

NC Principal Fellows Program

**Education Oversight Committee
September 27, 2000**

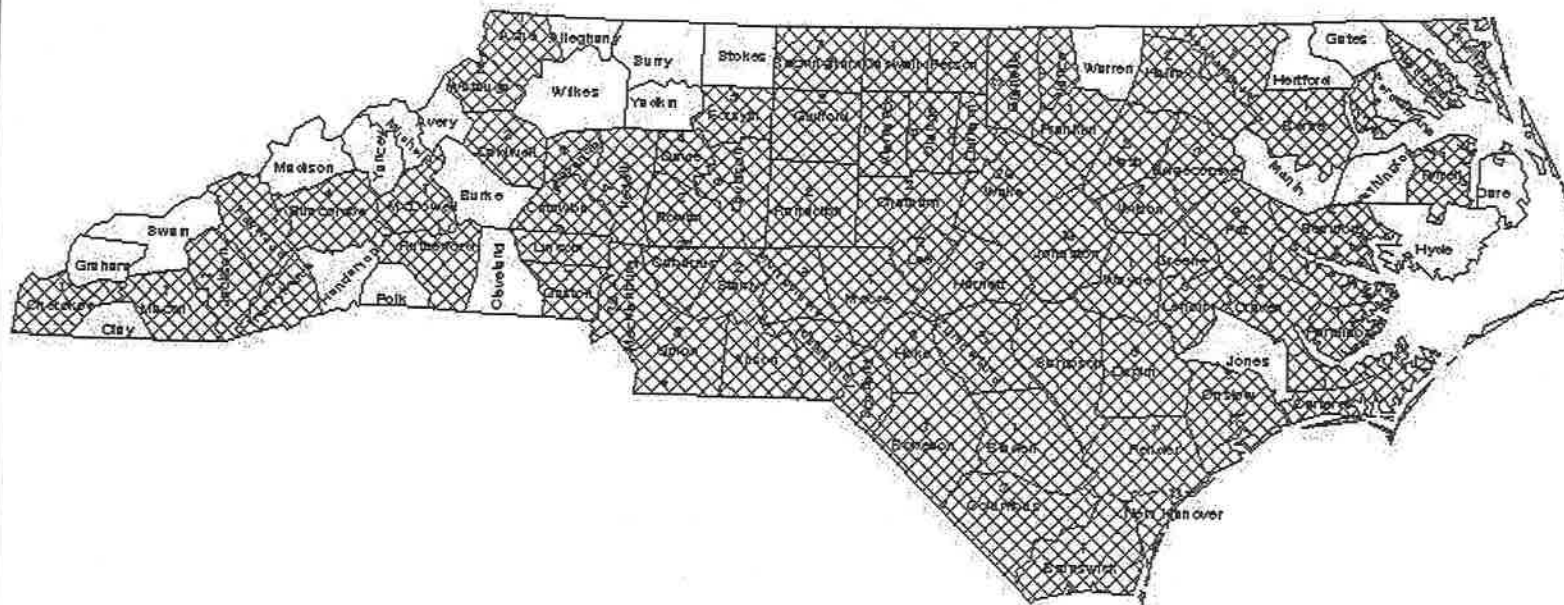
Remarks

In 1993 the Educational Leadership Task Force recommended to the Joint Legislative Education Oversight Committee that they "fund opportunities for full-time graduate work for prospective school leaders." The legislation establishing the Principal Fellows Program was passed in 1993 (GS 116-74.41-43), the program was organized in early 1994 and the first class of Principal Fellows began their studies in August 1994. The PFP is a merit-based scholarship loan program, the purpose of which is to support individuals in full-time study to prepare for a career in school administration and to provide a pool of well-trained and qualified candidates for administrative positions across the state. The scholarship loan provides twenty thousand dollars (\$20,000) per year to the students as they participate in an enhanced program of studies to earn the Master of School Administration degree at one of the nine (9) constituent universities of the University of North Carolina. In return a recipient must serve a minimum of four years as a school-based administrator in a public school in NC as service repayment of the loan or repay the loan in cash.

There are four major components to the PFP:

- 1) A year of full-time academic work in the MSA program at the university: This year allows the students to concentrate on the course work, research and field study in the area of school administration. For most Principal Fellows this is a true "value added" component of the program as they are immersed in their studies for year.
- 2) A yearlong, full-time internship: The second year of the program is the opportunity for the student to put "theory into practice" under the guidance of an experienced principal as they make the transition from student to administrator.
- 3) Enrichment activities: During the two years PFs are in the MSA program enrichment (professional development) activities are provided by the director of the PFP and the MSA campuses. The enrichment activities, which are required by the mandating legislation, are activities that are supplementary and complementary to the MSA program and focus on issues in education and leadership development.
- 4) Employment as a school-based administrator: Once the Principal Fellow completes the MSA degree program and earns the principal's license, they must obtain employment as a school-based administrator in a NC public school (or a school operated by the US government in NC), and serve a minimum of four years to repay the scholarship loan. They have six years from the date of graduation to find a position and complete the four-year obligation.

NC Principal Fellows Employment by District





JULIE MORROW
Principal
Sugar Loaf ES
Alexander County Schools
Class 5, UNC-C

Being a North Carolina Principal Fellow enabled me to develop a comprehensive understanding of the leadership role in today's schools. Strengthening this understanding of leadership, the Principal Fellows Program provided tremendous and diverse opportunities for all participants to explore, discover, and experience the role of the leader in North Carolina's school. These experiences granted me the ability and confidence to take an active leadership role as principal upon completion of the program.



JAMES M. OGLESBY
Assistant Principal
Green Hope HS
Wake County Schools
CLASS 4, UNC-C

Unequivocally the best leadership development program that I have participated in, including three advanced level leadership programs during a twenty-four year career in the United States Army. The availability of the Principal Fellows scholarship program made it possible for me to earn a Master School Administration degree.



JANICE LEWIS
Assistant Principal
Viewmont ES
Hickory City Schools
Class 3, UNC-C

The Principal Fellows Program prepared me for the awesome responsibility and challenges that face school leaders today. During my experience as a Principal Fellow I took advantage of the many, many enhancement opportunities that were available to me. I also met many extraordinary educators and fellow aspiring principals during my two-year training period, from across this state and nation. I take great pride in being a Principal Fellow as I share my experiences and the benefits of this program with others.

TOM HATCH
Assistant Principal
Reid Ross Classical School
Cumberland County Schools
Class 4, FSU



The Principal Fellows Program affords aspiring school administrators the opportunity for one year to focus strictly on leadership theory and its application to the public school setting. During the second year the program offers the chance to apply these theories within the domain of an internship experience. The Principal Fellows Program provides for a network of school administrators to share their successes and not so great successes with each other. As a result, we have been able to gain valuable insight into what may or may not work at our particular school.

PRINCIPAL FELLOWS COMMISSION

(A Commission created by Senate Bill 27, Section 85)

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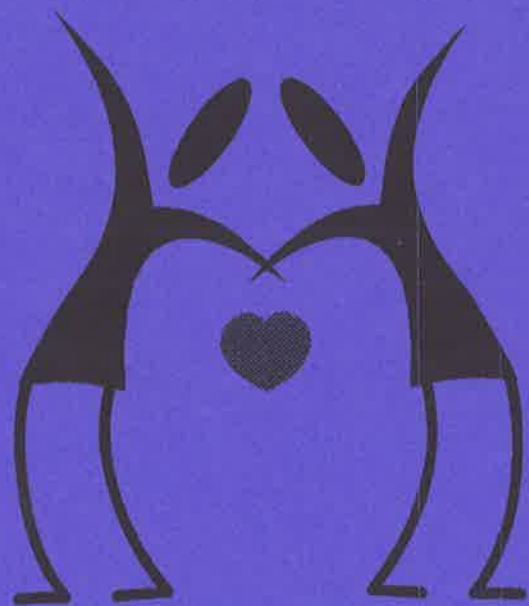
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NCSCA

**Presentation to the Education Oversight
Committee**

September 26, 2000

Audrey Thomasson, President

Eric Sparks, President Elect

Liz Conroy, Past President

Stephanie Slowik and Tara Winter, Government Relations Co-Chairs

OUTLINE FOR PRESENTATION

- I. Greetings and Introductions
- II. Statement of Purpose
- III. Role of the Counselor-
 - A) What are counselors supposed to be doing?
 - B) What are we really doing?
- IV. Data and Research
- V. Summation and Closure

SB 787 COUNSELOR ISSUES
Fund Additional Counselors to Lower Student-to-Counselor Ratio

- ◆ National organizations such as the American School Counseling Association, the Institute of Medicine, the National Education Association, and the National School Health Association recommend a student-to-counselor ratio of 250:1.
- ◆ North Carolina average student-to-counselor ratio is 450:1.
 - Some NC school counselors are currently responsible for 1000 or more students; some counselors serve PK-8 populations by themselves.
- ◆ School Counselor responsibilities include the following
 - Individual Counseling, Group Counseling, Classroom Guidance
 - Academic Achievement
 - Social Adjustment
 - Safe and Orderly Schools / Violence Prevention
 - Self-concept
 - Behavior Management
 - Career Education
 - Life Situation Changes – including divorce, death, personal crisis, etc.
 - Parent / Teacher / Administrator Consultation
 - School-Wide Program Planning
- ◆ Counselors should spend a minimum of 70% of counselors' time in direct service to students.
- ◆ Elimination of the non-counseling responsibilities listed below would provide students with more opportunity to utilize counselor services in the above areas.
 - Testing coordination
 - Chairing various committees
 - Data entry and management of attendance, schedules, records, etc.
 - Clerical duties/paperwork
 - Extensive duties

North Carolina School Counselors ask you to pass legislation to fund more counselors, thereby lowering the student-to-counselor ratio to 250:1.

Restructure Counselor Salary Schedule

- ◆ Counselors are dealing with heavy responsibilities such as
 - high student-to-counselor ratios
 - an increased number of challenging social issues
 - higher involvement in academic success
- ◆ Higher salaries are needed in order to recruit and retain the highest quality School Counselors to provide these services.
- ◆ School Counselors, School Psychologists, and Speech Therapists all have equivalent masters level training in their respective areas yet they are not paid equally.
- ◆ School Counselors' workload and responsibilities equal that of Psychologists and Speech Pathologists. However, School Counselor services impact a much larger number of students.

North Carolina School Counselors ask you to pass legislation to raise the school counselor salary schedule by five steps to equal that of school psychologists/speech therapists. Thank you for your consideration.

The Role of the Professional School Counselor (Approved by ASCA June, 1999)

The professional school counselor is a certified/licensed educator who addresses the needs of students comprehensively through the implementation of a developmental school counseling program. School counselors are employed in elementary, middle/junior high, senior high, and post-secondary settings. Their work is differentiated by attention to age-specific developmental stages of student growth and the needs, tasks, and student interests related to those stages. School counselors work with all students, including those who are considered "at-risk" and those with special needs. They are specialists in human behavior and relationships who provide assistance to students through four primary interventions: counseling (individual and group); large group guidance; consultation; and coordination.

COUNSELING is a confidential relationship in which the counselor meets with students individually and in small groups to help them resolve or cope constructively with their problems and developmental concerns.

LARGE GROUP GUIDANCE is a planned, developmental program of guidance activities designed to foster students' academic, career, and personal/social development. It is provided for all students through the collaborative effort by counselors and teachers.

CONSULTATION is a collaborative partnership in which the counselor works with parents, teachers, administrators, school psychologists, social workers, visiting teachers, medical professionals, and community health personnel in order to plan and implement strategies to help students become successful in the education system.

COORDINATION is a leadership process in which the counselor helps organize, manage, and evaluate the school counseling program. The counselor assists parents in obtaining needed services for their children through a referral and follow-up process and serves as a liaison between the school and community agencies so that they may collaborate in efforts to help students.

Professional school counselors are responsible for developing comprehensive school counseling programs that promote and enhance student learning. By providing interventions within a comprehensive program, school counselors focus their skills, time, and energies on direct services to students, staff, and families. In the delivery of direct services, the American School Counselor Association (ASCA) recommends that professional school counselors spend at least 70% of their time in direct services to students. ASCA considers a realistic counselor: student ration for effective program delivery to be a maximum of 1:250.

Above all, school counselors are student advocates who work cooperatively with other individuals and organizations to promote the development of children, youth, and families in their communities. School counselors, as members of the educational team, consult and collaborate with teachers, administrators, and families to assist students to be successful academically, vocationally, and personally. They work on behalf of students and their families to insure that all school programs facilitate the educational process and offer the opportunity for school success for each student. School counselors are an integral part of all school efforts to insure a safe learning environment for all members of the school community.

Professional school counselors meet the state certification/licensure standards and abide by the laws of the states in which they are employed. To assure high quality practice, school counselors are committed to continued professional growth and personal development. They are proactively involved in professional organizations which foster and promote school counseling at the local, state, and national levels. They uphold the ethical and professional standards of these associations and promote the development of the school counseling profession.

North Carolina School Counseling Fact Sheet

Ratio

Number of NC public schools: 2080; number of NC students: 1,253,135

Approximate ratio of NC school counselors to students: 1/458

Counselor/student ratio recommended by the American School Counselor Association, the Institute of Medicine, the National Education Association, and the National School Health Association: 1/250

Counselors are not equally divided among schools; some elementary counselors serve as many as 1000 students; some counselors serve PK-8 populations by themselves.

Certification

Approximate Number of NC School Counselors: 2700

Number of National Certified School Counselors currently certified by the National Board for Certified Counselors: 90

Median (15 years of experience) school counselor's yearly salary: \$39,940

Potential 12% pay raise for national certification of school counselor with 15 years experience: \$4,792.80

Training

Masters degree with 48-60 hours in the areas of human growth and development, group work, social and cultural foundations, appraisal, research and program evaluation, professional orientation, career and lifestyle development, and helping relationships

Research on the Impact of School Counseling Programs

In response to Senate Bill 787, the North Carolina School Counselor Association has prepared information related to the issues of school counselors. In reviewing the research, we have found marked evidence that school counseling programs significantly impact students' academic achievement, students' attitudes, behaviors, and skills, and students' lifelong success. More specifically, school counseling programs clearly improve students' academic achievement, improve students' attitudes, behaviors, and skills, and are directly linked to the reduction of dropout rates.

Academic Achievement- "Closing the Achievement Gap"

- Three years after Florida hired elementary school counselors students who were underachievers in reading advanced 1.1 years in seven months.
- Cams and Cams found that a study skills program conducted by school counselors for fourth graders, resulted in remarkable improvements after one year ranging from four years two months to one year four months.
- Studies of the effects of a small group counseling approach for failing elementary school students found that 83% of students showed improvement in grades.
- "Elementary school counseling is becoming more popular," said Sandy Peyser, a consultant on school counseling with the NC State Department of Public Instruction. "We're understanding that prevention needs to start in kindergarten. A child needs to feel good about himself to achieve."
- Based on its research, The Institute of Medicine recommends that "mental health and psychological services are essential in enabling many students to achieve academically, these should be considered mainstream, not optional, services".

Attitudes, Behavior, Skills- "Safe Schools"

- Gerler and Anderson found that classroom guidance activities significantly influenced improvement in ratings of children's behavior, conduct grades, and school attitude scores.
- Students who attended schools with more fully implemented guidance programs rated the climate in their schools as being more positive, reported greater feelings of belonging and safety in their schools, indicated that their classes were less likely to be interrupted by other students, that their peers behaved better in school, and that more career and college information was made available to them.
- Omizo, Hershberger, and Omizo found that group counseling was very successful in decreasing aggressive and hostile behaviors in grades four through six.

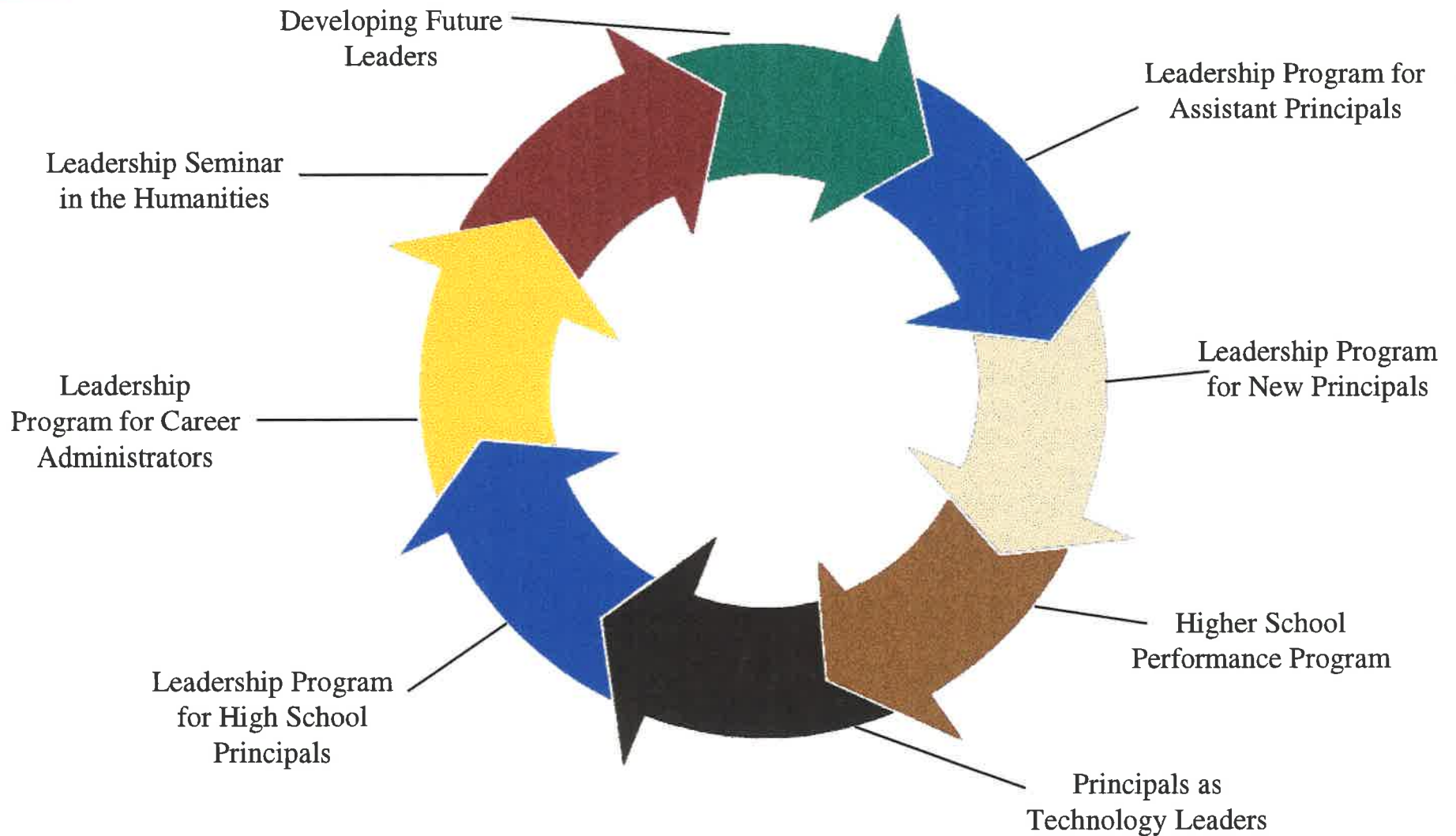
Lifelong Success- "Dropout Prevention"

- The US Office of Education found that there were 47% fewer dropouts and 50% fewer failures in schools where there were adequate counselor to student ratios.
- The Institute of Medicine reported that, "The consequences of failing to provide treatment services to children with severe emotional disturbances are significant. Forty-eight percent of these students drop out of high school. . . . Of those who dropped out of school, 73 percent are arrested within 5 years of leaving school".
- The School Dropout Assistance Program funded a number of projects to test and evaluate the effect of promising strategies for dropout prevention and reentry. The results found that counseling services were one of the key elements of any particular dropout prevention initiative.

The above research is just a fraction of research that we found illustrating the substantial impact that school counseling can and does have on students in all areas: academic, career, and personal/ social.

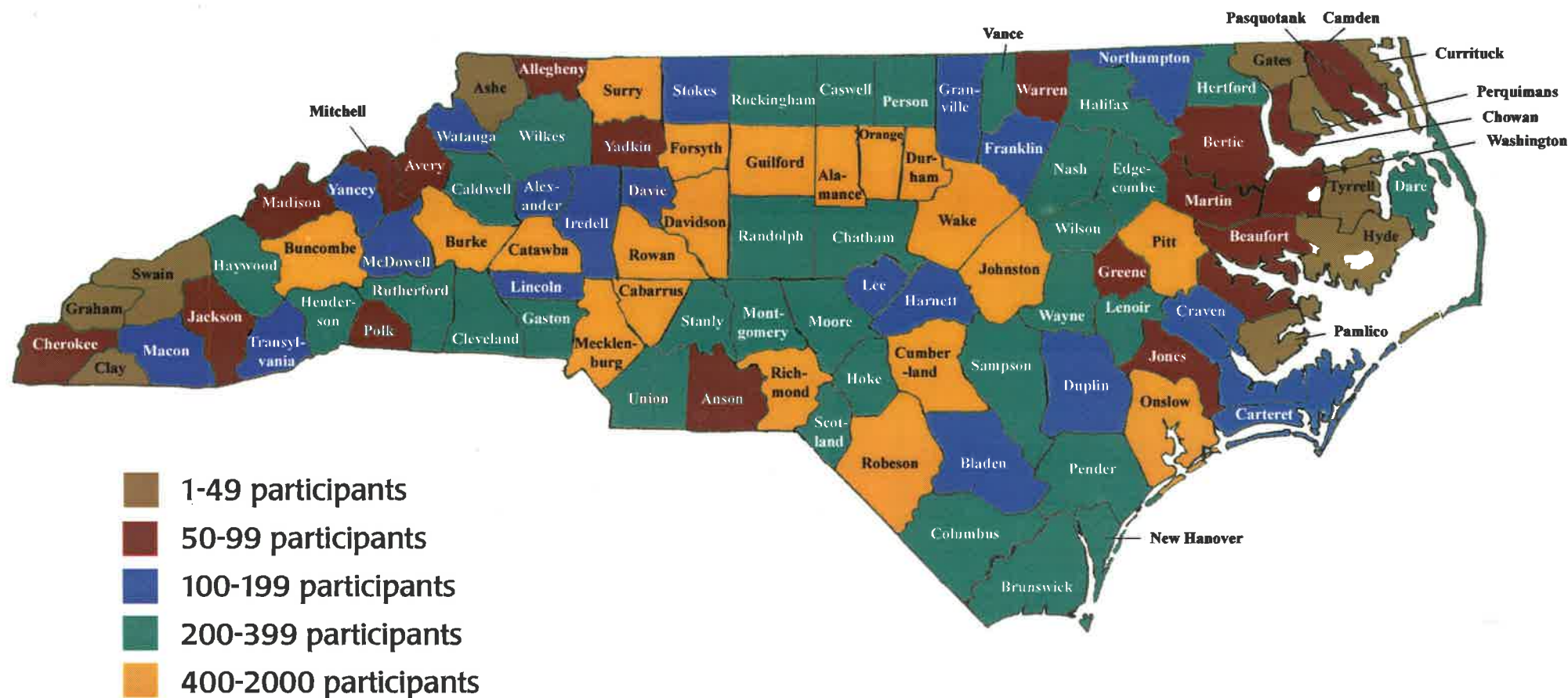
We need your support to recruit and retain quality school counselors (by aligning the pay scale). Also, your support is needed to reduce counselor: student ratios so that school counselors can work more effectively with and impact a greater number of students.

What We Do



Principals' Executive Program

Statewide Service 1984-2000



Distribution of Residential Program Graduates (3,475 Principals, Assistant Principals, Superintendents, and Central Office Personnel) and Topical Program Participants (29,090) by County



Principals' Executive Program

Home

About PEP

Programs

Resources



Welcome to the

Principals' Executive Program

UNC Center for School Leadership Development

[Home](#) | [About PEP](#) | [Programs](#) | [Resources](#)

The Principals' Executive Program (PEP), a constituent organization of the University of North Carolina's Center for School Leadership Development, conducts professional development programs for principals, assistant principals, and other leadership personnel in North Carolina's public schools. Established in 1984 by the North Carolina General Assembly, PEP seeks to improve the performance of the state's K-12 students by enlarging the knowledge and improving the skills of school administrators as managers and education leaders.

The need for continuous learning among school leaders has never been more important because the job of school leadership has never been more complex. It is not an oversimplification to say that a leader who stops learning stops leading. PEP's staff development activities therefore, are continually adjusted and refined to respond to the specific challenges of today's turbulent education environment.

Thank you for your interest in us. Please take a few moments to browse our site and learn more [About PEP](#), its unique [Resources](#), and acclaimed [Programs](#).

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This site updated 8/8/2000

Contact the UNC Center for School Leadership Development

Latest Happenings

ELNC Goes Virtual

PEP's legal reference resource for school administrators, *Education Law in North Carolina* (ELNC), is now available on the worldwide web. Subscribers may log onto ELNC's website www.LPHost.net/elnc using their assigned subscription code and their individually created user identification. For more information about ELNC or to access our ELNC demonstration website, visit the [ELNC](#) web page.



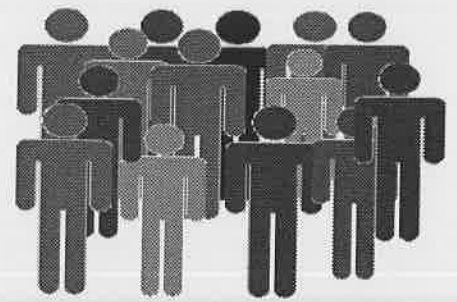
Equity of Participants

	Total Participants	Males	Females	White	Black	Native American	Other
Residential Program							
Principals' Executive Program (PEP) 1-53	1,721	1,036	685	1,309	394	18	
Superintendents' Executive Program (SEP) 1-4	119	96	23	107	11	1	
Central Office Leadership Program (COLP) 1-6	142	42	100	87	54	1	
Leadership Program for Assistant Principals (LPAP) 1-30	938	364	574	638	288	10	2
Higher School Performance Program (HSPP) 1-2	53	21	32	26	27		
Leaderships Program for High School Principals (LPHSP) 1	12	7	5	9	3		
Leadership Program for New Principals (LPNP) 1-2	51	18	33	34	16		1
Principals As Technology Leaders (PATL) 1	23	8	15	17	6		
Developing Future Leaders (DFL) 1	37	12	25	17	18	2	
Humanities Seminar	33	14	19	29	4		
SUBTOTALS	3,129	1,618	1,511	2,273	821	32	3
PERCENTAGES		52%	48%	73%	26%	0.1%	0%
Career Administrators	64	*	*	*	*	*	*
Advanced PEP	282	*	*	*	*	*	*
TOTALS	3,475	1,618	1,511	2,273	821	32	3
*Equity information not readily available							

Programs and Services

Growing . . .

ing!



Program	1984	1985	1986	1987	1988	1989	Cumulative Totals	Update Through June, 2000
PEP (26 days)	1 event 35 people	4 events 138 people	4 events 133 people	4 events 133 people	4 events 133 people		53 events 1,721 people	53 events 1,721 people
PEP Update (2-3 days)		1 event 88 people	2 events 178 people	2 events 203 people	2 events 203 people	1 event 97 people	22 events 1,933 people	22 events 1,933 people
SEP (25 days)				1 event 32 people	1 event 32 people		4 events 119 people	4 events 119 people
Symposium (2-3 days)				1 event 120 people	1 event 120 people	3 events 679 people	24 events 4,129 people	26 events 4,381 people
SALC (2.5-3.5 days)				2 events 58 people	2 events 58 people		37 events 1,380 people	37 events 1,380 people
Workshops (1-2 days)				2 events 45 people	2 events 45 people	15 events 568 people	288 events 8,076 people	290 events 8,136 people
SEP Update (2 days)							10 events 304 people	10 events 304 people
Advanced PEP (5 days)							6 events 282 people	6 events 282 people
Seminars (2-3 days)						35 events 1,153 people	71 events 2,107 people	81 events 2,444 people
Consulting (1-2 days)						51 events 1,245 people	245 events 8,078 people	249 events 8,189 people
Regional Updates (1 day)							35 events 1,985 people	35 events 1,985 people
APEP/LPAP (19 days)						4 events 97 people	28 events 881 people	30 events 938 people
APEP Update (2 days)							3 events 271 people	3 events 271 people
COEP/COLP (25 days)						1 event 17 people	5 events 123 people	6 events 142 people
Travel Seminar (17 days)							3 events 67 people	3 events 67 people
LPNP (15 days)						1 event 28 people	1 event 28 people	2 events 51 people
HSPP (12.5 days)						1 event 26 people	1 event 26 people	2 events 53 people
LPHSP (10 days)						1 event 12 people	1 event 12 people	1 event 12 people
Humanities Seminar (6 days)						1 event 14 people	1 event 14 people	2 events 33 people
PATL (10 days)								1 event 23 people
LPCP Modules (15 days)								4 events 64 people
DFL (8 days)								1 event 37 people
Total Events	1 event	5 events	6 events	12 events	12 events	114 events	838 events	868 events
Total Participants	35 people	226 people	311 people	591 people	591 people	3,936 people	31,536 people	32,565 people



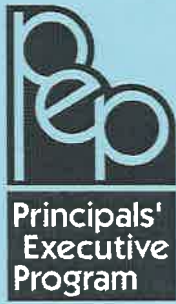
Indicators of Success

- ◆ This is a TOTALLY voluntary program, in which over 2,000 people annually choose to participate
- ◆ PEP has attracted over 3 million dollars in external funding, the bulk through the Bill and Melinda Gates Foundation
- ◆ Eight other statewide leadership academies have met or talked with PEP, citing it as a model they wished to study and learn from
- ◆ National Staff Development Council has commissioned an article to be written about PEP



Indicators of Success (continued)

- ◆ In the Higher School Performance Program—a program designed specifically to help principals of marginally or low performing schools—over 78% of the participating principals have shown a gain in the percentage of their students meeting grade level standards
- ◆ PEP had 3 residential programs in 1997 and 9 residential programs in 2000. All are currently full, and some are oversubscribed
- ◆ PEP's participants continually voice satisfaction with the program's quality, as revealed in each program's evaluations



Responsiveness to Our Customers

- ◆ All programs are aligned to the pre-existing four strategic priorities of the State Board
- ◆ Topical seminars and symposiums always address prevalent issues and concerns for North Carolina's public schools
- ◆ PEP has ventured into pre-service programs to help attract highly qualified candidates into the applicant pool



Responsiveness to Our Customers

(continued)

- ◆ PEP offers its programs in a geographically diverse manner, thereby building stronger relationships with school districts and universities in more distant parts of the state
- ◆ The Instructional Symposium for 2000-2001 will focus on the State Board's newest strategic priority: Building strong connections to communities, families, and businesses

Sample of PEP Offerings Aligned with SBE Strategic Priorities

HIGH STUDENT PERFORMANCE

- ◆ Higher School Performance Program (HSPP)– A PEP residential program designed for principals of low-performing and/or at-risk schools
- ◆ 1999 Instructional Symposium on the topic of “Reaching the Hard-to-Reach Student”
- ◆ Focus on the use of Socratic Seminars in every residential program
- ◆ Instructional segments in all residential programs on analyzing student performance data
- ◆ Topical seminar on “Curriculum Compacting”
- ◆ Case study research on high performing schools with low performing school characteristics
- ◆ Partnership with the national CIERA Project to improve reading instruction in elementary and middle schools
- ◆ Monograph on the techniques of instructional leadership in schools
- ◆ Leadership Program for Career Administrators (LPCA) – instructional module focused on creating a learner-centered school

SAFE, ORDERLY, AND CARING SCHOOLS

- ◆ Annual Law Symposium – focus on legal issues, particularly special education law and updates on new legislation
- ◆ Central Office Leadership Program (COLP) – A PEP residential program for central office administrators designed to support school-based administrators create productive learning environments for students
- ◆ *Education Law in North Carolina* – a compendium of statutory law, case law, and administrative regulations designed to help the school administrator now the legal foundation of school-based decision making
- ◆ Leadership Program for New Principals (LPNP) – A PEP residential program aimed to serve the needs of new principals

QUALITY TEACHERS, ADMINISTRATORS, AND STAFF

- ◆ Topical Seminar on “Teacher Supervision and Evaluation”
- ◆ Monograph on effective hiring and teacher retention practices
- ◆ Leadership Program for High School Principals (LPHSP) – this PEP residential program is designed for high school principals to help them gain capacity in helping their teachers meet the demands of high stakes accountability.
- ◆ Leadership Program for Assistant Principals (LPAP) – A PEP residential program aimed at helping assistant principals prepare for the principalship
- ◆ Salary Schedule Study – A PEP-sponsored research project for the SBE to address questions of equity and adequacy of principals and assistant principals’ salary schedules

- ◆ Principal and Central Office Evaluation Studies – PEP research sponsored by the SBE to help re-design the ways school-based administrators and central office administrators will be evaluated
- ◆ Annual Orientation Seminar – A two-day seminar co-sponsored with DPI for first year principals and assistant principals to provide basic understandings of their leadership roles and how those roles fit within state priorities
- ◆ PEP-PFP collaboration on Teacher Evaluation – A co-sponsored series of seminars with Principal Fellows teaching them best practices in evaluating teacher performance

EFFECTIVE AND EFFICIENT OPERATIONS

- ◆ Think Tank on resource re-allocation
- ◆ Presentations by Public School Forum staff on their report “The Things that Matter”
- ◆ Laptop technology component of residential programs to provide tools for thinking smarter
- ◆ Technology seminars on basic and advanced uses of computer technology
- ◆ Finance Officers Seminars – PEP seminars conducted under SBE sponsorship
- ◆ Leadership Program for Career Administrators (LPCA) – a module focused on effective decision making
- ◆ Developing Future Leaders (DFL) – this program is PEP’s only real pre-service program. It is intended to introduce prospective school administrators to the possibilities and realities of becoming a principal.

BUILDING STRONG CONNECTIONS TO COMMUNITIES, HOMES AND FAMILIES

- ◆ LPAP segment devoted to marketing one’s school
- ◆ Project-based learning activity in the new principals program (LPNP) requiring them to find a community organization they are not familiar with and arrange to tell them about their school
- ◆ The 2001 Instructional Symposium will focus on Improving Student Learning Through Strengthened Connections Between School, Home, and the Community

PROGRAMS AND ACTIVITIES THAT CUT ACROSS TWO OR MORE PRIORITIES

- ◆ Principals As Technology Leaders (PATL) – A PEP residential program designed to bring principals and instructional technology together in a supportive learning environment
- ◆ Leadership Seminar in the Humanities (LSH) – this is a program co-sponsored with the Program for the Humanities and Human Values on the UNC-CH campus. The program is designed for experienced principals to gather and explore larger issues of social and educational consequence
- ◆ Quarterly newsletters focusing on current topics of interest to principals and assistant principals in the state

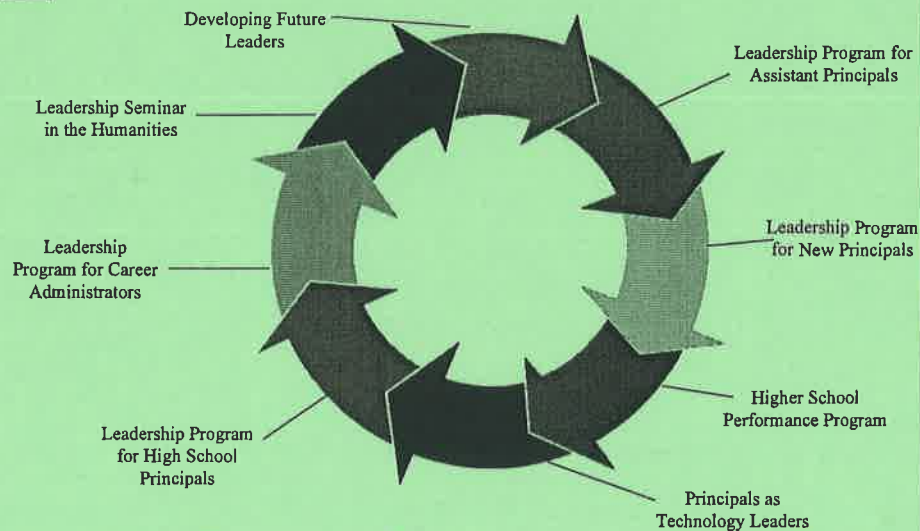
The Presentation Framework

- ◆ Overview of purpose and function of each respective program
- ◆ Program productivity
- ◆ Indicators of success
- ◆ Access to participation in programs
- ◆ Responsiveness to customer needs
- ◆ Equity of participants

The Principals' Executive Program – UNC Center for School Leadership Development



What We Do



The Principals' Executive Program – UNC Center for School Leadership Development



What We Do (continued)

- ◆ Symposiums and Seminars on current topics and issues
- ◆ Publications (e.g., *Education Law in North Carolina*, *Leadership*, *The Provident Principal*)
- ◆ Workshop Coordination and Topical Consultations
- ◆ Professional Services (e.g., lending library, telephone consultations on legal and technology issues)

The Principals' Executive Program – UNC Center for School Leadership Development



Access to Participation

Statewide Service 1984-2000



Distribution of Residential Program Graduates (3,475 Principals, Assistant Principals, Superintendents, and Central Office Personnel) and Topical Program Participants (29,090) by County

The Principals' Executive Program – UNC Center for School Leadership Development

The Principals' Executive Program – UNC Center for School Leadership Development

 Growing ...  Growing ...

The Principals' Executive Program – UNC Center for School Leadership Development

Program Productivity
(Continued)



Still Growing!

[illegible]

The Principals' Executive Program – UNC Center for School Leadership Development



Indicators of Success

- ◆ This is a TOTALLY voluntary program, in which over 2,000 people annually choose to participate
- ◆ PEP has attracted over 3 million dollars in external funding, the bulk through the Bill and Melinda Gates Foundation
- ◆ Eight other statewide leadership academies have met or talked with PEP, citing it as a model they wished to study and learn from
- ◆ National Staff Development Council has commissioned an article to be written about PEP

The Principals' Executive Program – UNC Center for School Leadership Development



Indicators of Success (continued)

- ◆ In the Higher School Performance Program—a program designed specifically to help principals of marginally or low performing schools—over 78% of the participating principals have shown a gain in the percentage of their students meeting grade level standards
- ◆ PEP had 3 residential programs in 1997 and 9 residential programs in 2000. All are currently full, and some are oversubscribed
- ◆ PEP's participants continually voice satisfaction with the program's quality, as revealed in each program's evaluations

The Principals' Executive Program – UNC Center for School Leadership Development



Responsiveness to Our Customers

- ◆ All programs are aligned to the pre-existing four strategic priorities of the State Board
- ◆ Topical seminars and symposiums always address prevalent issues and concerns for North Carolina's public schools
- ◆ PEP has ventured into pre-service programs to help attract highly qualified candidates into the applicant pool

The Principals' Executive Program – UNC Center for School Leadership Development



Responsiveness to Our Customers (continued)

- ◆ PEP offers its programs in a geographically diverse manner, thereby building stronger relationships with school districts and universities in more distant parts of the state
- ◆ The Instructional Symposium for 2000-2001 will focus on the State Board's newest strategic priority: Building strong connections to communities, families, and businesses

The Principals' Executive Program – UNC Center for School Leadership Development



Pictures and Quotes

I am inspired to continue to be a lifelong learner and remain up-to-date in all educational issues. As a model for faculty, students, and parents, I will continue to use all of the knowledge and skills that I possess to build and expand my community of learners. I will motivate and inspire others!!

— Winifred Hill, LPAP 29



The Principals' Executive Program – UNC Center for School Leadership Development

THE HISTORY OF THE

REPUBLIC OF THE UNITED STATES

OF AMERICA

FROM THE FIRST SETTLEMENTS TO THE PRESENT TIME

BY

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Pictures and Quotes



I would like to extend my appreciation to you, for all the help, guidance, and wisdom you shared with me during the last five years. PEP has played a major role in shaping me into what I hope is an effective instructional leader. The courses, along with the strong networking opportunities that PEP has offered, are probably the best way for principals to improve their skills.

— Michael Getz, PEP 49 and HSPP 01

The Principals' Executive Program – UNC Center for School Leadership Development



Pictures and Quotes

Based on PEP's excellent reputation, I was eager to join the ranks of other principals who had completed the program before me. The program fulfilled my expectations and more. I have come away from every PEP session eager to apply my learning, excited for the opportunity to work in the profession I have been trained for, and revitalized to tackle the myriad problems that came my way. I also came away with pride in my profession and a feeling of genuine friendship and fellowship that will create memories for years to come.



— Terri Chaney, LPNP 02

The Principals' Executive Program – UNC Center for School Leadership Development

To: Members of the Joint Legislative Education Oversight Committee

From: Jan Crotts, Executive Director
Linda Suggs, Director, Professional Development & Personnel Services
North Carolina Association of School Administrators

Re: In-Service Training of School Administrators

Date: September 27, 2000

Thirty nine administrators responded to a request from NCASA to comment on issues related to in-service training of school administrators. This was not a scientific survey, but the responses did show remarkable consistency in several areas and are probably worthy of further consideration. This whole area is vital to North Carolina's continued progress in educational achievement, and we appreciate the opportunity to share these thoughts with you today.

Needs/concerns/ or areas staff development should focus on:

- time
- budgets and finance
- special education issues
- student achievement issues, disaggregation of student data, finding & using diagnostic data
- teacher evaluation, especially evaluation of new teachers
- dealing with adults; dealing with difficult people
- stress management
- insufficient funds for staff development
- support groups and support strategies

Recommendations:

- strong mentors, or better yet, coaches for new principals
- assistant principal for every school
- lots of central office support, local support groups, etc.
- more involvement of practitioners in education administration programs
- encourage participation in PEP and in state and national conferences
- more money for staff development
- more attention to development of leadership skills/potential
- retirement changes to keep/attract those eligible to retire who might be enticed to stay

In conclusion

- Seven Core Beliefs on Professional Development for Principals (Annenberg Institute for School Reform , Brown University)
- Lots of professional development available (thus, sometimes "fragmented" programs)
- Administrators need all avenues and lots of support from a variety of sources
 - the local school system
 - university, Center for School Leadership Development, PEP, etc
 - professional organizations



Education Leadership

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Principal Consortium Alliance

SERVE is developing a model of professional development for principals that deliberately encourages administrators to reflect on their practice, explore effective change strategies, and collaboratively network with other administrators.

Currently, Education Leadership staff is working to provide opportunities for administrators engaging them in "focused reflection" that leads to implementation of best practice. Professional development experiences include

- An **Invitational Southeastern Regional Principal Forum**, that will be held in Atlanta, Georgia, this year focusing on Equity and School Reform issues
- **Principal Dialogue Forums**, engaging administrators in professional conversations about teacher empowerment, democratic learning, and intellectual dialogue based on recent research
- The formation of a **Principal Advisory Committee** that will serve as a powerful "think tank" and network within the region

The Annenberg Institute for School Reform has established **Seven Core Beliefs** on Professional Development for Principals that exemplify what Education Leadership staff strives to accomplish through our administrator support efforts.

1. Principals' learning is personal and yet takes place most effectively while working in groups. Work in groups reinforces the value of building on one another's thinking and of being willing to let go of earlier thinking in order to construct knowledge together.
2. Principals foster more powerful faculty and student learning by focusing on their own learning. To lead requires that principals be learners.
3. While we honor principals' thinking and voices, we want to push principals to move beyond their assumptions. We often move beyond the participants' comfort zone by introducing questions and issues that are central to everyone's work and at the same time terribly difficult to confront---expectations, standards, race, power, to name a few.
4. Focused reflection takes time away from "doing the work," and yet it is essential. It is important to build into the professional development experience many opportunities and ways to reflect.
5. It takes strong leadership in order to have truly democratic learning. Leaders are most truly democratic when they listen carefully and then design the work for the group.
6. Rigorous planning is necessary for flexible and responsive implementation. During each session, we spend time creating shared understandings, engaging in intellectual dialogue and debate, and planning specific applications of learning.
7. New learning depends on protected dissonance. Providing a safe setting in which to stretch makes all the difference.

Press Release

FOR IMMEDIATE RELEASE

Contact: June Million, NAESP
703-684-3345
Michael Carr, NASSP
703-860-7260

Study Confirms Powerful Link Between the Principal and School Success

Shortage of Qualified Candidates Hindering the Improvement of Schools

Washington, DC -- The widespread shortage of qualified principals has put a drain on the instructional leadership of the nation's schools, and is seriously affecting efforts in whole-school academic improvement according to a new report conducted by the Educational Research Service (ERS) at the request of the National Association of Elementary School Principals (NAESP) and the National Association of Secondary School Principals (NASSP).

The report, *The Principal, Keystone of a High-Achieving School: Attracting and Keeping the Leaders We Need*, takes a close look at the shortage, suggests reasons behind it, and provides an overview of programs designed to address aspects of the shortage. In addition, the report studies the strong connection between quality principals and high-performing schools and the affects of a principal shortage on education improvement activities.

"The principal is the cornerstone of a school's success--and improvement," said Vincent Ferrandino, NAESP's executive director, "and we're facing a critical shortage of qualified applicants for the principal's position."

"This report supports the position that a quality school reflects a quality school leader," stated Gerald Tirozzi, NASSP's executive director. "But for us to have whole-school and not piecemeal academic improvement, we need to address the shortage of qualified candidates, recognize the positive role the principal plays, and support the principal as the instructional leader of a school."

The report stresses the need to intensify conversation and collaboration among all groups concerned about the issue of leadership for the nation's schools. It recommends realistically defining expectations and responsibilities of the principalship position. The report goes on to discuss approaches that may help school districts eliminate barriers to recruiting and hiring the best candidates. The report suggests how efforts should be directed in the future to provide support for new and aspiring principals as well as ongoing development opportunities for more experienced principals.

Changing Role of the Principal

The study identifies critical skills for qualified principal candidates which include: being "educationally savvy," innovative, having a clear focus and vision, able to "sell the school," a good manager, interested in using and applying research to improve the school, possessing good conflict resolution and mediation skills, and loving child advocates.

However, the report also concludes that there are issues that complicate the need for quality principals. These issues include: the changing expectations for the position, the movement toward defining a new set of standards for candidates, the complex balance needed between leadership and management skills, and a nationwide focus on schoolwide improvement efforts.

"The role of the principal has changed dramatically," said Ferrandino. "The demands that are being placed on the individual are such that very few qualified people are willing to step up to the plate any longer and take on those responsibilities."

Some of the problems identified as inherent in the principal position were: insufficient compensation as compared to responsibilities, the excess of hours required for the job, stress, and the authority given to do the job is many times not in balance with accountability for the job done.

"A difficult and demanding job has only become more difficult and demanding," stated Tirozzi. "The problem we face is a shortage of qualified candidates with the will to do the job, and is magnified in many cases by a minimal amount of support, resources, development opportunities and compensation for the principals and aspiring principals."

Many of those interviewed for the study suggested that any initiative to address the shortage issue must include efforts to more realistically define the role of the principal. While expressing satisfaction with many aspects of their jobs, particular, their work with students and teachers, current principals often feel overwhelmed and concerned that they lack time to focus on what is essential-developing and maintaining a high-quality school.

A Growing Emphasis on Leadership

Recognition for the importance of the role of principal in effective schools is on the rise according to the report. Cited was a study by the firm Arthur Anderson of both high- and low-performing schools in Jersey City and Patterson (NJ) that found "the one attribute of all the high-performing schools we visited is a dedicated and dynamic principal." Programs have been developed to address some of the issues. Those include: encouraging talented people to prepare for and apply for the principalship, providing mentoring support for new principals, and encouraging more public recognition of good principals.

However, the report warns, there are not nearly enough of these programs and initiatives to meet school districts' needs. Many programs also fail to address some of the most important issues, such as the concern expressed by principals that there is insufficient time to spend on instructional leadership and that expectations placed on them are often unrealistic.

Two programs now under consideration by Congress, which could help stem this shortage, were singled out for praise:

The School Leadership Initiative-a Clinton administration proposal that asks Congress to appropriate \$40 million to establish regional centers to deliver professional development training for principals. Preference would be given to high-poverty, low-performing schools

that need it the most and could eventually provide much-needed training for 10,000 school leaders.

The LEAD (Leadership Education and Development) Program that would authorize \$100 million in grants to help states and agencies provide leadership education, recruitment, and mentoring programs for principals and other school leaders.

In addition many foundations are putting forth resources to address the issue of leadership at our schools, including the Bill and Melinda Gates Foundation which has allotted \$100 million to form a national leadership program aimed at principals and superintendents, and the DeWitt-Wallace Reader's Digest Fund.

Copies of the report, *The Principal, Keystone of a High-Achieving School: Attracting and Keeping the Leaders We Need*, are available from ERS upon request (800) 791-9308.

The 27,000 members of NAESP provide administrative and instructional leadership for public and private elementary and middle schools throughout the United States, Canada, and overseas. Founded in 1921. NAESP conveys the unique perspective of elementary and middle school principal to the highest policy councils of our government. NAESP is a strong advocate both for its members and for the 33 million American children enrolled in preschool, kindergarten, and grades 1 through 8.

NASSP is a voluntary, self-supporting, non-governmental association with a membership of over 42,000 school leaders from middle level and high schools. Its purpose is to advance the cause of secondary education and to promote and support principals, assistant principals, and other school leaders. NASSP strives to promote high professional and academic standards; focus attention on problems faced by school leaders in performing their duties; and provide a "national voice" for school leaders on educational matters. NASSP endeavors to build public confidence in education and to strengthen the role of the principal as instructional leader

*National Association
of Secondary School Principals*
1904 Association Drive, Reston, VA
20191-1537
800-253-7746

*National Association
of Elementary School Principals*
1615 Duke Street, Alexandria, VA
22314-3483
800-38-NAESP * www.naesp.org

Problems with the web site? Email webmaster@principals.org.



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LEANNE WINNER

Director of Governmental Relations

Comment to Joint Legislative Education Oversight Committee

Leanne E. Winner

NCSBA Director of Governmental Relations

August 30, 2000

2000 NCSBA Legislative Survey question:

Over the past several decades NC has embarked upon various efforts to reform and improve public schools. NCSBA supports the continued implementation of the ABCs Program.

Results: 90.5% support; 5.8% oppose; remainder no opinion

Consistent e-mail comments about the ABCs:

The main message was to stay the course.

Others include:

- The writing assessment needs to be revamped.
- The public still does not understand the ABC terminology.
- A school can be classified as a school of excellence or distinction and not meet expected growth and thus the personnel does not receive a bonus award.
- There needs to be a more reasonable testing environment especially in the elementary grades.
- Strategies need to be developed for increased concentration on the threes and fours.
- Attracting teachers to low performing schools has become increasingly more difficult.

What is the most important thing that the General Assembly can do?

Create incentive packages that low performing schools can use to attract good teachers to come teach at that school.

ABC's ISSUES/CONCERNS

GENERAL QUESTIONS

- Is the accountability program doing what we want it to do?
- What have we learned over the past four years?
- Is student achievement increasing?
- What's working; what's not?
- What needs to be looked at?
- What is DPI doing to improve it?

TESTING ISSUES

- Is there too much emphasis on test taking during instructional time?
- Is the writing test necessary or valid? Is it being used as the sole reason for retaining a student?
- Is the testing day too long for young children?
- Is growth slowing down? If so, why?
- Can we measure the growth of students who "top-out" on the EOC or EOG tests?
- How many students are exempt from testing? Why are they exempted?
- Should we be concerned that the high school model does not measure growth the same as the elementary school model?

ISSUES CONCERNING STUDENT PROMOTION STANDARDS

- Is there an overemphasis on test results in the promotion decision?
- Should writing be a part of this?
- Should the principal have final say at end of appeals process – especially in a school that is not recognized or is low performing?
- Does the policy encourage or discourage schools to retain a student solely on the basis of one test?
- If the student accountability standards had been in effect during the 1999-2000 school years, how many and what percentage of students would have been vulnerable to retention?

MISCELLANEOUS ACCOUNTABILITY ISSUES

- Are there schools that started out with high at-risk populations that have in past two years done well?
- Are non-reading and math teachers at all levels being told to teach reading or math – that subject area not the primary concern?
- Is there a yo-yo effect – low performing, then exemplary, then back to low performing?
- Why did a few schools, such as Eastway School in Durham, score low performing after at least one year with an assistance team?
- What about the charter schools?

- Why are middle schools not doing as well as elementary and high schools?
- Are we putting so much emphasis on what is the minimum that should be learned at a grade level or in a specific course that we are neglecting those students who could be challenged with even higher expectations?
- Are we seeing an increase in the number of students being identified as "exceptional" – for example, learning disabled?
- Are we losing teachers at critical grades (such as fourth grade where the writing test is given)?

Ed Oversight: ABC's Concerns 8-30-00

GENERAL ASSEMBLY OF NORTH CAROLINA
SESSION 1999

SESSION LAW 2000-67
HOUSE BILL 1840

AN ACT TO MODIFY THE CURRENT OPERATIONS AND CAPITAL IMPROVEMENTS APPROPRIATIONS ACT OF 1999 AND TO MAKE OTHER CHANGES IN THE BUDGET OPERATION OF THE STATE.

The General Assembly of North Carolina enacts:

HIGHER EDUCATION COMPENSATION

Section 10.5. The Joint Legislative Education Oversight Committee shall study the need for an "Excellent Universities and Community Colleges Act" that addresses the need and ability of The University of North Carolina and the State's community college system to attract and retain excellent faculty.

In its deliberations regarding university faculty, the Committee shall consider the study conducted by The University of North Carolina on compensation for the faculty at its constituent institutions, how compensation for similar faculty positions compares among the constituent institutions, and how compensation for faculty positions compares with that paid by other public universities for similar faculty positions.

In its deliberations regarding compensation for faculty in the State's community college system, the Committee shall consider any relevant studies on community college faculty compensation conducted by the community college system, how compensation for similar faculty positions compares among the community colleges, and how compensation for faculty positions compares with that paid by other public community college systems for similar faculty positions.

If the Committee determines in its study that there are critical issues regarding faculty compensation, then the Committee shall include in its recommendations and report whether a major, new legislative initiative is needed to address those issues. The Committee shall report its findings and recommendations to the 2001 General Assembly.

CHAPTER 507
HOUSE BILL 230

AN ACT TO APPROPRIATE FUNDS TO PROVIDE EXPANSION EXPENDITURES AND CAPITAL IMPROVEMENTS FOR STATE DEPARTMENTS, INSTITUTIONS, AND AGENCIES, AND FOR OTHER PURPOSES.

ACADEMIC ENHANCEMENT FUNDS

Sec. 15.15. (a) Notwithstanding G.S. 116-143, the Board of Trustees of a constituent institution designated as a Research University I campus of The University of North Carolina may increase tuition at the constituent institution by an amount not to exceed four hundred dollars (\$400.00) per full-time student per regular term academic year. All additional revenues derived from these tuition increases shall remain for use on that campus and are in addition to the operating budgets approved by the General Assembly. If the Board of Trustees of an institution increases tuition, the chancellor must allocate a minimum of thirty-five percent (35%) of the funds provided by the tuition increase for need-based financial aid. The balance of the funds may be allocated for faculty salaries or library budgets.

Students who are already receiving need-based financial aid or who are eligible for need-based financial aid shall have their financial aid awards increased to cover the tuition increase allowed under this subsection. Funding for these financial aid increases shall be the top priority for use of the financial aid funds provided in this subsection, but any source of funds may be used to cover the tuition increases for students receiving need-based financial aid.

(b) Notwithstanding G.S. 116-143, the Board of Trustees of a constituent institution of The University of North Carolina which has a professional school (law, medicine, dentistry, pharmacy, and veterinary medicine) or masters degree in Business Administration may increase tuition for students in the professional school by an amount not to exceed three thousand dollars (\$3,000) per full-time nonresident student per regular term academic year or by an amount not to exceed four hundred dollars (\$400.00) per full-time resident student per regular term academic year. If the Board of Trustees of an institution increases tuition for students in a professional school, the funds provided by the increase shall remain on that campus and be used to enhance that professional school. In no case shall a student attending a professional school be subject to a tuition increase allowable under this section greater than the amounts stated in this subsection.

(c) Once a Board of Trustees decides to increase tuition at a constituent institution, the institution shall notify the Board of Governors, the Office of State Budget and Management, and the Fiscal Research Division of the amount of increase, additional receipts anticipated, and the allocation of the funds among various programs in a format prescribed by the Board of Governors of The University of North Carolina.

(d) No employee of the University of North Carolina System who earns one hundred thousand dollars (\$100,000) or more a year shall receive additional remuneration from these funds.

CHAPTER 443
SENATE BILL 352

AN ACT TO MAKE APPROPRIATIONS FOR CURRENT OPERATIONS AND
FOR CAPITAL IMPROVEMENTS FOR STATE DEPARTMENTS,
INSTITUTIONS, AND AGENCIES, AND FOR OTHER PURPOSES.

Section 10.21.1 (a) Notwithstanding G.S. 116-143, the Board of Governors of The University of North Carolina may set tuition rates for students in the Masters of Business Administration and the Masters of Accounting programs of the School of Business at the University of North Carolina at Chapel Hill that are higher than those currently set pursuant to G.S. 116-143. If the Board of Governors does set higher tuition rates for those programs, then the additional funds generated by such tuition increases shall be used to enhance programs of the School of Business at the University of North Carolina at Chapel Hill.

A minimum of five percent (5%) of the funds so generated shall be used for need-based financial aid for North Carolina residents in the Masters of Business Administration program and the Masters of Accounting program.

(b) If the Board of Governors increases tuition pursuant to this section, the action shall be based on plans presented by the School of Business to the President and the Board of Governors with the approval of the Chancellor. The President and the Board of Governors shall notify the Office of State Budget and Management and the Fiscal Research Division of the amount of the increase, the additional receipts anticipated, and the allocation of these funds under these plans.

(c) The Board of Governors shall conduct a study of tuition levels, other charges, and costs of graduate and professional education and shall establish policies with respect to tuition differentials that are educationally and fiscally sound for such programs based on the results of this study. The Board of Governors shall adjust the tuition rates for students in the Masters of Business Administration and the Masters of Accounting programs of the School of Business of the University of North Carolina at Chapel Hill to align with its policies on tuition differentials as developed pursuant to this section. The Board of Governors shall report to the Joint Legislative Education Oversight Committee by January 15, 1999, regarding the findings of its study and shall also report on any action and results of actions taken under this section.

(d) The authority provided under this section may provide for phased implementation over a period of up to three years, beginning with the 1998-99 academic year. Tuition increases implemented under this section shall in no event exceed a total of two thousand five hundred dollars (\$2,500) per semester per student during the period fiscal year 1998-99 through fiscal year 2000-2001. The total increase in tuition by the end of fiscal year 2000-2001 shall not exceed five thousand dollars (\$5,000).

Joint Legislative Education Oversight Committee

August 29, 2000



Gretchen M. Bataille - Senior Vice President for Academic Affairs

The University of North Carolina

UNC Faculty Salary Study

"In order to attract and retain the best academic professionals, maintain the level of excellence for which North Carolina's public universities are known, and maximize the learning opportunities for students, the Board of Governors...shall:

- study the salaries and other compensation of faculty of the constituent institutions...
- evaluate the salaries and other compensation of faculty for each institution in comparison to other peer institutions within the state, region, and country...
- make recommendations on appropriate adjustments to faculty salaries and other compensation to achieve levels with other peer institutions...
- identify revenue options for funding adjustments..."

1999 Session, House Bill 168, Section 10.20.(a)

The University of North Carolina

UNC Faculty Salary Study

Overview

- Faculty are our greatest resource, so it is imperative that UNC be competitive, not just “average.” (Chancellors recommend top quintile.)
- Focus of study: four professorial ranks (assistant, associate, and full professor, plus instructor)—the positions filled from national pools.
- 15-16 peers selected for each UNC campus on basis of mission, academic program mix, size, level of research, etc.
- Other regional and national peer groups considered.

The University of North Carolina

UNC Faculty Salary Study

Key Findings

- Using all comparable public institutions as primary benchmark, \$28.5 million needed to close competitive funding gap.
- Using selected campus peer groups as additional benchmark, additional \$13.5 million needed to close special competitive funding gaps at eight campuses.
- Growing salary disparities between public and private institutions place UNC at competitive disadvantage, particularly at Research I level.
- Disparities in benefits exacerbate faculty-recruitment challenge.

The University of North Carolina

Average vs. Excellent

"There is a finite number of top quality faculty, and the colleges with the most top-flight faculty usually attract the best students, obtain the best facilities, and 'win the most games.' In this case 'winning' is less obvious [than in athletic contests], but it usually means more successful graduates, more research grants and patents, more state economic payoff, and a climate in which success breeds a reputation for more success."

SREB, 2000

The University of North Carolina

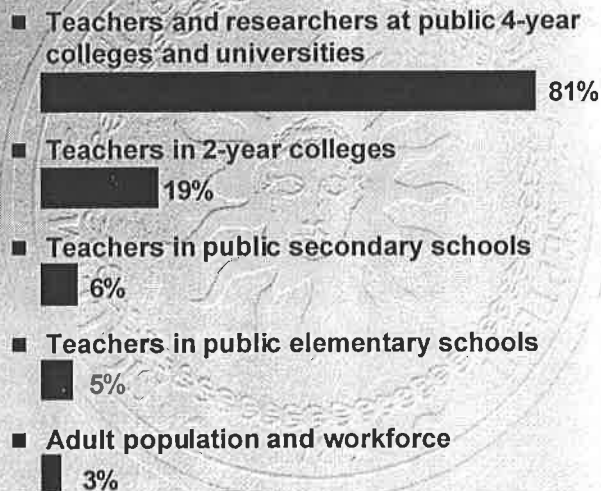
SREB Findings

- Faculty salaries have not grown at rates as high as those of other workers with advanced levels of education over the last 10 years.
- Faculty salaries have not grown at rates as high as those of *all* workers, regardless of level of education, over the last 25 years.
- The gap between the SREB region's and the nation's average salaries for faculty in public four-year and two-year colleges has grown over the last 10 years.
- The gap between the earnings of senior faculty and junior faculty is greater than it was 10 years ago.
- The gap between the salaries of faculty at the universities with the largest graduate-education programs and those of faculty in the other colleges has grown.

SREB, 2000

The University of North Carolina

Percent of Persons Nationwide with Doctoral or First-Professional Degree



SREB, 2000

The University of North Carolina

Highly Educated Faculty

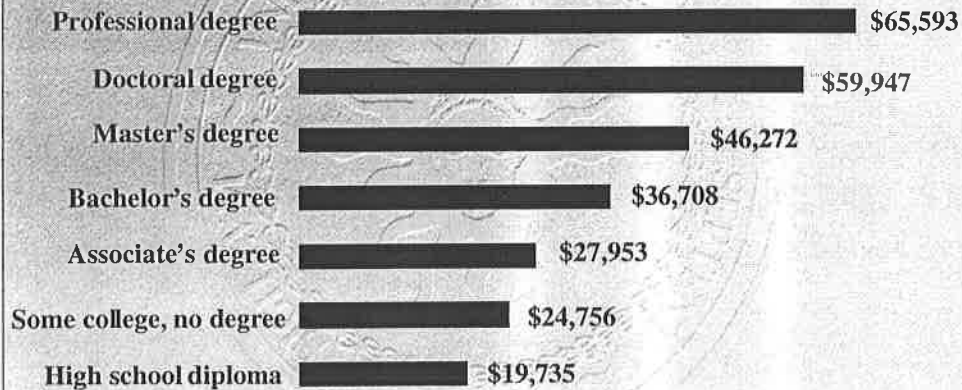
Faculty members at colleges and universities account for about one-third of the most highly educated employees in the country.

- College faculty have found their annual incomes grouped with occupational groups such as lawyers, physicians, engineers, financial managers, natural scientists, and computer scientists.
- Faculty salaries have not grown at same rate as other professions in the last 10 years.

SREB, 2000

The University of North Carolina

Median Annual Incomes of Adults 25 and older, 1998



SREB, 2000

The University of North Carolina

Comparable Average Annual Salaries of Other Professions in State Employ

1999-2000

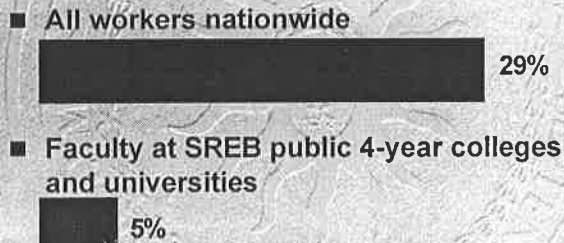
<u>Professions</u>	<u>N</u>	<u>Average Salary</u>
Attorneys	271	\$64,157
Transportation Engineers	1,071	\$52,958
Dentists	55	\$82,199

North Carolina Office of State Personnel

The University of North Carolina

Effect of Inflation on Faculty Salaries

Inflation-Adjusted Average Annual Salary Growth,
1974 to 1998



SREB, 2000

The University of North Carolina

SREB Inflation-Adjusted Gains

Inflation-adjusted change in average salaries of full-time
instructional faculty at SREB public 4-year colleges and universities,
1988-89 to 1998-99

Delaware	19.0%	Alabama	4.1%
West Virginia	10.9%	Oklahoma	4.0%
Kentucky	10.4%	S. Carolina	3.9%
Georgia	7.0%	Mississippi	3.2%
Louisiana	7.0%	Virginia	-0.8%
Arkansas	6.0%	Texas	-1.1%
North Carolina	5.6%	Florida	-1.7%
Maryland	4.2%	Tennessee	-2.4%

SREB, 2000

The University of North Carolina

What is an "Average" Faculty Member at UNC?

- Likely to be male
35% female in Fall 1999
29% female in Fall 1989
- Holds a Ph.D. or First-Professional Degree
78% in Fall 1999
75% in Fall 1989
- Spent 4 to 8 years earning the doctorate
- Is 48 years old
- Has 12 years service at his/her UNC institution
- Has an average salary of \$56,311

Faculty: AAUP population

The University of North Carolina

Average Faculty Salaries

Public vs. Private

	<u>1991-92</u>	<u>1998-99</u>
Public	\$45,260	\$55,858
Private	\$50,030	\$63,458

AAUP

The University of North Carolina

Nationwide Average Faculty Salary Comparison, 1988-89 to 1999-2000

Public vs. Private Institutions

Doctoral-Level Public Institutions –
Fell to 20% below Private Institutions

Comprehensive Public Institutions –
Fell to 6% below Private Institutions

General Baccalaureate Institutions –
Fell to 12% below Private Institutions

AAUP

The University of North Carolina

Average Hours Worked by Full-Time Instructional Faculty

Weekly Hours Worked, Fall 1992

Public Research Institutions	56.4
Public Doctoral Institutions	55.1
Public Comprehensive Institutions	52.4
Public 2-Year Institution	46.9
All Institutions (including Private)	52.5

NCES Statistical Analysis Report 97-470, September, 1997

The University of North Carolina

Cost of Family Health Insurance Coverage

Employee and Employer Monthly Contributions:

	<u>Cost to Employee</u>		<u>Cost to State</u>		
	<u>\$</u>	<u>Rank</u>	<u>\$</u>	<u>% of Total</u>	<u>Rank of %</u>
US	118.83		263.12		
SREB	169.73		291.98		
NC	216.18	36th of 43 states	144.60	40%	39th of 43 states

Segal Co., Atlanta, GA

The University of North Carolina

*Average Employer ORP Contribution Rate**

UNC Institutions' Peers:

NCSU Peers	9.13%	UNC-P Peers	7.92%
UNC-C Peers	9.07%	WSSU Peers	7.83%
UNC-A Peers	8.96%	UNC-W Peers	7.62%
UNC-CH Peers	8.92%	FSU Peers	7.60%
UNC-G Peers	8.41%	ECSU Peers	7.36%
ASU Peers	8.30%	NCCU Peers	7.13%
NCA&T Peers	8.23%		
WCU Peers	8.20%	All Combined Peers	7.96%
ECU Peers	8.02%	UNC ORP	6.84%

* Paid Directly to Employee's ORP Account

TIAA-CREF, November 1998

The University of North Carolina

Excellent Universities Act

- Faculty salaries
- Annual composite index adjustment
- Amend ORP:
 - Immediate vesting
 - Increase employer's contribution rate
- Expand benefits

The University of North Carolina

UNC's Responsibility

- Meet the needs of North Carolina's citizens
- Access
- Produce qualified teachers
- Improve the graduation rates
- Narrow the achievement gap

The University of North Carolina

UNC's Responsibility

Continued

- Work closely with the community colleges
- Expand the delivery of courses and programs through distance education
- Ensure accountability
- Communicate with our legislators and our citizens

The University of North Carolina

Campus-Initiated Tuition Increases

August 29, 2000



Jeffrey R. Davies - Vice President for Finance

The University of North Carolina

Campus-Initiated Tuition Increases

The General Assembly shall provide that the benefits of The University of North Carolina and other public institutions of higher education, as far as practicable, be extended to the people of the State free of expense.

North Carolina Constitution, Article IX, Section 9

The Board of Governors shall set tuition and required fees at the institutions, not inconsistent with actions of the General Assembly.

General Statute 116-11(7)

The University of North Carolina

Campus-Initiated Tuition Increases

On November 13, 1998, the Board of Governors adopted the *Report of the Task Force on Tuition Policy*. The policy was the result of a year-long comprehensive study. The policy provided for setting tuition rates earlier in the year to allow students time to plan for tuition increases.

The policy allowed for campus-initiated tuition increases for:

- Graduate and professional schools when needed to support graduate education.
- All students, including undergraduates, when extraordinary circumstances exist.

The University of North Carolina

Campus-Initiated Tuition Increases

- For the 2000-01 academic year, five institutions requested across-the-board campus-initiated tuition increases. Those institutions were East Carolina University, North Carolina State University, UNC-Chapel Hill, UNC-Charlotte, and UNC-Wilmington.

The University of North Carolina

Campus-Initiated Tuition Increases

- In reality, salaries and benefits comprise approximately 80% of the University's General Fund budget. Over time, faculty salary increases cannot be sustained through tuition increases.

The University of North Carolina

Campus-Initiated Tuition Increases

The Board of Governors approved the following campus-initiated tuition increases at the following institutions.

	<u>2000-01</u>	<u>2001-02</u>
ECU	\$150	\$150
NCSU	300	300
UNC-Chapel Hill	300	300
UNC-Charlotte	150	150
UNC-Wilmington		
residents	120	115
nonresidents	200	200

The University of North Carolina

Campus-Initiated Tuition Increases

- The tuition increases generate revenues totaling \$19.6 million. The Board required that sufficient revenues be set aside to "hold harmless" qualifying needy students. From the increased receipts, \$6.4 million will be set aside for need-based financial aid.
- Of the remaining available funds, \$10.1 million will be used to address faculty salaries and benefits.

The University of North Carolina

NEED FOR AN EXCELLENT UNIVERSITIES AND COMMUNITY COLLEGES ACT

Dr. Steve Scott, Executive Vice
President, NCCCS

Mr. Kennon Briggs, Vice President,
NCCCS

Dr. Bill Lewis, President, Isothermal
Community College

August 29, 2000

**The State Board of Community Colleges
Division of Business & Finance**

**PLANNED METHODOLOGY FOR ANALYSIS
OF COMPETITIVENESS OF FACULTY SALARIES
NORTH CAROLINA COMMUNITY COLLEGE SYSTEM**

Approach

The planned analytic approach is designed to provide information on salaries of community college faculty to the General Assembly in a format that follows:

- *Draw on a national database supplied by the U.S. Department of Education.*
- *Convert all salaries to the 9-10 month basis.*
- *Use the system average as the unit of analysis.*
- *Identify at least three comparison groups.*
- *Perform benchmark analyses at both the 80th percentile and the group average*

**Weighted Average Salaries of Full-Time Faculty
Public Two-Year Institutions
SREB States
1999-2000**

SREB Region	Two-Year 1	
	Average	Rank
	\$40,661	
Alabama	42,921	5
Arkansas	34,535	15
Delaware	47,954	2
Florida	41,455	7
Georgia	44,281	3
Kentucky	40,369	9
Louisiana	36,804	14
Maryland	49,845	1
Mississippi	41,387	8
North Carolina	34,527	16
Oklahoma	38,250	11
South Carolina	36,959	13
Tennessee	37,102	12
Texas	42,083	6
Virginia	43,959	4
West Virginia	39,986	10

**Average 9-Month Salary of Full-Time Curriculum Faculty at Two Year Public Institutions
A Comparison of North Carolina to the SREB Average, 1992-93 to 1999-2000**

Academic Year	NC 9-Month SREB Average	SREB Average	SREB Rank*
1992-93	\$26,461	\$32,302	14
1993-94	\$27,408	\$33,470	15
1994-95	\$29,234	\$34,433	15
1995-96	\$30,106	\$36,146	15
1996-97	\$30,124	\$37,163	15
1997-98	\$32,206	\$37,677	15
1998-99	\$33,027	\$38,777	14**
1999-00	\$34,527	\$40,661	16 [#]

*Ranking of 15 Southern Regional Education Board (SREB) states

**Kentucky did not report data in 1998-99; ranking is based on 14 states

[#]Delaware reported data for the first time; the report now includes 16 states

Average 9-Month Salary of Full-Time Curriculum Faculty at Two Year Public Institutions
A Comparison of North Carolina to the National Average, 1992-93 to 1997-98

Academic Year	NC 9-Month SREB Average	National Average*	National Rank
1992-93	\$26,461	\$38,935	50th
1993-94	\$27,408	\$41,040	49th
1994-95	\$29,234	\$42,101	46th
1995-96	\$30,106	\$43,295	49th
1996-97	\$30,124	\$44,584	46th**
1997-98	\$32,206	\$45,919	48th**
1998-99	\$33,027		
1999-00	\$34,527		

*Source: IPEDS Faculty Salary Survey, National Center for Education Statistics

**Data available on 49 states, ranking is out of 49 (no data reported from Vermont)

Average 9-Month Salary of Full-Time Curriculum Faculty at Two Year Public Institutions
A Comparison of North Carolina to the National Average, 1992-93 to 1999-2000

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1989 - 2000

<u>YEAR</u>	<u>STATE MANDATE</u>	<u>ICC'S INCREASE</u>
1989	4%	Minimum of 2% additional
1990	4%	4% additional
1991	None	No additional
1992	\$43.50 per month	Additional \$50 per month
1993	2% plus 1% bonus	Additional for faculty
1994	4% plus 1% bonus	Faculty additional 4%
1995	2%	Staff earning less than \$55,000, additional \$504 per person
1996	4.5%, eff. Sept. 1, plus ½ of 1 percent, also Sept. 1 for faculty	No additional
1997	4%	No additional
1998	3% plus 1% bonus	\$600 additional per person
1999	5%	Staff 5% Faculty, average 10.6% 7% + \$5,000 5 yrs. or less 7% + \$3,750 6 - 10 years 7% + \$2,500 beyond 10 years
2000	5%	\$2000 additional per person, 10.2%

**CURRICULUM FTE
1990 TO 2000-2001**

[illegible]

ARTICLE 9B.
Academically or Intellectually Gifted Students.

§ 115C-150.5. Academically or intellectually gifted students.

The General Assembly believes the public schools should challenge all students to aim for academic excellence and that academically or intellectually gifted students perform or show the potential to perform at substantially high levels of accomplishment when compared with others of their age, experience, or environment. Academically or intellectually gifted students exhibit high performance capability in intellectual areas, specific academic fields, or in both intellectual areas and specific academic fields. Academically or intellectually gifted students require differentiated educational services beyond those ordinarily provided by the regular educational program. Outstanding abilities are present in students from all cultural groups, across all economic strata, and in all areas of human endeavor.

§ 115C-150.6. State Board of Education responsibilities.

In order to implement this Article, the State Board of Education shall:

- (1) Develop and disseminate guidelines for developing local plans under G.S. 115C-150.7(a). These guidelines should address identification procedures, differentiated curriculum, integrated services, staff development, program evaluation methods, and any other information the State Board considers necessary or appropriate.
- (2) Provide ongoing technical assistance to the local school administrative units in the development, implementation, and evaluation of their local plans under G.S. 115C-150.7.

§ 115C-150.7. Local plans.

(a) Each local board of education shall develop a local plan designed to identify and establish a procedure for providing appropriate educational services to each academically or intellectually gifted student. The board shall include parents, the school community, representatives of the community, and others in the development of this plan. The plan may be developed by or in conjunction with other committees.

(b) Each plan shall include the following components:

- (1) Screening, identification, and placement procedures that allow for the identification of specific educational needs and for the assignment of academically or intellectually gifted students to appropriate services.
- (2) A clear statement of the program to be offered that includes different types of services provided in a variety of settings to meet the diversity of identified academically or intellectually gifted students.
- (3) Measurable objectives for the various services that align with core curriculum and a method to evaluate the plan and the services offered. The evaluation shall focus on improved student performance.
- (4) Professional development clearly matched to the goals and objectives of the plan, the needs of the staff providing services to academically or intellectually gifted students, the services offered, and the curricular modifications.
- (5) A plan to involve the school community, parents, and representatives of the local community in the ongoing implementation of the local plan, monitoring of the

local plan, and integration of educational services for academically or intellectually gifted students into the total school program. This should include a public information component.

- (6) The name and role description of the person responsible for implementation of the plan.
- (7) A procedure to resolve disagreements between parents or guardians and the local school administrative unit when a child is not identified as an academically or intellectually gifted student or concerning the appropriateness of services offered to the academically or intellectually gifted student.
- (8) Any other information the local board considers necessary or appropriate to implement this Article or to improve the educational performance of academically or intellectually gifted students.

(c) Upon its approval of the plan developed under this section, the local board shall submit the plan to the State Board of Education for its review and comments. The local board shall consider the comments it receives from the State Board before it implements the plan.

(d) A plan shall remain in effect for no more than three years; however, the local board may amend the plan as often as it considers necessary or appropriate. Any changes to a plan shall be submitted to the State Board of Education for its review and comments. The local board shall consider the State Board's comments before it implements the changes.

§ 115C-150.8. Review of Disagreements.

In the event that the procedure developed under G.S. 115C-150.7(b)(7) fails to resolve a disagreement, the parent or guardian may file a petition for a contested case hearing under Article 3 of Chapter 150B of the General Statutes. The scope of review shall be limited to (i) whether the local school administrative unit improperly failed to identify the child as an academically or intellectually gifted student, or (ii) whether the local plan developed under G.S. 115C-150.7 has been implemented appropriately with regard to the child. Following the hearing, the administrative law judge shall make a decision that contains findings of fact and conclusions of law. Notwithstanding the provisions of Chapter 150B of the General Statutes, the decision of the administrative law judge becomes final, is binding on the parties, and is not subject to further review under Article 4 of Chapter 150B of the General Statutes.

When Changes for the Gifted Spur Differentiation for All

A school district launches an effort to meet the needs of gifted students through differentiation but discovers that all students reap the rewards.

Until recently, North Carolina mandated artificial cutoff points in achievement and aptitude scores to identify gifted students. But in the 1990s, old state standards gave way to local plans for identifying and providing services to gifted children. What follows is the story of how our school district reevaluated *whom* it would serve and *how* it would provide those services.

Educators often talk about doing something different for those students "who just aren't getting it." But when we asked teachers, through surveys and focus groups, for their perceptions and assessments of those students "who got it the first time and are ready to go further and faster," teachers said they needed help to meet these students' needs. Recognizing the need to change our programs for gifted students, we chose differentiation: of content, of instructional processes, and in products and assessments. Implementing differentiation has led our school district to strategically examine the quality of work that we provide for all students.

Getting Started

Our district serves 9,700 students in eight elementary, three middle, and two high schools. Like many districts, our gifted services had been primarily pullout, enrichment activities for students in the intermediate grades and advanced courses for middle and high school students. As our new gifted program developed, we came to believe that students with the interest, motivation, and capacity for learning at higher academic levels should be challenged in every classroom every day. We needed to support and develop teachers' understandings of gifted education practices so that serving gifted students' needs became every teacher's responsibility. We appealed to teachers by citing the projected benefits for all students in their classrooms.

We offered 40 teachers from our elementary, middle, and high schools release time to attend six introductory differentiation workshops. The first-year teachers from most of the elementary schools and the three middle

schools participated. During the workshops, which we now offer every year, the teachers worked cooperatively to prepare lessons, projects, learning contracts, or other varied-ability materials. Participants shared their implementation ideas, concerns, refinements, and questions. Additionally, each participant could arrange to meet with the district's coordinator of gifted programs for help with preparing differentiated units, feedback, or demonstrations of model teaching.

Our next step was to overcome the barriers that teachers face: time, materials, and how-to knowledge. Many teachers already knew what they wanted to teach and had well-tested activities or project assignments that met the needs of one level of students. The teachers needed to develop differentiated levels of the curriculum, so we hired them for a week in the summer to work collaboratively on structured formats for lessons and projects. During the first years that our teachers wrote differentiated curriculum, we limited the



focus to the middle school curriculum. Concentrating effort, time, resources, and personnel on a few grade levels gave teachers ownership and purpose. The teachers created authentic materials that would be piloted voluntarily by teachers in each middle school and refined during the school year. In addition, the school district could target support, evaluation, and communication to the middle school teachers.

The teachers produced an overview of a unit that stated clear concepts and statements of understanding for all students. The overview identified core knowledge, skills, attitudes, and thinking habits that students should develop during the unit. Differentiation could occur in the texts and student activities or in the instructional processes and procedures. Although the overview was valuable, we eventually decided to concentrate on differentiating final assessments and student products, which we believed would have the biggest impact on teacher planning and student work.

Although some teachers initially felt uncomfortable collaborating with one another, we realized that the teachers' conversations generated deep understanding of how the curriculum could be differentiated. One teacher remarked, "I'm mentally exhausted at the end of the day. I can't think anymore. But I am eager each morning to come in and wrestle ideas with my colleagues in a way that we never get to do during the school year." As the school year commenced, the teachers' professional collaboration increased morale and communication. The teacher collaboration also improved the quality and usability of the work.

Differentiating a Unit

Teachers usually start differentiating instruction by reviewing the materials, activities, projects, or unit assessments they used in the past to teach a topic or concept. After determining the crucial concepts and skills for the discipline they want to address, our teachers differentiate one major unit that will take the students several days or weeks to complete. The gifted program coordinator urges teachers to begin to differentiate for the gifted students first. This forces the teachers to think about criteria that identify exemplary work and what a professional level of work entails. With this framework in mind, the process of constructing expectations for several layers of above-, on-, and below-grade-level work becomes more clear and consistent.

In one school in our district, teachers spent the summer differentiating a popular social studies project that required students in small groups to create a newspaper for ancient Greeks and Romans. Teachers had usually grouped students heterogeneously and required students to prepare a front page with articles on politics, fashion, and sports. The grading sheet listed point values for different elements of the assignment, such as timeliness, neatness, and number of articles. Teachers had rarely explicitly discussed their expectations for the quality of the articles. Consequently, the students' prod-

ucts varied in the quality of content and design.

As part of their differentiated curriculum writing opportunity, the teachers organized the elements of this assignment into two categories: physical/administrative/mechanics guidelines that all students would have to meet for spelling, punctuation, margins, time lines, font size, and number of articles; and differentiated rubrics that would vary according to students' abilities concerning the expected quality and complexity of the articles.

The differentiated rubrics explicitly describe expectations for content and writing style. These expectations progress from straight factual reporting of an event to more detailed feature stories, point-of-view editorials, and big-picture connections and analysis. These rubrics allow students and teachers to discuss the current level of the student's performance and to outline the next steps that the student should take.

Would we see results of implementing the new and improved version of the newspaper project? At a faculty meeting, teachers brought examples of students' newspapers from previous years and newspapers created after they applied the differentiated content rubric. The differences were marked. Students who used the rubric wrote longer, higher quality articles, included more illustrations and quotations, and created more lively layouts. For all levels of ability, the quality of the students' work was noticeably higher than in preceding years. Surprisingly, we discovered that some gifted students had struggled to reach the expectations of the rubric that they and the teacher had chosen as an appropriate challenge. Some students had found it difficult to accomplish the wit and commentary of the editorial cartoon or to identify and describe trends in ancient Greece.

Some of our other efforts to differentiate curriculum included developing role-and-task cards for literature circles. Using Harvey Daniels's *Literature Circles* (1994)¹, teachers expanded and enriched student roles, such as character creator, discussion director, and



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literary luminary. Teachers differentiated the tasks for each role so that a wide range of students could participate at challenging levels. Another example of differentiated curriculum includes a statistics unit during which students gather world population figures from a variety of sources, including the Internet. Remedial math groups receive more structures for completing their research, fewer choices, and simpler steps to take in their calculations. The advanced math groups interpret and evaluate far more of their research and develop algebraic formulas. All students know that teachers value their work, that the work should be completed on time, and that each group's piece contributes to a class project that leads to clear conceptual understandings and incorporates a range of skill ability levels.

supportive learning environment, and program development and support. Six to 10 statements give clear descriptions of each of these elements.

Teachers rated their grade-level departments according to how frequently and competently they employed these elements. We conducted the assessment as focus groups, which allowed the teachers to discuss in a controlled environment ideas, techniques, and teaching philosophies. As a result, teachers were able to identify strategic gaps in their own assessment practices and engage in group problem solving and planning. Many teachers' individual growth plans include a word-for-word descriptor from the self-assessment.

We also wanted to know whether students perceived and welcomed the

ation, to serve gifted students, and to establish best practices for instruction for all students.

Looking Ahead

To ensure continued professional growth, the district still offers differentiation workshops annually and hires teachers to write differentiated curriculum in the summer. We also offer academically and intellectually gifted certification courses. Carol Ann Tomlinson consults with us and conducts day-long workshops on such subjects as collaboration, higher-order questioning, and concept-based classrooms. She also works with teachers on-site to create more fully differentiated interdisciplinary studies. Individually, schools have organized full- and part-day workshops to help establish common vision and language. As a district, we hope to offer differentiated professional development to meet the needs of teachers.

Another key factor in serving our gifted students through differentiation is administrative support. From the superintendent to the building administrators to the site-based management teams, everyone knows about and provides input to the gifted program at the school site and in the district. In their three-year improvement plans, all schools must include a plan for academically and intellectually gifted students, including what and when actions will be taken, who will be responsible, with what resources, and how their efforts will be evaluated. Many schools include action items on how the school will support and monitor differentiation. In some schools, principals have required that teachers list at least one differentiation goal in their individual growth plans. The school board and the central office support services for gifted students by increasing the number of resource teachers for gifted students. Resource teachers advocate and prepare direct instruction for gifted students and serve as collaborators, staff developers, and curriculum supporters to facilitate teachers' differentiation efforts.

We hope to offer differentiated professional development to meet the needs of teachers.

Evaluating Our Work

Writing differentiated curriculum takes time to develop, time to implement, and time to communicate and value. In the end, our district spent three years writing curriculum at the middle school level only. By the end of this time, the teachers' success and value of their work had spread. Elementary teachers wanted to be included in the summer writing projects. Students who had experienced differentiation in middle school and had progressed to high school advocated for their high school teachers to meet their needs differently.

Recently, our district implemented two additional differentiation initiatives: a teacher self-assessment of academically rigorous classroom environment and instruction and a survey of student perceptions. On the basis of teacher input, we determined that a model classroom for high-ability students contains six elements: rich and rigorous content, challenging process, open-ended products and assessments, student choices and teacher options, a

differences in instruction and curriculum. We surveyed all middle school students, posing statements based on the descriptors that the teachers had used. We asked students to rank the frequency of employed strategies, such as materials and support for sophisticated work, application of skills and understanding in a variety of ways, or encouragement to reach challenge levels. Interestingly, the gifted students' perceptions did not differ from the entire student population's perceptions. All students valued and desired instruction that provided appropriate amounts of challenge; met their needs for pace, choice, and interests; and was relevant and authentic.

The student responses and teacher self-assessments informed the subject-area departments in each middle school and the district as a whole about areas of strength and weakness. This knowledge enabled us to respond with curricular materials, instructional strategies, staff development, and resource monies to educate our teachers about differenti-

Lessons Learned

On the basis of our experiences with differentiation, here's our advice to other school districts:

- Start by offering staff development to a small, interested group of teachers.
- Begin with what these teachers already do with curriculum and instruction.
- Devote resources to a defined target group to develop strong, fully implemented curriculum changes.
- Prepare and support collaboration with teachers and students.
- Share successes to encourage interest and growth throughout the district.
- Assess teachers, students, and student work to communicate the value of differentiation.
- Make sure that differentiation is reflected in both personal and building-level goals and planning.
- Provide ongoing, differentiated staff development.
- Provide administrative support.

■ Measure the frequency and quality of services for gifted students that is provided by differentiation within the classroom.

Our new gifted program plan asks classroom teachers to share the responsibility for serving gifted students' needs. High-ability students now have more frequent opportunities for challenge and enrichment, without leaving the classroom. In general, the gifted services and enrichment programs correspond to curricular studies of the entire class, and differentiation allows us to recognize talents and celebrate the contributions of every student.

For us, implementing differentiation has meant that teachers reflect on pedagogy, on the key skills and overarching concepts of the disciplines they teach, and on the qualities and challenges presented by the work given to students. By promoting differentiation, our district has increased awareness of the differences in students' and

teachers' abilities and understandings and has moved away from an "us versus them" attitude toward gifted education. This awareness has resulted in a commonly adopted philosophy about differentiation and in programming to support individuals' and schools' growth in achieving differentiation. As we employ principles of differentiation, we firmly believe that we are nurturing the talents and abilities of all learners, including the gifted, by enhancing the quality of the work that we ask students to do. ■

¹Daniels, H. (1994). *Literature circles: Voice and choice in the student-centered classroom*. York, ME: Sternhouse Publishers.

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Students with Limited English Proficiency

- ✓ Funding Increase: \$3.7 million
- ✓ Total Funding: \$17.1 million
- ✓ Total headcount for 1998-99 was 37,251 students.
- ✓ Funding is increased from \$10.3 million in 1999-00. Additional funds were included in continuation budget adjustments.
- ✓ This was funded as a separate category in 1998-99.

Comparison Data -- Limited English Proficient Students

LEAs	98-99	97-98	96-97	05-06	94-95	93-94
Alamance	1146	545	400	623	245	125
Burlington	*	*	*	*	82	161
Alexander	294	230	155	111	96	74
Alleghany	30	17	17	13	11	0
Anson	48	36	97	18	2	0
Ashe	43	24	24	18	6	5
Avery	8	3	9	5	13	17
Beaufort	106	88	71	43	33	13
Bertie	8	2	4	1	9	3
Bladen	161	53	42	37	20	20
Brunswick	112	101	90	54	53	36
Buncombe	492	272	214	142	187	149
Asheville	41	23	25	17	6	37
Burke	1300	1031	1063	803	667	286
Cabarrus	450	357	313	222	88	82
Kannapolis	193	166	127	121	40	48
Caldwell	148	126	79	40	11	17
Camden	0	0	0	0	0	0
Carteret	46	30	34	34	14	14
Caswell	13	14	13	18	7	0
Catawba	824	653	598	375	314	378
Hickory	523	514	310	240	221	108
Newton	322	304	188	120	142	106
Chatham	463	435	307	290	169	217
Cherokee	15	0	6	1	2	0
Chowan	0	5	3	4	1	0
Clay	0	0	0	0	0	0
Cleveland	67	58	64	31	21	29
Kings Mountain	49	26	25	3	0	108
Shelby	21	26	18	16	3	1
Columbus	104	108	96	16	11	0
Whiteville	21	16	21	10	8	2
Craven	141	135	113	64	21	30
Cumberland	513	396	368	355	359	253
Currituck	2	1	0	0	0	0
Dare	11	13	5	6	4	1
Davidson	52	47	25	25	15	24
Lexington	270	211	111	60	37	30
Thomasville	121	62	48	20	15	18
Davis	74	62	34	15	53	0
Duplin	990	942	801	771	331	264
Durham	1175	742	745	374	318	273
Edgecombe	236	254	193	122	83	80
Forsyth	1486	1222	909	737	459	396
Franklin	116	92	125	53	11	13
Gaston	452	360	441	325	326	207
Gates	0	0	0	0	0	0
Graham	0	166	0	0	0	0

* Consolidated
 **Data Not Reported

Comparison Data -- Limited English Proficient Students

LEAs	98-99	97-98	96-97	95-96	94-95	93-94
Granville	208	127	125	81	46	0
Greene	199	118	154	58	65	33
Guilford	2236	1983	1610	1248	775	738
Halifax	19	24	30	30	30	0
Roanoke Rapids	19	20	16	15	29	28
Weldon	7	7	3	1	1	6
Harnett	458	395	360	345	195	101
Haywood	69	47	22	15	13	13
Henderson	559	440	414	234	199	250
Hertford	0	1	5	0	0	14
Hoke	135	76	63	65	78	88
Hyde	1	1	8	0	0	0
Iredell	361	351	194	158	101	108
Mooreville	54	47	74	38	32	40
Jackson	18	15	21	1	2	4
Johnston	1047	945	687	472	376	124
Jones	31	17	25	11	10	11
Lee	874	811	734	585	342	350
Lenoir	252	218	183	0	161	58
Lincoln	425	357	238	182	95	106
Macon	14	18	13	7	9	7
Madison	1	0	2	1	9	5
Martin	34	35	23	3	24	6
McDowell	167	164	87	60	87	43
Mecklenburg	4399	2649	2259	1732	1889	1766
Mitchell	39	29	27	21	19	22
Montgomery	534	462	441	320	314	280
Moore	330	311	282	175	155	140
Nash	638	553	427	313	456	504
New Hanover	227	209	205	135	104	99
Northampton	2	2	3	3	8	4
Onslow	234	89	86	55	34	85
Orange	176	123	98	21	17	92
Chapel Hill-Carrboro	533	429	570	814	862	0
Pamlico	0	0	3	1	0	0
Pasquotank	28	33	27	14	9	25
Pender	230	207	93	65	103	100
Perquimans	0	1	0	0	0	0
Person	85	77	60	66	26	26
Pitt	393	244	241	175	274	200
Polk	53	8	16	25	10	4
Randolph	448	385	365	314	203	91
Asheboro	500	413	351	274	160	114
Richmond	133	101	85	62	14	50
Robeson	173	95	218	279	0	425
Rockingham	333	189	224	191	157	425
Rowan	705	540	363	287	270	201
Rutherford	98	87	72	67	38	10

* Consolidated
 **Data Not Reported

Comparison Data -- Limited English Proficient Students

LEAs	98-99	97-98	96-97	95-96	94-95	93-94
Sampson	888	448	397	365	235	228
Clinton	58	87	87	54	79	53
Scotland	9	5	7	0	1	0
Stanly	420	310	220	133	71	89
Albemarle	*	*	*	107	94	82
Stokes	62	70	65	48	30	28
Surry	420	333	309	246	147	146
Elkin	55	36	23	16	3	4
Mount Airy	202	128	50	42	16	10
Swain	1	0	7	12	0	0
Transylvania	34	15	10	0	0	0
Tyrrell	10	6	5	9	7	4
Union	645	488	288	288	142	92
Vance	178	153	103	80	26	4
Wake	2520	1857	1802	1047	929	789
Warren	22	10	17	19	14	11
Washington	2	10	6	7	0	16
Watauga	21	22	19	16	21	15
Wayne	531	383	429	317	208	168
Wilkes	315	196	230	128	114	77
Wilson	322	270	683	223	217	188
Yadkin	308	297	281	231	220	69
Yancey	44	41	28	13	1	0
Total	37,212	28,704	24,771	18,782	14,881	12,408
Charters						
Community CS	2	3				
Engleman CS	0	2				
Lincoln CS	8					
Rocky Mt CS	4					
SB Howard CS	24					
Woods CS	1					
Total	39	5				
Grand Total	37,251	28,709	24,771	18,782	14,881	12,408

ABCs Accountability Issues

Lou Fabrizio

Director of Accountability Services
NC Department of Public Instruction

ABCs Accountability Issues

Four major headings:

- What have we learned over the last four years?
- Unintended Consequences
- Remaining Challenges
- Other Issues

What have we learned over the last four years?

- Teachers are focusing on the Standard Course of Study
- More students are scoring at or above grade level
- Students scoring below grade level are getting more assistance
- Schools needing assistance are getting more attention from the central offices

What have we learned over the last four years?

- Schools are using multiple strategies to make students successful
- Not all strategies work the same in all places
- Schools with high-risk populations can do well
- There are some unintended consequences to high-stakes testing and accountability

Unintended Consequences

- Increasing negative anecdotes from parents and educators
 - Some schools/teachers focus on tested subjects at the expense of others
 - Some rote teaching to the test; reliance on drill and practice at the expense of "inquiry" methodology

Unintended Consequences

- Organized opposition to high-stakes testing and accountability
- Focus on students below grade level *may* reduce efforts for other students
- Loss of momentum in development of more formative kinds of assessment

Remaining Challenges

- Reducing achievement gap
- Attracting teachers in low-performing schools
- Refining and maintaining the ABCs model (also revising tests)
- Accountability issues for students with disabilities and limited English proficiency

Remaining Challenges

- Changes to writing assessments?
 - Writing Assessment Task Force to meet September 1, 2000
- Charter Schools
 - Use of Alternative Schools model for ABCs
- Implementation of Prediction Formulas for 10 EOC tests
- Demands on staff

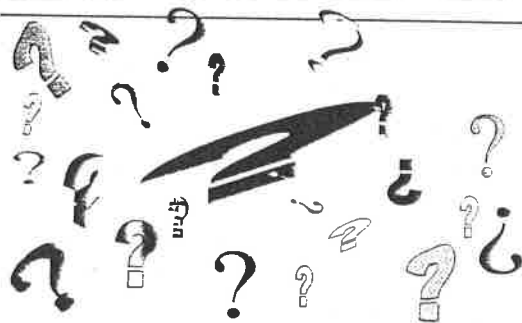
Remaining Challenges

- Improving achievement at middle schools
- Implementation of Student Accountability Standards
 - Communication is a big issue
 - Many parents seem unaware of the retesting opportunities or the review process. These are safeguards for the students.
 - Exit Exam

Other Issues

- Testing time
 - Less testing time lowers reliability
 - Day of state testing is a lost day of instruction (we hear)
 - Reducing testing time per day by increasing the testing days will have its problems too.

Questions ?



Selected Examples from UNC Campuses of Faculty Salary and Benefits Issues August 2000

All of the following examples are true and accurate reports from UNC campuses. The details have been removed to protect the privacy of the individuals in each case. The distribution of comments demonstrates that the salary issues are not confined to the technical disciplines, and the comments about benefits cross all disciplinary lines.

Computer Science and Computer Engineering

More than eighty percent of surveyed computer engineering and computer science students entering their final year of college report that they expect to earn higher salaries than last year's graduates averaged. CollegeHire interviewed more than 5,000 computer science and computer engineering students across the country and found that more than 51 percent of the respondents said they expect to earn between \$51K - \$70K in their first job. Graduates of those same programs earned an average of \$47,000 last year. Jeff Daniel, CEO of CollegeHire, cites a shortage of technical graduates as the main reason for the highest-ever salary expectations.

We lost one faculty member in decision sciences to Iowa State University in 1999 due to his salary/benefits package being insufficient to retain him. When he moved to an MIS position at Iowa State, his nine-month salary alone increased 20%. This faculty member was one of our top researchers and was offered a 6/6 load at Iowa State versus his 9/9 schedule here.

We just lost one very talented female tenure-track faculty member in computer science. Her 1999-2000 salary was around \$55K for 9 months. She received an offer from a university in Rhode Island for \$80K for nine months.

Department Chairs

Last year, we had a professor (who was also the department chairperson) who had been at the university for over 20 years. His total salary was a combination of his base salary and additional compensation for performing department chairperson duties during the academic year and during the summer. He was hired as department chairperson by another regional comprehensive university in another southeastern state. His total salary was increased by \$15,000.

Communication Studies

Over the past three years, the Department of Communication Studies lost two young faculty members to Rutgers University. One faculty member was hired away at the conclusion of her first year, and the other was hired away mid-year during her third year. In both cases, Rutgers was able to offer the faculty members salaries substantially higher than those at our campus. In fact, the salaries the faculty commanded more closely approximated those of our tenured faculty at the Associate Professor level. In addition, in at least one of those cases the faculty member was able to get significant "fringe" perks (equipment, travel) monies which we simply could not match. It was apparent to all in our department that we operated at a salary level which was out of sync nationally. When our other faculty learned that their entry-level colleagues--both of whom

had promise, but still had much to demonstrate--could command salaries similar to our faculty with far greater experience and tangible academic accomplishments, we had some morale problems particularly among those faculty whom I had to ask to take on extra responsibilities to cover the resignations.

Pharmacy

Our survey of graduating pharmacy students this year identified the mean starting salary entry-level positions to be \$70,000 (range \$67 K - \$77 K). Our entry-level assistant professor positions are at \$62.5, and we have no assistant professors above \$67 K. What this means is that every position we offer to an assistant professor requires them to accept an offer \$7.5 K below what their students will earn in their first job. Obviously, this makes recruiting extremely difficult, not to mention postgraduate education and careers in academia. We have an urgent problem today, but we are facing a crisis in the future.

We have had a vacant position in our clinical pharmacy group for a year, and we have lost two additional people in this group over the past year (one to academic, one to industry), leaving three vacant lines that are below the market rate. We have offered the first vacant position to three different candidates in the past year, in every case to excellent people with great potential. Their response to our offer was frank astonishment, followed by a mixture of amusement and sympathy. They really weren't angry or upset, more surprised to find our great reputation and programs not supported by competitive salaries. In each case the person had offers in hand at \$70 K or greater, and it was clearly not a negotiating ploy because we lost the candidates to institutions that subsequently confirmed their entry-level offers. And of course even if we could offer a competitive starting salary, we would immediately create equity problems with our in-place assistant and associate professors. It is truly a nightmare in terms of recruitment and we will experience continual hemorrhage of our faculty, without the ability to recruit replacements, unless faculty salaries are substantially improved. This probably isn't the dramatic type of vignette that has shock value, it is just a gradual and unrelenting erosion that is reducing our faculty ranks and preventing us from providing replacements. But eventually erosion creates a Grand Canyon, and then it is dramatic (but too late).

Librarians

We are losing a senior administrative librarian to another university, out of state, due in part to salary. She accepted an offer of a salary 60% higher than she was making here. True, she is also taking a higher level administrative post. But she came to work for us several years ago, taking a cut in salary in order to work for us. Even with the additional funds we put towards a counter offer, we were unable to match this offer. I feel sure we could have kept her for a few more years otherwise. I have other staff members who have taken salary cuts in order to work here, for various reasons. This creates an overall bad situation. They may like the work opportunities, climate, etc., but they know they are not being paid what they are worth. Ultimately this either drives them away or makes them dissatisfied employees.

Earth Science

Last spring we successfully recruited our first choice for a position in climatology, an absolutely stellar young scientist with impeccable credentials in both teaching and research. A week after he had accepted our position, our Human Resources office sent him a packet of information regarding

his benefits. When he saw how poor the benefits were, he called my department chair to tell her that he had decided to remain in California to continue his post-doctoral fellowship instead of joining our faculty. The poor benefits package, coupled with our inability to award any funds to offset moving expenses, continues to be the largest obstacle we face in each year's new faculty recruitment process. The salaries we can offer simply do not compensate for the expenses new people incur in joining our faculty.

Elementary Education

We have been looking for a coordinator of elementary education program for two years. The search process has generated excellent candidates each time, but we have been unable to recruit them because of our salary and benefit package. In addition, we lost a junior faculty member this month to another state institution because of better salary and benefits. He was key faculty member in the development and planned implementation of our M.Ed. in Elementary Education.

Middle Grades Education

This year a finalist for our faculty position in the middle grades education declined to come for an interview when she learned the position was budgeted at \$40,000. She was earning \$48,000 at Augusta College (GA) two years out of graduate school.

Educational Administration

We just lost our first choice for a faculty member in Educational Administration. We offered \$48,000, and our candidate is currently earning \$100,000 as a high school principal.

Business

The School of Business and Economics has recruited for a Management Information Systems faculty member for four of the last five years. The school has been unable to hire in each of those years except one. The person that was hired in 1997 has a current salary that is significantly below the market for PhD MIS assistant professors. Aside from salary, the issue of summer support and help with moving expenses for faculty is a problem. This is especially true for those fields where there are shortages of highly qualified faculty.

Nursing

Healthcare faculty are paid way below the salaries in the field. For example, starting salaries for RN's (new graduates) can be \$37,000 to lower \$40,000. We pay some doctorate nursing faculty in the lower \$40,000.

Political Science

Political Science lost its top young scholar this summer due to salary. He was making about \$44,000 in his third year, and received an offer of \$52,000 at Cal State Bakersfield. Another consideration was the far superior benefits package, which included free family health insurance, life insurance, and dental and vision packages with very small co-pays by faculty and family. The UNC system is terribly non-competitive in benefits for faculty. In addition to losing good existing faculty, this makes recruitment very difficult.

Mathematics

We hired a very talented Assistant Professor two years ago who was recommended as the top untenured person in the world in his research specialty in mathematics. This person is currently on leave to a Big Ten university which was able to offer him a \$20,000 salary increase and a rank of Associate Professor. He is now on leave of absence, and while we of course hope to retain him, our chances appear to be low.

English

The Department of English this past July lost a tenure-track faculty member to a Canadian institution. Although several factors were involved in the faculty member's decision to leave, money was a prominent factor. Much of the higher salary that the faculty member received at his new university can be accounted for by the rate of exchange that exists between Canadian currency and US dollars; that is, if his salary were converted to Canadian dollars, he would be getting a total salary figure over \$10,000 greater than his US salary. But as the faculty member explained to me, housing costs in Canada mirror those in NC (e.g. a \$65,000 house in NC would also cost 65,000 in Canadian dollars.) Hence, while he could afford a house in Canada with his new, "higher" salary, he couldn't afford to buy one here.

Economics

Our Department of Economics is small, with only twelve full-time faculty. In the past year we lost a tenure-track assistant professor in his fourth year who accepted a comparable job at Ohio State University with a substantial bump in salary, a much lower teaching load, and guaranteed summer research support.

Minority Recruitment

This past spring, we had just about convinced a highly-talented African American professor to join our program. She has been at Indiana University for some years, and she has established an outstanding record of teaching and scholarship. We had to stretch a bit on our salary offer, but, in the end, were able to come up with a figure that she felt to be acceptable. Based on this discussion, we obtained a tentative verbal agreement from her to come, and we looked forward to having her join our staff this fall. About a week later, the agreement came unraveled. She had had time to study the benefits package she would receive here in North Carolina. To be blunt, it was hopelessly inferior to what she has in Indiana. In addition, in Indiana, her three children will be able to attend IU on a tuition-free basis when they are old enough to do so. We had no comparable benefit to put on the table. In the end, we lost this outstanding professor. We had stretched our salary resources to the limit and could go no higher; we had a very poor benefits package to put on the table; and, we were unable to offer tuition remission to her children. The State of North Carolina lost the services of someone who would have made a wonderful addition to our faculty.

We actively recruited a young African-American woman for a faculty position in our Elementary and Middle Grades Education Program. The beginning salary we have been able to offer in that area is around \$41,000 for 9 months. If I had gone much higher than the \$41,000, it would have thrown everyone else (about 18 faculty) in that area relatively below her. For example, I had started another new faculty member there in 1998 at \$38,000. He is now at \$42,000. Bottom line--the female faculty member was offered two other positions at \$45,000 + as an Assistant Professor and a much better benefit program. In addition, the university she finally selected had an on-campus

child care facility where she has put her young son. She was able to select this service as part of a "menu" of benefits.

Benefits

As a parent of two children (ages 2 and 5), I find that the benefits within the UNC system pale in comparison to other universities which have contacted me. The base salary offered by Kent State University was greater than my current salary by \$11,000, the benefits were significantly more. For example, they offered full dependent tuition reimbursement for all family dependents. KSU's health care package for my family would be without cost, and it included optical. Dental coverage would cost \$45 per month vis-à-vis UNC's program which costs \$90 per month. Yet, despite KSU's lower dental costs the coverage was significantly greater. Thus, KSU offered more health care benefits for no out of pocket costs than UNC's health care which will run approximately \$500 per month. In other words I will pay \$500 per month out of my salary to receive fewer health care benefits and less coverage than if I paid nothing at KSU! Even more confusing related to benefits, my children would be able to attend college at no cost and KSU would contribute 14% of my base salary for retirement vis-à-vis UNC's 6% or 7%. Even schools like the University of Alabama at Birmingham and Western Michigan University pay 50% of dependent tuition costs, whereas, UNC pays nothing. I won't dwell on the benefits related to health care, dependent tuition reimbursement, or salaries within other Ohio, Michigan, or Pennsylvania public universities or smaller private schools like The University of Dayton, Stetson University, St. Louis University, or Duquesne. The inequity in benefits is disheartening. As I speak with colleagues with children across campus, it seems they too have these same concerns related to health care and tuition reimbursement for dependents. Frankly, based upon what I have witnessed related to shrinking health care options for me provided by the UNC System, it seems that those within the administration either don't understand the severity of the situation or do not care. I have a hard time believing the latter. Removing \$500 per month for health care benefits for my family would be difficult. I am an associate professor with corresponding pay. However, I cannot imagine how less senior faculty afford to address this issue. Add to this the additional cost of contributing money for future college tuition which is provided at no charge at public and private institutions elsewhere and one has little incentive to remain despite intense loyalty to the UNC System. I respectfully request that you convey your faculty's concerns to those who have the power to address these issues. We are committed to our students and the people of this great state. Please help them realize how the lack of family benefits such as tuition reimbursement for dependents, and associated health care and retirement benefits affect even the most dedicated supporters of the UNC System.

More on Benefits

With regard to problems facing faculty, I would say that benefits is the biggest problem. One faculty member I have cannot afford medical insurance for her husband because it is not possible to insure just a spouse. Other places I have been one can pick maternity vs non-maternity and then children, children plus spouse, and then just a spouse and the rates are all different

The state university system in Kentucky matches retirement contributions 2-to-1, up to a maximum of 10%. That is, if the professor contributes 5%, the state contributes 10%. Our ORP contribution is only about 6% in regard to salary (with an additional 2.34% for disability, etc.). We lost a valued, long-term faculty member and department chair because we couldn't compete.

I called to offer a position to a new faculty member. He is currently teaching at Manhattan College and has to pay \$50 per month for health and dental insurance for himself, his wife, and children. In comparison, here he will have to pay over \$450 per month for the same kind of coverage.

The New Market

One of my former graduate assistants is starting a new position at the University of Richmond. His nine-month salary is \$110,000 plus \$10,000 for summer. I find it sad and somewhat embarrassing to know that a student I once taught, who is now doing the same work I am doing, who has less experience, and a similar publication record, is so far above me in pay (approximately 25%). And on average, my annual raise has exceeded the average for faculty on my campus.

Joint Legislative Education Oversight Committee

North Carolina Association of School Administrators

Jan Crotts, Executive Director

Wednesday, August 30, 2000

Issue: Where Are We Going With Accountability?

North Carolina has made tremendous strides, probably over and above any other state, with our ABCs of Public Education and the related Student Accountability Standards. These programs are a result and reflection of your dedication and leadership for our public schools along with that of other policymakers and the education family. NCASA strongly supports the ABCs Plan. We also support the continued examination and refinement of the ABCs accountability model. It is truly a Work in Progress and will always be. We would like to establish from the beginning that administrators as a whole ask you to Stay the Course with the ABCs and Student Accountability Standards. Please do not interpret any suggestions that we make as an indictment of the program or any of its facets. This is not the case. However, we would ask that any changes that are made to the program be done very carefully with input from administrators. This is not a simple subject. We would like to point out here that, in our opinion, many factors affect the success or failure of the Student Accountability Program but I will confine my comments to a few broad areas.

- **Serious teacher and administrator shortage**

This is a problem that escalates every year for a variety of reasons. It impacts the whole accountability program. Studies show that investing in quality teachers and teaching is the most powerful intervention in improving academic achievement for all students. Without good teachers and administrators, we cannot expect our students to progress, pass the tests and reach the goals we set for them and they set for themselves. As Secretary Richard Riley said when he spoke in Durham recently, "Schools cannot succeed without enlightened administrators, dedicated teachers and a committed community." You have taken some important and expensive steps to address this issue. For this we are grateful. But should we continue to work around the edges of this problem? Or should we dig deeply, determine the root causes, develop the data to tell us just where we are on the issues related to the qualifications and availability of our educators, and then work together to fix it from the bottom up?

We all talk about the “teacher shortage” and administrators struggle to deal with it every year. But the shortage of principals and other administrators is fast becoming as critical as the shortage of teachers. The number of candidates for principal and superintendent has decreased markedly in every school system. This is a natural progression of an education system that has fewer teachers and thus fewer administrators moving up the ladder. Furthermore, many experienced principals see no advantage to moving into central office leadership positions when they frequently have to take a pay cut to do so. And, the shortage of candidates for superintendent is a nationwide epidemic.

You made a wise decision last session when you removed the roadblock for retired teachers so that they can continue teaching without penalty of losing their retirement. Now, we ask you to do the same for administrators as well as shortening the 12-month waiting period. Too many are lost to other fields during that 12 months period. This is one tangible step to address this issue.

- **Budget Issues**

Let us publicly thank you once again for pulling some rabbits out of a hat last year to fund many important programs for education, including the first steps toward a more equitable allotment for central office administrators. At this time the State Board of Education is in the process of determining their budget and policy requests for the next session. They have made efforts to maintain flexibility on such issues as teacher-pupil ratios. This is very important and you have acknowledged the benefits of budget flexibility and have built much more flexibility into the school budget over the last decades. That is good and surely appreciated. But the flexibility goes only so far when the complexity of programs and students has escalated enormously. Almost every funding line item speaks to the student accountability program. Without sufficient funds for at-risk students and early intervention, closing the gap is not even on the horizon. Without sufficient funds for the escalating number of special education students, these programs suffer while schools do their best to serve every one that is identified in their system. The issue of teaching students with Limited English Proficiency has serious roadblocks without the funds to hire the scarcely available teachers who can assist in these areas. The establishment of new or expanded programs without the new and expanded dollars creates unfunded mandates and erodes already existing programs.

The Low-Wealth Funds and Small School Funds help a lot and systems depend on these funds to plug a wide variety of holes specific to