding issues of performance continue to be plagued by tremendous gaps in subgroup factors- children of color and varying socioeconomic backgrounds often result in strikingly different performance levels.

The Leandro court case has been a major issue facing policymakers during this new century. The dilemma of the "Two North Carolinas" has been highlighted by the Leandro court ruling, and the subsequent oversight of the court ruling by Judge Howard Manning, Jr.

The Leandro case was a suit filed by a student in Hoke County, North Carolina, claiming that students in low wealth counties/communities do not receive the same level of educational opportunities as those in higher wealth areas. The primary source of this funding discrepancy is the tax base and subsequent tax rate- that low wealth counties have higher tax rates while at the same time not being able to generate enough revenue to offer students comparable education experiences.

The courts ruled in favor of the plaintiff, and North Carolina policymakers have been addressing this ruling ever since. And to date the solutions to many of the educational issues raised by income, location and race have been elusive and less than satisfactory.

North Carolina students are also dropping out in numbers that are both unacceptable and unprecedented. The drop out rate is considered a barometer by many policymakers of the quality of education being offered for ALL students. To date the dropout rate remains stubbornly high, despite high school reform efforts and other initiatives.

Governor Michael Easley, who served as Governor from 2001-2009, focused primarily on an early childhood initiative and high school reform. His education focus is viewed as a series of programs and projects, but the Easley administration never produced a formal education plan during the eight-year time frame.

Beverly Perdue was elected in 2008 as the first female Governor in the state's history. A former chair of the Senate Education Committee, Governor Perdue's focus to date has been around education and the economy. The challenges of a state in a deep recession, budget deficits and high unemployment rates have, of necessity, dominated the first year of the Perdue Administration. However, as Governor Perdue's positions on education evolve it is clear she envisions education as central to restarting North Carolina's economy and her primary focus on schools and jobs.

Future Challenges

As the state moves forward into 2010 and beyond, the future issues in K12 education that will likely need to be addressed include the following;

- The dichotomy of performance based on where a child lives and the socio-economic background of that child. From school finance to construction, a child's socioeconomic and demographic backgrounds often correlate with performance. As the state becomes increasingly diverse, how policymakers address these factors through policy and funding will impact dramatically on future generations.
- The need for a more modern curriculum based on 21st century skills that link the state's competitiveness of the work force to in the global economy will likely be even more important in the future. The tug will come from those who want to maintain a 'basic' curriculum of reading, writing, science and mathematics vs. those who believe these basics are not enough.
- The use of technology, the digital divide, online/virtual learning and a whole host of non-traditional issues that impact education will require enormous time and energy as the state grapples to become more effective and efficient in K12 education.

These issues will continue to address the two recurring themes that have driven the effort to achieve the level of performance that makes North Carolina a magnet for new jobs, a higher quality of life, a better educated citizenry and a place where K12 education is the ultimate driver of success.

Profile of Howard N. Lee

Howard Lee's influence on education in North Carolina stretches back to 1990 when he was elected to the North Carolina Senate and soon became the chair of the Senate Education Committee. The son of a sharecropper from Georgia, Howard Lee became the first African-American Mayor of Chapel Hill, ran for Lieutenant Governor, and eventually was elected to the Senate. He has served as Chairman of the State Board of Education and was most recently selected as Executive Director of the North Carolina Education Cabinet.

Profile of Howard E. Manning, Jr.

Howard Manning was first appointed to the bench (Superior Court) by Governor Martin in 1988 and then appointed as a Special Superior Court Judge by Governor Hunt in 1996. He was subsequently elected to an eight-year term as Resident Superior Court Judge in 2000. His handling of the Leandro case (1997) resulted in four opinions totaling 400 pages- he ruled that the state had failed to meet its constitutional obligations to provide every child in the state with certified teachers, competent administrators and instructional programs that were supported with adequate resources. What state leaders at all levels could not resolve eventually was taken over by the courts. In the case of low wealth funding, it was Judge Manning and not state policymakers who crafted the policy to address these issues.

Profile of Leslie Winner

Leslie Winner is currently the Executive Director of the Z. Smith Reynolds Foundation, one of North Carolina's leading philanthropic institutions. This position caps a career of political and civil service, primarily in the field of education, and makes Ms. Winner a major influencer of K12 education during the 1990s through today. She served as Education/Higher Education co-chair in the North Carolina State Senate and was a major leader of the Excellent Schools Act of 1997. She then served as Vice President and General Counsel to the University of North Carolina General Administration before being named Executive Director of the Z. Smith Reynolds Foundation in 2008.

CASE STUDY-

ACHIEVING 'BREAKTHROUGH' PERFORMANCE' THROUGH STANDARDS, ACCOUNTABILITY, AND HIGHER EXPECTATIONS- A NATIONAL MODEL

The National Education Goals Panel, a federal entity charged with tracking and reporting annually on 33 indicators of K12 performance, commissioned a Study by the Rand Corporation (1998) on states who led the nation in performance improvement on the National Assessment of Education Progress (NAEP). After an analysis of the Goals Panel's 1997 report, the states of North Carolina and Texas "stood out for realizing positive gains on the greatest number of indicators". (p. i)

Dr. David Grissmer, a world leader in education research, was commissioned to analyze the education reforms in both states to ascertain the role of policy in the progress being made re: student performance. Dr. Grissmer's analysis "confirmed that **gains in academic achievement** in both states are **significant and sustained**." (p. i) Of special note, Dr. Grissmer's study "concludes that the most plausible explanation for the test score gains are found in the policy environment established in each state." (p. i)

In short, the rapid and profound gains of student performance were not achieved by a single program or new idea, but rather through a policy environment that created Senate Bill 2 and the Excellent Schools Act, both of which were comprehensive policy initiatives that focused on the 'system' of education and not some catchy, easily recognizable project that had limited impact on the system.

Changes in the organizational environment and incentive structure for educators emerged as the most decisive aspects of the policies enacted in both North Carolina and Texas (p.1.) However, as the author pointed out, similar sets of policies exist in other states. So what was different in North Carolina to result in "breakthrough performance" during the decade of the 1990s? Grissmer identified an overarching theme and three component parts that made the theme successful.

The overarching policy factor was this: *While North Carolina enacted a comprehensive set of policy initiatives, the state's success in raising academic achievement was related as much to the way "these policies were developed, implemented and sustained as to the policies themselves."* What were the elements that helped develop, implement and sustain these policies?

- **#1-- Leadership from the Business Community**

In North Carolina (and Texas) the business community played a critical leadership role in developing and sustaining reform. "Business leaders helped form the strategic plan for improvement, forging compromises with the education interests, and enabling passage of the necessary legislation." (p. ii). Business funded organizations that brought together educators, business and policymakers through the North Carolina Public School Forum. Developing these organizations was often a long, tedious and arduous task, but clearly, without business

involvement every step of the way, the success of policy initiatives like the Excellent Schools Act likely might never have occurred.

- **#2- Political Leadership**

Political leadership in North Carolina (and Texas) was “essential at critical points in the reform process.” (p. ii). In both states political parties changed hands in the Governor’s office, yet the reforms begun under one administration were continued by the next administration, in spite of a change in party control. The business community remained an important ally for continuity and advocate for the reform agenda.

In North Carolina the election of a strong supporter of education, James B. Hunt, was the catalyst that took education reform from a series of projects and programs to a comprehensive approach that raised expectations, held students and educators to high standards, and provided incentives and consequences for performance.

The leadership of Governor Hunt “seems essential to build on and maintain the momentum of earlier reforms and to help maintain the still somewhat fragile coalitions supporting educational reform. Without political leaders willing to build on the foundations of earlier reform initiatives, it is difficult if not impossible to create the continuity in the reform agenda that is critical to long-term success.” (p. iii)

- **#3 Consistency of the Reform Agenda**

Efforts to improve education often focus around new programs or projects that are currently in vogue- thus over time and due to changes in leadership the old practices are replaced with new programs or projects. In North Carolina under Governor Hunt’s leadership, this was not the case.

Instead of throwing out the efforts of a previous administration from a different political party, Governor Hunt built on both the Basic Education Plan and Senate Bill 2, creating new incentives and consequences and raising teacher salaries to the national average. What resulted was a level of consistency and policy stability (no more ‘zig-zag reform’) that helped to stabilize reform as a long-term plan of action, lasting well over a decade.

Did this level of consistency work? According to the Rand Report: the approach has generated “strong evidence that it is working...Most importantly, data from state assessments and NAEP show that academic achievement is rising for all students.” (p.iii)

The key reform policies identified by Grissmer that were critical to achieving ‘breakthrough performance’;

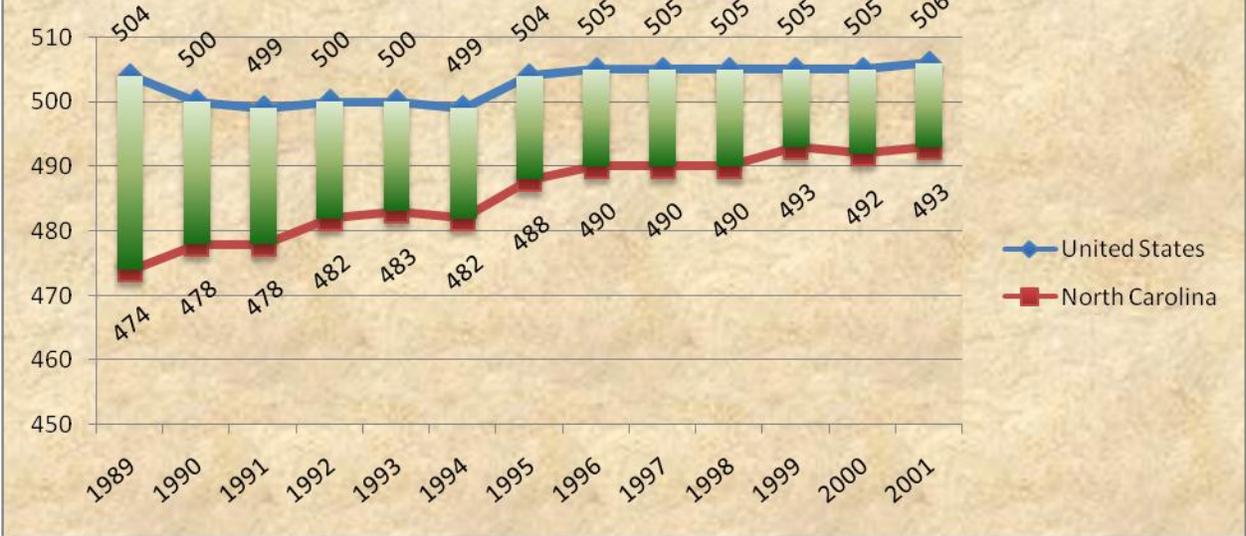
- **State-wide standard by grade for clear teaching objectives-** clear levels of expectation by grade were a hallmark of the accountability program, with textbooks and curriculum being aligned with the state-wide standards. These standards helped ‘raise the bar’ of expectation regarding teaching and learning.

- **Hold ALL students to the same standards-** all students, regardless of disadvantage or other socioeconomic factors, were held to the same state standards. To meet the requirements of the accountability system, each population subgroup in a school or district must meet the performance targets.
- **State-wide Assessments closely linked to academic standards-** assessments in all grades 3-8 in reading and math were in place. These assessments reflected the standards in place for each grade, thus creating a sense of alignment between standards and accountability. This system of standards and assessments was left virtually unchanged over time.
- **Accountability Systems with consequences for results-** schools were rated based on their performance on state tests. Monetary rewards based on teamwork (i.e. school faculties) were offered to schools who improved performance, and consequences involving school intervention were implemented in chronically underperforming schools. And throughout the accountability system, awareness of population challenges and socioeconomic factors were related to improvement guidelines- i.e. marked growth from one year to the next versus an arbitrary improvement number regardless of local needs or challenges.
- **Increasing local control and flexibility for administration and teachers-** the effort recognized that holding educators accountable without giving local control and flexibility would not work. The emphasis was on performance, not dictating how to change the performance (a huge change in policy). Statutes were removed, laws were changed, and the constraints placed on superintendents and principals for how money was spent were reduced. The policy goal was to allow schools locally to develop and implement practices that impacted performance based on individual needs.
- **Infrastructure to sustain reform-** from computerized feedback systems that provided data for continuous improvement to research institutes, the infrastructure to sustain reform was put in place. This infrastructure, both public and private, supported a continual process of innovation and improvement that lasted into the 21st century.

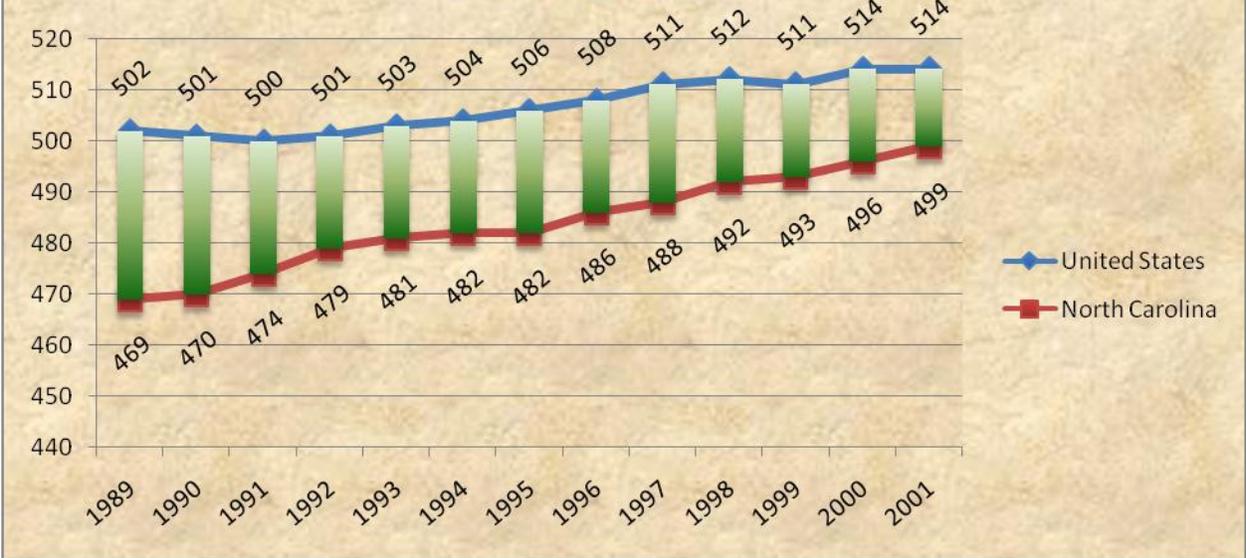
Perhaps most important, the combination of political leadership, business involvement, and continuity helped propel North Carolina to a leading state in terms of education improvement during the decade of the 1990s. Many educators refer to the 1990s as the “Golden Age of K12 Education”. From a student performance standpoint, there is no doubt that improvement was enormous, resulting in the kind of breakthrough improvement rarely, if ever, found either before or since this time not only in North Carolina but across the nation as well.

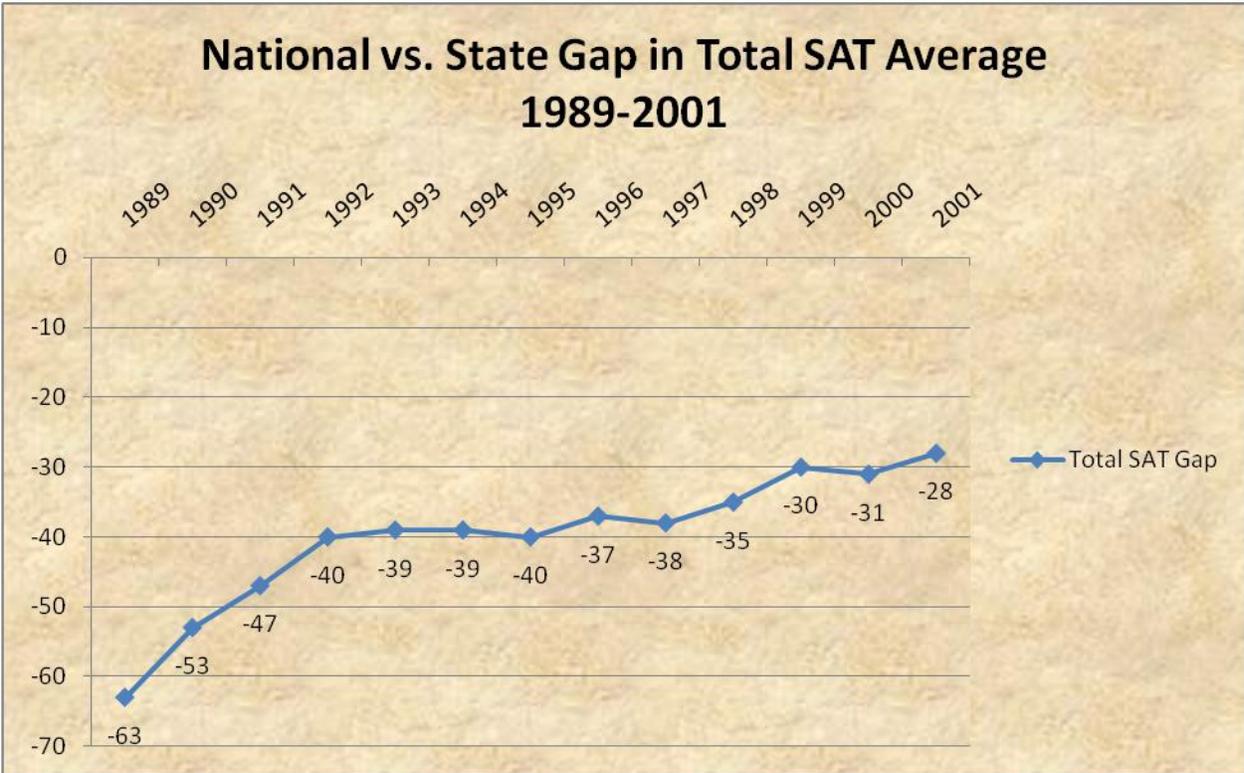
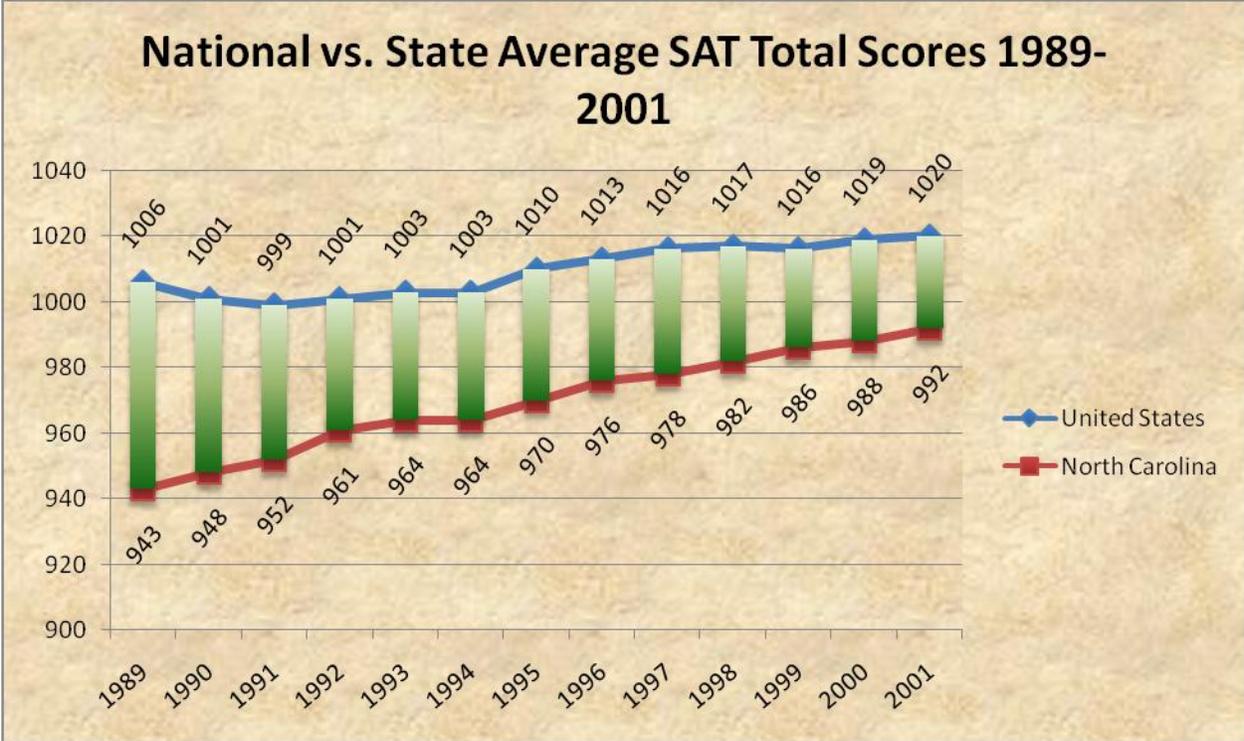
An example of the enormous change during the 1990s relates to the marked average score improvements on the Scholastic Assessment Test (SAT) (just one of many performance improvements that led the nation). In 1989, North Carolina’s average SAT score was one of the lowest among all 50 states. By the year 2001, North Carolina led the nation in raw score improvement on the SAT. See results below.....

National vs. State Average SAT Critical Reading Scores 1989-2001



National vs. State Average SAT Mathematics Scores 1989-2001





CASE STUDY- THE NORTH CAROLINA PUBLIC SCHOOL FORUM- THE STATE'S 'FLOATING PEACE ORGANIZATION'

Background

In the early 1980s North Carolina was in the midst of a dilemma- new programs and projects to improve K12 education were not working, and public education was growing as a partisan, political issue. A group of four legislators became increasingly frustrated with the inability of the state's policymakers and educators to achieve consensus on school improvement.

In 1985 a group of seven legislators, business leaders and one educator approached the Z. Smith Reynolds Foundation with a brand new concept- to create a non-profit organization that could become a 'floating peace conference' for new ideas, strategies and goals to improve the state's public schools. What emerged was an organization "that was envisioned to be a standing blue ribbon commission on schools and the economy". (The Forum Report, p. 2.)

The new organization was composed of a large number of Board of Directors, roughly one-half appointed by elected officials or service by virtue of position. Literally every major education association, higher education, policymaking groups and elected officials had representation on the Forum's Board of Directors. The idea was to have these Board members study issues carefully, often opposite legislative sessions, and to craft a consensus among the wide variety of representatives on issues, ideas and legislative initiatives.

Policy Leaders

The original seven Forum Founders were a combination of legislators, business leaders, and eventually one educator. They included:

- Gerry Hancock, former member, North Carolina Senate
- Martin Lancaster, former member, North Carolina House and former President of the Community College System
- Tony Rand, North Carolina Senate
- Dan Blue, former Speaker of the House
- Sherwood Smith, former CEO, Carolina Power & Light (now Progress Energy)
- Dick Daugherty, former State Executive for IBM
- Jay Robinson, former Superintendent of Charlotte-Mecklenburg Schools

This group of leaders helped orchestrate the selection of John Dornan as the Forum's Executive Director. John, who continues to serve as the Forum's only Executive Director, was a controversial selection. He was serving at the time as the head of the North Carolina Association of Educators, the 'teacher union' in North Carolina and a group that was either very well liked or abhorred, depending upon political affiliation.

Yet John was as tough as they came and 'took no prisoners' in his stand about the need to improve education. A former union negotiator 'from the North', John's style was not in keeping

with the gentility of public behavior of politicians in the South. This toughness was exactly what was needed to drive reform, and the original founders of the Forum, led by Gerry Hancock and Jay Robinson, saw John Dornan as the kind of person it would take to bring about reform.

Policy Actions and Accomplishments

Today the Public School Forum is well entrenched as the ‘go to’ organization on public policy related to K12 education. This reputation is well deserved- out of this ‘floating peace conference’ have come major pieces of education reform since 1985:

- The North Carolina Teaching Fellows Program
- Senate Bill 2
- Support for the Excellent Schools Act/ABCs of K12 education
- Lead Teacher Pilot project

Currently the Forum is involved in a number of high profile efforts to study education around the world (Learning from Abroad), the Education Policy Fellowship Program, the Institute for Educational Policymakers, the Progress Energy Leadership Institute, and the North Carolina Center for Afterschool Programs.

North Carolina has made significant progress in improved student performance since the 1980s, and the Public School Forum has been the thread of support, consensus and action that has allowed reform to continue despite changes in leadership in the Governor’s Office and in various Council of State and Legislative bodies.

PROPOSED IDEA FOR AN INTERACTIVE ‘LIVE’ POLICY EXHIBIT IN THE HUNT LIBRARY AROUND K12 EDUCATION

As a result of the interview conducted with IEI staff, the Design Team, and myself (11/24/09), the concept of what this assignment is designed to produce has finally begun to make sense. As I understand this assignment, the goal is to provide the Design Team with information about K12 education that could eventually be turned into an exhibit in the new Hunt Library at NC State. The exhibit is to be an interactive, hands-on, ‘live’ exhibit that will entice attendees to learn more about policy in K12 education and to find ways to make the subject matter ‘come alive’ through an interactive experience.

With that in mind, I am proposing the following exhibit idea that would combine content, current information and future education challenges in an interactive, hands-on experience that might be of interest to the Design Team.

Proposed ideas for an exhibit:

Recently I had the opportunity to visit the War Museum in downtown London, England- the museum that is located in bunkers below ground where then-Prime Minister Churchill and his staff led the war effort during WW II.

One of the exhibits in the museum is a flat surface exhibit with dates and timelines down one side and a series of events related to the war next to the timeline. Museum visitors could touch a button and highlight a certain date and corresponding events would light up accordingly.

Taking the idea of a visual concept that attempted to ‘bring to life’ to the history of WW II, here is an idea for an exhibit. Below is a figure titled “The Dilemma of North Carolina K12 Performance- Expectations vs. Reality”. The idea for an exhibit is to highlight real time data on student performance and then have visitors decide and select a range of potential policy options to address the issues highlighted by the data.

This exhibit could be set up around the twin themes that we have focused on in this report;

Theme #1- The Quest to Achieve Breakthrough Performance- accountability, assessments and standards- through Higher Expectations

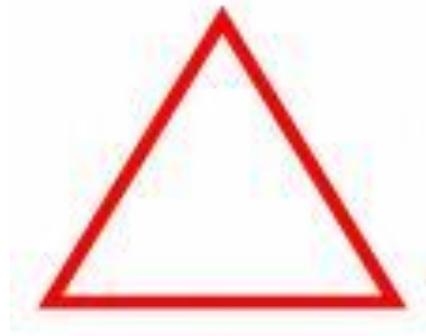
Theme #2- The Battle of the “Two North Carolinas”- how resources funding and the dichotomy of rural/urban impact the quality of education throughout the state.

No matter what data is displayed in K12 education, one or both of these two themes will be at the heart and soul of the problem and the potential solutions as well.

One sample example of real-time data that could be analyzed is found in the document below on the ‘dilemma of performance’. You will note that NAEP proficiency scores are much lower than NC testing scores- a clear dichotomy of expectations as the NC tests appear to be far easier than national assessments.

**THE DILEMMA OF NORTH CAROLINA K12 PERFORMANCE--
EXPECTATIONS VS. REALITY**

NAEP PROFICIENCY



**COMM. COLLEGE
REMEDICATION RATES**

EOG/EOC PROFICIENCY

A. NAEP (National Assessment of Education Progress)- i.e. “The Nation’s Report Card”

2009- NC 4th grade proficiency- mathematics—43%

2009- NC 8th grade proficiency- mathematics—36%

2007- NC 4th grade proficiency- reading- 29%

2007- NC 8th grade proficiency- reading- 28%

B. EOG/EOC (End of Grade or End of Course proficiency levels- (NC Assessment System)

2007-2008- NC 4th grade proficiency- mathematics- 74.5%

2007-2008- NC 8th grade proficiency- mathematics- 69.8%

2007-2008- NC 4th grade proficiency- reading- 60.9%

2007-2008- NC 8th grade proficiency- reading- 55.7%

2007-2008 – High School Biology- 69%

2007-2008- English I- 74%

2007-2008- US History- 67%

C. Community College Remediation (percent of enrolling students needing tutoring and extra work in reading and/or math)

2007- 46% of general population enrolling in Community College System

64% of high school graduates in 2008 enrolling in the Community College System

Visitors could select from a variety of ‘reasons’ there is a discrepancy of scores (as examples);

1. NC tests are much harder than national tests
2. National tests are much harder than NC tests
3. NC scores mean more because they are locally developed
4. National tests are more rigorous and give a better comparison to global competitiveness.

A visitor would select one of the four optional reasons to explain the data presented. Based on the option selected, there would be a series of policy options the visitor would then see, with some of the policy options ending up going “no where” and others ending up being solutions to the data dilemma presented.

And on and on... the point is to find a way to get visitors intellectually and visually engaged in the real time data of K12 performance and to help devise policy solutions.

Imagine the power of getting a group of key NC policy leaders (or staff) together to create the options mentioned above and then to create the policy solutions or next steps. Such a group of policy folks would more than likely be quite willing to volunteer to do this assignment, and once a year (or when new data comes out), I am sure it would be minimal to get people together to update the exhibit.

Here is a set of people to pick from who I think would be willing to do this voluntarily;

- Tom Houlihan
- John Dornan, Public School Forum
- Judith Rizzo, Executive Director, Hunt Institute
- Carr Thompson, Burroughs Wellcome Student Science Enrichment Grant Program
- Matty Lazo-Chadderton, Director of Hispanic/Latino Affairs, NC Senate
- Mike Ward, former State Supt, NC
- Bill Harrison, State Board Chair
- Howard Lee, Head of the NC Cabinet
- Rep. Doug Youngue, NC House Education Committee
- Sen. AB Swindell, NC Senate
- Lou Frabrizio, Director of Accountability, NC Department of Public Instruction
- Charles Coble, former Dean, School of Education, East Carolina University

The data mentioned as an example around proficiency is just one of a whole host of performance issues facing NC (and every other state). Another example is some rather startling data on other performance in NC:

BY THE NUMBERS

- **75**—number of low performing schools in NC, the lowest designation in the testing program
- **0**—number of low performing schools with less than 20% free/reduced-price lunch students
- **66**—low performing schools with at least 60% free/reduced price lunch students

- **1006**—average SAT score for North Carolina students in 2009
- **930**—average score for students from families with incomes of less than \$40,000 a year
- **1082**—average score for students in families with incomes of at least \$120,000
- **1141**-- average score for students in families with incomes of more than \$200,000
- **211**- difference in SAT scores between families who earn more than \$200,000 and families who earn less than \$40,000
- **1308**—mean SAT score of students admitted to UNC- Chapel Hill
 - **Source-** Raleigh N + O- 9/10/09

The power of presenting very important data like this cannot be overstated- in the process the Friday Institute could become a partner with this exhibit and help raise both the level of awareness of the general public and get the public's involvement in policy solutions.

The concept is this- take key performance data about K12 education, display it visually in an attractive and 'catchy' way, let visitors contemplate what the data is saying, then let visitors choose what they think the data means, and then have visitors help craft policy solutions developed by a group of the 'best and brightest' minds in the state.

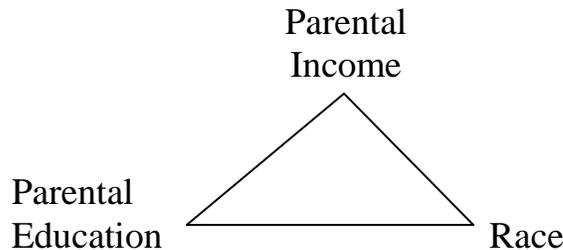
What follows is a report from the Public School Forum on another data set- note the various way data can be displayed, and what a powerful way to get people more actively engaged in both understanding and eventually supporting reform.

The Public School Forum's Friday Report

PDF versions can be found at www.ncforum.org

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Can Educators Find a Way to Break the Iron Triangle of SAT Score Predictability?

The release of SAT scores this week attracted little attention. Average scores in North Carolina dropped 1 point from last year; national scores also dropped one point. While North Carolina has moved from near the bottom (48th out of 50 states in 1990) to only 10 points below average, the State remains below average in almost all categories – ethnic comparisons, income comparisons, etc. Albeit, it has made larger SAT gains than all but one other state in the union.

If one digs deeper into SAT test-taking results, however, one finds patterns that raise disturbing questions about education's ability to pull all young people up to higher levels of achievement.

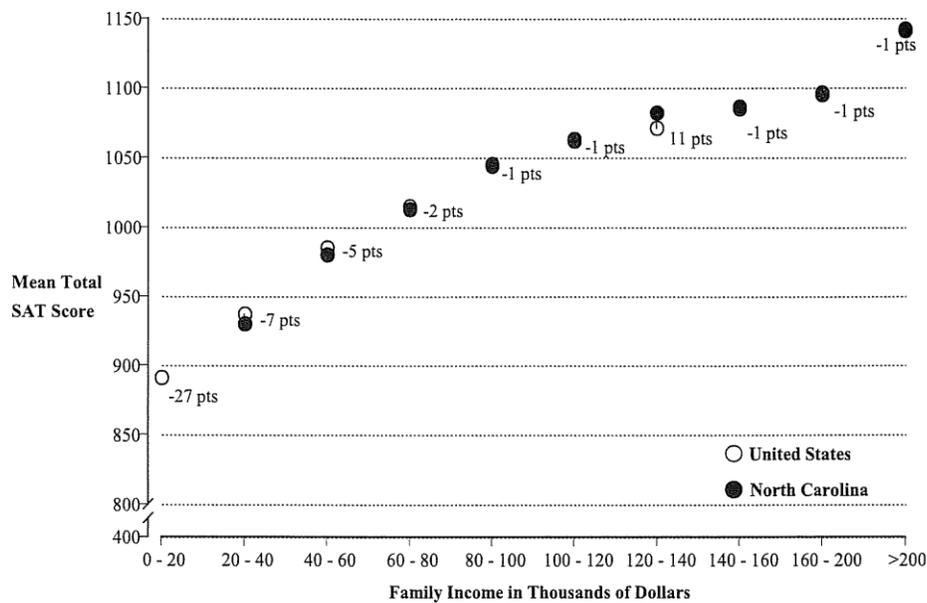
The Department of Public Instruction's 2009 SAT Report graphically presents data that has become depressingly repetitive. When one breaks down the scores of SAT test takers, race, parental education levels and parental income in almost all cases are accurate predictors of how young people will fare on the test widely used to determine college admission.

With very few exceptions, the demographics of a school system's population mirror the SAT scores of test takers. Districts largely composed of minority students who come from low-income families with low levels of educational attainment score the lowest. Districts whose student population is largely made up of white, middle class families with above-average levels of education score the highest. End of story; or, does it have to be?

That is the question facing not only North Carolina educators but educators across the country. It is a question that looms large for states like North Carolina that have large numbers of minority students and students living in poverty.

Category	N.C. 2009 Sat Scores	U.S. Average 2009 Sat Scores
Asian American	1075	1103
White	1063	1064
Hispanic	963	915
American Indian	913	979
Black	855	855

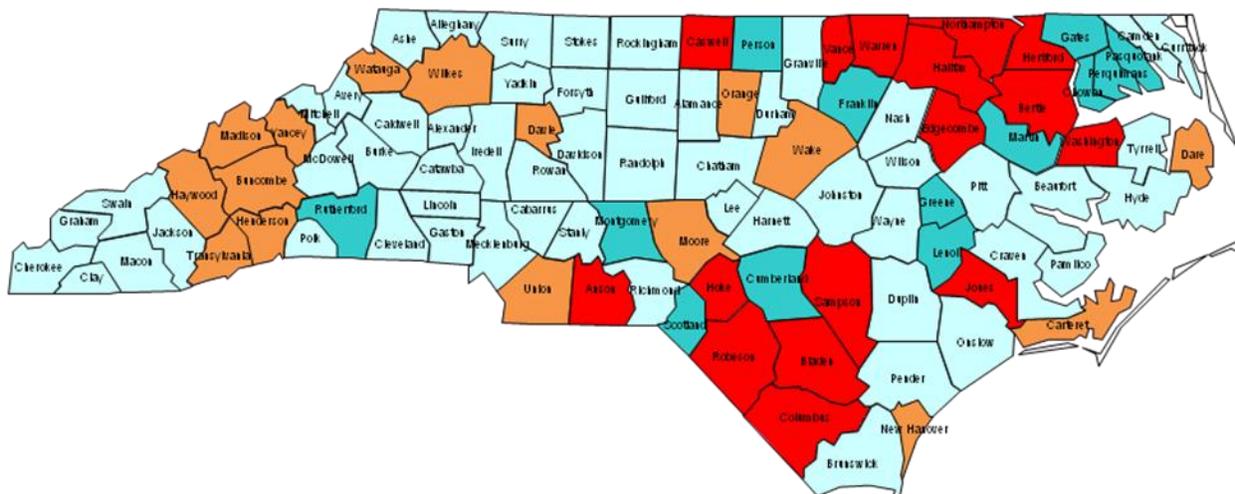
Further evidence of the predictability strength of the factors in the Iron Triangle (i.e., race, parental income & educational levels) can be found when looking at SAT scores of students growing up in households in North Carolina and around the country with varying income levels.



Source: DPI's The North Carolina 2009 SAT report

Closer to home, the map below shows the degree to which the iron triangle of race, parental income and parental educational attainment mirror educational results in North Carolina. Students in counties shaded in red scored below 900 on the math/language portion of their SAT tests – that is 900 out of a possible 1600, or 116 below the national average SAT score.

- Red = Less than 900
- Light Blue = 910 to 950
- Blue/Green = 960 to 1020
- Orange = Greater than 1020



If one examines the map more closely, it becomes painfully clear that almost all of the low-scoring counties are also counties with:

- High percentages of minority students.
- High percentages of unemployment or under-employment.
- Low levels of adult educational attainment.
- Few job opportunities and, in many cases, a declining population base.

Conversely, if one looks at the counties shaded in orange – counties where SAT scores are above the national average -- he/she will typically find counties that:

- Have above-average income and real estate wealth.
- Have an adult population with above average educational attainment levels.
- Have strong economies that are growing and attracting jobs and people.

County averages, however, can mask dramatic differences between high schools. In Mecklenburg County as an example, high school scores range from 1125 in Myers Park High School to 863 at West Mecklenburg High School. The difference? Once again, it's the iron triangle of race, parental income and parental educational levels.

If there is good news to be found in the new SAT data it is that there are a handful of districts that don't fit the iron triangle of predictability model. Asheville City, for instance, serves a large minority and low-income population but is one of the highest scoring SAT systems in the state. The challenge for educators is to look at lessons that can be learned from systems like Asheville that are beating the odds and proving that educators can make a difference in the performance of all young people. The challenge beyond that is to replicate practices that are enabling young people to break the grip of predictability.

DPI's thorough, albeit troubling, assessment of SAT scores can be accessed by going to <http://www.ncpublicschools.org/docs/newsroom/news/2009-10/0825/sat-report-final.pdf> .

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