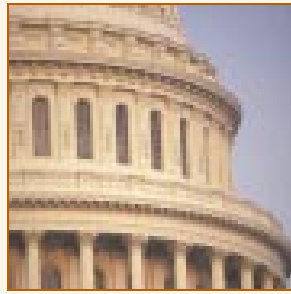


# PROGRESS REPORT



 JAMES B HUNT, JR INSTITUTE  
*for* EDUCATIONAL LEADERSHIP *and* POLICY

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 JAMES B HUNT, JR INSTITUTE  
*for* EDUCATIONAL LEADERSHIP *and* POLICY



## LETTER FROM THE EXECUTIVE DIRECTOR



Our first Annual Governors Education Symposium confirmed what Jim Hunt has known all along – that our nation’s governors understand that they must lead the effort to improve education in their states. The Hunt Institute’s December 2002 inaugural Governors Education Symposium provided the perfect venue to begin our work with governors and other national leaders to forward our common agenda to improve education for all American students.

I began my tenure as executive director of the Hunt Institute in June 2002 with two part-time staff members, a small office space and the seeds for a new kind of education reform organization. Within the span of one year, our staff and office have grown, and Governor Hunt’s concept has taken root. Since our founding in March 2002, the Hunt Institute has secured substantial funding for a unique and powerful new business model that combines consulting and conferencing. We’ve designed a nimble organization that can respond quickly to states’ needs for customized education policy advice – advice for which a number of governors have already engaged the Hunt Institute’s services.

We created a strategic plan, business plan and marketing materials to attract continued financial support and promote our work. We have partnered with key national organizations and recruited senior advisers with exceptional expertise to deliver on the promise of our work. Our affiliation with the University of North Carolina affords us access to the considerable resources of this world-class 16-campus system.

Throughout my career in education, I have had the great good fortune to work with extraordinarily talented and committed individuals, but none more so than the chairman, Board and staff of the Hunt Institute.

Everyone associated with the Hunt Institute believes deeply in the transforming power of education and in the right of every child to high-quality teaching and learning. More importantly, we know from experience that through effective gubernatorial leadership and strategic partnerships, states can cultivate an environment in which all children can learn and succeed.

Our first annual progress report chronicles our many accomplishments and previews some of our exciting plans for year two. As I look at how far we’ve come in our first year, I am encouraged and enthusiastic about the work that lies ahead. The Hunt Institute has accomplished much, as this report will attest, and has built a solid foundation for our future work.

*Judith A. Rizzo*

Sincerely,  
Judith A. Rizzo  
Executive Director

# Vision



## *A vision from the heart*

“My mother was a teacher, a marvelous teacher... So early in my life I saw what successful teaching was and how all students learned from it, because I saw my mother do it. That’s why I’ve always had this vision of how teachers can teach well, how students can learn, and how we can have successful schools where all students are watched out for, taken care of, and expected to do well. It’s a vision that has guided me throughout my public life.”  
— Governor James B. Hunt, Jr.

While the James B. Hunt, Jr. Institute for Educational Leadership and Policy is national in scope, we always remember that our work is ultimately about helping individual students improve. We’re guided by Governor Hunt’s vision of schools in which “...all students are watched out for, taken care of, and expected to do well.” It’s a vision governors and other state leaders share.

“The creation of the Hunt Institute for Educational Leadership and Policy is a very positive step in providing a means to export knowledge and information relative to reforming education all across America.”  
 – *U. S. Secretary of Education Rod Paige*

**EXPERIENCE,  
 PASSION,  
 LEADERSHIP,  
 RESOURCES –  
 THE POWER  
 TO MAKE  
 A DIFFERENCE**

In our inaugural Governors Education Symposium we learned firsthand that governors have a deep understanding of their leadership role in improving education in their states and that they look to the Hunt Institute to help them realize such improvements.

Two key themes emerged from the Symposium:

- Governors **must be the education leaders** in their states and drive the political process to advance education reform.
- Governors must incorporate **the direct link between education and the economy** as part of implementing their education agendas.

These themes inform our State Engagement work with individual states. But far more important, they promise to spark substantive action and assure great strides forward for American education.

During his four terms as Governor of North Carolina (1977-1985 and 1993-2001), Jim Hunt developed and implemented a comprehensive statewide education reform platform. Governor Hunt’s

platform was one of the first in the nation to focus on standards and take the visionary approach to aligning all the pieces that together form a quality education, including student assessment, teacher quality and early childhood education. To enact this ambitious agenda, Governor Hunt built consensus among political, business and education leaders and the citizens of North Carolina to create the support that made his ideas a reality. He also earned a national reputation as a leading advocate for the power of education. Governor Hunt’s experience and expertise are the foundation of the Hunt Institute.

“[The] Hunt Institute’s meeting of new governors inspired me to quickly take my campaign promises of education reform and put them into action. To this day [the Hunt Institute’s] call to the new governors motivates me to be relentless in my effort to pass a comprehensive education reform package. North Carolina’s economic recovery is proof that a sound basic education system is the bedrock of economic growth — especially in today’s global economy.”

*The Honorable Edward Rendell  
 Governor of Pennsylvania*



**A Clear Mission:  
 An Unlimited Future**

*The James B. Hunt, Jr. Institute for Educational Leadership and Policy engages governors and other leaders in strategic efforts to advance and sustain state-level education reform.*

Those few words are the basis for helping create a better educational environment for all Americans. When we can advance and sustain meaningful education reform in every state, we make tremendous strides in education for every child nationwide.

At the Hunt Institute, we firmly believe that education is the key to a better future for all of us – and that the key to educational reform is gubernatorial leadership.

**The Hunt Institute at work**

As Governor of North Carolina, Jim Hunt recognized the need for governors to grasp the connection between the politics and policy of education reform. At that time, no national organization existed to assist governors with the complex reality that good education policy is necessarily crafted in a political environment. It is at that intersection of politics and policy that the Hunt Institute was founded to meet leaders’ needs.

We know that “one-size-fits-all” answers don’t work in state education reform. The most effective solutions are those informed by the experiences within an individual state and from other states – then crafted to address specific needs.

We are able to address those needs by remaining a nimble and responsive organization – one that develops customized solutions and advice to help improve education in individual states.

Our approach is comprised of two integrally connected core competencies:

- **State Engagement:** working directly with governors and other state leaders to jointly craft solutions for individual states
- **Convening:** bringing together governors and other leaders nationwide to exchange lessons learned and discuss strategies at Hunt Institute programs and symposia

Our core competencies are mutually reinforcing and complementary – each contributes to our knowledge base of successful educational policy and practice.

The result is a deep understanding and practical expertise that leads not only to customized solutions, but to better solutions for education improvements.

*Leadership*



## STATE ENGAGEMENT: TRANSFORMING EDUCATION STATE BY STATE

The Hunt Institute provides targeted advice and assistance to governors and other state leaders. We combine our analysis of states' needs and best practices with the education priorities identified by governors to help develop precisely-tailored answers unique to each state.

State-level education improvement is the cornerstone of our efforts. Synthesizing and analyzing information, assessing and evaluating policy options and practice and providing advice on building public and political will for change are the key elements of the Hunt Institute's customized approach to addressing the education policy needs of a state.

While our work is specific to each state, there are elements common to the process:

- Continual, active involvement of the state's governor in the Hunt Institute effort
- Immersion in the educational, political and policy contexts of the state
- Participation of key leaders from different sectors to form action-oriented coalitions and serve as advocates for effective education improvements
- Creating the conditions for effective educational leadership within states
- Reliance on research, policy and political experts from within and outside the state
- Identification of state specific outcomes and a time frame in which to achieve them
- Monitoring, evaluating and reporting what has been learned and accomplished

A number of states have already recognized the valuable role that the Hunt Institute can play in helping them develop and implement a successful, long-term education agenda. Our initial State Engagement work includes:

- Working with teams that include the most important education leader in a state – the governor
- Facilitating the development of business-education partnerships to help advance governors' education platforms

- Developing and managing a state-level strategic planning group on education policy
- Helping governors address major education issues such as school finance, low-performing schools, achievement gaps, pre-K-16 learning continuum, comprehensive systems of standards and accountability and early childhood education
- Working with education, business and political leaders in states to encourage dialogue on governors' education initiatives

### Defining values

The Hunt Institute's unique perspective distinguishes it from other organizations. These distinctions are at the heart of the Institute's work and are rooted in the values and experiences of Governor Hunt and the Institute's Board and staff. We believe:

- Effective education occupies a critical place in ensuring a vibrant economy and enhanced quality of life.
- Education promotes democratic values and a just and caring society.
- Governors have a unique and central role in providing leadership for educational improvement.
- Leadership is essential in motivating and enabling states to undertake comprehensive efforts to improve education.
- Deep and sustained improvement in education leads to better outcomes for all students.
- Building the political will to sustain educational improvement is essential to realizing that improvement.

# Transforming

"Our work with the Hunt Institute confirms my belief that governors need to clearly articulate the education agenda and vision in their states. The Hunt Institute's comprehensive approach to education policy makes it unique and helped me bring the full education landscape in Kansas into focus. With the Hunt Institute's guidance, Kansas has already made great progress to improve education in our state."

**The Honorable Kathleen Sebelius**  
Governor of Kansas

Our Convening activities – bringing together governors, policy-makers and other leaders to examine education reform issues – reinforce our State Engagement work. At Hunt Institute symposia, leaders share knowledge, discuss successes and challenges and develop new ideas and potential solutions around significant education issues.

**CONVENING:  
SHARING IDEAS,  
SHARING  
STRATEGIES**

By assembling governors and leaders of education and policy organizations, businesses, foundations and universities, the Hunt Institute helps

build partnerships to develop support for school improvement strategies and initiatives. We also provide a one-of-a-kind forum for these leaders to discuss education issues candidly and privately.

The Hunt Institute's signature Convening program is an annual invitation-only Governors Education Symposium. During the Symposium, governors take part in sessions with leading education, policy and business experts. Feedback from the 22 governors who participated in the December 2002 event confirms that it is an excellent way for governors to share knowledge on the entire range of education issues. The private nature of the gathering also inspires a candor that gives us a better understanding of governors' interests and needs, which enhances our ongoing State Engagement work.

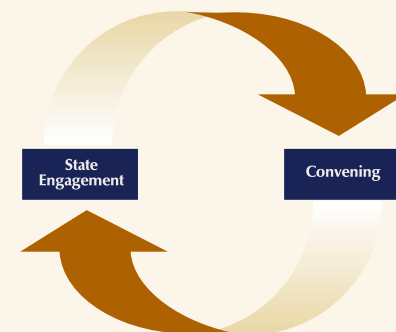
The hallmark of our Governors Education Symposium is its frank, governor-to-governor setting. Future symposia and State Engagement work guarantee that the informative, productive dialogue among governors will continue and expand.

**Our core work**

Our State Engagement and Convening efforts combine to make the Hunt Institute an invaluable resource for governors and other state leaders for substantive education improvement and innovative practices.

Through State Engagement and Convening, the Hunt Institute:

- Helps governors and other leaders develop a deep understanding of education issues
- Assists leaders in accessing and interpreting the information needed to guide and support statewide school improvements
- Enlists experts experienced in developing and realizing successful educational reforms to help state leaders in moving from idea to implementation
- Engages political, business and education leaders and other influential policy-makers in leading education policy efforts in their states
- Helps business, political, education and civic leaders master critical education issues and develop policy based on best practices



"I can think of no issue of more importance to state governments than training a well-educated workforce to compete in the information age. Governor Hunt has created a forum for governors to learn from their peers and nationally-acclaimed experts about the state of the art thinking with regards to accountability, competency-measured learning and other reforms."

*The Honorable Michael Leavitt  
Governor of Utah*

**Education in Your State: Setting the Agenda and Staying the Course**

*A Symposium by Governors for Governors  
December 2002*

On December 1-2, 2002, in Chapel Hill, North Carolina, the James B. Hunt, Jr. Institute for Educational Leadership and Policy launched its first Annual Governors Education Symposium. More than twenty governors from around the nation participated in the historic symposium: "Education in Your State: Setting the Agenda and Staying the Course." Focusing on substantive education reform issues ranging from early childhood education to teacher quality to achievement, accountability and assessment, the Symposium was unique in its combination of rich, dynamic discussion between governors and presenters and confidential governors-only sessions.

Throughout the program, governors benefited from presentations by and discussions with national education leaders, including Rod Paige, U.S. Secretary of Education; Margaret Spellings, Assistant to the President for Domestic Policy; Tom Vander

Ark, Executive Director of Education for the Bill and Melinda Gates Foundation; and Ted Sanders, President of the Education Commission of the States.

The clearest message from the Symposium—that governors **must** lead education reform in their states – affirmed both the need for and the role of the Hunt Institute. The Institute serves as a source of expertise for governors and their policy advisers for how to get things done politically, to determine what the best applicable practices are in the context of individual states' needs and to understand how education policy plays out in real-world implementation.

The 2002 Annual Governors Education Symposium was unique in both structure and content. The combination of high-level guest speakers and opportunities for governors to talk candidly in private resulted in a meaningful, substantive program that has opened the door to continuing dialogue among the nation's governors.



James B. Hunt, Jr.  
Institute for Educational Leadership & Policy  
GOVERNORS EDUCATION SYMPOSIUM

The Hunt Institute's **2004 Annual Governors Education Symposium** is scheduled for June 10-13, 2004, at the historic Grove Park Inn in Asheville, North Carolina. Drawing on the Institute's work to date and discussions initiated in the 2002 Symposium, the **2004 Annual Governors Education Symposium** promises to build on the foundation of last December's inaugural event and expand the opportunity for governors to exchange information about education policy in a private setting.

The **2004 Annual Governors Education Symposium** will again be an opportunity for governors to hear directly from some of the top leaders in American education – people with innovative ideas about how to change children's lives for the better. It will also be a time when governors can share information and ideas with each other in a private setting about what is working well in their states and how they put those successful practices in place.

As the Hunt Institute continues its unique model of State Engagement and Convening activities as a route to educational improvement in states across America, it will begin to work in new areas as well. We will look to develop programs that complement and strengthen our core competencies. Chief among these is our educational leadership development program.

### Resources and relationships

The funding that makes our work possible comes from The Atlantic Philanthropies, Bill & Melinda Gates Foundation, the Pumpkin Foundation, the Wallace Foundation, and the Z. Smith Reynolds Foundation. Funding from these prestigious national foundations reflects confidence in our unique ability to engage with governors directly on educational issues that impact student performance. Generous individual donors have also provided substantial additional funding to support the Hunt Institute's work.

Our partnership with the University of North Carolina gives us access to the University's 16-campus system for expertise in policy research, educational training and evaluation. The Hunt Institute complements and helps advance the University's three-part mission of teaching, research and public service. Our unique and integral relationship with UNC is reflected in the Hunt Institute's reliance on research and policy analysis to affect systemic and continuous improvement in education.

It takes more than funding and intelligent strategies to carry out the work of the Hunt Institute. We are

## CREATING A MORE POWERFUL FUTURE

fortunate to count among our ranks a staff with decades of combined experience and expertise in education, intergovernmental affairs, policy research, development and communications.

In addition to our staff, we've brought together an experienced team of senior advisers who provide insight on specific education, policy and business issues. We are privileged to be able to draw on the wisdom and experience of our Board of Directors, comprised of nationally recognized leaders in education, government, business and philanthropy.

Our advisory Board of Governors is unique to the Hunt Institute. This bipartisan panel is comprised of former and incumbent governors who have consistently shown a strong commitment to education. The Board of Governors advises us on the Annual Governors Education Symposium and educational leadership development programs, helping the Hunt Institute maintain its unmatched access to current best practices in education in states across the country. Their advice informs the Hunt Institute's programs and helps structure the "by governors for governors" opportunities the Institute facilitates.

"Education reform is at the forefront of governors' agendas, and the [Governors Education Symposium] discussions helped us refine our ideas. Governor Hunt was a mentor for many of us in the area of education reform. It's wonderful the Institute exists to carry on his ideas and legacy."

*The Honorable Mike Huckabee  
Governor of Arkansas*

We recognize how important it is for leaders at every level to understand the critical issues facing education and how these issues impact their constituencies. Our educational leadership development program will focus on helping political, business, education and civic leaders develop a vision of sound education policies on which to build their education agenda.

We're also convening a Legislators Retreat late in 2003 for the North Carolina legislature. Co-sponsored by the General Assembly's leadership and supported by the Governor of North Carolina, the retreat will be a unique opportunity for state legislators to learn more and engage each other in discussions about the critical issues facing the education system. This program will serve as a model for similar Hunt Institute forums nationwide. Bringing together a broad spectrum of state legislators in a bipartisan manner holds great promise for constructive discussion that can lead to significant educational improvement.

### Building the will for educational improvement

In our first year of operation, the Hunt Institute has made substantial progress. We grew Governor Hunt's vision into a vibrant organization that is making significant contributions to educational improvement in states across America.

At the same time, we understand that our real work is just beginning. Building and sustaining political will, devising new and more effective strategies for educational improvement and implementing those strategies is never really finished.

The rewards for the effort are great: well-educated children, informed citizens, a stronger economy. In short, a better America.

And that's what the James B. Hunt, Jr. Institute for Educational Leadership and Policy is working for now and in the future — a better America through educational improvement.

### GOVERNOR

#### JAMES B. HUNT, JR. CHAIRMAN

For more than 20 years, Hunt Institute Chairman James B. Hunt, Jr. has been a national leader in education reform. Serving four terms as North Carolina's governor, Hunt focused on early childhood development and improving the quality of teaching in America. His public-private partnership, Smart Start, is a national model for providing quality child care, health care and family support. A strong supporter of high standards in schools, Hunt led North Carolina's effort to establish one of the nation's most rigorous approaches to measuring student performance with the Excellent Schools Act. The Rand Corporation reports that, under Hunt's leadership, North Carolina schools improved test scores on the National Assessment of Education Progress more than any other state in the 1990s.

#### JUDITH A. RIZZO, Ed. D., EXECUTIVE DIRECTOR

Prior to being named the Hunt Institute's first Executive Director, Dr. Judith A. Rizzo was deputy chancellor for instruction with the New York City Board of Education. As the chief educational officer of the New York City public school system, Rizzo developed a nationally recognized prototype for turning around low-performing schools. In addition, Rizzo spearheaded high school reform and implemented model efforts in reforming special education, standards for early childhood education and comprehensive school-based accountability systems.



## STRENGTH BEHIND THE SCENES

Strong board of directors. Experienced staff. An action-oriented focus. To supplement these strengths the Hunt Institute partners with people and organizations to increase its capacity to respond to states' needs for current, reliable information on educational issues. We leverage the specialized knowledge and experience of our partners to produce results that advance and sustain lasting education reform in the states.

### HUNT INSTITUTE RESOURCES

**Staff.** The Hunt Institute staff offers a wide range of political, policy, education, business, academic and development experience. Their individual and combined expertise is an invaluable resource for the Institute and its clients.

John Hart  
Director of Policy Implementation

Michael Gilligan  
Deputy Director for Development & Partnerships

Victoria Mikow-Porto, Ph.D.  
Deputy Director for Programs

Kellie Murphy  
Communications Officer

**Advisers.** The Hunt Institute's team of senior advisers offers deep experience and expertise in a wide range of education, policy and business issues. They counsel the Institute's staff, clients and partners.

**Board of Governors.** This bipartisan advisory board is comprised of recent former and incumbent governors who have consistently demonstrated a strong commitment to education. The Board of Governors advises the Hunt Institute on its programs for governors and educational leadership development.

## STRONG ORGANIZATIONS ARE BUILT ON STRONG FOUNDATIONS

The Hunt Institute is proud to count among the members of its board some of the nation's most passionate, reasoned and articulate voices for education. It's a group that is diverse in its backgrounds. Yet it's a group united not only in its support for education, but also in its belief that there's no better way to build a better tomorrow than through a quality education.

### Board of Directors

Governor James B. Hunt, Jr., Chairman

Evan Bayh, United States Senator, Indiana, 1999 -

Molly Broad, President, University of North Carolina

Michael N. Castle, United States House of Representatives, Delaware, 1993 -

John Engler, Governor of Michigan, 1991-2003

Joel Fleishman, Director, Center for Ethics & Public Policy, Duke University

Kati Haycock, Director, Education Trust

James Holshouser, Jr., Governor of North Carolina, 1973-1977

Robert Ingram, former CEO and President, GlaxoSmithKline

Barbara Kelley, Chair, National Board for Professional Teaching Standards

Thomas Lambeth, Senior Fellow, Z. Smith Reynolds Foundation

Charles Miller, Chairman, Meridian National, Inc.

Paul Patton, Governor of Kentucky, 1996 -

William Raspberry, Columnist, Washington Post

Diane Ravitch, Research Professor, New York University

Joseph and Carol Reich, Co-Founders, beginning with children, inc.

Ben Ruffin, President, Ruffin Group

Edward B. Rust, Jr., Chairman and CEO, State Farm Insurance Companies

Ted Sanders, President, Education Commission of the States

Tom Vander Ark, Executive Director of Education, Bill and Melinda Gates Foundation

Robert Wehling, Vice Chairman, National Board for Professional Teaching Standards

J. Bradley Wilson, Sr. Vice President, Blue Cross and Blue Shield of North Carolina