

SUMMARY

2003 NORTH CAROLINA LEGISLATORS RETREAT

On November 19-20, 2003, the James B. Hunt, Jr. Institute for Educational Leadership and Policy convened the first annual North Carolina Legislators Retreat, in partnership with Senate President Pro Tempore, Marc Basnight; Republican Speaker of the House, Richard Morgan; and Democratic Speaker of the House, James Black. The 2003 Retreat presented a forum for legislative leaders to hear from nationally recognized experts and talk about educational equity, student assessment and demographics and other critical issues facing North Carolina's public education system. The discussion encouraged legislators to re-examine goals for the state's education system and explore new strategies to keep the state on the road to continuous school improvement.

Former Governors Jim Hunt and Jim Holshouser co-hosted the Retreat. Governor Mike Easley and business leaders from across the state also attended and contributed to the dialogue.

Mark Musick, president of the Southern Regional Education Board (SREB), America's first interstate compact for education, introduced the presenters and moderated the discussions. The program began with David Grissmer, senior management scientist at RAND Corporation, who provided a thorough analysis of student progress in subjects included in the National Assessment of Education Progress (NAEP) as evidence of North Carolina's remarkable progress during the past decade. Kati Haycock, executive director of The Education Trust, discussed ways in which North Carolina can close the achievement gap between the state's poorest and most affluent students. Dr. Harold Hodgkinson, director of the Center of Demographic Information at the Institute for

Educational Leadership, presented information about the changing demographics of the state's student population and how schools could anticipate this change.

"In most of the states in America, schools are led at the local level. Here in this state, legislators have done it differently; our biggest educational improvements have been at the state level. You are the leaders for education in North Carolina."

Governor Jim Hunt

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Representative Doug Yongue, Senator William Purcell and Senator Katie Dorsett



MAKING MONEY MATTER

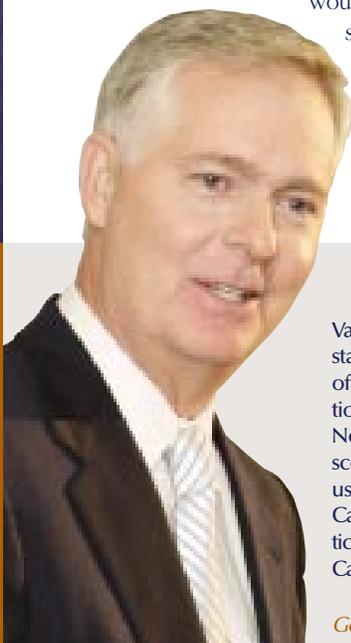
North Carolina's students have made significant gains based on NAEP scores. During the 1990s, North Carolina led the nation in progress in math and was third in the nation in reading at the fourth grade level. In writing, North Carolina was one of the top five states in the nation.

Dr. David Grissmer gave credit to North Carolina's lawmakers and business community for the state's continued rise in NAEP scores. His research showed that both groups have been instrumental in creating new policies and programs and in establishing the infrastructure for education success. Lobbying by the business community has helped drive reforms which are research-driven and support accountability.

It is widely held that higher spending equals higher achievement. During the past 30 years, per pupil spending nationally has dramatically increased. Grissmer's research, however, has determined that, after factoring out increased special education, technology and social program costs, only 35% of the increased funding has been directly applied to improving academic achievement. Based on his research, Grissmer has concluded that the biggest return on education investment comes from allocations in four areas:

- Decreasing class size in lower grades
- Adding more pre-kindergarten programs
- Retaining more experienced teachers
- Providing additional resources for teachers

Statistics show that reducing class size by just three students would predict a 6% increase in scores in states with high numbers of disadvantaged students. Reducing class sizes in elementary schools would translate to significant gains for black and Hispanic students.



Governor Mike Easley

Vastly different populations between states create an unequal distribution of families and an uneven distribution of NAEP scores; this makes North Carolina's gains in NAEP scores even more impressive. When using this measurement, North Carolina ranks eighth out of 47 participating states. Texas ranks first and California ranks last.

Policymakers would do well to direct class size reduction dollars to the children who would benefit the most.

Grissmer's research also shows that it is better to reduce class size than to provide teachers with an instructional aide. Managing an assistant, he said, tends to add to a teacher's workload instead of decreasing it.

Grissmer noted that the chief predictors of higher test scores – called favorable family characteristics – include parent education, family income, the mother's age at childbirth, single parent households and the number of children in the home. When using favorable family characteristics as a measure, North Carolina has a challenging population to educate.

ELIMINATING THE ACHIEVEMENT GAP

States across the country, including North Carolina, have made major strides in education during the last 20 years. Many students today leave high school with better skills in math and science than their peers did two decades ago. Even with these impressive jumps in math and reading scores, there are still substantial gaps between white and minority students and students from different family income levels.

Kati Haycock explained that currently one in three children in a fourth grade class is trapped at a "below basic" reading level. Black and Hispanic children are over-represented in this group, but many white and Asian middle-class students also cannot read at the most basic level. The same is true for eighth grade students in math. Mastering basic math and reading skills is fundamental to accessing all other types of learning, and not having these skills in place by fourth and eighth grade has enormous implications for students' future economic status and career opportunities.

Haycock noted that when comparing students of equal achievement levels, those with higher family incomes are more likely to go to college; i.e. high-performing students from lower income families are less likely to attend college than poorer

IN NORTH CAROLINA:

- North Carolina has the 11th highest minority population in the United States
- North Carolina has the 5th highest number of black students when compared to states which participated in the NAEP test between 1990-2000
- 20% of the 4th graders who took the NAEP test have parents with an education level below the national average
- North Carolina has the 5th highest percentage of single parent families when compared to other states taking the NAEP test
- North Carolina's average family income is below the national average

“Your presence here at this Retreat fulfills part of the dream and the hope of the Hunt Institute that our own policy makers in North Carolina would come together in a serious agenda, evaluating where we are, celebrating the remarkable progress we’ve made and never being satisfied that we have arrived at the place we want and need to be for North Carolina.”

Molly Broad – President, University of North Carolina

performing students from higher income families. Unless educators and lawmakers are prepared to assert that children from higher income families are simply smarter than kids from lower incomes, there is something wrong in pre-K-12 and higher education.

Haycock put this information in context for North Carolina lawmakers, showing that the state is above the national average in many areas and has made enormous progress in others. North Carolina ranks first in math across the board for progress made and is first in reading growth for white students and fourth for black students. In the last decade, North Carolina has made substantial gains in moving large numbers of children out of the “below basic” learning category. However, Haycock detailed five actions necessary for continued progress:

1. Set the Right Goals

Appropriately setting goals and benchmarks is one of the reasons North Carolina has seen dramatic improvement. Based on the success North Carolina has already achieved, lawmakers should begin to raise the standards of state assessments to bring them in line with NAEP.

2. Develop and Follow a Systematic Approach to Teaching

Systematic approaches to teaching and learning help poor and minority students make the largest gains. Schools that provide clear goals and a well defined scope and sequence of what students should know and be able to do have the most success. Schools that follow this approach do not wait until an end-of-grade test to see how students are learning. Benchmark assessments are conducted at regular intervals throughout the school year to identify students who need targeted intervention and teachers who may need coaching and additional resources to meet the needs of these learners.

3. Make High School Coursework More Rigorous and Relevant

Haycock’s data show that the nation’s high schools are in trouble. Many students do not graduate and many who do are not equipped with the skills and knowledge to succeed in college or the workforce. Many other students are leaving high school not because it is too hard, but because it is too easy. The single strongest predictor of whether or not students will succeed in college or in the workforce is the quality and rigor of the high school curriculum.

4. Improving Teacher Quality

Research shows that children who have three high quality teachers in a row will excel, regardless of family background,



Governor Jim Hunt and UNC President Molly Broad

while students who have two weak teachers consecutively may never recover academically. If educators can find a way to give disadvantaged students five good teachers in a row, the achievement gap could be closed completely.

5. Make Good Schools Good for All Students

While there are many examples of good schools in which students are generally high-achieving,

minority students in these same schools lag behind. Lawmakers should closely evaluate the standards that schools must meet and re-define “high-performing schools” as those that close achievement gaps for all populations they serve.

DEMOGRAPHIC SHIFTS AND PUBLIC SCHOOL POLICY

Dr. Harold Hodgkinson presented data that show the demographic make-up of families in America is dramatically shifting. Gone are the Norman Rockwell days of fathers working and mothers staying at home with the children. The largest numbers of children are now raised by two different groups – two working parents or single working mothers – meaning that people other than mothers and fathers are responsible for a child’s pre-K education foundation. Therefore, it is vitally important for educators and policymakers to shift their focus to the preschool years to help children from all backgrounds achieve academic success.

Children who live in poverty suffer from a lack of access to enrichment and summer programs. When children are tested prior to kindergarten, children in poverty and from higher income families show the same achievement gap as when they leave kindergarten. This gap grows drastically during the summer between kindergarten and first grade, as children from higher income backgrounds are able to take advantage of greater educational opportunities external to school. Hodgkinson said that North Carolina is helping to close this gap through Smart Start and More at Four, but that gaps are still evident.

North Carolina has a more stable population than states like Florida, but its population is also more transient than states like Maine, which have such static school populations that these states have been able to maintain high education



Wake County Superintendent Bill McNeal



standards relatively easily. By 2010, most public schools in the country will have a majority of “non-white” populations because of the influx of Hispanic and Asian students. This creates instructional dilemmas for schools, particularly those in non-metropolitan areas which are less-equipped to handle demographic change.

Hodgkinson praised Governor Hunt and North Carolina legislators for their education reform efforts, noting that Governor Hunt was the first state leader who saw the need for a long-term strategy to affect and sustain educational improvements. North Carolina has also done a good job of growing businesses and industries that fuel education improvements. The Triangle area is the only place in the south, outside of Atlanta, that draws the country’s new and important “creative class.” These are the type of people who demand a quality education for their children and support education improvements that are beneficial to all.

A CONVERSATION WITH LOCAL SCHOOL LEADERS

In addition to national experts, legislators had an opportunity to hear from local education leaders about challenges facing their schools. A panel discussion, moderated by John Dorman, executive director of the North Carolina Public School Forum, provided an opportunity for Bill McNeal, Wake County Schools superintendent and National Superintendent of the Year; Rene Corders, principal, E. E. Smith High School; Joan Celestino, teacher, Mineral Springs A+ Academy; and Connie Brown, principal, Bruce Drysdale Elementary School, to focus on issues related to raising student performance.

Panel members agreed that maintaining high standards and a demanding and relevant curriculum taught by highly qualified teachers were clearly the most important factors in increasing student performance. A strong school principal, improved working conditions for teachers and potential incentives to attract master teachers to low-performing schools were also topics of discussion.

While all aspects of the 2003 North Carolina Legislators Retreat received high marks from the participants, legislators were especially pleased with the opportunity to talk candidly with local administrators and teachers about the many challenges they face and to seek their advice as to how state-level policy-makers can help them to meet those challenges. Such discussions can strengthen school improvement efforts from the state



Governor Jim Holshouser, Senator Tom Apodaca and Senator John Garwood

house all the way to the school house.

CONCLUSION

The 2003 North Carolina Legislators Retreat was a unique opportunity for state legislators to hear from national experts who presented research-based information about the status of school improvement efforts in the North Carolina public schools and to seek their advice as to what steps are necessary for continued progress. Subsequent discussions throughout the Retreat remained focused on chal-

lenges at both the state and local level, and new strategies with the potential to keep North Carolina on the road to greater success began to emerge. Based on program evaluations and positive feedback from participants, the Hunt Institute will convene the second annual North Carolina Legislators Retreat in the fall of 2004.

The 2003 North Carolina Legislators Retreat serves as a pilot model for similar retreats across the country. The Hunt Institute believes that the format of the North Carolina Legislators Retreat holds great promise for other states to follow in having their legislative leaders join in a constructive dialogue that can lead to significant educational improvement. By encouraging legislators to gain access to the best available information on the status of their education systems and to probe the implications educational research has for policy, legislation and investment in education, the Retreat helps lawmakers make well-informed decisions on how to apply resources to improve student achievement.

The 2003 North Carolina Legislators Retreat was made possible through the generous support of BellSouth, Blue Cross/Blue Shield of North Carolina, Burroughs Wellcome Fund, the Joseph M. Bryan Foundation and the Michael Brader-Araje Foundation.

“North Carolina is nationally known for what we do in the legislature. This Retreat is a good place for lawmakers to take a deep breath and look at where it is we started and where we want to go.”

Governor Mike Easley