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NORTH CAROLINA



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HOLSHOUSER  
LEGISLATORS  
RETREAT

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A Report from the Annual 2015 Holshouser Legislators Retreat

*For the 12<sup>th</sup> consecutive year, The Hunt Institute convened North Carolina Legislators to engage in a dialogue about one of the most important issues to our state's economic health: education. The 2015 Holshouser Legislators Retreat gathered North Carolina educators, and national education experts and leaders from business and higher education to discuss strengthening our education system to strengthen our state. This report documents some of the key learnings from this year's Retreat.*



**KEYNOTE: *The Common Denominator***

# INTRODUCTION

The content of this report is drawn from *Retreat* presentations and discussions with the following resource experts:

**Ms. Brenda Berg**, BEST NC

**Dr. Alisa Chapman**, University of North Carolina  
General Administration

**Dr. Jim Cibulka**, Council for the Accreditation of  
Educator Preparation

**Dr. Linda Darling-Hammond**, Stanford University

**Mr. Lew Ebert**, NC Chamber of Commerce

**Dr. Marcia Fetters**, Western Michigan University

**Mr. James Ford**, 2014 NC Teacher of the Year

**Mr. Eric Guckian**, Office of the Governor of North  
Carolina

**Dr. Terry Holliday**, Commissioner of Education,  
Kentucky

**Mr. Michael Horn**, Clayton Christensen Institute

**Mr. Geoff Lang**, Metlife, Inc.

**Mr. Walter McDowell**, BEST NC

**Ms. Barbara Mulkey**, Mulkey Engineers &  
Consultants

**Ms. Linda Noonan**, Massachusetts Business  
Alliance for Education

**Ms. Cheryl Oldham**, U.S. Chamber of Commerce  
Foundation

**Dr. Janice Poda**, Council of Chief State School Officers

**Dr. Scott Ralls**, NC Community Colleges System

**Ms. Allison Reid**, 2014 Wake County Teacher of the  
Year

**Mr. Tom Ross**, The University of North Carolina

**Ms. Courtney Samuelson**, Maureen Joy Charter School

**Ms. Melanie Shaver**, McDowell County Schools

**Ms. Brenda Welburn**, TWW and Associates, LLC

**Ms. Jamie Woodson**, State Collaborative on Reforming  
Education

# The Need for Improved Educational Outcomes in North Carolina

**First Take-Away: North Carolina must improve educational outcomes; students must be ready for college and career when they graduate.**

**“What we all want is a talented workforce.”**

A clear imperative surfaced from discussions at the 2015 *Holshouser Legislators Retreat*: We must improve educational outcomes in North Carolina if we want today’s students to be successful tomorrow. Not only is educational achievement important for the prospects of individual North Carolinians, it is important for the economy as a whole. Too often, North Carolina employers cannot find employees with the knowledge and skills necessary to succeed in the available jobs.<sup>i</sup> Challenges in finding a talented, prepared workforce make it harder for businesses to innovate, drive growth and introduce the best products and services to the marketplace. Significantly improved student outcomes – ensuring more students graduate with the knowledge and skills for success in jobs and postsecondary education – will lead to a better future for North Carolina.



**Michael Horn**, Co-Founder and Executive Director of Education at the Clayton Christensen Institute, discussed the ideas in his new book, *Blended: Using Disruptive Innovation to Improve Schools*, at this year’s *Retreat*. Horn shared his knowledge about the power of blending online learning with a traditional classroom setting to deliver student-centered instruction.



**Geoff Lang**, Vice President and General Manager of MetLife Global Technology and Operations.

Geoff Lang, vice president and general manager of MetLife Global Technology and Operations, discussed his company’s challenges in North Carolina. Despite nearby universities and high-tech research companies, Mr. Lang laid out the employment reality in stark terms: “We have more jobs available than we can find people, and as a consequence, we end up going outside of the area, outside of the geography, and the state, to try to fill some of those positions.” President of the North Carolina Chamber of Commerce Lew Ebert’s comments reflected the same urgency: North Carolina businesses are constantly looking for talent to drive improvement.

**“Teach them how to be innovators.”**

Employees entering the workforce at all levels must be able to think critically and solve complex problems. As Mr. Lang suggested, business depends on innovation



**Session - Education & the Economy in NC: Needs and Opportunities**

to remain competitive, and too often even students that have achieved at high levels and have degrees or certificates are not prepared to add value to a company or organization. A recent study of results on one highly regarded international assessment of adult skills, found that Americans born after 1980 (millennials) score significantly below many of their international peers on measures of literacy and numeracy - this despite being on track to be the American generation with the most formal education.<sup>ii</sup> In a world where businesses must be able to compete globally, students must have the credentials *and* the knowledge and skills. As President Tom Ross of The University of North Carolina (UNC) stated, "People want not only a credential, but they want that credential to be a quality credential."

The upshot from the *Retreat's* panelists of business and higher education leaders: Our economic well-being depends on our education system. As Cheryl Oldham from the U.S. Chamber of Commerce asserted: "We really need that steady pipeline of talent. That means that as one generation of American workers winds down, the next is ready to go. And, we really look to our K-12 education system to be that strong foundation upon which all of that is built."

To view videos from the  
*2015 Holshouser  
Legislators Retreat,*  
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[www.hunt-institute.org](http://www.hunt-institute.org)



## Talent in the Education System

**Second Take-Away: Educators are the most important lever to improve student outcomes and develop tomorrow's workforce; we must recruit, prepare, support, and retain talent within the education system.**

Recruit

Prepare

Support

Retain

Educators For  
North Carolina Schools



More than any other idea, **talent** surfaced as a repeated theme at this year's *Retreat*. In much the same way that businesses value finding the right people to help them innovate and compete, North Carolina's education system must recruit, prepare, support, and retain a talented, capable educator workforce to meet today's higher expectations for students. Teachers influence student learning more than any other in-school factor.<sup>iii</sup> If our goal is ensuring that every North Carolina graduate is ready for college and employment, then our educators are the key to meeting that goal.

With this in mind, North Carolina legislators, educators, and national resource experts dug into the issues of recruiting, preparing, supporting, and retaining our educator workforce.

**"We're going to have to find new ways of recruiting."**

Enrollment in teacher preparation programs is declining around the country. North Carolina is no exception; from 2011-2013, enrollment in UNC's teacher preparation programs has dropped by 17 percent.<sup>iv</sup> Jim Cibulka, president of the Council for the Accreditation of Educator Preparation (CAEP), described a complicated picture of the causes of this decline. Salary, working conditions, and the flat career arc of traditional teaching positions were all suggested as contributors to the declining interest. Additionally, public dialogue about teachers has taken on a critical, and often negative, tone. According to Dr. Cibulka, "All of these things send signals to talented people who have other options." Teaching must be an attractive profession and held in high regard.

The new CAEP standards put an emphasis on selectivity of candidates by raising the bar for preparation program candidates' average performance on nationally normed achievement assessments to the top 33 percent of the distribution by 2020.<sup>v</sup> This level of selectivity is not generally reflected in today's applicants to schools of education. Additionally, the new standards would require a 3.0 GPA in order to be accepted into the program.

Panelists emphasized that recruitment for certain teaching positions was particularly important. STEM, English-language

"What the evidence suggests most strongly is that teacher quality matters and should be a major focus of efforts to upgrade the quality of schooling. Skilled teachers are the most critical of all schooling inputs."

- Ronald Ferguson

"Paying for Public Education: New Evidence on How and Why Money Matters." Harvard Journal of Legislation, 28 (Summer 1991), pp. 465-498.

learner, and exceptional children teachers are currently in the highest demand. Additionally, Alisa Chapman, from UNC General Administration, suggested that more needs to be done to attract teachers to North Carolina's rural and low-wealth schools, which historically have a greater challenge in recruiting teachers.

### Teacher preparation that “brings theory and practice together.”

Much work is being done around the country and in North Carolina to respond to the need to improve educational outcomes by improving how educators are prepared to enter the profession. A few big themes rose to the surface at the *Retreat*:

Clinical practice and ensuring teachers-in-training spend more time than they have traditionally with students in classrooms was an important idea repeated by the resource experts. James Ford, the 2014 *North Carolina Teacher of the Year*, put it nicely: “There’s a difference between theory and practice. There are days you think, ‘Okay, they didn’t tell me about this in class. What do I do here?’” Stanford University education scholar Linda Darling-Hammond suggested a model that mirrors other professions, such as medicine. “Like doctors, teachers have to know how to *do* teaching. Not just the theory of teaching. Not just some facts about teaching.” UNC’s Board of Governor’s subcommittee on teacher and school leader preparation and quality is focusing on this topic and is moving programs toward year-long internships and embedded clinical practice throughout the preparation programs.

Teachers must both know how to teach and also have a deep understanding of the content they will teach. In addition to an emphasis on clinical practice, participants highlighted the need to ensure that teacher preparation programs have rigorous content expectations. For instance, prospective science teachers need to have a deep understanding of science itself, and coursework expectations in preparation programs should require rigorous content mastery for perspective teachers.

Additionally, given that a significant and increasing number of North Carolina students come from low-income households, teachers need to be equipped to understand the unique set of needs associated with serving students from low-wealth backgrounds. Likewise, the increased numbers of students who are learning English as a second language must be reflected in how teachers are prepared. In a state that continues to struggle to close the achievement gap, preparation of teachers to support and inspire students in the most challenging situations is central to improving North Carolina’s overall performance and equity of opportunity.

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James E. Ford, 2014 North Carolina  
Teacher of the Year

## Creating a New Model for Providing Support.

While educator recruitment and preparation are vital for ensuring a talent pipeline into North Carolina schools, educators must also continue to learn and grow on the job. At this year's *Retreat*, panelists, teachers, leaders and experts alike agreed that educators must enter into professional work environments where growth is valued, enabled, and supported. Too often, models of professional learning have led to little improvement in actual practice and therefore, in student outcomes. In much the same way preparation programs in North Carolina are incorporating more practical, clinical elements in training, so too, many K-12 schools are shifting focus from one-time training sessions to job-embedded coaching models that support teachers with regular feedback on their actual instruction.

A panel of teachers and teacher coaches discussed the advantages of coaching models to improve practice. In these job-embedded models, teachers are regularly observed by a coach (sometimes the principal or a designated instructional leader) who then spends time debriefing the observation with the teacher and deciding together on action steps. Ideally, this allows teachers to focus on where they need to improve. Teaching is so multi-dimensional that this could mean working on skills as varied as long-term planning, classroom management, reaching English-language learners, personal organization, differentiation, or assessment and data analysis -- among many others. When coaching models work well, teachers get much more direct -- albeit sometime tough to hear -- feedback on their actual practice with students. The partnership between coach and teacher helps establish accountability for improvement.



Session - *Teacher Coaching for Student Success*



## Recurring Ideas of What Matters in Supporting North Carolina Teachers

**Leadership.** Principals and school leaders must:

- Create a culture that values instruction and instructional improvement.
- Put supports in place for regular, job-embedded feedback.
- Create an environment that enables collaboration and accountability.

**Collaboration.** Professional Learning Communities must:

- Allow teachers time and space to work and plan together.
- Create important learning spaces for cross-discipline planning (e.g. science and math teachers working and planning together).
- Ensure all teachers improve.

**Early Career Support.** Teachers in their first years in the classroom must:

- Regularly get feedback from the most effective teachers in the school.
- Develop trusting mentor-mentee relationships within their school.

### “We need to retain folks when they do a good job.”

Lastly, excellent teachers in North Carolina need to remain on the job. Traditionally, there are few upward professional paths that keep great teachers in the classroom with students and reward them with increased responsibility, positions, and pay. Often, the only upward path for teachers is into traditional leadership and administrative positions. This has its limits. The relatively small number of leadership roles mean only a small number of teachers can advance into these positions. Not all current teachers may want, or be the right fit, for the principal role or other administrative positions. Career ladders, such as those being used in Charlotte Mecklenburg’s *Project Lift*, offer teachers meaningful career advancement without removing them from the classroom and extend the reach of the most effective teachers.

Our resource experts agreed that teacher preparation and support have a huge impact on retention. Teachers who have been well-prepared and are given professional support within the school building, will be much more likely to be successful in the classroom and motivated to stay in education. Again, leadership was cited as a key factor in retaining teachers. According to Dr. Darling-Hammond, “Effective administrators are magnets for accomplished teachers.”



**Barbara Mulkey**, Founder & Chair,  
Mulkey Engineers & Consultants

## Setting an Educational Vision

**Third Take-Away: In order solve the challenges of improving student outcomes and attracting and retaining talent in the education system, leaders have to establish a compelling and guiding vision over the long term.**

This year's *Holshouser Legislators Retreat* established the importance of a strong education system for ensuring a stronger North Carolina, which raises the question: How do we establish broad-based support and collective will to make educational improvement happen? North Carolina Legislators engaged in a conversation with a panel of state education leaders from around the country about establishing and sustaining a vision for education that is likely to truly improve outcomes for students. A few key principles were shared by the panelists:

**1) Establishing Urgency and the Need to Improve.** Jamie Woodson, executive director of SCORE, emphasized the rationale for the changes they put in place seven years ago in Tennessee:

*"We received an 'F' in 'truth in advertising' from the U.S. Chamber of Commerce. We were saying 90 percent of kids were proficient in Tennessee, but on NAEP, 26 percent were actually proficient. We were lying. As policymakers we were lying to each other. We were lying to parents and kids."*

By focusing on this hard reality and the need to improve, stakeholders in Tennessee built a coalition that remained strong over the course of a transition in the governor's office in 2010. Additionally, Linda Noonan from the Massachusetts Business Alliance for Education emphasized the need to have a long-term view and to constantly return to the need to improve outcomes when faced with inevitable challenges. The value and importance of communication ran through the comments of all panelists, including the need to keep focused on what is best for students, and to be clear and simple in messages.



**Eric Guckian**, Senior Advisor on Education, Office of the Governor, North Carolina



**Dr. Judith A. Rizzo**, Executive Director and CEO, The Hunt Institute



**Allison Reid**, 2014 Wake County Teacher of the Year



**Session - Teacher Preparation & Recruitment: Ensuring All Teachers are Ready**

**2) Bipartisanship and Stakeholder Involvement.** Education is a complex issue with both policy and political implications. Many state leaders emphasized the importance of building a shared vision and getting stakeholders involved in leading the effort. Terry Holliday, commissioner of education in Kentucky, described the efforts of a wide group of stakeholders - led by the state legislators - to raise expectations and provide better education to students across the state. Dr. Holliday particularly emphasized the importance of having the support of parents:

*"It's critical that you have a line of sight in the vision down to even the student level. When I was a local superintendent this was critical because parents are going to be your greatest advocates - unless they don't see what the vision means for their child."*

Building a coalition means involving students, parents, teachers, principals, superintendents, business leaders, policymakers, and the general public.

**3) Preparedness to Stand Your Ground.** Setting out to transform educational outcomes for students means truly changing behaviors and mindsets. Inevitably, this kind of large-scale change will not be universally welcomed. Experience indicates that often the pushback to policy comes when it actually hits the ground and is implemented. Panelists agreed that even the best, most well-intentioned policy will not be successful without careful and adaptive implementation.



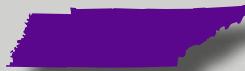
**Breakout Session - Building a Culture of Achievement**

For more information from our Education Vision Panel:



**Massachusetts**

Linda Noonan  
Massachusetts Business  
Alliance for Education  
<http://www.mbae.org/>



**Tennessee**

Jamie Woodson  
SCORE  
<http://tnscore.org/>



**Kentucky**

Dr. Terry Holliday  
KY Department of Education  
<http://education.ky.gov/>



Session - *Setting an Education Vision*

## **BEST NC - Business for Educational Success and Transformation**

Legislators at this year's *Retreat* heard from a recently established non-partisan coalition of business leaders dedicated to improving North Carolina's education system through policy and advocacy. Brenda Berg, president and CEO of BEST NC, talked about the process that they are using to develop a bold vision in North Carolina that focuses on making transformational change for students. Central to that process is ensuring that stakeholders are grounded in the data that point to North Carolina's growing skills gap and the urgency to close that gap. Walter McDowell, the Chairman of BEST NC, facilitated our final panel on educational vision with Terry Holiday, Linda Noonan, Jamie Woodson, and Brenda Berg.

Ms. Berg emphasized that BEST NC is committed to working across party and ideological lines to find common ground and solutions that work for North Carolina students. This process has included engaging leaders from across the state to chair committees of diverse stakeholders. These committees were charged with developing ambitious policy recommendations in areas such as teacher recruitment, preparation and compensation, early childhood education, standards and assessment, technology and infrastructure, and school funding among others. BEST NC released a synthesis of the committees' recommendations in February 2015 as the proposed *North Carolina Education Vision*. By 2030, the *Vision* aims to have North Carolina lead the nation in academic achievement, and by 2020 to have the highest academic progress in the nation.

For more about BEST NC, visit: <http://best-nc.org/>



**Brenda Berg**, President and CEO,  
BEST NC



**Walter McDowell**, Chairman,  
BEST NC

## SUPPORTERS

### BILL & MELINDA GATES *foundation*

Guided by the belief that every life has equal value, the Bill & Melinda Gates Foundation works to help all people lead healthy, productive lives. In developing countries, it focuses on improving people's health and giving them the chance to lift themselves out of hunger and extreme poverty. In the United States, it seeks to ensure that all people – especially those with the fewest resources – have access to the opportunities they need to succeed in school and life. Based in Seattle, Washington, the foundation is led by CEO Sue Desmond-Hellmann and Co-chair William H. Gates Sr., under the direction of Bill and Melinda Gates and Warren Buffett.



The State Farm Companies Foundation was established in 1963 as an independent private foundation. The Foundation is primarily committed to education, helping to raise the level of student achievement in our elementary and secondary schools, as well as supporting key higher education initiatives.



The Burroughs Wellcome Fund is an independent private foundation dedicated to advancing the biomedical sciences by supporting research and other scientific and educational activities. Within this broad mission, BWF has two primary goals:

- To help scientists early in their careers develop as independent investigators.
- To advance fields in the basic biomedical sciences that are undervalued or in need of particular encouragement.

## ENDNOTES

<sup>i</sup> North Carolina Association of Workforce Development Boards and Labor & Economic Analysis Division, North Carolina Department of Commerce (2014). *2014 Employer Needs Survey*. Available at: <http://www.nccommerce.com/Portals/11/Documents/Commission/Commission%20on%20Workforce%20Development%20Strategic%20Plan%202014-16.pdf>

<sup>ii</sup> Goodman, Madeline, Anita Sands, and Richard Coley. (2015). Educational Testing Service. *American's Skills Challenge: Millennials and the Future*. Available at: <http://www.ets.org/s/research/30079/index.html>

<sup>iii</sup> Rockoff, Jonah.(2004). *The Impact of Individual Teachers on Student Achievement: Evidence from Panel Data*. American Economic Review 94(2): 247-252; Rivkin, Steven, Eric Hanushek, and Thomas Kane. (2005). *Teachers, schools, and academic achievement*. Econometrica 73(2): 417-458; Hattie, John. (2009). *Visible Learning: A Synthesis of Over 800 Meta-analyses Related to Achievement*. New York, NY: Routledge; Branch, Gregory, Eric Hanushek, and Steven Rivkin. (2012). *Estimating the Effect of Leaders on Public Sector Productivity: The Case of School Principals*. Washington, D.C.: National Bureau of Economic Research Working Paper No. 17803

<sup>iv</sup> Sawchuk, Stephen. Steep Drops Seen in Teacher-Prep Enrollment Numbers. Education Week (10/21/2014). Bethesda, MD: Editorial Projects in Education. Available at: <http://www.edweek.org/ew/articles/2014/10/22/09enroll.h34.html>

<sup>v</sup> Council for the Accreditation of Educator Preparation. (2013). *CAEP Accreditation Standards (Standard 3)*. Available at: <http://caepnet.org/standards/standards/standard-3-candidate-quality-recruitment-and-selectivity/>

*Created by the University of North Carolina Board of Governors in 2001, The Hunt Institute collaborates with policymakers and stakeholders to secure America's future through quality education. The Institute connects leaders with the best resources and strategies for developing and implementing policies and programs. The results are informed policy decisions that improve public education in North Carolina and across the nation.*



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