



# 2019 EDUCATION POLICY RETREAT



**KEY TAKEAWAYS & POLICY CONSIDERATIONS**

# Key Takeaways & Policy Considerations

## EARLY CHILDHOOD | INCREASING QUALITY AND ACCESS

This session explored the connections between early childhood and the rest of the education continuum, with a focus on what research tells us about the impact of early childhood learning. Panelists discussed the history of early childhood in the state and barriers to equitable access to early child care and pre-K.

### RESOURCE EXPERTS:

- ✉ **Karen Ponder**, Distinguished Fellow, BUILD Initiative
- ✉ **Rachel Schumacher**, Senior Advisor, Early Childhood, The Hunt Institute

### MODERATOR:

- ✉ **Meka Sales**, Director of Special Initiatives, The Duke Endowment

### KEY TAKEAWAYS:

- Infant/toddler care and preschool are part of the education continuum. Children learn wherever they are—which means that any adult caring for a child needs information and support.
- A [study](#) by researchers at Duke University including over one million children born between 1988 and 2000 found that NC PreK and Smart Start had positive impacts on participating children through grade eight, with no fadeout.
- Only 25 percent of eligible children have access to NC PreK.
- Various evidence-based models for home visiting services are being used to help new parents build relationships with a trusted partner.
- The early childhood workforce receives low wages and is often less-educated. Increasing educational attainment and training for the workforce may result in a higher-quality child care experience but will also cause cost of child care to rise.
- North Carolina has several efforts underway to help align initiatives providing services and supports to families, infants, and young children, including the Birth to Third Grade (B-3) Interagency Council created by legislation and the Pritzker Children’s Initiative, funded by a private foundation.

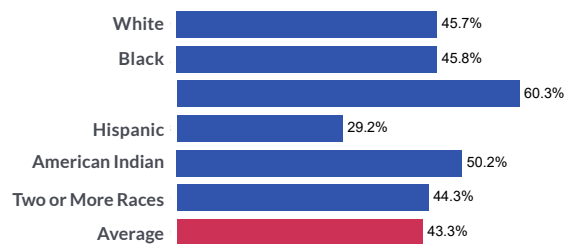
### ACTION ITEMS FOR LEGISLATORS:

- Consider opportunities to increase educational attainment and training among the early childhood workforce.
- Consider building upon existing federal programs supporting home visits, child care, and healthcare.

### KEY RESOURCES:

- The [B-3 Interagency Council](#) is charged with creating a vision and accountability for early childhood education from birth through third grade in North Carolina.
- The [Early Childhood Action Plan](#) was released in November 2018 and includes measurable goals addressing child health, safety and wellbeing, and developmental and academic readiness.

Percentage of 3- and 4-Year-Olds Enrolled in Preschool Programs, Public & Private by Race\*



**43%**

All 3- and 4-Year-Olds  
(Estimated **105,297** children)

[VIEW DATA RESOURCE HERE](#)

\*Data reported by parents.  
Races not shown did not meet reporting standards.

# Key Takeaways & Policy Considerations

## STANDARDS, ASSESSMENT, AND ACCOUNTABILITY

*This session provided an overview of standards, assessment, and accountability systems, including the history of standards and assessment, and the current systems utilized in North Carolina.*

### RESOURCE EXPERTS:

- ✉ **Eric Hall**, Deputy State Superintendent of Innovation, NC Department of Public Instruction
- ✉ **Michael Petrilli**, President, The Thomas B. Fordham Institute

### MODERATOR:

- ✉ **John Denning**, Senior Program Officer, Bill & Melinda Gates Foundation

### KEY TAKEAWAYS:

- The modern education reform movement began following the release of the report, [A Nation at Risk](#) in 1983, spurring governors around the nation to take action to ensure that the education system was preparing students to meet the needs of a growing economy. States began creating and implementing higher standards which defined what students should learn, and annual assessments were created to measure student growth.
- After two decades of significant gains, student achievement began to slow across the country around 2010. This trend produced unintended consequences as schools began to narrow their curricula. The conversation today around standards reform is based on this key question: how can we raise standards, improve tests, and improve accountability systems so that today's students will be prepared to take on tomorrow's challenges?
- North Carolina has a history of having quality standards and assessments. The state has made efforts to ensure its End-of-Grade and End-of-Course exams are aligned to state standards by decreasing its reliance on national assessments from Common Core.
- The Department of Public Instruction prioritizes revisiting state standards on a consistent basis, doing so once every five to seven years. The state gets feedback from business leaders when reevaluating standards, determining whether those standards align with workforce expectations.

### ACTION ITEMS FOR LEGISLATORS:

- Policymakers should consider visiting secondary school sites throughout the state that are working to provide credentials aligned with workforce expectations consider what students need to do to be prepared for these secondary school programs.
- Legislators should discuss steps being taken to ensure that all students are on track by the end of middle school.

### KEY RESOURCES:

- The Hunt Institute recently discussed the use of [college and career ready standards](#) in North Carolina, as well as the high school diploma endorsements available to graduates.
- [A review](#) of North Carolina's ESSA Plan highlights strengths and areas for improvement.

# Key Takeaways & Policy Considerations

## TEACHER PREPARATION | PATHWAYS TO EXCELLENCE

This session took a closer look at North Carolina's varied teacher preparation pathways with a focus on what research has revealed about effective teacher preparation. The panelists discussed current challenges facing teacher preparation programs as well as teacher recruitment.

### RESOURCE EXPERTS:

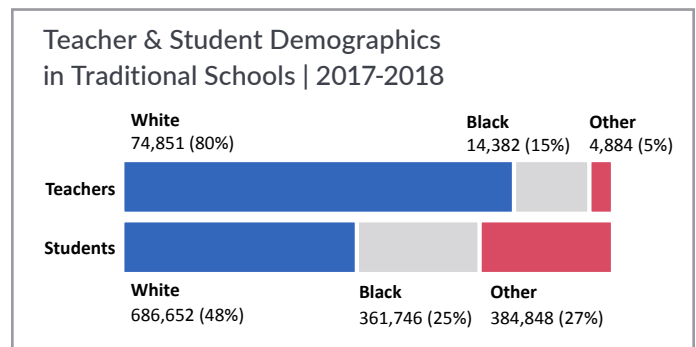
- ✉ **Karla Oakley**, Senior Strategist, TNTP
- ✉ **Dr. Fouad Abd-El-Khalick**, Dean, School of Education, UNC-Chapel Hill

### MODERATOR:

- ✉ **Dr. Don Phipps**, Superintendent, Caldwell County Schools

### KEY TAKEAWAYS:

- Research has shown that teachers are the most important in-school influencers of student achievement. States must prioritize creating and offering high-quality preparation programs for all aspiring teachers.
- Strong teacher preparation is important as a mechanism for retaining a strong teacher workforce. Teacher attrition costs the state about \$90 million per year.
- Students who have teachers with high expectations are more likely to see greater strides in their own progress – when teachers expect more, students will do more.
- Educator workforce diversity plays an important role in student achievement, yet the educator workforce does not accurately reflect the diversity in North Carolina's schools. Eighty percent of the state's educators are white, while 48 percent of the state's public-school students are white.
- Placing the best teachers in high-need schools is a top priority.



### ACTION ITEMS FOR LEGISLATORS:

- Policymakers in North Carolina should consider research regarding effective teacher preparation programs and consider best practices from across the country to determine which approaches match local needs.
- Legislators may wish to consider ways to incentivize highly-effective teachers to teach in high-need schools.
- Legislators should consider ways to recruit and retain teachers of color.

### KEY RESOURCES:

- [Solving the Teacher Shortage: How to Attract and Retain Excellent Educators](#) | A brief by Linda Darling-Hammond, Anne Podolsky, Tara Kiln, and Joseph Bishop that reports on a research review which finds that the most effective policies for attracting and retaining strong educators include: teacher compensation; improving preparation, professional support, and working conditions; and improving district and school management practices that otherwise create obstacles to recruitment and retention.
- [Diversifying the Teaching Profession: How to Recruit and Retain Teachers of Color](#) | This report by Desiree Carver-Thomas offers an overview of the impact teachers of color have on students and recommendations for policies and practice.

# Key Takeaways & Policy Considerations

## HIGHER EDUCATION | ACCESS TO POSTSECONDARY LEARNING

*This session provided an overview of the work of the myFutureNC Commission and the importance of setting a postsecondary attainment goal for North Carolina. Panelists discussed the role K-12, higher education, and the business community play in postsecondary attainment.*

### RESOURCE EXPERTS:

**Rocio Gonzalez**, Executive Director, Latin American Chamber of Commerce of Charlotte

**Peter Hans**, President, North Carolina Community Colleges

**Mark Johnson**, Superintendent, North Carolina Public Schools

### MODERATOR:

**MC Belk Pilon**, Board Chair, John M. Belk Endowment

### KEY TAKEAWAYS:

- The workplace is changing fast in North Carolina. Today, two-thirds of jobs in North Carolina require a credential that goes beyond high school. The myFutureNC Commission is responding to this demand by developing a multi-year education plan that sets a goal for postsecondary attainment.
- Attending a four-year college is not the only route to postsecondary attainment. There are multiple pathways to success, and it is important for stakeholders in education to engage with students early as they consider the path that best suits them.
- Breaking down barriers to postsecondary education is also a priority for the state.
- The state's community colleges have been contracted to manage the state's registered apprenticeship program. Currently, there are between 6,000 - 7,000 registered apprenticeships in the state, and that number can grow with more partnerships between community colleges and the business community.
- To prepare students for the workforce, the education and business communities must collaborate to provide internships, apprenticeships, and job training opportunities. Small businesses can play a strong role in this effort.
- Portability is another concern – many professionals earn degrees in their home countries and come to the United States for work, yet those degrees are not necessarily transferrable.
- Schools must be equipped with the resources and capital necessary to prepare students as they transition into postsecondary settings.

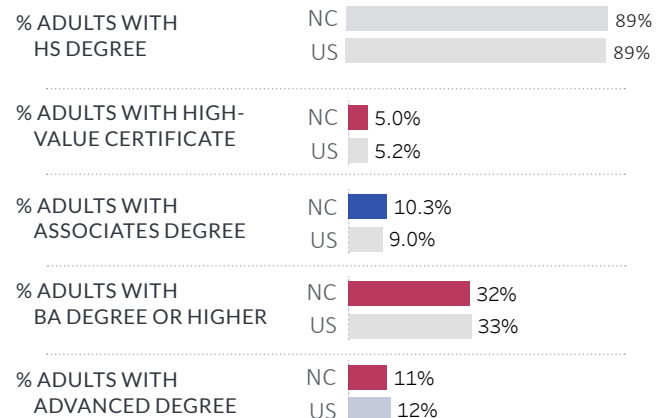
### ACTION ITEMS FOR LEGISLATORS:

- It is important for policymakers to understand the barriers to entry to postsecondary education, as well as identifying the role the legislature can play to combat these problems.
- Legislators should collaborate with the education community to support progress towards setting and reaching a postsecondary attainment goal.

### KEY RESOURCES:

- The Hunt Institute brief, [Reaching a Postsecondary Attainment Goal: A Multistate Overview](#), takes a closer look at the 41 state-level attainment goals and identifies best practices.

### Educational Attainment Rates | 2011-2015 Estimates



## TEACHER COMPENSATION | PAY & PENSIONS

*This session highlighted the role of teacher leadership and teacher pension in the broader teacher compensation landscape. Panelists shared information about ways in which advanced teaching roles support teacher retention, and considerations for policymakers regarding the current state of our pension system.*

### RESOURCE EXPERTS:

- ✉ **Chad Aldeman**, Senior Associate Partner, Bellwether Education Partners
- ✉ **Stephanie Dean**, Vice President of Strategic Policy Advising, Public Impact

### MODERATOR:

- ✉ **Jenni Owen**, Director of Strategic Partnerships, North Carolina Office of State Budget and Management, Office of the Governor

### KEY TAKEAWAYS:

- It is important to understand the roles that teacher pay and deferred compensation play in the effort to recruit and retain high-quality educators.
- In 2017, the [average teacher salary](#) in North Carolina was \$49,970. This salary places North Carolina 39<sup>th</sup> in the nation for average teacher pay and eighth out of 10 southern states.
- Efforts are underway to take on the teacher compensation discussion, specifically through Opportunity Culture, an initiative which develops career ladders for teachers.
  - Opportunity Culture gives excellent teachers the opportunity to manage their own teams of teachers, sharing best practices to extend the reach of strong teaching to more students in a school. These teacher-leaders are paid more to assume these roles, and this is done without increasing school budgets.
  - Schools using this model have seen success in raising student achievement, particularly in math.
  - This model has shown that schools can do more with existing teachers by strategically utilizing their strongest teachers.
- Understanding North Carolina’s pension system and its ability to provide retirement benefits to teachers is critical in the teacher compensation discussion.
- In order to qualify to receive employer-provided retirement benefits, teachers in North Carolina must stay in the profession for five years. Teachers who leave before that five-year benchmark must forfeit contributions to their school or state on their behalf. Less than half of teachers in the state will qualify for a retirement benefit.
- For those who qualify for that pension, only 25 percent will “break even,” meaning that, for most teachers, their future benefits will not exceed what they contributed plus interest to that plan.
- Like many states, North Carolina is using a sizeable portion of its contributions to fund pension debt. Today, just under 39 percent of the state’s pension contributions are going toward that debt.

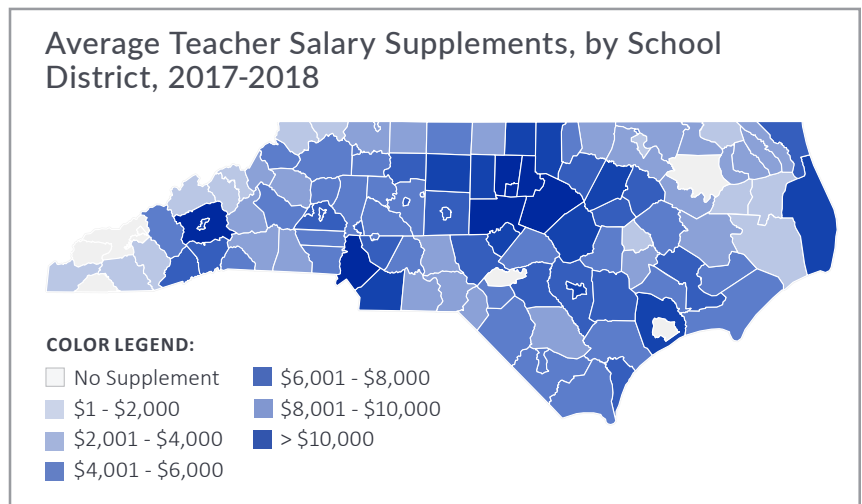
### ACTION ITEMS FOR LEGISLATORS:

- State policymakers should consider visiting schools where Opportunity Culture is being used to hear directly from teachers and school leaders about the impact of advanced teaching roles.
- Policymakers in North Carolina should consider whether the state’s retirement system is financially sustainable and can provide adequate benefits to teachers.
- State policymakers should review where the plan’s investments are being placed and consider conducting a stress test for the state pension plan. The plan’s investments go beyond stocks and bonds, focusing more on hedge funds and real estate. Legislators should be prepared to respond accordingly should the market not provide an anticipated return.

# Key Takeaways & Policy Considerations

## KEY RESOURCES:

- The website [TeacherPensions.org](http://TeacherPensions.org) provides an [overview](#) of how well North Carolina delivers benefits to teachers.
- [Taking Stock of California's Weighted Student Funding Overhaul: What Have Districts Done with their Spending Flexibility?](#) | Paper by Marguerite Roza, Time Coughlin, and Laura Anderson that explores the spending decisions made by districts in California after the state adopted a weighted student funding formula.



## PROFESSIONAL PERSPECTIVES | BUILDING A PIPELINE OF LEADERS

*To further the learning from the Retreat, legislators engaged in small group discussions with outstanding superintendents and principals from across the state to get their on-the-ground perspectives on how to strengthen the educator and leadership pipelines in North Carolina.*

### TEAMS:

**Dr. Tim Markley**, Superintendent, New Hanover County Schools  
**Krista Holland**, Principal, Anderson Elementary School

**Dr. Pascal Mubenga**, Superintendent, Durham Public Schools  
**David Hawks**, Principal, Durham School of the Arts

**Dr. Denise Patterson**, Superintendent, Asheville City Schools  
**Ruletta Hughes**, Principal, Vance Elementary School

**Dr. Don Phipps**, Superintendent, Caldwell County Schools,  
**David Cowell**, Principal, Hibriten High School

**Dr. Todd Wirt**, Superintendent, Orange County Schools,  
**Ambra Wilson**, Principal, New Hope Elementary School

### MODERATOR:

✉ **Patrick Sims**, Director of Policy & Research, The Hunt Institute

### ACTION ITEMS FOR LEGISLATORS:

- Legislators are encouraged to visit schools in their districts to meet with teachers, leaders, and superintendents to support awareness and understanding of local needs.

# Key Takeaways & Policy Considerations

## SCHOOL CHOICE | CHARTER SCHOOLS IN NORTH CAROLINA

This session provided an overview of the school choice landscape in North Carolina. Panelists discussed North Carolina's charter schools, specifically identifying strengths and areas for improvement in the laws governing North Carolina's charter schools, as well as voucher programs.

### RESOURCE EXPERTS:

- ✉ **Minnie Forte-Brown**, Board Member, Durham Public Schools Board of Education and Interim Board Chair, KIPP Eastern North Carolina
- ✉ **Emily Schultz**, Director, State Advocacy and Policy, National Alliance for Public Charter Schools

### MODERATOR:

- ✉ **Molly Osborne**, Director of Policy and Engagement, EducationNC

### KEY TAKEAWAYS:

- The charter landscape has grown steadily throughout the United States since the first charter laws were adopted in the 1990s. Today, over three million students are attending charter schools across the country.
- North Carolina's charter law was enacted in 1996, and the state currently has an estimated 168 charter schools, serving just under 92,000 students.
- [The National Alliance for Public Charter Schools \(NAPCS\) ranks](#) North Carolina's charter law 16<sup>th</sup> out of 44 existing state charter laws based on the organization's model charter school law.
- The State Board of Education is North Carolina's single charter authorizer, which is viewed as a point of strength in our charter law. North Carolina does not have a cap on the number of charter schools allowed in the state.
- The Opportunity Scholarship, Special Education Scholarship Grants for Children with Disabilities, and Personal Education Savings Account also provide opportunities for parents to exercise school choice.

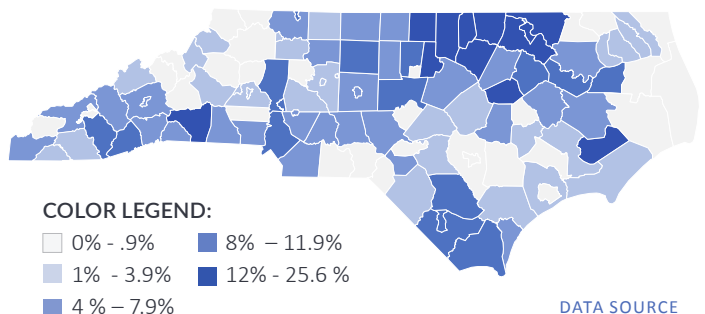
### ACTION ITEMS FOR LEGISLATORS:

- The legislature should determine if charter schools have equitable access to the operational funding needed to ensure sufficient capital funding and facilities.
- In an effort to ensure equitable access to charter schools, policymakers should consider whether the state should require all charter schools to offer transportation and lunch services.
- Legislators may wish to take a close look at the Opportunity Scholarship to determine if the number of scholarships utilized warrants continued increases in the state budget.

### KEY RESOURCES:

- The Center for Research on Education Outcomes' [National Charter School Study](#) (2013) reports outcomes for charter school students in 26 states and offers policy considerations to improve performance and accountability standards for charter schools.

Percent of Public School Students Enrolled in a Charter School, 2017-2018





# Key Takeaways & Policy Considerations

## EDUCATION FUNDING | THE ROLE OF STATE AND LOCAL GOVERNMENT

This session provided a national overview of school funding models with a focus on North Carolina. The panelist highlighted special funding considerations for serving special student populations including at-risk students, English learners, students with disabilities, and students who are academically gifted.

### RESOURCE EXPERTS:

✉ **Emily Parker**, Senior Policy Analyst, Education Commission of the States

### MODERATOR:

✉ **Dr. Sam Houston**, President & CEO, North Carolina Science, Mathematics, and Technology Education Center

### KEY TAKEAWAYS:

- North Carolina uses a resource allocation model to fund to its elementary and secondary education system. This system uses a series of formulas and rules to determine allotments – specific amounts of resources – to distribute to local school districts.
- Over time, several allotments have been added to the system to address the evolving needs of the state’s schools resulting in a complex funding formula that lacks transparency. This model is overly complicated and cumbersome.
- There is not one best approach for funding schools, as states take different approaches in how they allocate their funding. Thirty-two states use a foundation formula, eight use a resource allocation formula, two states use a hybrid of the foundation and resource allocation formulas, and eight states use other approaches for funding their schools.
- States have adopted new funding formulas, which can be encouraged through a governor’s initiative, legislative action, or by court mandate.

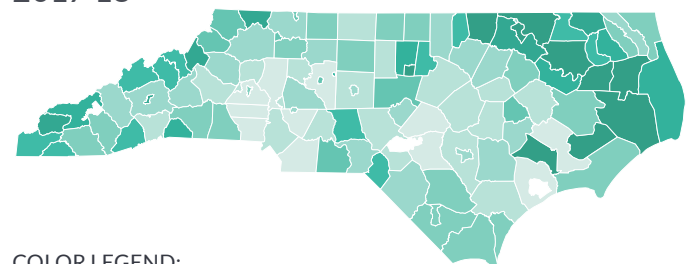
### ACTION ITEMS FOR LEGISLATORS:

- District size is important to consider in the education funding space. It is necessary for districts to keep a close eye on where their funds are going and whether they are being distributed in an equitable manner, particularly for large districts.
- For special education funding, policymakers may consider looking closely at Texas’s funding system, which uses multiple weights and provides a more accurate reflection of the costs of special education.

### KEY RESOURCES:

- The [materials](#) presented to the Joint Legislative Task Force on Education Finance Reform from a variety of researchers and stakeholders provide helpful context and information on school finance in North Carolina.
- Emily Parker’s presentation from the Retreat can be found [here](#).

Per Pupil Expenditures by School District, 2017-18



#### COLOR LEGEND:

< \$8,500	\$9,501 - \$10,000	\$11,001 - \$11,500
\$8,501 - \$9,000	\$10,001 - \$10,500	\$11,501 - \$12,000
\$9,001 - \$9,500	\$10,501 - \$11,000	> \$12,000

[DATA SOURCE](#)



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