JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE

Agenda
Tuesday, January 14, 2003, 9:00 a.m.
Room 544, Legislative Office Building
Representative Gene Rogers, presiding

- **WELCOME AND INTRODUCTIONS**
  Representative Rogers and Senator Dalton, Cochairs

- **INTERIM REQUIREMENTS FOR CONTINUING CERTIFICATION (9:00)**
  Shirley Iorio, Legislative Analyst
  Kathy Sullivan, Director, Human Resource Management Division, DPI

- **TEXTBOOKS (10:00)**
  Jim Newlin, Fiscal Analyst
  Larry McLamb, Director of Financial Services Division, DPI

- **VOCATS (10:45)**
  June Atkinson, Director, Division of Instructional Services, DPI
  Marshall Stewart, State Agricultural Education Coordinator, Department of Agricultural and Extension Education, College of Agriculture and Life Sciences, NC State University
  Lynn P. Moody, Director of Career and Technical Education, Wake County Public School System
  President, NC Association of Career and Technical Education Administrators

- **LUNCH (12:00-1:00)**

- **PROFESSIONAL DEVELOPMENT STUDY (1:00)**
  Shirley Iorio, Legislative Analyst
  Stephanie Hirsh, Ph.D, Deputy Executive Director, National Staff Development Council

- **NO CHILD LEFT BEHIND (2:30)**
  Overview and Summary of Law and Regulations
  Robin Johnson, Committee Counsel
  Drupti Chauhan, Committee Counsel

  Implementation Status in NC: Opportunities & Challenges
  Brad Sneeden, Deputy Superintendent, DPI

MINUTES

JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE

2001 –2002 Session

January 14, 2003

The Joint Legislative Education Oversight Committee met on Tuesday, January 14th, 2002, at 9 A.M. in room 544 of the Legislative Office Building. Representative Gene Rogers, Co-Chair presided. The following members were present: Senators Dalton, Co-Chair; Dannelly, Garrou, Garwood, Hartsell, Lee, Lucas and Martin. Representatives Rogers, Co-Chair; Buchanan, Insko, Jeffus, Morgan, Sherill, Warner, and Yongue. The following Advisory members attended: Representatives Grady, McLawhorn and Warren.

Representative Rogers opened the meeting and welcomed the members and visitors. Senator Walter Dalton, Co-Chair, notified the members that Mr. James Watts, Vice-President of the Southern Regional Education Board, in charge of State Services, was very ill. He asked that a letter of appreciation for his many years of service to the State of North Carolina be sent to Mr. Watts from the Joint Legislative Education Oversight Committee. *(Please see Attachment 1).* Senator Dalton asked that a letter be sent to the members and staff of the Committee thanking them for their service. Senator Dalton offered a motion and Senator Dannelly seconded it. The motion carried unanimously. *(Please see Attachment 2).* A resolution was entered in the minutes evidencing the service of Mr. Watts and the members and staff of the Joint Legislative Education Oversight Committee.

INTERIM REQUIREMENTS FOR CONTINUING CERTIFICATION

Shirley Iorio, Legislative Analyst, briefed the Committee on the authorizing legislation for the Performance-Based Licensure Program/Suspension of Portfolio Requirement Study. *(Please see attachment 3).* The legislation required the State Board of Education to suspend the portfolio requirement for all teachers who are required, under the current law, to submit portfolios from August 1, 2002, through June 30, 2004.

Ms. Kathy Sullivan, Director of Human Resourcement Management, DPI, was recognized to present a report on the interim requirements for continuing certification. Ms. Sullivan briefed the Committee on the previous requirements, and the State Board's newly proposed recommended requirements. *(Please see Attachment 4).*

Ms. Sullivan described the process that preceded the recommendations to the State Board. There were eight regional meetings held throughout the State to elicit suggestions. Following these meetings, a final meeting was held to finalize the recommendations to the State Board. The State Board accepted the recommendations. *(Please see attachment 5).* She discussed the importance of the input of INTASC (Interstate New Teacher Assessment and Support Consortium). Ms. Sullivan detailed the ten standards of the INTASC. She stated the LEA's are primarily responsible for the recommendation as to whether or not a teacher has met the requirements.

Following the presentation, there was a discussion by the Committee as to the procedure for approving the recommendations. Ms. Sullivan reported that the assessors are teachers, principals and central office personnel who have been trained. She emphasized that beginning teachers do have due process rights.

Representative Rogers thanked Ms. Sullivan for her presentation.

TEXTBOOKS

Representative Rogers introduced Mr. Jim Newlin, Fiscal Analyst, to brief the Committee on the legislative study recommendation in 2001, to evaluate the textbook distribution system and report the findings to the Joint Legislative Education Oversight Committee.

Representative Rogers paused the meeting and introduced Representative-elect Charles Johnson, from Pitt County to the Committee Members. Representative-elect Johnson was invited to join the Committee members at the table.

Mr. Larry McLamb, Director of Financial Services Division, Department of Public Instruction, was asked to present the results of the Study on Textbooks to the Committee. *(Please see attachment 6).* Mr. McLamb stated the study focused on four primary areas. The four core areas were:

1. Efficiency of Operation
2. Cost Comparison
3. Review of Accounting Operations
4. E-Procurement Solutions

The over-all goal of the study was to determine if the current warehouse distribution system is the most effective/efficient way to distribute textbooks to North Carolina public schools.

Mr. McLamb reported there have been numerous improvements in the operation as a result of the study. Some of the improvements have included hiring a new warehouse manager who excels at distribution; and, changing the operational strategy from a warehouse to an actual distribution center. He reported during the past two years, there have been major improvements in the timely delivery of textbooks to the schools prior to the beginning of the school year. He also reported they have recently partnered with the Department of Corrections to save on freight. Mr. McLamb estimated there would be approximately a 50% savings on freight due to this partnership.

Representative Rogers stated that it was a legislative mandate to conduct the ensuing study on textbooks. He thanked Mr. McLamb for his report.

VoCATS

Representative Rogers stated there has been some concern reported across the state about academic testing of vocational students. This concern prompted a request by the Joint Legislative Education Oversight Committee for additional information.

Representative Rogers recognized Ms. June Atkinson, Director, Division of Instructional Services, Department of Public Instruction to brief the Committee on Vocational and Technical education. Ms. Atkinson briefed the Committee on the statute regarding the Duties of the State Board of Education pertinent to Vocational and Technical Education *(Please see attachment 7),* and to the Carl D. Perkins Vocational Applied Technology Education amendments of 1998*(Please see Attachment 8).* She reported the Carl D. Perkins act provides the mechanism for federal funding of secondary and postsecondary vocational education. North Carolina received $32 million for the 2001-2002 year. There are significant requirements for accountability in order to receive the Perkins's federal funding. The four categories for standards are:

- Student Attainment: Student proficiency in academic and technical skills.
- Credential Attainment: Student secondary or postsecondary graduation and attainment of an advanced credential.
- Placement and Retention: Student placement in, retention in, and completion of postsecondary education or advanced training, placement in military service, or placement or retention in employment.
- Participation in or Completion of Non-traditional Programs: Student placement in and completion of programs leading to non-traditional training and employment.

The Office of Vocational and Adult Education of the U.S. Department of Education approved the North Carolina State Plan for the years 2000-2004. North Carolina established seven indicators of performance used in conjunction with the federal system of accountability. The seven indicators of performance used in conjunction with the federal system of accountability are:

1. Attainment of Academic Proficiencies.
2. Attainment of Vocational and Technical Skill Proficiencies.
3. Attainment of Credentials.
4. Placement.
5. Nontraditional Enrollment.
6. Nontraditional Graduation.
7. Career Development Plans.

Ms. Atkinson explained that VoCATS is an electronic instructional management system. It includes Blueprints, curriculum materials and assessment tools. The current status of VoCATS effort is that all LEA's are using VoCATS-designated software components and 95 percent of all high schools and many elementary and middle schools have computer hardware to run this software. Approximately 90% of teachers have participated in VoCATS staff development. VoCATS ensures that all teachers have access to the same curriculum resources. It strengthens the link between the classroom and the business community; closely monitors the progress of each student; and pinpoints students' areas of weakness and provides the necessary remedial assistance. At the program completion, it provides students with a detailed record of their mastery of course content.

Ms. Atkinson reported the VoCATS process has received recognition from the following:

- The U.S. Department of Education has recognized VoCATS as a national Career Technical Education instructional model.
- The Rand Corporation has cited VoCATS as an exemplary statewide system to assess student learning in Career Technical Education courses and programs.

Senator Dalton reported the Southern Regional Education Board supports the North Carolina Program for VoCATS. *(Please see Attachment 9).*

For more detailed information regarding Ms. Atkinson's briefing, *please refer to Attachment 10.*

Next, Representative Rogers recognized Mr. Marshall Stewart. Mr. Stewart thanked the Committee for the opportunity to express his concerns regarding the VoCATS system. Mr. Stewart stated that he was speaking as a parent of a ninth grade son. He stated that in his opinion, VoCATS is a bad-testing system for both students and teachers, for the North Carolina economy and bad public policy. He respectfully requested that the Committee end the current testing in career and technical education and provide leadership for the development of a new accountability system in career and technical education. Mr. Marshall's detailed presentation to the Joint Legislative Education Oversight Committee is included in *Attachment 11.*

A lengthy discussion followed by the members of the Committee. The Joint Legislative Education Oversight Committee asked if they could recommend a task force to further study VoCATS. Both Senator Dalton and Representative Rogers stated this was possible.

Representative Rogers introduced Ms. Lynn Moody, Director of Career and Technical Education, Wake County Public School System and the President of the North Carolina Association of Career and Technical Education Administrators. Wake County Public School System to speak regarding VoCATS. Ms. Moody stressed that in most schools, the VoCATS assessment tests represents only about 25% of the total grade and that 75% of the students grade is derived from actual performance evaluation. She stated the State Board of Education has upheld VoCATS as a valid and reliable data source for measuring students' achievement as determined by multiple validity and reliability studies. She noted the State Board of Education's Commission for Accountability and Testing is also on record for supporting VoCATS as an accountability measure. Ms. Moody stated that the majority of Career and Technical Education teachers support the usage of VoCATS. *(Please see Attachment 12).*

Next, Representative Rogers recognized Mr. Gerald Barlow, an agriculture teacher in Union School in Sampson County, and President-elect of the North Carolina Agriculture Teacher's Association. Mr. Barlow stated he has been a teacher for 19 years. He described the agriculture vocational program at Union School. He reported that due to the recently instituted end of course test, he has less time to actually teach in the classroom. Also, he reported the tests were having a negative effect on students. He noted that fewer students were signing up for the vocational program at Union School due to the end of grade tests. Representative Rogers thanked Mr. Barlow for his presentation.

PROFESSIONAL DEVELOPMENT STUDY

Representative Rogers recognized Dr. Shirley Iorio, Legislative Analyst to brief the Committee on the authorizing legislation regarding the Professional Development Study. Dr. Iorio reported the Joint Legislative Education Oversight Committee was given the authority to hire an independent consultant to study and make recommendations regarding professional development for public school professionals in North Carolina. She detailed the areas that were to be evaluated. The consultant was instructed to report the findings to the Joint Legislative Education Oversight Committee. *(Please see Attachment 13).*

Dr. Iorio introduced Stephanie Hirsh, Ph.D., Deputy Executive Director, National Staff Development Council to report her findings. Dr. Hirsh began her remarks by complementing the North Carolina education programs. She reported that North Carolina received a **B** in teacher quality from *Education Week's Annual Report*. Only one state exceeded North Carolina's grade – and that was South Carolina, with a **B+.** There were only four other states in the country that also obtained a **B** grade.

Dr. Hirsh detailed the recommendations compiled by the National Staff Development Council:

- *Hold all state-level programs to high standards of professional development and ground them in research with a focus on improving educator practice and student achievement.*
- *Reexamine and rewrite the mission statements for the UNC Center for School Leadership Development and its constituent programs.*
- *Align all state-level professional development with North Carolina's system of accountability.*
- *Require annual program reports that document the application of research-based strategies and the impact of the work on improved educator practice and student results.*
- *Establish a single governance authority for the UNC Center for school Leadership Development programs.*
- *Give the educators in the field the information they require to make better decisions about professional development including professional development programs and services available from the state.*
- *Determine curricula of training modules that would encourage consistency, extend reach, develop leadership, and build capacity of educators throughout the state.*

- *Require that a portion of the time and resources of each state-funded program be prioritized to support school-based and job-embedded learning.*

- *Institute a program review cycle that focuses on the issues of mission, governance, efficiency, and effectiveness.*

- *Focus resources of the UNC-CSLD programs on staff development that will help teachers and other support staff reduce the gap in student achievement.*

- *Design and deliver systematic induction programs plus training for mentor teachers.*

- *Redesign the recertification/relicensure proceeds so that it supports the goal that all teachers have the knowledge and skills to successfully close the achievement gap.*

- *Focus additional resources of the UNC-CSLD programs on support for new principals and staff development that will help them reduce the gap in student achievement.*

- *Establish a vision and adopt a comprehensive state plan for professional development.*

- *Mandate a standard format and due date for school/district improvement plans.*

- *Align the allocation of state dollars to state priorities.*

- *Determine whether the need still exists for the Model Teacher Education Consortium (MTEC) in light of the recent establishment of the Regional alternative Licensing Centers and a new grant to Elizabeth City State University to support Transition to Teaching programs.*

- *Require collaboration among the DPI, Center for School Leadership Development, local colleges and universities, and other recipients of large federal and state grants.*

- *Consider the recommendation of the State Board Professional Development Committee regarding the establishment of limited regional staff development services.*

Dr. Hirsh stated that her report focused on 3 key issues – a vision of high quality professional learning; the recommendations that have been listed and potential legislative actions that could be considered for the current Session of the legislature.

For the complete National Staff Development Council report, *please see Attachments 14 and 15.*

NO CHILD LEFT BEHIND

Representative Rogers recognized Robin Johnson, Committee Counsel to brief the Committee regarding the federal guidelines for No Child Left Behind. Ms. Johnson presented detailed information regarding Title 1, the Section on Accountability and Assessment. *(Please see Attachment 16).* She reported this Act, historically, is the largest involvement in K – 12 education policy by the federal government. During the past year, all states have been receiving mammoth amounts of reports on the future requirements of the Act. Ms. Johnson stated the requirements for the states are continually evolving. She reported this would be a Law that will be implemented over time. She referred the members to the NCLB Timeline. *(Please see Attachment 17).*

Regarding the funding to implement this law, she stated that the total budget provided for the implementation by the federal government is approximately 7% of the total state budget for public schools. Several states have expressed concern about costs to the States for implementation of NCLB. And she reported there is a certain amount of fear that if the states cannot, for whatever reason, meet all of the federal expectations of the NCLB Act, they will be subject to litigation similar to the Leandro Case in North Carolina.

Next, Representative Rogers introduced Ms. Drupti Chauhan, Committee Counsel, to present an overview of the NCLB law and regulations. Ms. Chauhan followed-up with the teacher quality and reporting requirements for NCLB. She reported that beginning with the 2002 – 2003 school year, any new teacher funded with Title 1 funds, must meet the requirements of NCLB designated as "highly qualified". In addition, paraprofessionals are also required to NCLB qualifications. At the end of the 2005 – 2006 school year, all teachers, if teaching in the core areas, will be required to meet the highly qualified designation. Ms. Chauhan referred the Committee Members to a flow chart which details the 'Highly Qualified" teacher requirements for the No Child Left Behind Act. *(Please see Attachment 18).*

She reported there is a state issued annual report card required beginning with the 2002 – 2003 school year. It is required of any state that receives assistance under Title 1 *(Please see Attachment 19).* Included in the Act is a clause that provides any parent a right to request information on the qualifications of their child's teacher. There is a school choice component of the NCLB. Ms. Chauhan explained that if a child is assigned to a school that is designated as an unsafe school, the child has the right to be reassigned to another school in the same district that is a safe school.

Representative Rogers recognized Representative-elect Debra Ross and invited her to sit at the table with the Committee Members. Ms. Ross joined the members.

Representative Rogers and Senator Dalton thanked both Ms. Johnson and Ms. Chauhan for their presentations.

IMPLEMENTATION STATUS IN NORTH CAROLINA: OPPORTUNITIES AND CHALLENGES

Representative Rogers introduced Brad Sneeden, Deputy Superintendent, Department of Public Instruction, to present an overview of the No Child Left Behind legislation from the departments perspective. Dr. Sneeden reported that the No Child Left Behind Act of 2002 amends the Elementary and Secondary Education Act of 1965, and replaces the Improving America's School Act of 1994. He reported there is a significant consolidation of programs and funding. The key requirements in the new law are:

- *Closing the achievement gap for low-income students, minority students and students with disabilities.*
- *Holding schools accountable for all students performing at a high-level.*
- *Increasing the number of "High Quality" educators.*

Dr. Sneeden stated that North Carolina already has an accountability program in place. The improvement of minority achievement and the closing of achievement gaps between minority students and white students are already major priorities in North Carolina. In 2001, the General Assembly mandated that beginning in the 2002-2003 school year, the state include a "closing the achievement gap" component in its measurement of educational growth in student performance for each school.

NCLB requires determination of student, school, school district, and state progress in achieving proficiency goals through the use of a measure called Adequate Yearly Progress (AYP). The state is required to determine a baseline on existing levels of proficiency based on the 2001 – 2002 data. All subgroups must make annual measurable objectives. Ninety-five of each subgroup must take the assessment. All students will be required to achieve the "proficient" level within 12 years (race/ethnicity, disabled, low-income, LEP). North Carolina will set performance targets designed to raise achievement in gradual, but equal increments to reach 100% by 2013-2014. All of

the schools subgroups must pass both the reading and mathematics test. A school will make AYP if - the percent of students passing the statewide tests in reading and in mathematics, school wide and by subgroup - meets or exceeds the AYP targets for the year, or, the percentage of students not scoring proficient in a subgroup is reduced by at least 10 percent in a year, and the subgroup makes progress on the other AYP indicator. A Title 1 school that fails to make AYP for two consecutive years must provide all eligible enrolled in the school with the option of transferring to another public school, pay for the transportation, develop a plan for improvement, provide professional development to the staff (10% of the budget) and provide for notice to parents and involvement of the community.

Dr. Sneeden stated that the North Carolina Department of Public Instruction believes there is a lot of value in the No Child Left Behind Act. The Department is working with the federal education personnel to clarify certain components of the Act. He said the Department looks forward to implementing the Act and is confident the Nor Carolina Accountability Program will be a major asset to the implementation. *(Please see Attachment 20).*

A handout summarizing the Voluntary Programs in No Child Left Behind is available in *Attachment 21.*

In response to a question by a Committee Member regarding federal funding received by North Carolina, Mr. Jim Newlin, Fiscal Analyst, presented a data sheet to the members. *(Please see Attachment 22).*

Representative Rogers thanked all of the presenters to the meeting.

Senator Dalton and Representative Rogers addressed the members and informed them the Joint Legislative Education Oversight Committee was required to make a report to the 2003 –2004 North Carolina General Assembly.

The Joint Legislative Education Oversight Committee Recommendations to the 2003 General Assembly are listed in *Attachment 23.*

Representative Rogers adjourned the meeting at 4 P.M.

Senator Walter Dalton, Co-Chair

Gene Rogers (by)
Representative Gene Rogers, Co-Chair

Christina K. Minard
Christina K. Minard, Education
Committee Assistant

JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE RECOMMENDATIONS TO THE 2003 GENERAL ASSEMBLY

Senator Dalton and Representative Rogers addressed the members and informed them the Joint Legislative Education Oversight Committee was required to make a report to the 2003 –2004 North Carolina General Assembly.

Following are the Joint Legislative Education Oversight Recommendations to the 2003 North Carolina General Assembly:

1. The General Assembly should establish a task force to examine the VoCATS program, which is the accountability system for vocational education courses. The task force should be charged with determining whether the State-developed tests are appropriate means to measure student mastery of the knowledge and skills taught in vocational education courses, with a specific focus on the agriculture curriculum. The task force should include members of the General Assembly, the Superintendent of Public Instruction or his designee, and members of the public. The task force should report to the chairs of the education appropriation subcommittees of the Senate and House of Representatives by June 30, 2003.

2. The standing education committees of the House of Representatives and the Senate should further review and evaluate the recommendations in the National Staff Development Council's Report on the State's professional development programs. The Council reported on its study and its recommendations to the Joint Legislative Education Oversight Committee on January 14, 2003. The standing education committees should propose any legislative or statutory changes before the bill drafting deadlines.

3. The reporting date in Section 5(b) of S.L. 2002-178 (SB 1275) should be extended to allow the Board of Governors additional time to conduct its study of reading methods courses for education majors. The Board of Governors is encouraged to utilize the expertise of the Center for School Leadership to coordinate this study. As part of this study, the Board of Governors should develop a statewide reading program, seeking input from teachers, administrators, and experts in the field of reading methods. The Board of Governors should report to the Joint Legislative Education Oversight Committee by November 15, 2003.

JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE

2001-2002 Session

January 14, 2003

TABS

PERFORMANCE-BASED LICENSURE PROGRAM/SUSPENSION OF PORTFOLIO REQUIREMENT AND STUDY

SECTION 7.18.(a) The State Board of Education, in consultation with the Board of Governors of The University of North Carolina and the Education Cabinet, shall review teacher preparation programs and the continuing certification process to determine how these programs can be modified to enhance the continuing teacher certification process and to reduce the burden the continuing certification process places on newly certified teachers. This evaluation shall consider strategies for streamlining the current continuing certification process and reducing the amount of documentation required in the applicant's portfolio.

The State Board of Education shall suspend the portfolio requirement for all teachers who are required, under the current law, to submit portfolios from August 1, 2002, through June 30, 2004. Teachers who are not required to submit portfolios during the period the portfolio requirement is suspended shall be subject to interim requirements adopted by the State Board and shall complete the interim requirements. The State Board of Education shall make every effort to insure that any interim requirements do not require significant and unnecessary paperwork, effort, and administrative burden. Prior to implementation of the interim requirements, the State Board of Education shall report to the Joint Legislative Education Oversight Committee on the proposed requirements.

Public Schools of North Carolina
State Board of Education
Department of Public Instruction

Report to the Joint Legislative Education Oversight Committee

Interim Requirements for Continuing Licensure (Performance-Based Licensure)

Senate Bill 1115 Section 7.18(a)

Date Due Fall 2002
Report #1 in October 2002-December 2003
DPI Chronological Schedule

State Board of Education

Phillip J. Kirk, Jr.
Chairman
Raleigh

Jane P. Norwood
Vice Chair
Charlotte

Kathy A. Taft
Greenville

Michelle Howard-Vital
Wilmington

Edgar D. Murphy
Durham

Evelyn B. Monroe
West End

Maria T. Palmer
Chapel Hill

Ronald E. Deal
Hickory

Wayne McDevitt
Asheville

Patricia Nickens Willoughby
Raleigh

Beverly Perdue
Lieutenant Governor
New Bern

Richard Moore
State Treasurer
Kittrell

NC Department of Public Instruction

Michael E. Ward, State Superintendent

301 North Wilmington Street • Raleigh, North Carolina 27601-2825 • Website: www.ncpublicschools.org

Interim Requirements for Continuing Certification

Session Law 2002-126 Section 7.18 (a) suspends the portfolio requirement for continuing licensure and directs that prior to the implementation of interim requirements the State Board of Education report proposed requirements to the Joint Legislative Education Oversight Committee. A copy of this section of the law is included as Appendix A.

Input on possible interim requirements was solicited from a variety of stakeholders including teachers, school administrators, Initial Licensure Program Coordinators, central office administrators, and superintendents. Eight regional meetings were held in November. Participants in the meetings and the summaries of those meetings are included as Appendix B. On December 3, 2002 a ninth meeting was held with representative stakeholders to review the input provided through the regional meetings. Participants in the December 3 meeting are included as Appendix C. On December 12, 2002, the State Board of Education approved the following interim requirements for continuing certification:

1. The Beginning Teacher Individualized Growth Plan (IGP) be utilized to document professional growth and development focused on the INTASC Standards. The completed IGPs and the required observations and annual summative TPAI-R evaluations will be submitted with a statement from the LEA indicating whether or not the beginning teacher has adequately demonstrated competency with all INTASC Standards. (Note: Beginning teachers are currently required to complete an IGP annually and are observed four times and evaluated annually using the TPAI-R.)

2. Beginning teachers be required to participate in professional development activities which are focused on the INTASC Standards and reflect IGP formative assessments. The activities are to be documented.

3. Beginning teachers, along with their mentors, be required to participate in regular meetings within their school/LEA communities for focused discussion of and reflection on the INTASC Standards. They are also to have individual conferences focused on the needs of the beginning teacher. These group meetings and individual conferences are to be documented.

4. While there was not consensus on the use of videos, the majority of participants in the December 3rd meeting favored the use of videos for self-reflection at the local level.

5. The IGPs, the TPAI-R observations and evaluations submitted with the statement from the LEA, documentation of the professional development activities completed by the beginning teacher, and documentation of the beginning teacher/mentor meetings will be reviewed by trained assessors. The results of the reviews will be reported to the State Board.

A copy of the INTASC Standards, the Beginning Teacher Individualized Growth Plan, and the TPAI-R are included as Appendix D.

APPENDIX A

Session Law 2002-126

PERFORMANCE-BASED LICENSURE PROGRAM/SUSPENSION OF PORTFOLIO REQUIREMENT AND STUDY

SECTION 7.18.(a) The State Board of Education, in consultation with the Board of Governors of The University of North Carolina and the Education Cabinet, shall review teacher preparation programs and the continuing certification process to determine how these programs can be modified to enhance the continuing teacher certification process and to reduce the burden the continuing certification process places on newly certified teachers. This evaluation shall consider strategies for streamlining the current continuing certification process and reducing the amount of documentation required in the applicant's portfolio.

The State Board of Education shall suspend the portfolio requirement for all teachers who are required, under the current law, to submit portfolios from August 1, 2002, through June 30, 2004. Teachers who are not required to submit portfolios during the period the portfolio requirement is suspended shall be subject to interim requirements adopted by the State Board and shall complete the interim requirements. The State Board of Education shall make every effort to insure that any interim requirements do not require significant and unnecessary paperwork, effort, and administrative burden. Prior to implementation of the interim requirements, the State Board of Education shall report to the Joint Legislative Education Oversight Committee on the proposed requirements.

APPENDIX B
Summaries of Regional Meetings

Central Region Group 1

Group preferences that showed up in each group discussion:

1. Provide options for teachers to select from. Once option is selected the teachers remains in that track.
2. Use a combination of IGP, TPAI and reflection from teacher, mentor and principal.
3. All testing or options should be at no cost to teacher.
4. Collaboration with IHE to develop the quality of teachers and provide credit for staff development for all years of ILT program. Bank CEUs—both coursework toward Masters and local CEUs.
5. More mentor training and release time for mentors and ILTs to conference.

Feedback

1. Use IGP, show evidences, signatures of 3 individuals and reflection on what ILT needs to focus on as well as a growth reflection paired with TPAI-R.
2. Peer teacher review process (as in SERVE model)—3 mentor teachers
3. Reflection practice process is important
4. Options package that is fair—monitor how options work
5. Provide incentives to complete in 2003—since only 5 months left—2 bonus leave days or banked CEUs
6. Test (TTK?)—teacher should not have to pay
7. Performance documentation—video, TPAI and Summative
8. Staff development hours banked (3 CEUs to carry over to continuing license)

Central Group 2

1. Implement a statewide timeline for ILTs and Mentors to document work that focuses on INTASC—may require mentor re-training and at least three district wide meetings to support timelines
2. ILTs with Masters degrees should get a professional continuing license.
3. Video to show INTASC standards being met
4. Concern about any tests that might be offered—are they an authentic assessment?
5. Evaluation instrument based on INTASC to be preformed by administrators (in addition to those currently being given)
6. Video assessment with lesson plans, reflection and self-assessment
7. TTK—test—state should pay
8. Offer PBLP as an option with modifications because of short time frame
9. Staff Development credits re-instated focus on INTASC
10. IGP and Evaluations to be tied
11. Evidence(proof) of each INTASC standard in evaluation process
12. Local assessments—teachers assessing teachers with state approved assessors
13. Unannounced observations with outside assessors
14. Interviews to express knowledge of INTASC
15. Teach a lesson with another component (?)
16. Video (1 hour long) with INTASC demonstrated.
17. Documentation of monthly meetings with mentors and ILTs

Additional Concerns/Comments

- The state should pay the cost for any requirement (as they did with product).
- Move the product requirement to year 3.
- Don't forget that teachers will begin EOC/EOG testing in March--whatever takes place of product should not interrupt this class time needed for preparing for testing with students.
- Compensation such as extra annual leave days should be awarded for completion of process.
- Place more responsibility on universities not ILTs.
- It is important that the "practice of teaching" is OJT and should be demonstrated there.
- Any requirement should reflect INTASC as that is what previous focus has been.

Northeast Group 1	Northeast Group 2	Northeast Group 3
• Observations and IGP • INTASC with checklist of behaviors/evidences (they are not collected) • Video "Interactive Assessment" -video, panel review (reflection piece-interview, discussion) observations/IGP	• Video - 20-minute lesson (can be edited)/lesson plan included • Guided Question Interview Video -standard questions based upon INTASC standards (Post-conference formal interview) -Reflective thinking • Required IGP • Observations (2nd year) / Summative (1st year) *All four elements would be required. Rubrics must be developed for each segment.	3 15-minute unedited video tape sessions • Beginning • Middle • End of Year Reflective Questions on classroom management and planning/instruction would show mastery of INTASC standards PROS: Questions already developed Assessors already trained (state) Video gives visual to support reflective questions No unnecessary paperwork or administrative burden
Northeast Group 4	**Northeast Group 5**	**Northeast Group 6**
"ILT Package" Options 1. IGP - submit with evidence of completed goals State assessors review (Year 1 and 2) LEA - sign off on evidence Principal/central office 2. Video - Reflective of IGP 3. Reflection - Video/IGP/ (self analysis) (3 typed pages maximum) This is where I've been This is where I am This is where I'm going +/- + tied to what ILT is doing + INTASC connection + Performance Based Clear - convincing- consistent	• Testing Teacher Knowledge by NES (connected to INTASC standards) State should cover cost of test. • Use IGP and Evaluations Have assessors to evaluate these two documents • Video testing INTASC standards knowledge Reflection/analyze standard knowledge in video tape • Provide teachers with options Use the above bullets as options Teacher chooses and pass only one of the above options	• Observations (Reported to State) linked to INTASC standards checklist *Administration *Teacher • Test plus Observations (TTK) • Video tape (more than once) • Quality IGPs (planning and implementation/summation) (useable strategies)
Northeast Group 7	**Northeast Group 8**	**Northeast Group 9**
1. Outside observers 2. Videotaping and interviewing by assessors 3. Regional oral interviews on INTASC standards 4. NO ADDITIONAL TESTING 5. More Training for Legislators	*Videotaping a lesson/unit *Oral interview concerning lesson/unit based on the INTASC standards *Summative Evaluation	Growth Plan (IGP) Video/Oral Narrative Evaluations (Satisfactory or Above) Possible Oral Exam (Locally)

Northeast Group 10	Northwest Group 1	Northwest Group 2

Paced Timeline of Professional Growth
• Video of different lessons throughout the year (math, communications, cooperative groups, giving tests, review lessons)
• IGP
• Professional Readings with Response (written assessment)
• Standardized Test at the end of Year 2 (TTK) standardized assessment
• Reflective Practices
Video lessons, student growth, professional development
	• **Submission of summative evaluation**
	• Monthly Mentor/ILT conferences
	• Log as an expansion to the 3rd page IGP, plus delta sheet
	• All evaluations, conferences and IGP based on INTASC Standards at no additional cost
		A "statement of assurance" checklist
		• Mentor/Mentee regular meetings
		• System-wide staff development/support meetings with focus on
		• INTASC Standards
		• Regular review of IGP
		• Documentation of scheduled observations
		• Written reflection in two INTASC areas
		• Final verification and signatures
		  • Principal
		  • Mentor
		  • Mentee/ILT
		  • ILT Coordinator/Central Office Rep.

Northwest Group 3	**Northwest Group 4**	**Northwest Group 5**

• Required monthly meetings on INTASC Standards
• Required skill building on INTASC Standards – Coach 2 Coach Modes
• Required designated time weekly/monthly for Mentor/ILT meetings
• Expand observation data - add lesson plans and student work for each observation
  • present pre-conference form with data relating directly to ITASC Standards as does the ILT's IGP
  • add a two page reflection for each year of how ILT grew professionally as a teacher
	• Menu: choices of test, video, etc.
	• Video and documentation
	• Monthly meetings Mentee/ILT Coordinator
	• Banking of CEUs
	• Graduated annual leave credits (ILT 1-1 day, ILT 2-2days)
	• Submission of a monthly journal of reflections (based on INTASC Standards) and a video
		• Continue Mentor/Mentee meetings – ILT 1,2, and 3s (goal/objectives & coordinated)
		• LEA wide Mentor/Mentee meetings based on needed areas of improvement
		• Professional journal – reflections: weekly, bi-monthly, monthly??
		• Additional observations of master/superior teachers and reflect
		• Video – reflection with mentor +/^ based on INTASC Standards
		• Graduate work = some interim requirements/ additional certification
		• Staff development

Sandhills Proposal 1	Sandhills Proposal 2	Sandhills Proposal 3
Year 1—Evaluation with feedback by Mentors and Principal. Meet educational requirements. Spend this year getting to know curriculum, etc. Year 2 – Create a rubric to determine who would need to do "interim" requirements(such as a product) using IGP, TPAI-R, etc. Have the designated individuals do the interim requirements. Year 3—Streamline and customize any revisions on interim product or requirement. Demonstrate through observation ability to overcome weaknesses identified in year 2.	Incorporate true coaching model and build it into the daily schedule. Use the IGP to develop reflections for year 2. Oral assessment with state providing questions prior to assessment.	Want choices/options: • LEA taught courses (use Coach2Coach modules) on INTASC. Provide evidences each month of attending sessions AND implementing the strategies in classroom. • Test (TTK???) • Masters degree in Education # hours per year(?)

Sandhills Proposal 4	Sandhills Proposal 5
Options/Choices: • Graduate credit/Masters of Education • TPAI-R • Written reflection on chosen part of IGP related to INTASC • Monthly Meetings with ILTs/Mentors	No TEST Reinstate staff development credit and require ILTs and Mentors to meet monthly for focused discussion on the INTASC standards.

Southeast Group 1	Southeast Group 2	Southeast Group 3
1. The ILT will demonstrate competency of INTASC standards by the development of a video. 2. The ILT will use a variety of methods/strategies to show mastery. **Options** As an incentive for this year's ILT-2's to complete the video, the length and number of INTASC standards would be reduced.	1. **NO** to the student performance as measurement 2. Choice of more in depth IGP (Regional review board) **or** TTK 3. Larger role for mentor (ex. Release time for frequent observations from mentor, time for feedback)	OPTIONS- Differentiated Licensure Process*-- • TTK – Verbal linguistic, analytical • Video and form (NES) * - (Kinesthetic, art/visual, naturalist • EOC/G growth – (Analytical, interpersonal) • Documented Mentor/Mentee observations & meetings based on INTASC (interpersonal, intrapersonal) This process treats teachers in the manner in which we expect teachers to treat students.
Southeast Group 4	**Southeast Group 5**	**Southeast Group 6**
1. Choice of assessments (test, video, observations, reflective writing) 2. Personal Inquiry Project (evidence to support standards picked in IGP) Cape Fear Center for Inquiry 3. Redirect State Funding to the School Level Focus more on mentor and administrative observations; bring trained assessors to the classroom 4. Observations with reflection and meet with Mentor (interdistrict as well as intradistrict observations) (focus on one standard per month) 5. Spread amount of work equally over 3 years.	1. True implementation of BTIGP • INTASC Standards • Documented evidence of completion • Targeted Staff Development 2. Menu of Options • Video Lesson with reflection on INTASC standards • Test of Teaching Knowledge (TTK) • Documentation of implementation of INTASC standards	1. Video with questions (looking for lesson plan, behavior, unique learners) 2. Accept work already done by present ILT-2s 3. Assessors to come into the classrooms 4. Conversational reflection is important (journal with mentor) 5. ALL NC colleges and universities should prepare teachers with INTASC standards (ECU model) 6. Video (with no edits) and narrative, with evidence of understanding of INTASC standards. 7. Option of test (state paid) or "whatever" is decided upon. 8. Give additional incentive for ILTs to complete the requirement this year. (Additional annual leave days.) 9. More staff development on curriculum strategies, technology, and classroom management. 10. State assessors from neighboring counties with pre-conference. 11. *This year, change requirement from year 2 to year 3. (Dec.-May is too short a time frame) 12. Begin in year 2004 Year 1 – plan with mentor (unit) Year 2 – implement/reflect Year 3 – compile and assess 13. Different process for ILTs and Lateral Entry.

Southwest Region

All groups supported the proposal presented by the SW Region Personnel Directors (attached)

Reasons:

Meets both letter and spirit of the legislation, do-able, already in place, acceptability is there, accountability is there (ILT, Mentor, and Principal).

Should include an appeal process and review process from local group of teachers, mentors, etc. State teams could go and observe this process if this is a state decision.

Fine tune the IGP to show proof of learning INTASC and include reflections on the INTASC standards related to the IGP.

Focus the TPAI-R pre-conference on the INTASC standards as well as classroom observations. Merge the INTASC standards and observation questions.

If there are inequities across the state with IGP and TPAI-R process—could DPI address these differences as a part of the "interim" requirement?

Use forms, Standards, processes already in place.

1. Staff Development Units should be reinstated: gives the ILT documentation and is an incentive. Monthly meetings with Mentor and ILT documented by sign-in sheets(provide time for Mentor/ILT meetings within the day). Must be related to INTASC. Give schools the opportunity to tie in School Improvement, Technology, SACS, Safe Schools, etc.

2. IHEs should be required to introduce INTASC standards. Make known differences in portfolio at IHE level and at other levels…should be different than any required of teachers. Need to think about a year long internship, thus justifying the increased pay upon graduation.

3. There should be different requirements for Lateral Entry teachers. Pay for teachers who graduated from Teacher Education institutions should be a pay grade higher than lateral entry.

4. Require ILTs to observe designated Master Teachers in the LEA. Provide two half days of release time for this.

5. Unannounced Observations by a Professional Observer—Whole day, Based on INTASC, planning period to review and give feedback.

6. More rigorous accountability for Mentors.

7. No additional tests of any kind.

West Group 1	West Group 2	West Group 3
1) Continue monthly meetings with ILTs and mentors • Focus on IGP and these INTASC Standards: content pedagogy, motivation and management, and planning. • ILT2s will be assessed via TPAI-R (or other model) with all functions rated "at standard" or above. 2) Long-term proposal • ILT3s in their 1st semester produce a 20-minute video and written reflections, assessed by a trained mentor/assessor in concert with principal's recommendation.	Menu option • Pilot test National Education Services test on INTASC Standards. • Require mentor/mentee meetings with evidence of INTASC to be assessed within the region but outside the LEA. • If deemed "below standard," ILT must go to a 2-day intensive training. The intense 2-day retreat will be for ILTs who need further professional development. High quality teachers who demonstrate INTASC Standards and help ILTs pull together evidence of INTASC Standards will provide this training. ILTs will earn CEUs for participation. • Also noted: PBL Product requirement would move to a part of student teaching	Four options as numbered: 1) Licensure decision based on results of interviews and conferences between ILT and site administrator. • Rubric on INTASC Standards • LEA makes recommendation for licensure. 2) Two full lessons on videotape with supporting evidence. • ILT reflects orally, on tape, or written • Based on INTASC • Evaluated by trained assessors. 3) Menu (No more than three) • PBL Portfolio • Videotaped lessons with assessment • Test (State pays, not ILT or State reimburses upon successful completion). 4) Continuing Education Credits to document learning • Banked during ILT process • Formula for how many count toward continuing license. Also noted: Tough calls make it difficult for licensure decisions to be done locally
West Group 4	**West Group 5**	**West Group 6**
1) Expand and clearly define the role of mentor • Better documentation of meetings • Implement reflective practices with mentor • Give mentor more authority • Better match of certification areas • Give mentor more training and more time with mentee 2) Shrink Process • Questions need to be more succinct • Lengthen the time frame to complete the product • ILT2 process • Also noted: No more out of pocket expenses for teachers No video	Show INTASC implementation in classroom with more support for ILT • Monthly meetings with ILTs and mentors. Possibly structured activities or action plans. Mentor should provide informal observations for ILT. Support system. Let ILTs see good teachers in action. • Focused staff development with timeline. Provide professional development day on a monthly basis. • Follow-up is important. Support throughout the entire year. • Promotional incentives for ILTs such as renewal credit or annual leave days. Also noted: Products should be implemented during college or student teaching to standardize requirements. No Test	1) Options for different learning styles, but build reflective process into all components 2) Provide strong support base in individual schools/school systems with a cyclical approach • Network of ILTs so that they have a structure for addressing real problems • Input from experienced teachers • Practical application • Review and reflect with groups. • Staff development model that includes regular meetings focused on real classroom issues with input from experienced teachers. Practical professional development in which participants try ideas, discuss, revise, etc. Also noted: There should be ongoing communication with colleges and universities to incorporate PBL Components and requirements into student teaching experience.

West Group 7	West Group 8

Suggestions include:
• Money that has been set aside for PBL assessment be given to local systems to hire master teachers who provide assistance to first year and second year teachers
• Local control
• Time provided for comprehensive program
• Video/discussion of INTASC Standards
	Menu option of four items; keep the rigor; system chooses.
	• Test
	• Interview
	• Portfolio – may be modified
	• Growth standard (not a one time, one test situation) Have a school level discussion with ILT2s as a part of the process
	  • TPAI with monthly reflection
	  • Principal or committee recommendation.
	  • Cover INTASC over three years and give options when standards are covered.
	
	Also noted:
	Reflective process is good
	Beginning teacher pay does not match expectations
	Improve student teaching
	Hire full time mentors

Additional Comments/Notes

1. Individuals who need to resubmit

   From the Southeast Regional Meeting: *WE ARE VERY CONCERNED ABOUT RESUBMISSIONS!!!! (Can we let them redo??? Since we want "Interim" requirements to be well-developed and not rushed?)

2. $500 stipend from the state for teachers completing requirements in lieu of assessment fees (Sandhills)

3. Expand probationary license to 3 years (Sandhills)

4. More uniform standards at IHEs (Sandhills)

5. Want flexible options with balance (Sandhills)

6. Retrain Mentors on current material (Sandhills)

7. **VERY IMPORTANT:** Teachers should not pay for any interim requirement since the product did not have a fee to assess paid by teachers. (Southwest)

8. DO NOT make this in addition to what teachers are already doing. (Southwest)

9. Let the decision making be at the local level. (Southwest)

10. There needs to be stronger accountability for Principals/Administrators. (Southwest)

11. Options (a menus of two of three items to clear ILT) should be allowed with parameters. (Southwest)

12. DO NOT give options(differing view was would this be defensible in court?). (Southwest)

13. Move the product to year 4. (Southwest)

14. Teachers are not returning because of the product.

15. Continue full funding for a Mentor Program.

From Brenda Dail, Perquimans County

I have just recently finished going through the NC Teaching Fellows process with our top-notch students. I was so impressed with them and the entire process. It is a wonderful, challenging and valid process (much research and documentation to support program). I was thinking this process might be a good fill-in until another process could be approved. It is a very structured and rigorous process. Naturally, we could take it to a higher level and incorporate the INTASC standards.

Writing Assessment:

I suggest that we keep the writing assessment like they do for the teaching fellows. All LEAs will receive a sealed envelope including two writing prompts. During a certain time frame all local coordinators (or designees) will be responsible for administering a 60-minute writing assignment to their local ILTs - year 2 (or people needing to meet this licensure requirement). It would be nice to have it done on computers (like we do our comps for our masters degrees). Use a website, disk or paper - I would prefer them to demonstrate technology skills. Each ILT will select one prompt to write about defending their answer or reflecting on an experience. I will fax you a copy of the Teaching Fellows writing assignment and directions for you to review. The writing assignment can be printed out, saved on a disk or sent as an attachment to our Regional ILT Coordinator. Our Regional Coordinator will get our already trained PBL assessors to meet in June to read these papers and evaluate them based on a standard four-scale rubric. This will demonstrate technology skills, reflective writing and thinking skills, etc. I don't think this is too much to ask of our ILTs. The writing assessment can be done during the month of April.

Interview Assessment:

During the months of May and June, all ILTs will schedule a 20-minute interview with three trained PBL assessors (arranged by Regional and Local ILT Coordinators). The assessors will be given a set of 5 - 8 questions designed by DPI State ILT Coordinator and team. Again, received in a sealed envelope and all will be alike and follow their directions. (I will fax you a copy of this, too). Each ILT will be asked the same questions across the state. The interview session can be judged like the Teaching Fellows interview. I will send you a copy of the scoring sheet. Each PBL assessor will give a certain score for five areas. A minimum score will be set for the interview and all writing assignments must meet "At Standard" ranking.

I realized a lot of people suggested a video taping yesterday, but a writing assessment and interview may be more valid and practical while wait for the study to be completed. Many schools do not have proper video equipment and could case a real hardship here at the last minute. I know our school system is poor and we don't have a lot of cameras. Also, teachers sometime record the same lesson over and over again until they get it perfect and this takes away from true instructional time and true learning. Plus, getting some one to record a quality video is often difficult. You get motion sickness watching some of these amateur videos. I don't think a 15-minute video allows enough time for a person to evaluate another person' s teaching abilities. Based on the TPAI training, a true evaluation should last a least 45 to 50 minutes. Snapshots alone are not very valid documentation. Plus, getting people together to view videos could cost the state more money and more trouble. Is there validity in video watching?

Hopefully, IGPs, INTASC standards and evaluations could be a part of the interview questions and/or writing assessments. (They are all very important components for an ILT to be successful).

November 22, 2002

Ms. Gayenell Campbell Gull
Mr. V. Brock Murray
Dr. Kathy Sullivan
Dr. Zoe Locklear

Greetings:

At a meeting on November 14, 2002, the personnel administrators of the Southwest Educational Alliance agreed on a recommendation to make to you regarding the interim Performance-Based Licensure requirements. We appreciate very much the opportunity to provide this input.

We want to emphasize that we are fully supportive of high standards for continuing licensure. Furthermore, we feel strongly that continuing licenses should be issued based on quality performance. In addition, one of the goals of the State Board of Education and all of our local school systems involves the recruitment and retention of **quality** teachers. These are some of the guiding principles behind our proposal.

As you know, the Initial Licensure Process that is in place now is already more rigorous than it was when the Excellent Schools Act was passed. This additional rigor is due to the alignment of the Beginning Teachers' Individual Growth Plan with the Teacher Performance Appraisal Instrument—Revised, the Pre-Conference Questions, and the rubrics that have been developed. In addition, these documents have also been correlated to the INTASC Standards, the State Board's standards, and the NBPTS Core Propositions. With these alignments, we feel strongly that the continuing licensure program for Initially Licensed Teachers must be based on the INTASC standards and the teacher's growth within these ten standards. Therefore, we strongly recommend that the Beginning Teacher Individualized Growth Plan be the **primary** document used for determining continuing licensure, along with the other TPAI-R documents. On the following page is the analysis behind this recommendation.

A further recommendation is that the General Assembly provide a fully-funded mentor program. If the new teacher is classified as an ILT, then a state-paid mentor should be provided until the new teacher qualifies for a continuing license.

Again, we appreciate this opportunity for input. Please let us know if you would like additional information.

Sincerely,

Personnel Administrators
Southwest Educational Alliance

Analysis of the Recommendation to use

THE BEGINNING TEACHER'S INDIVIDUAL GROWTH PLAN FOR CONTINUING LICENSURE

+	▲
+ Since 2000, administrators, mentors, and ILTs have been trained and/or re-trained in the use of this instrument.	▲ The State Board and/or Legislative Oversight Committee may not be aware of the BT-IGP and the revised TPAI, including the excellent Pre-Observation Questions and Rubric, as they were not in place when the Excellent Schools Act was passed. The monitoring process and evaluation system for beginning teachers are now more rigorous than when the PBL process began.
+ The BT-IGP focuses on the ten INTASC Standards, which address the main things that a teacher needs to know and be able to do.	▲ With the added focus on the BT-IGP, school systems may need to concentrate a little additional in-service time on this instrument, as well as on how to analyze one's strengths and weaknesses as they relate to the BT-IGP.
+ The legislation requires "that any interim requirements do not require significant and unnecessary paperwork, effort, and administrative burden." Since these documents and processes are already in place, this recommendation meets that requirement of the legislation.	▲ Many school systems have used the Pre-Observation Conference questions with our Initially Licensed Teachers on a trial basis (these questions were originally developed for experienced teachers). Those trials have been very successful, and we recommend that the Pre-Conference Questions and Rubric be used at least one time per year with the ILTs (not more than once because their use requires an announced observation). These questions need to be incorporated into the local performance appraisal training for ILTs.
+ With the additional focus on the BT-IGP, it becomes a more rigorous process.	▲ Someone (preferably DPI) should further develop the INTASC Key Indicators Rubric, listing suggested activities / strategies for each of the Key Indicators as well as the resources (people, funds, materials, or time) needed to accomplish each activity/strategy. This sample prescriptive growth document should be shared with all NC school systems.
+ It focuses on the GROWTH of the ILT. Certainly that should be the focus of any effective and productive recruitment, induction, retention, and licensing program.	
+ The IGP is reviewed three times per year. The school-based administrators and the mentor and/or other peers are involved in that review. As part of the review, the ILT provides documentation / evidence related to or addressing each of the INTASC standards. Over a three-year period, a minimum of nine reviews occur. A form is already provided to document these reviews.	
+ Part of the BT-IGP documentation would be verification of completion of professional development sessions related to each of the INTASC standards (for example, a minimum of 60 hours = 20 hours per year for each of the three years in the ILT program). These would not be renewal credits, but would be professional growth directly related to the Beginning Teacher Process and the INTASC Standards.	
+ One of the INTASC Standards addresses Motivation and Management of Students, one of the most common growth areas for ILTs.	
+ The Key Indicators for the INTASC Standards provide a ready-made rubric for the IGP (copy attached).	
+ This recommendation is aligned with what beginning teachers already are doing, with the addition of specified professional growth and documentation related to the INTASC standards. Perhaps one additional page would have to be added: a sign-off sheet for the school-based administrator, the mentor, and the central office regarding the ILTs readiness for a continuing license.	
+ This proposal does not require additional DPI staffing or major effort at DPI. In a year, when the state agency has already lost 30-40 positions and most departments are stressed, this is an important consideration.	

Participants in the Regional Meetings

Individual	Position	LEA
Linda Loy	Coordinator for Personnel Development	Alamance-Burlington
Sheryl Steele	Mentor Teacher	Alamance-Burlington
Rachel Walker	ILT 2	Alamance-Burlington
Liz Cronan	ILT2	Alexander County
Elizabeth Curry	Principal	Alexander County
Lynn Grogan	EC Lead Teacher	Alexander County
Barry Redmond	Associate Superintendent	Alexander County
Tanya Carmichael	ILT2	Alleghany County
Phil Howell	Principal	Alleghany County
Leann Joines	ILT1	Alleghany County
Carol Porter	Mentor Teacher	Alleghany County
Gary West	Principal	Alleghany County
Maxter Allen		Anson County
Betsy Ammons		Anson County
Melissa Edwards		Anson County
Eileen Churchill	ILT Coordinator	Arapahoe Charter
Ina Cox	Personnel Director	Ashe County
Elizabeth Cuildus		Asheboro City
Jennifer Lake		Asheboro City
Barbara Skelly		Asheboro City
Jennifer Smith		Asheboro City
Cindy Byron	Teacher	Asheville City
Vicki Dineen	Principal	Asheville City
Nancy Reid	ILT Coordinator	Asheville City/McDowell County
Greg Towsend	Mentor Teacher	Asheville City
Rachel Hollman	Director of Personnel	Avery County
Diane Jaynes	Principal	Avery County

Individual	Position	LEA
Wendi Reed	ILT 1	Baker Charter
Marti Wilson	Principal	Baker Charter
Susan Legg	Teacher	Beauford County
Nicole Howard	Principal	Beaufort County
Carolyn Satchell	Human Resources	Beaufort County
Sandra Hardy	Assistant Principal	Bertie County
Brenda Pollard	Teacher	Bertie County
Connie Richardson	Director	Bertie County
John Bettarto	Principal	Bethel Hill Charter
Gail Collie	Teacher	Bethel Hill Charter
Sandra Snead	Teacher	Bethel Hill Charter
Sandy Jones		Bladen County
Pat Holden	Director-ILT Coordinator	Brunswick County
Susan Piland	Mentor Teacher	Bumcombe County
Margaret Hyatt	Principal	Buncombe County
Don Icenhour	Principal	Buncombe County
Donna James	ILT Coordinator	Buncombe County
Cassie Ostertag	ILT	Buncombe County
Steve Demiter	Director of Personnel/ILT Coordinator	Burke County
Penny Jenkins	Mentor	Burke County
Julia Knight-Pittman	Assistant Principal	Burke County
Shanda McFarlin	Principal	Burke County
Erin Wall	ILT2	Burke County
Teresa Abernathy		Cabarrus County
Marion Bish		Cabarrus County
Vickie Honeycutt		Cabarrus County
Jonathan Newton		Cabarrus County
Colleen Sain		Cabarrus County
Paula Mickey	Personnel Director/ILT Coordinator	Camden County

Individual	Position	LEA
Mary Beth Poole	Teacher	Camp Lejeune
Tom King	Personnel Administrator	Camp Lejeune
Janet Kinney	Principal	Camp Lejeune
Lisa Griffin	Director	Cape Fear Center for Inquiry
Sarah McCorcle	Teacher	Cape Fear Center for Inquiry
Valarie Simmons	Teacher	Cape Fear Center for Inquiry
Lisa Sullivan	Teacher	Cape Fear Center for Inquiry
Barbara Brown	Licensure Specialist	Carteret County
Donna Kimbro	ILT Coordinator	Caswell
Shelba Barrett	ILT Coordinator	Catawba County
Ashley Dozier	Teacher	Chapel Hill-Carrboro City
Mary Gundeson	ILT Coordinator	Chapel Hill-Carrboro City
Helen Maxwell	Teacher	Chapel Hill-Carrboro City
Mollie Henderson		Charlotte-Mecklenburg Schools
Elaine Miller		Charlotte-Mecklenburg Schools
Teresa Shipman	Human Resources	Charlotte-Mecklenburg Schools
Valerie Williams		Charlotte-Mecklenburg Schools
Dale Bunch	Teacher	Chatham Charter School
John Cazzinni	Principal	Chatham Charter School
Judy Morris	Teacher	Chatham County
Crystal Perry	Teacher	Chatham Charter School
Rhonda Underwood	ILT Coordinator/Licensure Specialist	Chatham County
John Arnold	ILT Coordinator	Cherokee Central Schools
Wanda Arrowood	Principal	Cherokee County Schools
Tim Coffey	Director of Instruction	Cherokee County Schools
Linda Crowe	Principal	Cherokee Central Schools
Clara Gustason	Mentor Teacher	Cherokee County Schools
Arlene Huskey	Teacher	Cherokee Central Schools
Teresa Mosteller	Teacher	Cherokee County Schools

Individual	Position	LEA
David Newsome	Principal	Cherokee County Schools
Laura Hastings	Association President	CLDS
Christine Moye	ILT	CLDS
Joe Bowen		Cleveland County
Cathy Mason	Assistant Principal	Clinton City
Mary Nell Darden	Assistant Principal	Clinton City
Faye McManus	Principal	Clover Garden Charter
Charity Saunders	Teacher	Clover Garden Charter
Camille Thomas	Teacher	Clover Garden Charter
Kathryn Faulk		Columbus County
Roy Mayo		Columbus County
Amy Powell		Columbus County
Georgia Spaulding		Columbus County
Barbara Yates		Columbus County
Marnie Halvorson		Covenant Day School
Betty Blythe	Personnel Director	Craven County
Shirley Dawson	Assistant Superintendent	Craven County
Cindy Johnston	Teacher/Mentor	Craven County
Jennie Oakley	Principal	Craven County
Jewel Smith	Teacher/Mentor	Craven County
Cindy McCormic		Cumberland County
Theresa Rovry		Cumberland County
Dale Williams		Cumberland County
Anne Mackin	Personnel Director	Currituck County
Margie Parker		Dare County
Jules Crowell	Principal	Davidson County
Annette Kruse		Davidson County
Melissa MacDermid		Davidson County
Evan Myers		Davidson County

Individual	Position	LEA
Faye Patterson	ILT Coordinator	Davidson County
Amy Durso	Resource Coordinator	DHHS
Michael Viar	Licensure/Support Services Coordinator	DHHS
Carole Breerwood		Diocese of Charlotte
Rosalie Innacelli	ILT Coordinator	Diocese of Raleigh
Jennifer Haygood	Teacher Support Coordinator	DJJDP
Vicki Alabaster	ILT Coordinator	Duplin County
Minnie Bryant	Human Resource Director	Duplin County
Marian Chavious	Lateral Entry Coordinator	Duplin County
Alice Hagaman	PBL Coordinator	Durham Public
Sheila Washington-Callis	Mentor Coordinator	Durham Public
Jennifer Bellizza	Teacher	East Wake Academy
Kelly Maxson	ILT Coordinator	East Wake Academy
Michelle Alexander	HR Director	Edenton-Chowan
Debbie Burrough	ILT 2 Coach	Edenton-Chowan
Debora Lightfoot	ILT Coordinator	Edgecombe County
Joyce Harris	ILT Coordinator	Elizabeth City/Pasquotank
Victor Vance		Fort Bragg Schools
Quincy Etheridge		Gaston County
Jennifer Fannin		Gaston County
Marcia Hunter		Gaston County
Penny Powell		Gaston County
Linda Rader		Gaston County
Nina Yeargin	Director of Human Resources	Graham County Schools
Dave Bennett	HR Director	Granville County
Mekeisha Williams	Professional Development Coordinator	Granville County
Mary Beth Riddick	Teacher	Greene County
Gwen Smith	ILT Coordinator	Greene County
Raymond Smith	Director, Human Resources	Greene County

Individual	Position	LEA
Erica Summerlin	Teacher	Greene County
Sonja Fischer		Guilford County
Doris Henderson	ILT Coordinator	Guilford County
Martha Snavely		Guilford County
Audrey Young	Teacher	Guilford County
Selma Allen	Personnel Director	Halifax County
Vivian Branch	Principal	Halifax County
Chastity Kinsey	Teacher	Halifax County
Jeffrey McCain	Principal	Halifax County
Claudia Sikes	Literacy Specialist	Halifax County
Betty Ann Bowen		Harnett County
Carla Crenshaw		Harnett County
Cecilia Gregory		Harnett County
Linda Turlington Herring		Harnett County
Rebecca Caldwell	Mentor Teacher	Haywood County Schools
Kadie Franklin	ILT	Haywood County Schools
Regina Lambert	Principal	Haywood County Schools
Terry McCracken	Director of Human Resources	Haywood County Schools
Bill Nolte	Principal	Haywood County Schools
David Jones	Sr. Director of Personnel Services	Henderson County
Gailoe Johnson	Teacher	Hertford County
Betty Pyl	ILT Coordinator	Hertford County
Ric Vandett	Assistant Superintendent	Hickory City
Linda McLaughlin		Hoke County
Diantha Coley	Administrative Assistant	Hyde County
Charles Delforge	Principal	Hyde County
Bertha Valentine-Thorpe	Principal	Hyde County
Susan Norman	Lead Teacher	Jackson County
Carol Burchette	Mentor Teacher	Johnston County

Individual	Position	LEA
Kirk Denning	Principal	Johnston County
Robin Little	ILT Coordinator	Johnston County
Holly Price	ILT 2	Johnston County
Valeria Barrow	Personnel Officer	Jones County
Jerry Meaney	Teacher	Jones County
Donna Morton	Teacher	Jones County
Jo Stone	Principal	Jones County
Sherry Winn	ILT 2	Jones County
Chip Buckwell		Kannapolis City
Judy Dayroult		Kannapolis City
Judy Goodnight		Kannapolis City
Annie Pickett	Personnel Director	Kannapolis City
Kristi Stubbs		Kannapolis City
Ronnie Wilson		Kings Mountain
Lou Coggins		Lee County
Amy Thomas		Lee County
Robert Melton	ILT Coordinator	Lenoir County
Ashley Hinson		Lexington City
Melissa Pfeffer		Lexington City
Susan Vivacoua		Lexington City
Vicky Ratchford		Lincoln County
Phyllis Talbert		Lincoln County
Richard Baldwin	Director of Personnel	Macon County
Terry Bell	Principal	Macon County
Tammy Tisdale	Principal	Macon County
Theresa Banks	Associate Superintendent	Madison County
Susanne DuVall	Teacher	Madison County
Shannon Ramsey	Teacher	Madison County
Lisa Snelson	Teacher	Madison County

Individual	Position	LEA
Candi McPherson	Principal	McDowell County
Sarah Pratt	Personnel Services	McDowell County
Sandra Queen	Mentor	McDowell County
Robyn Wall	Teacher	McDowell County
Jim Washburn	Principal	McDowell County
Aimee Auman		Montgomery County
Bob Gilman		Montgomery County
Ralph Johnson		Montgomery County
Sue Long		Montgomery County
Stella Farrow		Moore County
Donna Thomas		Moore County
Carmen Vaughan		Moore County
Elizabeth Sadler		Mooresville City
Denny Barr	Assistant Principal	Mt. Airy
Gloria Best	Mentor	Mt. Airy
Whitney Blackwell	ILT2	Mt. Airy
Roberta Ackley		New Century Charter
Amy Conklin	Teacher	New Hanover County
Cary Sink	Teacher	New Hanover County
Olga Wheatley	ILT Coordinator	New Hanover County
Michael Zentwerger	Principal	New Hanover County
Larry Harris		Newton-Conover
Beckie Collins	Personnel Director	Onslow County
Cindy Paredes	ILT 3	Onslow County
Deborah Rose	Site Coordinator	Onslow County
Sue Florence	ILT Coordinator	Orange County
Judy Pounds	Teacher	Orange County
Patricia Temple	Principal	Orange County
Margaret Vaughn	Teacher	Orange County

Individual	Position	LEA
Wanda Dawson	Assistant Superintendent	Pamlico County
Deloris Rhodes	Director of Personnel	Pender County
Brenda Dail	Personnel Director	Perquimans County
Jennifer Kiesicki	Teacher	Perquimans County
Judith Hunley	Teacher	Person County
Donna Jerry	Assistant Director/Personnel	Person County
Kim Kauffman	Mentor Teacher	Person County
Chera Cayton	Teacher	Pitt County
Walter Claybrook	Assistant Principal	Pitt County
Sheridan Holstein	ILT Coordinator	Pitt County
Virginia Simmons	Assistant Principal	Pitt County
Margaret Wirth	Teacher	Pitt County
Cathy Childress	Principal	Polk County
Rick Howell	Principal	Polk County
Mary Margaret Ingle	Associate Superintendent	Polk County
Stephanie Bridges	Assistant Principal	Randolph County
Nancy Cross	Instructional Lead Teacher	Randolph County
Judi Moffitt	Coordinator for Personnel Support	Randolph County
Kelli Vann	Teacher	Randolph County
K. Luann Greene		Richmond County
Lane Street		Richmond County
Martha Webb		Richmond County
Linda Humble	ILT Coordinator/Principal	River Mill Academy
Mildred Hurteau	Teacher	River Mill Academy
Joan Love	Teacher	River Mill Academy
Joyce Kennedy	Personnel Director	Roanoke Rapids
Gene Freeman		Robeson County
Vicki Gibson		Robeson County
Melinda Powers		Robeson County

Individual	Position	LEA
Jay Jones	ILT Coordinator	Rockingham County
Delores Morris		Rowan Salisbury
Jean Kennedy		Rowan-Salisbury
Sandra Rogers		Rowan-Salisbury
Mandi Sweet		Rowan-Salisbury
Donna Wiseman		Rowan-Salisbury
Steven Helton	Assistant Principal	Rutherford County
Marty Hopper	Principal	Rutherford County
Diann Johnson	Assistant Principal	Sampson County
Rhonda Spell	Assistant Principal	Sampson County
Elizabeth Wheeler	Teacher	Sampson County
Ellen Jones		Scotland County
Leslie Knauss		Scotland County
Patricia McLean		Scotland County
Any Sloop		Scotland County
Donna Suttle		Shelby City
Peggy Furr		Stanly County
Terry Griffin		Stanly County
Debby Johnston		Stanly County
Angela Mills		Stanly County
Susan Shields		Stanly County
Melisa Jessup	Human Resources	Stokes County
Jennifer Scott	Director of Professional Development	Surry County
Bill Hester	ILT	Swain County
Bobby Marr	Associate Superintendent	Swain County
Jody Marr	Mentor Teacher	Swain County
Sam Pattillo	Principal	Swain County
Os Waters	Principal	Swain County
Barbara Armstrong		Thomasville City

Individual	Position	LEA
Elizabeth Ballard	ILT	Transylvania County
Amy Schoenacher	Mentor	Transylvania County
Betty Scruggs	Assistant Principal	Transylvania County
James Cahoon	Assistant Superintendent/ILT Coord.	Tyrrell County
Pearl Ogletree	Director, C&I	Tyrrell County
Joanne Smith	Teacher	Tyrrell County
Patty Spencer	Support Teacher	Tyrrell County
Terri Cooper		Union County
Sarah Bristow	Teacher	Vance Charter School
Vivian Bullock	ILT Coordinator	Vance County
Carolyn Powell	Principal	Vance Charter School
S. Wall		Vance Charter School
Gail Washington	Teacher	Vance Charter School
Anne Hudson	Elementary ILP Coordinator	Wake County
Luana McCamy	Teacher/ILP Coordinator	Wake County
Mary Page	Principal	Wake County
Judy Stines	Secondary ILP Coordinator	Wake County
Wendy Thomas	Administrator	Wake County
Lisa Woodside	ILT 3	Wake County
Princine Jefferies	Assistant Superintendent	Warren County
Chelsa Jennings	Teacher	Warren County
Joyce Long	Principal	Warren County
Willistine Williams	Teacher	Warren County
Gail Ford	K-8 ILT Coordinator	Watauga County
Phyllis Garr	Mentor Teacher	Watauga County
Clarissa Schanal	HS ILT Coordinator	Watauga County
Angela Watson	Teacher/Mentee	Watauga County
Carla Anderson	Teacher	Wayne County
Debbie Durham	ILT Coordinator	Wayne County

Individual	Position	LEA
Teresa Simmons	Mentor Teacher	Wayne County
Diane Watts	Assistant Principal	Wayne County
Jenny Whitfield	Principal	Wayne County
Donna Draper	Teacher/Support Coach	Weldon City
Betty Hanks	Counselor/Support Coach	Weldon City
Roger Metcalf	Director	Western-RESA
Milton Frink		Whiteville City
Chinaki Jal		Whiteville City
Katie McLam		Whiteville City
Deanna Sherman		Whiteville City
Jerry Barlett	Principal	Wilkes County
Deborah Elleridge	ILT Coordinator	Wilkes County
Bob Hobert	Principal	Wilkes County
Charles Davis	Principal	Winston-Salem Forsyth
James Lucas	ILT Coordinator	Winston-Salem Forsyth
Fran Oates	Dir. of Staff Development/ILT Coor.	Winston-Salem Forsyth
Suzanne Sarfert	ILT2	Winston-Salem Forsyth
Jane Thomas	Mentor Teacher	Winston-Salem Forsyth
Ann Marie Wasson	ILT3	Yadkin County
Karen Matthew	ILT Coordinator	Yadkin County
Brenda Perdue	Mentor	Yadkin County
James Sheek	Principal	Yadkin County

APPENDIX C

Participants

December 3, 2002 Meeting

Individual	LEA Affiliation
Barbara Armstrong	Thomasville City
Cecil Banks	NCPTSC
Velma Barnes	Wilson County
Valeria Barrow	Jones County
Becky Blomgren	Greensboro College
Betty Blythe	Craven County
Chip Buckwell	Kannapolis City
Vivian Bullock	Vance County
Angela Farthing	NCAE
Alice Hagaman	Durham County
Larry Harris	Newton-Conover
Dorsey Harris	NCAE
Susan Harrison	Wake County
Parmalee Hawk	East Carolina University
Doris Henderson	Guilford County
Ashley Hinson	Lexington City
Vickie Honeycutt	Cabarrus County
Anne Hudson	Wake County
Gary Jarrett	DPI
Melisa Jessup	Stokes County
Jay Jones	Rockingham County
Jean Kennedy	Rowan-Salisbury
Debora Lightfoot	Edgecombe County
Robin Little	Johnston County
Zoe Locklear	DPI

Individual	LEA Affiliation
Penny Maguire	DPI
Karen Matthews	Yadkin County
Robert Melton	Lenoir County
Delores Morris	Rowan-Salisbury
Brock Murray	DPI
Bennett Myers	Craven County
Jane Norwood	SBE
Faye Patterson	Davidson County
Philip Price	DPI
Vicki Rivenbark	Onslow County
Sandra Rogers	Rowan-Salisbury
Tony Romano	Charlotte-Mecklenburg
Susan Simpson	PENC
Judy Stines	Wake County
Linda Suggs	DPI
Joyce Wade	Johnston County
Olga Wheatley	New Hanover County
Claire White	NCPTA
Devon White	PENC
Margaret Wirth	Pitt County

APPENDIX D

INTASC STANDARDS

INDIVIDUALIZED GROWTH PLAN

TPAI-R

The INTASC Standards

Standard 1: Content Pedagogy
The teacher understands the central concepts, tools of inquiry, and structures of the discipline he or she teaches and can create learning experiences that make these aspects of subject matter meaningful for students.

Standard 2: Student Development
The teacher understands how children learn and develop, and can provide learning opportunities that support a child's intellectual, social, and personal development.

Standard 3: Diverse Learners
The teacher understands how students differ in their approaches to learning and creates instructional opportunities that are adapted to diverse learners.

Standard 4: Multiple Instructional Strategies
The teacher understands and uses a variety of instructional strategies to encourage student development of critical thinking, problem solving, and performance skills.

Standard 5: Motivation and Management
The teacher uses an understanding of individual and group motivation and behavior to create a learning environment that encourages positive social interaction, active engagement in learning, and self-motivation.

Standard 6: Communication and Technology
The teacher uses knowledge of effective verbal, nonverbal, and media communication techniques to foster active inquiry, collaboration, and supportive interaction in the classroom.

Standard 7: Planning
The teacher plans instruction based upon knowledge of subject matter, students, the community, and curriculum goals.

Standard 8: Assessment
The teacher understands and uses formal and informal assessment strategies to evaluate and ensure the continuous intellectual, social, and physical development of the learner.

Standard 9: Reflective Practice: Professional Growth
The teacher is a reflective practitioner who continually evaluates the effects of his or her choices and actions on others and who actively seeks out opportunities to grow professionally.

Standard 10: School and Community Involvement
The teacher fosters relationships with school colleagues, parents, and agencies in the larger community to support students' learning and well-being.

DIRECTIONS FOR THE USE OF THE BEGINNING TEACHER'S INDIVIDUALIZED GROWTH PLAN (IGP)

1. Fill in identifying data on the beginning teacher and the mentor teacher. Specify the school year and indicate (by circling 1, 2, or 3) if the beginning teacher is in the first, second, or third year of the Initial Licensure Program.

2. Review the 10 INTASC Standards for Beginning Teachers. Using the attached form, assess the beginning teacher's standing relative to each of the standards.

3. Based on the review of the INTASC standards, identify the standard(s) on which the beginning teacher will focus for the IGP year.

4. Identify the Key Indicators on which the beginning teacher will focus during the IGP year.

5. Identify the Activities/Strategies the beginning teacher will use to focus on the targeted Key Indicators during the IGP year.

6. Identify the Resources (people, funds, materials, or time) need to accomplish each activity/strategy.

7. Identify a target date for each activity/strategy.

8. Record the completion date for each activity/strategy.

9. Identify evidence of completion of each activity/strategy.

10. Near the end of the school year, the beginning teacher, the mentor teacher, and the supervisor should each assess the progress of the beginning teacher in realizing the targeted Key Indicators. Each should sign and date the comments.

11. Throughout the year, periodic conferences should be conducted to assess the beginning teacher's progress in realizing the targeted Key Indicators. Summaries of these conferences should be recorded on the Assessment Conferences sheet. Additional copies of this sheet should be made as needed.

BEGINNING TEACHER INDIVIDUALIZED GROWTH PLAN

School Year: _____ ILP Year: 1 2 3 (Circle)

Name: _____ Position/Subject Area: _____ School: _____

Mentor: _____ Postion/Subject Area: _____ School: _____

INTASC Standards for Beginning Teachers

1. Content Pedagogy
2. Student Development
3. Diverse Learners
4. Multiple Instructional Strategies
5. Motivation and Management
6. Communication and Technology
7. Planning
8. Assessment
9. Reflective Practice: Professional Growth
10. School and Community Involvement

Focus Standards:

Key Indicators	Activities (Strategies)	Resources	Target Date	Completion Date	Evidence of Completion

Beginning Teacher's Summative Assessment

Signature: _____ Date: _____

Mentor's Summative Assessment

Signature: _____ Date: _____

Supervisor's Summative Assessment

Signature: _____ Date: _____

ASSESSMENT CONFERENCES

Date	Beginning Teacher's Assessment/Comments	Mentor's/Principal's Assessment/Comments
	Signature: _____	Signature: _____
	Signature: _____	Signature: _____
	Signature: _____	Signature: _____

INTASC STANDARDS ASSESSMENT

1: Content Pedagogy	2: Student Development	3: Diverse Learners	4: Multiple Instructional Strategies	5: Motivation and Management
+ ▲	+ ▲	+ ▲	+ ▲	+ ▲
6: Communication/Technology	**7: Planning**	**8: Assessment**	**9: Reflective Practice**	**10: School/Community Involvement**
+ ▲	+ ▲	+ ▲	+ ▲	+ ▲

Teacher Performance Appraisal System – Revised

Teacher's Name _____ School/Location _____

INSTRUCTIONS

- Based on the evidence from observation, artifacts, and discussion, the evaluator is to rate the teacher's performance with respect to the 8 major functions of teaching listed below.
- The evaluator must add pertinent comments at the end of each major function for which a rating of Above Standard, Below Standard, or Unsatisfactory is given.
- The teacher is provided an opportunity to react to the evaluator's ratings and comments.
- The evaluator and the teacher must discuss the results of the appraisal and any recommended actions pertinent to it.
- The teacher and the evaluator must sign the instrument in the assigned spaces.
- The instrument must be filed in the teacher's personnel folder.
- The rating scale will include the four Levels of Performance described below.

4. Above Standard

Performance within this function area is consistently high. Teaching practices are demonstrated at a high level. Teacher seeks to expand scope of competencies and undertakes additional, appropriate responsibilities.

3. At Standard

Performance within this function area is consistently adequate or acceptable. Teaching practices fully meet all performance expectations at an acceptable level. Teacher maintains an adequate scope of competencies and performs additional responsibilities as assigned.

2. Below Standard

Performance within this function area is sometimes inadequate or unacceptable and needs improvement. Teacher requires supervision and assistance to maintain an adequate scope of competencies and sometimes fails to perform additional responsibilities as assigned.

1. Unsatisfactory

Performance within this function area is consistently inadequate or unacceptable and most practices require considerable improvement to meet minimum performance expectations. Teacher requires close and frequent supervision in the performance of all responsibilities.

Above Standard	At Standard	Below Standard	Unsatisfactory

1. Major Function: Management of Instructional Time

1.1 Teacher has materials, supplies, and equipment ready at the start of the lesson or instructional activity.
1.2 Teacher gets the class started quickly.
1.3 Teacher uses available time for learning and keeps students on task.

Comments: _____

Above Standard	At Standard	Below Standard	Unsatisfactory

2. Major Function: Management of Student Behavior

2.1 Teacher has established a set of rules and procedures that govern the handling of routine administrative matters.
2.2 Teacher has established a set of rules and procedures that govern student verbal participation and talk during different types of activities—whole class instruction, small group instruction, etc.
2.3 Teacher has established a set of rules and procedures that govern student movement in the classroom during different types of instructional activities.
2.4 Teacher frequently monitors the behavior of all students during whole-class, small group, and seat work activities and during transitions between instructional activities.
2.5 Teacher stops inappropriate behavior promptly and consistently, yet maintains the dignity of the student.
2.6 Teacher analyzes the classroom environment and makes adjustment to support learning and enhance social relationships.

Comments: _____

Above Standard	At Standard	Below Standard	Unsatisfactory

3. Major Function: Instructional Presentation

3.1 Teacher links instructional activities to prior learning.
3.2 Teacher understands the central concepts, tools of inquiry, and structures of the discipline(s) he or she teaches and creates learning activities that make these aspects of subject matter understandable and meaningful for students.
3.3 Teacher speaks fluently and precisely.
3.4 Teacher provides relevant examples and demonstrations to illustrate concepts and skills.
3.5 Teacher assigns tasks and asks appropriate levels of questions that students handle with a high rate of success.
3.6 Teacher conducts the lesson or instructional activity at a brisk pace, slowing presentations when necessary for student understanding but avoiding unnecessary slowdowns.
3.7 Teacher makes transitions between lessons and between instructional activities within lessons effectively and smoothly.
3.8 Teacher makes sure that assignment is clear.
3.9 The teacher creates instructional opportunities that are adapted to diverse learners.
3.10 The teacher uses instructional strategies that encourage the development of critical thinking, problem solving, and performance skills.
3.11 The teacher uses technology to support instruction.
3.12 The teacher encourages students to be engaged in and responsible for their own learning.

Comments: _____

Above Standard	At Standard	Below Standard	Unsatisfactory

4. Major Function: Instructional Monitoring

4.1 Teacher maintains clear, firm, and reasonable work standards and due dates.
4.2 Teacher circulates to check all students' performance.
4.3 Teacher routinely uses oral, written, and other work products to evaluate the effects of instructional activities and to check student progress.
4.4 Teacher poses questions clearly and one at a time.
4.5 Teacher uses student responses to adjust teaching as necessary.

Comments:

Above Standard	At Standard	Below Standard	Unsatisfactory

5. Major Function: Instructional Feedback

5.1 Teacher provides feedback on the correctness or incorrectness of in-class work to encourage student growth.
5.2 Teacher regularly provides prompt feedback on out-of-class work.
5.3 Teacher affirms a correct oral response appropriately and moves on.
5.4 Teacher provides sustaining feedback after an incorrect response by probing, repeating the question, giving a clue, or allowing more time.
5.5 The teacher uses knowledge of effective verbal and non-verbal communication techniques to foster active inquiry, collaboration, and supportive interaction in the classroom.

Comments:

Above Standard	At Standard	Below Standard	Unsatisfactory

6. Major Function: Facilitating Instruction

6.1 Teacher has long- and short-term instructional plans that are compatible with school and district curricular goals, the school improvement plan, the NC Standard Course of Study, and the diverse needs of students and the community.
6.2 Teacher uses diagnostic information obtained from tests and other formal and informal assessment procedures to evaluate and ensure the continuous intellectual, social, and physical development of the learner.
6.3 Teacher maintains accurate records to document student performance.
6.4 Teacher understands how students learn and develop and plans appropriate instructional activities for diverse student needs and different levels of difficulty.
6.5 Teacher uses available human and material resources to support the instructional program.

Comments:

Above Standard	At Standard	Below Standard	Unsatisfactory

7. Major Function: Communicating within the Educational Environment

7.1 Teacher treats all students in a fair and equitable manner.
7.2 Teacher participates in the development of a broad vision of the school.
7.3 Teacher fosters relationships with school colleagues, parents, and community agencies to support students' learning and well-being.

Comments: _____

Above Standard	At Standard	Below Standard	Unsatisfactory

8. Major Function: Performing Non-Instructional Duties

8.1 Teacher carries out non-instructional duties as assigned and/or as need is perceived to ensure student safety outside the classroom.
8.2 Teacher adheres to established laws, policies, rules, and regulations.
8.3 Teacher follows a plan for professional development and actively seeks out opportunities to grow professionally.
8.4 Teacher is a reflective practitioner who continually evaluates the effects of his or her decisions and actions on students, parents, and other professionals in the learning community.

Comments: _____

Evaluator's Summary Comments _____

Teacher's Reactions to Evaluation _____

_____ _____

Evaluator's Signature and Date Teacher's Signature and Date

Signature indicates that the written evaluation has been seen and discussed.

What Was Required	What Will Be Required	If We Did Nothing
4 observations (GS 115C-333[a])	4 observations (GS 115C-333[a])	4 observations (GS 115C-333[a])
Annual Summative Evaluation (GS 115C-333[a])	Annual Summative Evaluation (GS 115C-333[a])	Annual Summative Evaluation (GS 115C-333[a])
Individual Growth Plan	Individual Growth Plan	Individual Growth Plan
Mentor	Mentor	Mentor
Development of Product	Professional Development focused on INTASC Standards	
For a Continuing License ❖ 3 years of satisfactory teaching as determined by LEA ❖ satisfactory performance on product ❖ ethical and moral conduct	For a Continuing License ❖ 3 years of satisfactory teaching as determined by LEA ❖ recommendation of LEA ❖ ethical and moral conduct	For a Continuing License ❖ 3 years of satisfactory teaching as determined by LEA ❖ recommendation of LEA ❖ ethical and moral conduct
❖ Unit Plan and Goals ❖ Five Lesson Plans from Unit ❖ Related Student Work (Class and Unique Learner) ❖ Related Assessment/Test Data (Class and Unique Learner) ❖ Video ❖ Video Narrative ❖ Reflection on each component ❖ Sample from Parent Communication Log ❖ Classroom Management Plan ❖ Sample from Log of Discipline Incidents ❖ **Copy of Individual Growth Plan** ❖ Professional Growth Log	❖ Statement from LEA related to INTASC Standards ❖ **Copy of Individual Growth Plan** ❖ Copy of observations and evaluations ❖ Documentation of professional development activities focused on INTASC Standards ❖ Documentation of meetings with mentor teacher	

What Was Required	What Will Be Required	If We Did Nothing
4 observations (GS 115C-333[a])	4 observations (GS 115C-333[a])	4 observations (GS 115C-333[a])
Annual Summative Evaluation (GS 115C-333[a])	Annual Summative Evaluation (GS 115C-333[a])	Annual Summative Evaluation (GS 115C-333[a])
Individual Growth Plan	Individual Growth Plan	Individual Growth Plan
Mentor	Mentor	Mentor
Development of Product	Professional Development focused on INTASC Standards	
For a Continuing License ❖ 3 years of satisfactory teaching as determined by LEA ❖ satisfactory performance on product ❖ ethical and moral conduct	For a Continuing License ❖ 3 years of satisfactory teaching as determined by LEA ❖ recommendation of LEA ❖ ethical and moral conduct	For a Continuing License ❖ 3 years of satisfactory teaching as determined by LEA ❖ recommendation of LEA ❖ ethical and moral conduct
❖ Unit Plan and Goals ❖ Five Lesson Plans from Unit ❖ Related Student Work (Class and Unique Learner) ❖ Related Assessment/Test Data (Class and Unique Learner) ❖ Video ❖ Video Narrative ❖ Reflection on each component ❖ Sample from Parent Communication Log ❖ Classroom Management Plan ❖ Sample from Log of Discipline Incidents ❖ **Copy of Individual Growth Plan** ❖ Professional Growth Log	❖ Statement from LEA related to INTASC Standards ❖ **Copy of Individual Growth Plan** ❖ Copy of observations and evaluations ❖ Documentation of professional development activities focused on INTASC Standards ❖ Documentation of meetings with mentor teacher	

Options Considered

- Reinstatement of Principles of Learning and Teaching Exam
- Test of Teaching Knowledge
- State-administered Interview
- Reinstatement of Renewal Requirements
- Options Generated by Practitioners (Pages 3 - 14)

Development of Current Proposal

- 8 Regional Meetings in November
  349 participants (Pages 15 - 26)
- December 3, 2002 Meeting
  45 participants (Pages 27 - 28)
- Discussed by SBE on December 4, 2002
- Approved by SBE on December 12, 2002

INTASC Standards

Interstate New Teacher Assessment and Support Consortium
(Page 30)

- Content Pedagogy
- Student Development
- Diverse Learners
- Multiple Instructional Strategies
- Motivation and Management
- Communication and Technology
- Planning
- Assessment
- Reflective Practice/ Professional Growth
- School and Community Involvement

Proposed Interim Requirements

- LEA will assess whether or not the beginning teacher has adequately demonstrated competency with all INTASC Standards.
- Continuing License will be issued upon recommendation of the LEA.
- Beginning teachers will be required to participate in professional development activities focused on the INTASC Standards.

Proposed Interim Requirements (continued)

- Beginning teachers, along with their mentors, will be required to participate in regular meetings within their school/LEA communities focused on the INTASC Standards.
- Beginning teachers and their mentors are to have individual conferences focused on the needs of the beginning teacher.

Proposed Interim Requirements (continued)

- The following materials will be submitted to the State
  - Copy of the Individual Growth Plan
  - Copy of the TPAI-R Observations and Summative Evaluations
  - LEA Statement of whether or not the beginning teacher has demonstrated competency with all INTASC Standards
  - Documentation of Professional Development Activities completed by the beginning teacher
  - Documentation of beginning teacher/mentor meetings

State Review of Materials Submitted

Purpose: To validate the LEA assessment of competency with the INTASC Standards

~~Licensure Decisions~~

Concerns Addressed

- Time Consuming
- Focus on Assessment, rather than Support
- Individuals who do not know teachers are making license decisions
- Video

Tab 5

Public Schools of North Carolina

State Board of Education
Phillip J. Kirk, Jr., Chairman

http://www.dpi.state.nc.us

Department of Public Instruction
Michael E. Ward, State Superintendent

Proposed Technical Proposal For the DPI RFP 40-TextbookWarehouse Feasibility Study

Date Submitted: November 13,2001
Vendor Name: Innovate E-Commerce, Inc.
Contact Name: Robert Veranes
Contact Email-Address:
rveranes@innovateec.com
Phone Number: 919-968-1646

INNOVATE
E-COMMERCE INC.

160 North Craig Street
Pittsburgh, PA 15213

Table of Contents

This page intentionally left blank

1 CORPORATE BACKGROUND & EXPERIENCE

Innovate was founded by professionals with extensive experience in Supply Chain Management and Electronic Commerce across a broad spectrum of Business and Technology areas. Among the professional staff there is extensive experience in logistics, warehouse operations, and warehousing technology such as bar coding. Among the particular team Innovate has in mind for the DPI project are individuals possessing experience with financial models and accounting. A major focus of the company has been on helping companies take advantage of the opportunities afforded by adopting technological capabilities. These opportunities are not simply based on technology, but on the optimization of business process and organizational change dynamics.

Broadly, Innovate business solutions fall into three areas: planning, implementation and management of business strategies and technologies. Through technology, we help clients *bring innovation to their business*. In doing so, clients are able to forge ahead into new markets, dramatically improve business processes, open new avenues in serving customers, reduce supply chain inefficiencies, and lower costs of doing business.

The figure below indicates the three primary areas of focus for Innovate. We provide services that help our clients Plan, Implement and Manage E-Commerce related environments.

Planning services include Strategic Planning, Implementation Planning, Security Planning, Environmental Assessments, and Optimization of Infrastructure to support E-Commerce, logistics planning, use of bar code technologies, and Package Selection of appropriate hardware and software to support business operations.

Implementation services include: building web sites to support customer self service across the entire order to cash cycle, building and implementing complete audit and control tracking systems to manage the diverse set of data used to support E-Commerce, migration of applications from legacy platforms, Web-enabling legacy applications, implementation of new E-Commerce capabilities, identification and incorporation of bar code technology into manufacturing, distribution and logistics, and Integration with back end execution systems across a broad spectrum of functional business areas.

Managing includes: In-sourcing, Outsourcing, and Co-sourcing of a company's E-Commerce environment. Innovate runs an outsourced service for companies that process approximately 5 million critical business transactions annually. We co-source for many companies in which the E-Commerce application remains on their site while Innovate consultants manage the day-to-day operations remotely. We also in-source where Innovate consultants are onsite managing the day-to-day operations and enhancing the system based on business needs.

Technologies often include traditional EDI, XML, the Internet, Data Warehousing, Workflow, E-mail, Electronic Catalogs, bar coding, and integration with back end applications such as Enterprise Requirements Planning (ERP), Materials Requirements Planning (MRP), Manufacturing Requirements Planning (MRP2), Customer Relationship Management (CRM), and Supply Chain Management (SCM) systems and front-end Portal and Procurement systems.

Innovate E-Commerce believes it is uniquely suited to the feasibility study due to its extensive experience in logistics, distribution and warehousing as well as its familiarity with North Carolina government and eGovernment technology strategy.

1.1 Management Approach

Innovate E-Commerce will employ experts in all aspects of Warehousing, logistics, audits and controls, accounting, and financial modeling. Each of these professionals are highly skilled in their particular areas. Each has worked extensively in the key industries and has worked with the Office of the State Controller (OSC) on policies and controls, Financial Modeling for the IRM and ITS Operations, and has acted as technical consultants, when called on, to assist the e-procurement team in architecture and design.

1.2 Industry Innovation/Best Practices

Based on staff experience in the distribution industry including product logistics, order fulfillment, receiving, put-away, picking, and shipping Innovate represents a hand-in-glove fit with the needs conveyed by the State for the DPI feasibility study. In addition, among our unique staff are degreed accounting and financial professionals with experience with the automation of accounting processes. Our team of e-commerce professionals possessing traditional EDI, internet, and bar coding expertise will allow the state to benefit from their experience and knowledge of best practices. Examples of industry "Best Practices" include:

- Automated receiving (with vendor compliance)
- Using bar-coded home locations (possibly global location bar code schemas) within the warehouse to improve accuracy and speed physical counts
- Automated generation of order picking manifest from on-line orders with consideration given to locations and picking efficiency
- Automated inventory system updates (from inbound and outbound scanning process)
- Automated invoicing and record keeping from order shipment records
- Automated online-order placement, order status, and availability
- Distribution performance reports

1.3 Prior Related Experience

Innovate E-Commerce has been a leader in e-Government strategy development for the state of North Carolina. It has worked with the state in developing architectures and designs for enterprise services. Among the projects and experience that Innovate has performed include:

1. Assisted hundreds of companies with the automation of all aspects of business from order placement to accounting and inventory control.

2. Management of a business center supporting several hundred inventory and accounting system installations.
3. Voting member of the Uniform Code Council Shipping Container Marking and Labeling Committee.
4. Staff with over thirteen years of concentrated experience in distribution.
5. Authored and administered the bar code specifications impacting 1,200 suppliers to varied distribution centers across the country.
6. Architecture Development for the State of North Carolina, examples can be found at: http://irm.state.nc.us/techarch/archfrm.htm
7. Built a Common Payment Engine for handling all payments of credit cards, ACH and future check processing.
8. Migration Study for the DPI that included a model for Textbook Warehouse directions as well as other DPI systems.
9. On-site review of the DPI Textbook Warehouse logistical and accounting operations.

Innovate E-Commerce has also been a principal player in the distribution industry with roles in organizations molding e-commerce and bar code standards. Within the distribution industry, Innovate has worked closely with accounting and product logistics staffs in formulating new strategies for increased efficiency.

Innovate has designed and developed a number of on-line procurement mechanisms requiring integration to existing application systems.

2 FINANCIAL STATEMENT

3 PROJECT ORGANIZATION

The project will focus on providing increased efficiency of operation, comparison of costs of the same title, review of accounting operations, and solutions for fully utilizing the State's new e-procurement system to allow LEAs to order textoooks online. Interim (bi-weekly) status reports and a final report will also be a part of the project.

3.1 Project Request

The state of North Carolina Department of Public Instruction (DPI) has submitted an RFP for a Feasibility Study encompassing the operations of the DPI Textbook Warehouse for purpose of: improving operational efficiency, analyzing cost comparisons with textbook distribution centers in other states, reviewing accounting operations, and providing solutions for full utilization of the State's e-procurement system.

3.2 Background

The DPI Textbook warehouse currently receives fax and paper orders from the local school districts. These orders are manually entered into a computer system, pooled and placed with various publishing houses. Any inquiries regarding order status are made via telephone with a member of the warehouse staff.

Upon receipt, inbound warehouse shipments are processed by manual methods and stored on either the metal rack system or on skids in between aisles. Orders for the school districts are constructed from these inventories and shipped via carriers.

The state of North Carolina realizes that greater efficiency and higher service levels may be achieved with strategic and technological advancements.

3.3 Scope

The scope of this engagement would include four primary areas of focus with an overall objective of assisting the State of North Carolina in improving the efficiency and effectiveness of the DPI Textbook Warehouse. The four core areas of project focus include:

1. Efficiency of Operation
2. Cost Comparison
3. Review of Accounting Operations
4. E-Procurement Solutions
5. Determine if the current warehouse distribution system is the most effective/efficient way to distribute textbooks to North Carolina public schools.

3.4 Proposed Project Team

The proposed project team would consist of Innovate E-Commerce staff with participation from the Department of Public Instruction. The senior experts are listed below. Specialized expertise will be called on as appropriate.

3.5 Roles and Responsibilities

Role	Responsibility
Project Executive (Robert Veranes)	Overall project completion and timely delivery
Warehousing & Logistics Expert (Stephanie Maust, others)	WHS assessment and improvements
Financial Modeling and Accounting Experts (Mike Blakley, others)	Analyze auditing controls and processes, build financial models
DPI Textbook Warehouse Management	Participation in research and recommendations
DPI Textbook Warehouse staff	For interviews
OSC/E-Procurement	For interviews

4 TECHNICAL APPROACH

Innovate E-Commerce believes that a solution for improvement of the DPI Textbook Warehouse is multi-faceted. First, the overall warehouse layout is not conducive to optimal productivity of core warehouse functions such as receiving, order fulfillment, order staging, shipping and physical inventory counts. Secondly, the systems supporting these core warehouse functions and administrative business functions (inbound and outbound order placement, invoicing, order/shipment status, and accounting record keeping) need intensive evaluation for time savings and overall efficiency measures. Possible solutions include new processes, greater utilization of State available technologies, new technology, equipment, and fixtures.

4.1 Proposed Solution

Specific solutions will be included in the deliverables resulting from this project along with prioritization of recommendations based upon projected cost benefit analysis. The recommendations will be derived from research of four primary areas of focus.

4.1.1 Feasibility Study

A feasibility study affords numerous advantages to the state. In the quest to improve efficiency and better serve customers, there has to be some quantitative measurement in determining the types of changes that should occur. A feasibility study allows for a formalized forum by which existing processes and performance may be documented and compared to the operations of textbook distribution centers (DCs) in South Carolina, Tennessee, Florida, Texas, New Mexico, and Virginia. The study will provide a methodology for the capture and analysis of comparative data. That knowledge can then be utilized in formulating strategies and recommendations for enhanced operational efficiency.

4.1.2 Cost Comparison

Data captured during the feasibility study will be analyzed using various financial models. These models will be designed to facilitate a comprehensive, yet easily referenced cost comparison of textbook distribution activities, costs and performance.

4.1.3 Review of Accounting Operations

Our consultants have worked in the accounting environment and assisted companies across the U.S. with automation of accounting functions. In addition, our consultants have been involved in initiatives to standardized accounting-based electronic documents. The outcome of the feasibility study will assist in identifying deviations in processes and efficiency in accounting practices. This comparative data combined with the expertise of our consultants will allow for optimal results in improving accounting practices, procedures, internal controls, and overall efficiency.

4.1.4 E-Procurement

Having developed a variety of e-procurement options, our technicians will review the State's new E-Procurement system and in coordination with other feasibility team members will formulate workable recommendations for full integration of DPI, NCAS, and proposed operational improvements. The top priorities to the end will include: on-line textbook order placement, on-line order status, and textbook availability.

4.2 Vendor Relationships

In preparing recommendations for improvement particularly as is relates to Distribution Center receiving functions, the technological capabilities of DPI vendors should be considered and factored into any pertinent recommendations for improvement.

4.3 LEA Capabilities

In preparing recommendations that will allow LEAs to fully utilize the State's new E-Procurement system for on-line ordering, consideration will need to be given to current capabilities and the most effective method of access that also minimizes ongoing technological maintenance.

4.4 Standards

There are a number of standards that will be applied in the analysis and recommendations. Some of the standards that will be referenced include: product level book industry standards (ISBN), carton level marking global standards, shipment level marking global standards, global location standards, generally accepted accounting procedures (GAAP), OSC G.S. 143B-426.39, various e-commerce (ANSI/ASC) and ISO standards.

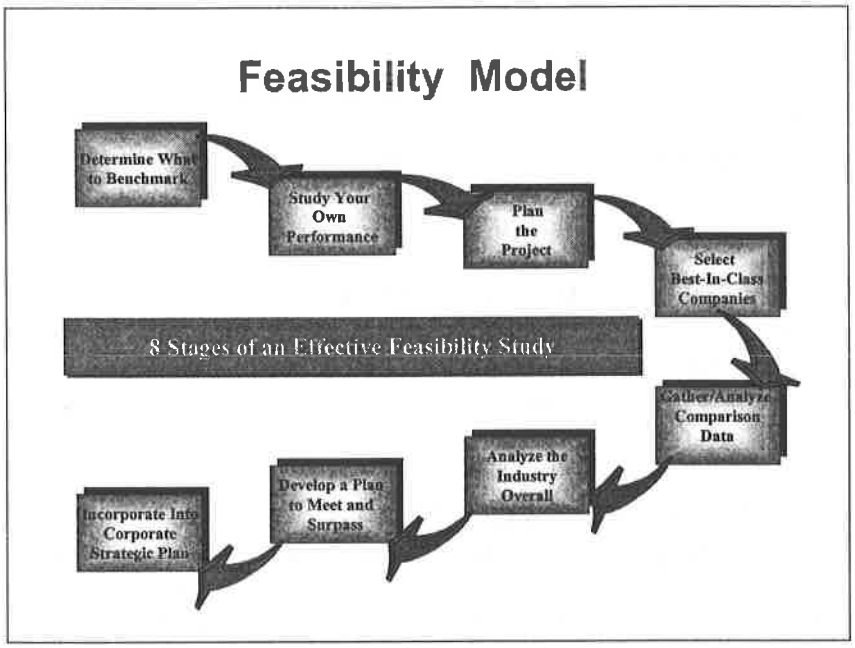
4.5 Technical Architecture

In formulating recommendations, careful attention will be given to existing state-wide technical architecture guidelines, constraints, and capabilities. Existing solutions (ie. E-Procurement, NCAS) should be considered and utilized to the fullest extent possible in improving DPI operations.

4.6 Description of Approach

Innovate E-Commerce proposes that solutions be sought using a feasibility study as an avenue for investigation and proof of concept for proposed DPI Textbook Warehouse changes. The study would encompass all three areas of DC functions previously discussed: efficiency of operation, cost comparison, and review of accounting operations.

Benchmarking is, in essence, a standardized change methodology that allows for a systematic analysis and strategy formation.



STAGE 1 – DETERMINE FEASIBILITY PRIORITIES

This stage would include:

- Documenting the current business processes related to the DPI Warehouse with primary emphasis on processes with highest impact on productivity and service.
- Documenting the information and correlating systems flow associated with the targeted processes.
- Document accounting processes, policies, and procedures.
- Documenting distribution center benchmarks for South Carolina, Tennessee, Florida, Texas, New Mexico, and Virginia.

STAGE 2 – STUDY YOUR OWN PERFORMANCE

It is our understanding that the DPI warehouse has minimal internal measurements in place. These existing as well as some new measurement tools will aid in better understanding current productivity.

- Identify specific topics among those determined in Stage 1 such as:
  - Number of employees versus overhead costs thereof
  - Number of textbooks distributed and timeframes
  - Size of student populations for each DC included in study
  - Timeframes for ordering and receiving LEA textbooks
  - Other financial data
- Collect quantitative internal data
- Analyze the data collected

- Develop a process flowchart (or refine existing) as needed

STAGE 3 – PLAN THE PROJECT

During this phase of the project, the feasibility team will carefully plan out each subsequent aspect of the study.

STAGE 4 – CONTACT COMPARATIVE DISTRIBUTION CENTERS

This key phase in the feasibility process will focus on the states identified (South Carolina, Tennessee, Florida, Texas, New Mexico and Virginia). This stage can then select "best practice" examples within the textbook distribution centers.

STAGE 5 – GATHER AND ANALYZE COMPARISON DATA

There are various mechanisms for gathering data which. As information is gathered, it is critical to keep in mind the importance of understanding "why" a center has adopted a specific practice. It is the rationale and not necessarily the actual practice that can be most helpful in developing new techniques.

Included in the Data Gathering Stage is collaboration with the Office of the State Controller (OSC) regarding procedures and expected internal controls prescribed by G.S. 143B-426.39 and any other pertinent state regulations.

In analyzing the data collected, Innovate will identify performance "gaps" or differences. Our main opportunities for improvement exist in those areas where the gap analysis yields a negative performance gap.

STAGE 6 – ANALYZE THE DATA

The analysis performed at this stage will include obtaining any readily available business information regarding existing offerings and future direction of the book industry. We will focus on state-of-the art technology, warehouse fixtures, and processes that will yield productivity and service level improvements. The study will include:

- Accounting processes, policies, and procedures for recommendations to improve the efficiency of operations and to strengthen accounting controls.
- DPI textbook distribution logistics processes encompassing procurement and product movement

STAGE 7 – DEVELOP A PLAN TO MEET AND SURPASS

This stage will be performed in conjunction with Stage 6, Analyze the Data and will require combining the findings of all elements within the study. This information coupled with the wide expertise of our staff will surely result in a comprehensive plan aimed at catapulting the DPI to the forefront of the textbook distribution industry.

STAGE 8 – INCORPORATE PLAN INTO STATE STRATEGIC PLAN

The results of this stage in the process will yield a high-level Feasibility Study (white paper) entitled "DPI Textbook Warehouse Feasibility Study." The study will include recommendations prioritized based on a projected cost benefit analysis.

4.7 Key Project Deliverables

Key Deliverable	Responsibility	Acceptance Criteria	Timeline
Statement of Work	Bob Veranes, Project Executive, Innovate E-Commerce	Must use the standard SOW format and content defined for the DPI Feasibility Project, describe key deliverables and high-level project plan	RFP Response, Nov 14, 2001
Efficiency of Operation	Stephanie Maust, EC. Accounting, and Business Consultant, Innovate E-Commerce	Must include: 1. Documentation of existing business processes for DPI operations 2. Comparison data from six states with textbook distribution centers 3. Document Financial Data comparing non-profit and privatized operations 4. Determine Financial Impact to the LEAs 5. Detailed Recommendations on improvements and cost-savings strategies.	Start: December 15,2001
Cost Comparisons	Stephanie Maust, Consultant, Mike Blakely, Financial Expert	Detailed cost comparisons of titles as used in the named states and any other appropriate states	Start: December 15, 2001
Review of Accounting Operations	Mike Blakley, Financial Expert, Stephanie Maust, Consultant	1. Findings from reviews of accounting processes, policies and procedures 2. Evaluation of Findings by the OSC 3. Detailed recommendations on improvements of internal accounting controls 4. Cost benefit analysis of feasibility study recommendations.	Start: January 15, 2002 – Feb 15, 2002

Key Deliverable	Responsibility	Acceptance Criteria	Timeline
E-Procurement	Stephanie Maust, Consultant, Siew Tho Thong, Technical Specialist	1. Detailed Recommendations on how to utilize the State's e-procurement solution 2. Recommendation for integration in to the DPI Accounting system and/or the NCAS as appropriate	January 20, 2002-February 15, 2002
Interim Reports	Stephanie Maust, Technical Specialist Robert Veranes, Project Executive	Bi-Weekly Status Reports	On-going
Final Report	Project Executive Technical Specialist	Completed Feasibility Study to Dr. Ben Matthews	12:00pm, Feb 28, 2002

4.8 Proposed Timeline for Implementation

Refer to "Timeline" of above chart

4.9 Risks

Risks will be managed as a normal aspect of project management. Currently identified risks include:

Risks	Mitigation
Lack of availability of e-procurement technical staff may delay identifying solutions	1. Project team will need to schedule e-procurement staff early.
Availability and willingness of other state centers to participate in data gathering may impact schedules	1. Project team to develop questionnaire early in project. 2. Project Team to contact other states early in project schedule

5 APPENDIX – PROJECT TEAM RESUMES

§ 115C-154. Duties of the State Board of Education.

In carrying out its duties, the State Board of Education shall develop and implement any policies, rules, regulations, and procedures as necessary to ensure vocational and technical education programs of high quality. The State Board of Education shall prepare a Master Plan for Vocational and Technical Education. The plan, to be updated periodically, shall ensure minimally that:

(10) A system of continuing qualitative and quantitative evaluation of all vocational and technical education programs, services, and activities supported under the provisions of this Part shall be established, maintained, and utilized periodically. One component of the system shall be follow-up studies of employees and former students of vocational and technical education programs who have been out of school for one year, and for five years to ascertain the effectiveness of instruction, services, and activities. (1977, c. 490, s. 2; 1981, c. 423, s. 1; 1983, c. 750, s. 1; 1993, c. 180, s. 3.)

"(A) among secondary school vocational and technical education, or postsecondary and adult vocational and technical education, or both, including the rationale for such allocation; and

"(B) among any consortia that will be formed among secondary schools and eligible institutions, and how funds will be allocated among the members of the consortia, including the rationale for such allocation;

"(5) describes how the eligible agency will—

"(A) improve the academic and technical skills of students participating in vocational and technical education programs, including strengthening the academic, and vocational and technical, components of vocational and technical education programs through the integration of academics with vocational and technical education to ensure learning in the core academic, and vocational and technical, subjects, and provide students with strong experience in, and understanding of, all aspects of an industry; and

"(B) ensure that students who participate in such vocational and technical education programs are taught to the same challenging academic proficiencies as are taught to all other students;

"(6) describes how the eligible agency will annually evaluate the effectiveness of such vocational and technical education programs, and describe, to the extent practicable, how the eligible agency is coordinating such programs to ensure nonduplication with other existing Federal programs;

"(7) describes the eligible agency's program strategies for special populations;

"(8) describes how individuals who are members of the special populations—

"(A) will be provided with equal access to activities assisted under this title;

"(B) will not be discriminated against on the basis of their status as members of the special populations; and

"(C) will be provided with programs designed to enable the special populations to meet or exceed State adjusted levels of performance, and prepare special populations for further learning and for high skill, high wage careers;

"(9) describe what steps the eligible agency shall take to involve representatives of eligible recipients in the development of the State adjusted levels of performance;

"(10) provides assurances that the eligible agency will comply with the requirements of this title and the provisions of the State plan, including the provision of a financial audit of funds received under this title which may be included as part of an audit of other Federal or State programs;

"(11) provides assurances that none of the funds expended under this title will be used to acquire equipment (including computer software) in any instance in which such acquisition results in a direct financial benefit to any organization representing the interests of the purchasing entity, the employees of the purchasing entity, or any affiliate of such an organization;

"(12) describes how the eligible agency will report data relating to students participating in vocational and technical education in order to adequately measure the progress of the students, including special populations;

Holding Career/Technical Education Programs Accountable for Advancing Student Learning

by Gene Bottoms, Senior Vice President, Southern Regional Education Board

High school career/technical education programs must be held accountable for producing technically literate graduates who can:

- Read, comprehend and communicate in the language of the career field;
- Use mathematical skills, reasoning and understanding to solve the kinds of math problems necessary for entering and advancing in the career field;
- Demonstrate understanding of essential technical principles and procedures necessary for continued learning in the career field; and
- Use technology to perform essential tasks in the career field.

Employers are no longer satisfied with students who have technical aptitude but low academic skills. The changing demands of the modern workplace require career/technical education programs to keep pace by producing graduates who excel in both academic and career/technical studies.

For example, the National Association of Manufacturers completed a survey of its members concerning the readiness of recent high school graduates for the workplace. Manufacturers reported that 40 to 50 percent of new workers did not have the communications, reading and comprehension, or mathematics skills necessary for success in the modern manufacturing industry. I recently spoke with a representative of the National Construction Industry, and he said, "We must have persons who have both literacy and numeracy skills in our field." Any high school graduate from North Carolina who seeks employment with BellSouth or with IBM as a technician will have to pass an exam that will assess their ability to read and interpret technical materials and to solve real-world math problems.

Improving career/technical students' academic achievement would not only better prepare them for the modern workplace, but it would also make our country's educational system comparable to those of other industrialized nations. For example, a few years ago in a study tour of Germany, I looked at the end-of-program exams their students were taking, and they averaged 300 test items. One hundred items dealt with reading and comprehending the written materials of the field; 100 dealt with mathematics related to the career field; and the final 100 dealt with the technical concepts students would need in order to continue learning in their career field.

These German career/technical students were being prepared for the demands of the 21st century workplace by comprehensive end-of-program exams that required a high degree of technical literacy. Career/technical education programs in the United States need to revise their assessment procedures so that our students are held to the same high standards. Rather than testing students at the end of each career/technical course, one option SREB believes states should consider is to have high school career/technical completers take an end-of-program exam that assesses students' "technical literacy," which is the ability to:

- Read, comprehend and communicate in the language of the career field;
- Use mathematical skills, reasoning and understanding to solve the kinds of math problems necessary for entering and advancing in the career field;

- Demonstrate understanding of essential technical principles and procedures necessary for continued learning in the career field; and
- Use technology to perform essential tasks in the career field.

For some career fields of study, states can adopt suitable employer's exams that assess technical literacy and numeracy knowledge and skills. For other fields, states will need to develop their own well-developed, valid and reliable assessments. Because of the cost of developing such exams, states may want to work together in order to share resources, knowledge, experience and expense.

Finally, states must provide opportunities and support to help career/technical teachers upgrade their skills so that they are prepared to teach students the skills they need. On the *High Schools That Work* survey of more than 25,000 teachers, more than half admitted that they did not have the necessary academic foundation and did not know how to develop assignments that require students to use academic knowledge and skills to solve work-related problems and complete work-related projects.

These are **not** bad teachers. Instead, they are teachers who were prepared by a system designed in the 1970s. As employers' needs have changed, too often the preparation and certification standards for career/technical teachers have not. Career/technical teachers have a great concern for the needs of the "ordinary" student, but they need states' support in upgrading their skills so that they are better prepared for their role in preparing "technically literate" graduates for the 21st century workplace, which is the primary mission of high school career/technical studies.

Accountability in NC Career-Technical Education

Focus on accountability

Over the last decade, schools have faced increasing demands for accountability. Taxpayers, business people, and others with a stake in the educational system want to be sure money going into education at all levels is being spent wisely. Parents want their children to be well prepared for the future. Elected officials want to know what learning is taking place in local classrooms.

In recent years, the focus has been not only on doing a good job, but on acquiring valid and reliable data that illustrate the quality of education.

State requirements for accountability in Career-Technical Education

By state statute (§115C-154) the State Board of Education is required to provide "…Appropriate minimum standards for vocational and technical education programs, services, and activities" and to establish "…A system of continuing qualitative and quantitative evaluation" that measures how well Career-Technical Education in North Carolina meets these standards.

Federal role in accountability for Career-Technical Education

The Carl D. Perkins Vocational and Technical Education Act of 1998 (Perkins III) set a new vision for vocational and technical education in the 21st Century. This act provides the mechanism for federal funding of secondary and postsecondary vocational education. North Carolina received about $32 million for the 2001-2002 year, much of which was passed on to local education agencies.

> *"Perkins III promotes reform, innovation, and continuous improvement in vocational and technical education to ensure that students acquire the skills and knowledge they need to meet challenging State academic standards and industry-recognized skill standards, and to prepare for postsecondary education, further learning, and a wide range of opportunities in high-skill, high-wage careers."*
>
> http://www.ed.gov/offices/OVAE/CTE/2pgperk.html

With the funding come significant requirements for accountability. Each state works with Department of Education officials to set state standards and determine how they will be measured. The four categories for standards are:

- Student Attainment: Student proficiency in academic and technical skills.
- Credential Attainment: Student secondary or postsecondary graduation and attainment of an advanced credential.
- Placement and Retention: Student placement in, retention in, and completion of postsecondary education or advanced training, placement in military service, or placement or retention in employment.
- Participation in or Completion of Non-traditional Programs: Student placement in and completion of programs leading to non-traditional training and employment.

(Continued on next page)

Accountability in NC CTE *(continued)*

Federal requirements

To meet the provisions of Perkins III, each state must demonstrate, at the minimum, "…Student attainment of challenging State established academic, and vocational and technical, skill proficiencies" (§ 113). State standards must be "objective, quantifiable, and measurable," and provide for continuous improvement in the performance of CTE students. Extensive public input is required in establishing these proficiencies and is summarized in the State Plan. The State Plan, which is approved by the Office of Vocational and Adult Education of the U.S. Department of Education, is for the years 2000-2004.

Performance Indicators

North Carolina established seven indicators of performance used in conjunction with the federal system of accountability.

1. **Attainment of Academic Proficiencies.** By school year 2003-2004, 59.7 percent of vocational concentrators in North Carolina will score at or above the national mean on each of the four ASSET tests: reading, writing, numerical skills, and elementary algebra.
2. **Attainment of Vocational and Technical Skill Proficiencies.** By 2003-2004, 58.2 percent of career and technical education enrollees in North Carolina will score at Level III or above (65% or better) on Career-Technical Education postassessments.
3. **Attainment of Credentials.** By 2003-2004, 76.8 percent of graduating career and technical education concentrators in North Carolina will have completed a Tech Prep or a combined Tech Prep/College Prep course of study. (The remainder graduate with a Career Prep or Vocational course of study.)
4. **Placement.** By 2003-2004, 96.4 percent of graduating vocational and technical education concentrators in North Carolina will go on to further education, work, or both the year following graduation. (The remainder are unemployed seeking employment.)
5. **Nontraditional Enrollment.** By 2003-2004, 26.6 percent of students enrolled in vocational and technical education courses in North Carolina leading to nontraditional employment and training will be from underrepresented genders.
6. **Nontraditional Graduation.** By 2003-2004, 16.3 percent of students completing vocational and technical education programs in North Carolina leading to nontraditional employment and training will be from underrepresented genders.
7. **Career Development Plans.** All local education agencies in North Carolina will maintain their baseline percentages of WDE enrollees with Career Development Plans.

(Continued on next page)

Accountability in NC CTE *(continued)*

Why we have VoCATS

Statewide postassessments aligned to the curriculum are one component of VoCATS. Results on these postassessments are used to determine which students meet the Perkins' requirements for Technical Attainment.

Establishing clear connections between instruction and accountability strengthens the system. Teachers know from the course blueprint what should be taught in their classes and even the approximate amount of time that should be used to cover each topic. They know at the beginning of the course what students will be evaluated on and even the exact number of questions that will be asked on each objective. They can use the classroom assessment banks to test students throughout the course, monitor student progress, and determine which students need remedial activities. The statewide postassessments should reinforce what teachers already know about their students' mastery of the course content.

It is up to local school systems to determine other ways the data are used.

Collection of data

Data to support these performance indicators are collected in North Carolina through the Planning and Performance Management System, aggregated to the state level, and submitted to the U.S. Department of Education. In order to receive our share of the federal funding, we must continue to demonstrate progress toward meeting the goals in our performance indicators. The U.S. Department of Education Office of Vocational and Adult Education accountability site explains the standards set for each state and shows levels of performance for each standard.

The state and each local school system must submit a plan each year that indicates what funds are being spent on Career and Technical Education and how programs can be improved. Anyone can log into the Planning and Performance Management System (http:\\wdeppms.dpi.state.nc.us/wdeppms.nsf), using a login of "guest" and password of "guest," and review the plan for their local school system or other comparable systems.

VoCATS Briefing

What is VoCATS?

VoCATS, the N.C. Instructional Management System used primarily in Career-Technical Education (CTE), helps improve student learning by providing teachers with the materials they need to plan and carry out instruction.

VoCATS provides schools with a computerized instructional management system that can be used for the following:

- Planning instruction
- Assessing students before, during, and after instruction
- Tracking student progress
- Evaluating student mastery of competencies
- Documenting student achievement
- Providing accountability data

What does VoCATS include?

A complete VoCATS curriculum package includes:

- A blueprint, developed by teachers and validated by Business and Industry, which specifies course units, competencies, and objectives, and provides an indication of the relative importance of each
- Curriculum support materials aligned to the blueprint, such as an outline, resources, lesson plans, instructional activities, and other information useful in teaching the course
- A bank of assessment items, also aligned to the blueprint, that allows teachers to easily generate preassessments, interim assessments, and postassessments for use in the classroom
- A secured accountability assessment bank, aligned to the blueprint, from which statewide multiple-choice postassessments used to produce accountability data are generated annually

Current status

The current status of the VoCATS effort is as follows:

- More than 300 business representatives, 150 local administrators, and thousands of CTE teachers have been involved in developing curriculum materials.
- All LEAs are using VoCATS-designated software components and 95 percent of all high schools and many elementary and middle schools have computer hardware to run this software.

Approximately 90% of CTE teachers have participated in VoCATS staff development.

(Continued on next page)

VoCATS Briefing *(continued)*

Components provided by SDPI

Components provided by the State CTE staff include the following:

- 128 course blueprints validated by business/industry
- 119 classroom assessment banks distributed
- 98 curriculum support documents developed or adopted for use in North Carolina
- Statewide postassessments for 109 courses

Strengths of the instructional management system

VoCATS ensures that all teachers have access to the same curriculum resources. No matter where in the state they come from, teachers can utilize course blueprints and other materials. Most of these materials are available for download free or can be purchased in hard copy at a reasonable cost. Many are distributed at no charge to people who attend scheduled NCDPI staff development activities.

VoCATS strengthens the link between the classroom and the business community. It helps teachers individualize instruction and closely monitor the progress of each student. VoCATS makes it easy to pinpoint students' areas of weakness and provide necessary remedial assistance. At program completion, it provides students with a detailed record of their mastery of course content.

Accountability

Carl D. Perkins Vocational and Technical Education Act of 1998 (known as Perkins III) links federal funding in vocational education to student performance. As one of the measures, local school systems must report the percentage of students who attain a standard proficiency level on statewide postassessments. School systems must demonstrate continuous progress toward a five-year goal. Data are disaggregated to analyze student performance by course, by school, by LEA, and by targeted groups such as students with disabilities.

Strengths of accountability system

Statewide postassessments are one component of VoCATS. Establishing clear connections between instruction and accountability strengthens the system. Teachers know from the course blueprint what should be taught in their classes and even the approximate amount of time that should be used to cover each topic. They know at the beginning of the course what students will be evaluated on and even the exact number of questions that will be asked on each objective. They can use the classroom assessment banks to test students throughout the course, monitor student progress, and determine which students need remedial activities. The statewide postassessments should reinforce what teachers already know about their students' mastery of the course content.

Recognition

The VoCATS process has received recognition from the following:

- The U. S. Department of Education has recognized VoCATS as a national CTE instructional model.
- The Rand Corporation has cited VoCATS as an exemplary statewide system to assess student learning in CTE courses and programs.

Career and Technical Education Testing in North Carolina

Presented by
Marshall Stewart, State Agricultural Education Coordinator
Department of Agricultural and Extension Education
College of Agriculture and Life Sciences
NC State University
January 14, 2003

Table of Contents

Executive Summary
Career and Technical Education Testing in North Carolina

Marshall Stewart, State Agricultural Education Coordinator, NC State University
On behalf of concerned career and technical educators, school administrators and students.
January 14, 2003

Whatever gets measured gets done!

What is the problem?

VoCATS is a bad **testing** system.
- It's bad for students!
- It's bad for teachers!
- It's bad for North Carolina's economy!
- It's bad public policy!

VoCATS is a "counterfeit accountability" system. ***Dr. Jim Flowers, NC State University***

What do you want us to do?

Two actions are respectfully requested:
1. *End the current testing system in career and technical education.*
2. *Provide leadership for the development of a new accountability system in career and technical education.*

Why is it a problem?

The tests are paper and pencil and multiple choice and focus on the cognitive domain.
The tests count up to 25% of a student's final grade.
The tests do not measure student performance.
The tests do not measure work-based learning.
The tests do not assess student organization activities.

What is resulting from this problem?

It's causing less students to be involved in work-based learning experiences.
It's leading to an increase in the dropout rate.
Its frustrating highly motivated, well-qualified teachers.
It's encouraging students to take other elective courses that have no end of course test.
It's decreases the time spent by students on hands-on learning activities.
Its hurting career and technical student organizations.
It's lowering teacher morale.
It's a waste of money that could be used by teachers.
It's being misused as a teacher accountability tool.
It's causing career and technical students to be tested more than other students.
It's removing the "vocational" for vocational education.

How has this happened?

VoCATS was developed in the 1980's as an instructional management tool.
- *Course Blueprints, Instructional Materials and Assessments*

VoCATS evolved into an accountability system in the 1990's in response to federal legislation.

How has this happened?

VoCATS is being used for something today that it was never intended

"VoCATS is inadequate and invalid for measuring what students know, can perform, can manipulate. Knowing how to do something and being able to do it are two different things. Teachers are not getting credit for all that students are learning." ***Meg Murphy, VoCATS Creator***

So, what has been the impact?

Today, there are over 115 career and technical education courses for North Carolina students.
Today, there are over 115 end of course tests.

We must change!

The current system is a disservice to teachers and students.
Our goal must be higher and more far-reaching!
We have wasted too much time, too much money and too many human resources.

A Call to Action!

Whatever gets measured gets done!
We must measure the right things!
It is the right time to do the right thing!

Resolve to...

End the current testing system in Career and Technical Education.
Create a new accountability system that results in a world-class future workforce for North Carolina.

Testimony
Career and Technical Education Testing in North Carolina
Presented by Marshall Stewart, State Agricultural Education Coordinator, NC State University
On behalf of concerned career and technical educators, school administrators and students.
January 14, 2003

Introduction

First, I would like to thank Senator Dalton, Representative Rogers and all of the members of the Joint Oversight Education Committee for the opportunity to share concerns, thoughts and ideas regarding the future of career and technical education in North Carolina. It is an honor for me to have the opportunity to share with you suggestions that could help to build a stronger future for career and technical education students in North Carolina. I am pleased to have with me today a number of professional career and technical education teachers and administrators who are concerned about the issues that I will share with you today. I personally thank them for being here with us.

I serve as State Agricultural Education Coordinator in the Department of Agricultural and Extension Education at NC State University. My role is to provide leadership and coordination for the middle and high school agricultural education program in North Carolina. I have had the opportunity to work with hundreds of teachers and thousands of students, not only in agricultural education, but also in all phases of career and technical education in the nation. Furthermore, I have had the opportunity to serve as vice president for the Association for Career and Technical Education, Chairman of the National Council for Agricultural Education, and as a member of the National FFA Organization Board of Directors and National FFA Foundation Board of Trustees. Earlier in my career I served as Executive Director of the National Association of Agricultural Educators and as Director of Teacher Services for the National FFA Organization. During this period of time, I had the opportunity to visit hundreds of schools and teachers across the United States and to be involved in the development of federal educational policy including the Carl Perkins Vocational Education Act. I share these background thoughts with you as a basis for saying that I have spent my career totally immersed in career and technical education in North Carolina and around the nation. For me, it all started in 1977 when I first entered career and technical education at Midway High School in Sampson County as a vocational agriculture student. From those valuable high school experiences, I chose to become a professional educator. To say the least, I am a proud product of career and technical education in North Carolina. Today, I come before you as a state leader in career and technical education and most importantly as the parent of a nine-year-old son that I hope someday will be an enrolled in career and technical education.

The Problem

The problem that is being brought to you today is that the current career and technical education testing system (VoCATS) for measuring technical skill attainment for career and technical education in North Carolina is inappropriate and doing a disservice to students and teachers in this state. Dr. Jim Flowers, Department Head for Agricultural and Extension Education, has described this testing system as "counterfeit accountability." Why? Because this testing system does not provide a measure of

student achievement in career and technical education nor does it give teachers a "fair shake" on the great job that they are doing across this state. It is a bad testing system and it needs to be stopped.

The Proposal

We propose the following solutions to this problem:

1. **We are asking for an end to the standardized, comprehensive, end-of-course testing in grades seven through twelve for career and technical education courses offered in North Carolina.**
2. **We are requesting that a new accountability model be created that assesses cognitive learning and hands-on performance in the classroom, laboratory, work-based learning and student organization. We would welcome the opportunity to help create a new accountability model that would be good for students, teachers and the state's future workforce.**

The Background

Career and Technical Education is offered to middle and high students through the Department of Public Instruction. These courses are designed to develop a highly skilled workforce through technical training and development. Approximately 427,000 (2000) students are served through over 115 state-approved courses by this program. In 1999-2000, over 427,000 students in grades 6–12 were enrolled in career and technical education courses. These courses are taught by over 6,400 career and technical education teachers. Sixty-nine percent of all students enrolled in grades 9-12 took at least one career and technical education course. Program areas included in career and technical education are: agricultural education, business education, family and consumer sciences education, health occupations education, marketing education, technology education and trade and industry education.

Current Situation

In the mid-1980's, a new "instructional management tool" was created by career and technical education in North Carolina. This tool was originally known as the Vocational Competency Assessment Tracking System (VoCATS). The VoCATS instructional management system includes a blueprint (course outline), instructional materials (curriculum) and a test item bank for each course in career and technical education. **From its inception, many teachers and administrators were concerned that VoCATS would eventually move from being an "instructional management system" to an "accountability tool."** Initially, this system provided some positive results, including:

- *Teachers having quality instructional materials to use.*
- *Statewide curriculum format consistency.*
- *An assessment bank that could be used throughout the teaching of a particular course.*

In the 1990's, it was decided by North Carolina education leaders that the state's response to the accountability requirements of the Carl Perkins Federal Vocational and Technical Education Act would be the aggregation of the end-of-course (final exam, end-of-course test) assessment scores. **This marked a significant shift in policy as VoCATS**

moved away from its original instructional management goals and focused on high stakes assessment. During this period of time, teachers began to express great concern regarding how the student's performance on the final exam (end-of-course test) was being used as a teacher evaluation tool. While historically, career and technical education teachers had been evaluated on multiple factors with a total career and technical education program performance (instruction, work-based learning, student organization participation, community/industry connectivity, student placement in careers, etc.), now they were being evaluated on how their students performed **on a paper and pencil, multiple choice, end-of-course test.** Increasingly, teachers reported that administrators were being directed to look less at total education program performance and focus totally on end-of-course test performance. This has become a greater problem as some administrators have begun to compare test scores between career and technical education program areas. An example would be a family and consumer science teacher being asked why his or her scores are not as high as the agriculture teacher's scores. Clearly, this is a misuse of the system because one would not compare math scores to science scores. To compare two different disciplines (i.e. family and consumer science vs. agriculture) is inappropriate.

These trends have been further compounded over the past several years with the increased public policy debate regarding accountability and by a move on the part of some educational leaders to push career and technical education into the ABC's accountability model through the use of end-of-course tests. The State Board of Education (SBE) has demonstrated great leadership and expressed their concerns regarding the VoCATS testing system through their board meetings over the past three years. In fact the SBE took action in their *November 2001* meeting to separate VoCATS end-of-course tests from ABC's. Based on the action of the Board, one would think that this would bring an end to the development of end-of-course-tests in career and technical education. In contradiction to this line of thought, DPI education leaders have continued to maintain existing and create new "secured" test item banks.

It is important to reiterate that career and technical education courses have an end-of-course comprehensive test that is given to all students enrolled in the particular course. This amounts to over **115** end-of-course tests in career and technical education. Each course also has an unsecured test item bank that is being regularly updated and managed at the state and local level. These are paper and pencil tests and they carry significant weight (25 % in most cases) of the student's course grade. Even though career and technical education courses are driven by experiential learning (applied and hands-on), the final test is exclusively paper and pencil. Again, the rationale and argument given for the evolution of VoCATS from an instructional management system to an accountability system has been that it was needed to meet the requirements for measuring technical attainment that is a part of the Federal Carl Perkins Vocational Education Act (1996). However, other states have found more authentic methods and less costly approaches for quantifying technical attainment. These methods include use of portfolios, rubrics, performance checklists, program accountability models, etc.

Historically, one of the strengths of career and technical education has been the leadership development and personal growth opportunities provided by student organizations. These secured end-of-course tests for courses in career and technical education courses do not include information regarding the student organizations (an integral component according to State Board of Education policy, United States Department of Education policy and Federal Law). The student organization is not included in this accountability model because the state career and technical staff have been directed to remove student organization references from career and technical education curriculum. This is interesting in light of the current interest in greater "character education" by both state and federal lawmakers. Is it not interesting that student organizations, a "tried and true" approach to character education is being de-emphasized by the state's career and technical education program. Additionally, these secured tests do not measure the work-based learning component of the program, which has always been core to career and technical education. Students having real-life work experiences as a part of their educational experience has been and continues to be one of the most successful strategies ever used to prepare students for future careers.

However, the most troubling component of these secured tests revolves around the fact that these end-of-course tests include no performance measures. As paper and pencil, multiple-choice tests, they measure the cognitive ability ("a fraction of intelligence"), but they do not measure the psychomotor skills (ie. hands-on learning). In essence, what has been created is an accountability system that counts up to 25% of a student's final grade, but that does not measure student skill performance, student organization involvement or work-based learning --- all of which are fundamental to a quality career and technical education experience! ***Meg Murphy, one of the originators of VoCATS, stated that multiple choice tests are "...inadequate and invalid for measuring what students can do, can perform, can manipulate, ie., the psychomotor behaviors. Knowing how to do something and being able to do it are two different things. The course blueprints for programs under the umbrella of career and technical education include both cognitive and psychomotor objectives. Yet, our entire accountability system is based on a series of multiple-choice tests of cognitive-only objectives. We are getting only part of the picture. Teachers are not getting credit for all that students are learning." (North Carolina Association for Career and Technical Education News, January. 2001).*** We are placing students (the state's future workforce), and teachers at a disadvantage when we rely on high stakes tests to determine if a student has **mastered** the skills taught in career and technical education. **The use of paper and pencil tests to measure what a student has learned in career and technical education is like using a screwdriver to hammer a nail. Murphy's comments further emphasize the concerns of the current system that have often resulted in career and technical education teachers teaching students to take paper and pencil test rather than teaching the curriculum. Should teachers be driving the classroom or should a paper and pencil test be driving the classroom?** This diminishes the hands-on, experiential learning component of the program and reduces the utilization of lab and shop facilities, which are basic to a quality career and technical education experience.

Results

The results of these actions are:

- Declining number of students involved in work-based learning experiences.
- Students that have been traditionally served by career and technical education are now are more likely to dropout of school.
- Frustration on the part of teachers and administrators who are attempting to provide a quality, well-rounded, total education program.
- Students selecting other public school elective courses that have no end-of-course tests in order to protect their grade point average and class rank.
- Less time spent in the "hands-on" component of the program with many laboratories and shop facilities not being used.
- Declining or stagnating student organization membership and participation in seven of the eight career and technical student organizations.
- Low teacher morale.
- The current testing system is a drain on existing, valuable resources. This system is federally funded. The local personnel costs to maintain the system are *estimated* to be four million dollars ($4,000,000). This does not include costs such as: state administration, duplication of tests, computer equipment/programming, etc. In total the costs are well beyond the four million dollar mark. Currently, over thirty million federal dollars are issued to the state for career and technical education. **Elimination of this testing system means more of these federal funds could be used in high school classrooms and laboratories of the state to improve student learning.**
- Career and Technical Education students are being tested more than any other students in the public schools. Although not a part of the *ABC's Accountability Model*, many schools are treating these tests as if they were. Elimination of non-essential, end-of-course tests has the potential to improve student performance on those course tests that are required by the *ABC's and No Child Left Behind* federal legislation.
- Career and Technical Education teachers are, in many cases, being evaluated exclusively on the basis of the end-of-course test given in these courses, although they are not a part of the *ABC's Accountability Model*.
- Suggestions have been made that in the near future the amount of career and technical education funding a Local Education Agency receives could be tied to the student's scores on VoCATS tests. If you have higher scores, your school would get more money. Is this really where we want our program headed?

However, probably the greatest concern is, **where will this lead career and technical education in the future? Many teachers and administrators believe that career and technical education will, within a matter of a few years, become another academic course and lose its vocational/hands-on differentiation**. With the great impact that career and technical education has in North Carolina, this would be a devastating loss for thousands of students and to the future workforce.

You might ask, "How can you prove that all of this is occurring?" The answer is simple. We spend the majority of our time assisting teachers. What we share with

you is real because we have been eyewitnesses to these concerns. Visiting classrooms, working with students, interacting daily with administrators and listening to the concerns of industry leaders, parents and other stakeholders has led us to the point of bringing this issue to you today.

Solution

We must end the standardized, comprehensive, end-of-course testing in grades seven through twelve for career and technical education courses offered in North Carolina and create a new accountability model that assesses cognitive learning and hands-on performance in the classroom, laboratory, work-based learning and student organization. We ask you to help us fix this problem. We would welcome the opportunity to be a part of the development of the solution.

Recommendations

"There was Mr. Sheffield, my vocational agriculture teacher. He was a strong, tough guy. He'd grown up poor as he could be. But he'd gone to State and graduated in his mid-thirties. He got me interested in the Future Farmers of America, a farm youth organization with training and contests in parliamentary procedure and public speaking. I loved it. I was beginning to get a glimpse into a future that might be right for me. Mr. Sheffield had high goals for us. He really expected us to do well. He demanded it."

"Teachers should go the extra mile to get to know parents and their students' family situations. When I practice-taught vocational agriculture at Cary High School, one of the requirements to get my ten hours of credits was to visit the home of every one of my students. I wish every teacher was required to do that today in North Carolina. Teachers would be amazed at how much they'd learn and how much more they could help their students if they had actually been in their home and met the parents, if they constantly had that home situation in their mind's eye."

These two, real-life illustrations were taken from *First in America*, by Governor Jim Hunt, as he shared his personal experiences as a career and technical education student and teacher. What our former Governor so eloquently describes is a total career and technical education program. A total career and technical education program focuses on meeting students needs, preparing them for future career opportunities and being involved in the community and developing leaders. All of these components make a strong career and technical education program. **Is cognitive learning important? Absolutely, and there are situations where a pencil and paper test is an appropriate assessment, but our goal must be higher and more far-reaching. In fact, I would submit to you today that our standard is too low and in fact doing a disservice to our students and teachers.**

Today, we propose to you the development of a new model that enables our state to recapture the greatness of career and technical education. This new model must encompass the total education experience that should be offered through a quality career and technical education program. Since the mid- 1980's with the creation of VoCATS we have **wasted too much time, too much money and too many human resources**

focused on a paper and pencil testing system. This waste has gone on long enough. It's time to do the right thing for our students and teachers.

Conclusion

Teachers of career and technical education are not against accountability. For decades they have been accountable to the local community. The graduates they have produced have gone out in the local community and worked as secretaries, health care providers, auto mechanics, store managers, etc. The teachers and schools were accountable for preparing students for the world-of-work. This approach to accountability has served us well. In no way can a paper and pencil test replace this "real-world" approach to accountability.

Whatever gets measured gets done! If we want a well-trained future workforce we must measure the right things. Additionally we must make the decision as to whether we will test more or teach more --- we cannot do both!

The challenge for us to today is, **"Will we be strong and courageous enough to make the necessary changes in career and technical education before it is too late?"** The educational experience of our youth and career opportunities of tomorrow require that we encourage our teachers to have total career and technical education programs. It is the right thing for all students to have the highest quality career and technical education experience possible. **It is always the right time to do the right thing!** With your leadership and direction, together, we can do the right thing!

Reality Check

What You Might Hear Proponents of the current VoCATS System Say

They'll say: VoCATS has been endorsed by leading researchers.
Response: Several groups have highlighted the VOCATS system. When they do, they are focusing on the total system (curriculum blueprint, instructional materials, and assessment banks). They typically endorse it as an instructional management system. However, the detail analysis of the tests that measure knowledge only, might result in a different story.

They'll say: We have invested too much time and money to turn back now.
Response: Our students deserve better. If the VoCATS testing system is broken it must be fixed. The future of our students and our state depends upon it.

They'll say: The VoCATS accountability system is needed to get federal funds.
Response: This is simply not true. All states receive Perkins funding. Each state submits a plan to determine how it will implement the Perkins legislation. VoCATS is North Carolina's plan. It is not a federal mandate.

They'll say: Should these issues be discussed with the State Board of Education and/or Department of Public Instruction staff?
Response: These issues have been surfaced to SBE members and DPI staff. The DPI staff has not responded and the SBE has moved aggressively to keep VoCATS out of the ABC's Accountability Model. At this point, all other avenues have been exhausted.

They'll say: The VoCATS system has been endorsed by the Superintendents and Career and Technical Education Directors.
Response: Both of these groups have reason for their support. Superintendents are looking for an easy number to determine success or failure. VoCATS will provide such a number although it does not truly measure success or failure. Career and Technical Education Directors are seeking Perkins funds for their schools. Their local plans must fit the state plan in order to receive funds. There is a financial incentive for both of these groups to endorse this testing system.

They'll say: If teachers have a problem with this system, why don't they voice their concerns more?
Response: Teachers, throughout the existence of VoCATS have been concerned about where this system might be headed. On many occasions they have voiced their concerns, but have been described as non-cooperative and unprofessional. Dissent and disagreement have not been allowed on this issue.

They'll say: Every student does not join a career and technical student organization or have a work-based learning experience. How can we have those factors in an accountability system?
Response: Federal law and state policy describe student organizations as integral. In order for it to be integral, it must be measured. Work-based learning has been given a

great amount of lip service in career and technical education, but has continued to slide as a result of the current VoCATS system. Some states require a certain level of participation in these factors in order for local schools to receive funds. These factors are as important educationally as the classroom instruction component. Student organizations and work-based learning are integral at the local level and should be a component of any accountability system.

They'll say: It is too expensive to measure performance on an end-of-course test.
Response: This is not true. Other states have used checklists, rubrics, etc. to accomplish this task. It can be done if we want it to be done.

They'll say: We cannot rely on teachers to do end-of-course testing. We need to use proctors to assure the integrity of the test.
Response: There is confusion between accountability and personnel issues. If we cannot trust a teacher to administer a performance test and evaluate it correctly, then we have a significant trust problem. Don't we trust teachers to do their job?

They'll say: Career and Technical Education enrollment continues to grow. VoCATS must not be hurting the program.
Response: Two factors mask the enrollment issue. First, North Carolina has a rapidly growing student enrollment. Second, a high percentage of schools are on block schedules, which enable students to have more career and technical education electives during their high school years.

They'll say: Teachers and industry representatives have been involved in the development of the test questions.
Response: Teachers and industry have been involved, this is true; however, two issues come up here. First, teachers and industry representatives are not testing experts. Second, the tests that are being created measure only cognitive learning. The system is bad regardless of who developed the tests.

They'll say: We are in the process of adding performance items to the VoCATS tests.
Response: First, it is very late in the game to be making this shift. The fact is that performance items need to be included and must be facilitated by the instructor. In order for this to occur, teachers must be trusted. It is doubtful that this last minute push will ever provide the desired results.

They'll say: These folks just don't like accountability.
Response: That is not true. In fact, accountability is welcomed. However, accountability must be based on a total program experience, not information learned for a paper and pencil end-of-course test. Accountability is good and necessary; but it must be administered correctlyt!

Career and Technical Education Testing in North Carolina

Whatever gets measured gets done!

What is the problem?

- VoCATS is a bad testing system.
  - It is bad for students!
  - It is bad for teachers!
  - It is bad for North Carolina's economy!
  - It is bad public policy!
- VoCATS is a "counterfeit accountability" system.

Dr. Jim Flowers, NC State University

What do we want you to do?

- Two actions are respectfully requested:
  1. End the current testing system in career and technical education.
  2. Provide leadership for the development of a new accountability system in career and technical education.

Why is it a problem?

- The tests are paper and pencil and multiple choice and focus on the cognitive domain.
- The tests count up to 25% of a students final grade.
- The tests do not measure student performance.
- The tests do not measure work-based learning.
- The tests do not assess student organization activities.

What is resulting from this problem?

- It's causing less students to be involved in work-based learning experiences.
- It's leading to an potential increase in the dropout rate.
- It's frustrating highly motivated, well-qualified teachers.
- It's encouraging students to take other elective courses that have no end of course test.
- It's decreases the time spent by students on hands-on learning activities.
- It's hurting career and technical student organizations.
- It's lowering teacher morale.
- It's a waste of money that could be used by teachers.
- It's being misused as a teacher accountability tool.
- It's causing career and technical students to be tested more than other students.
- It's removing the "vocational" for vocational education.

How has this happened?

- VoCATS was developed in the 1980's as an instructional management tool.
  - Course Blueprints, Instructional Materials and Assessments
- VoCATS evolved into an accountability system in the 1990's in response to federal legislation.

How has this happened?

- VoCATS is being used for something today that it was never intended
  - ***"VoCATS is inadequate and invalid for measuring what students know, can perform, can manipulate. Knowing how to do something and being able to do it are two different things. Teachers are not getting credit for all that students are learning."***

Meg Murphy, VoCATS Creator

So, what has been the impact?

- Today, there are over 115 career and technical education courses for North Carolina students.
- Today, there are over 115 end-of-course tests.

We must change!

- The current system is a disservice to teachers and students.
- Our goal must be higher and more far-reaching!
- We have wasted too much time, too much money and too many human resources.

A Call to Action!

- Whatever gets measured gets done!
- We must measure the right things!
- It is the right time to do the right thing!
- Resolve to...
  - End the current testing system in Career and Technical Education.
  - Create a new accountability system that results in a world-class future workforce for North Carolina.

NCACTEA

North Carolina Association of Career and Technical Education Administrators

Presentation to the Joint Education Oversight Committee
January 14, 2003

- Grading is and should be determined and managed by Local Boards of Education.
- VoCATS post assessment prepares students for other paper and pencil tests required for national professional credentialing and licensure (i.e., Certified Nursing Assistant, Automotive Service Excellence, Pesticide Management, Landscape Management, and A+ Certification). The community college system requires paper and pencil test for placement. Students are even required to take a pencil and paper test to obtain a driver's license.
- VoCATS is a data management system with standardized results to help us improve quality instruction. It has become an increasingly important standardized measure for Career and Technical Education as school district work towards preparing students for "No Child Left Behind". It supports our efforts across the curriculum areas to teach the necessary skills in reading, math and writing. It gives us an additional source of information for measuring achievement gaps.
- VoCATS is used as one of the criteria for granting college credit for articulated courses between high school and the community colleges. Without a standard measure of achievement for Career and Technical course content, students could not earn community college credit.
- Subjective performance based assessment and teacher evaluation is 75% or greater of the student's final grade. We need a combination of both subjective and objective assessment.
- The State Board of Education has upheld VoCATS as a valid and reliable data source for measuring students' achievement as determined by multiple validity and reliability studies. The State Board of Education's Commission for Accountability and Testing is also on record for supporting VoCATS as an accountability measure.
- The majority of Career and Technical Education teachers support the usage of VoCATS. We recognize the importance of being accountable to taxpayers.
- The post assessment scores and data meet the technical attainment measure required in Perkins III. These measures of accountability are the basis for 32 million dollars per year to North Carolina in federal money. If we expect students to take the test seriously, we must count it as part of their final grade.

"(A) among secondary school vocational and technical education, or postsecondary and adult vocational and technical education, or both, including the rationale for such allocation; and

"(B) among any consortia that will be formed among secondary schools and eligible institutions, and how funds will be allocated among the members of the consortia, including the rationale for such allocation;

"(5) describes how the eligible agency will—

"(A) improve the academic and technical skills of students participating in vocational and technical education programs, including strengthening the academic, and vocational and technical, components of vocational and technical education programs through the integration of academics with vocational and technical education to ensure learning in the core academic, and vocational and technical, subjects, and provide students with strong experience in, and understanding of, all aspects of an industry; and

"(B) ensure that students who participate in such vocational and technical education programs are taught to the same challenging academic proficiencies as are taught to all other students;

"(6) describes how the eligible agency will annually evaluate the effectiveness of such vocational and technical education programs, and describe, to the extent practicable, how the eligible agency is coordinating such programs to ensure nonduplication with other existing Federal programs;

"(7) describes the eligible agency's program strategies for special populations;

"(8) describes how individuals who are members of the special populations—

"(A) will be provided with equal access to activities assisted under this title;

"(B) will not be discriminated against on the basis of their status as members of the special populations; and

"(C) will be provided with programs designed to enable the special populations to meet or exceed State adjusted levels of performance, and prepare special populations for further learning and for high skill, high wage careers;

"(9) describe what steps the eligible agency shall take to involve representatives of eligible recipients in the development of the State adjusted levels of performance;

"(10) provides assurances that the eligible agency will comply with the requirements of this title and the provisions of the State plan, including the provision of a financial audit of funds received under this title which may be included as part of an audit of other Federal or State programs;

"(11) provides assurances that none of the funds expended under this title will be used to acquire equipment (including computer software) in any instance in which such acquisition results in a direct financial benefit to any organization representing the interests of the purchasing entity, the employees of the purchasing entity, or any affiliate of such an organization;

"(12) describes how the eligible agency will report data relating to students participating in vocational and technical education in order to adequately measure the progress of the students, including special populations;

§ 115C-154. Duties of the State Board of Education.

In carrying out its duties, the State Board of Education shall develop and implement any policies, rules, regulations, and procedures as necessary to ensure vocational and technical education programs of high quality. The State Board of Education shall prepare a Master Plan for Vocational and Technical Education. The plan, to be updated periodically, shall ensure minimally that:

(10) A system of continuing qualitative and quantitative evaluation of all vocational and technical education programs, services, and activities supported under the provisions of this Part shall be established, maintained, and utilized periodically. One component of the system shall be follow-up studies of employees and former students of vocational and technical education programs who have been out of school for one year, and for five years to ascertain the effectiveness of instruction, services, and activities. (1977, c. 490, s. 2; 1981, c. 423, s. 1; 1983, c. 750, s. 1; 1993, c. 180, s. 3.)

Holding Career/Technical Education Programs Accountable for Advancing Student Learning

by Gene Bottoms, Senior Vice President, Southern Regional Education Board

High school career/technical education programs must be held accountable for producing technically literate graduates who can:

- Read, comprehend and communicate in the language of the career field;
- Use mathematical skills, reasoning and understanding to solve the kinds of math problems necessary for entering and advancing in the career field;
- Demonstrate understanding of essential technical principles and procedures necessary for continued learning in the career field; and
- Use technology to perform essential tasks in the career field.

Employers are no longer satisfied with students who have technical aptitude but low academic skills. The changing demands of the modern workplace require career/technical education programs to keep pace by producing graduates who excel in both academic and career/technical studies.

For example, the National Association of Manufacturers completed a survey of its members concerning the readiness of recent high school graduates for the workplace. Manufacturers reported that 40 to 50 percent of new workers did not have the communications, reading and comprehension, or mathematics skills necessary for success in the modern manufacturing industry. I recently spoke with a representative of the National Construction Industry, and he said, "We must have persons who have both literacy and numeracy skills in our field." Any high school graduate from North Carolina who seeks employment with BellSouth or with IBM as a technician will have to pass an exam that will assess their ability to read and interpret technical materials and to solve real-world math problems.

Improving career/technical students' academic achievement would not only better prepare them for the modern workplace, but it would also make our country's educational system comparable to those of other industrialized nations. For example, a few years ago in a study tour of Germany, I looked at the end-of-program exams their students were taking, and they averaged 300 test items. One hundred items dealt with reading and comprehending the written materials of the field; 100 dealt with mathematics related to the career field; and the final 100 dealt with the technical concepts students would need in order to continue learning in their career field.

These German career/technical students were being prepared for the demands of the 21st century workplace by comprehensive end-of-program exams that required a high degree of technical literacy. Career/technical education programs in the United States need to revise their assessment procedures so that our students are held to the same high standards. Rather than testing students at the end of each career/technical course, one option SREB believes states should consider is to have high school career/technical completers take an end-of-program exam that assesses students' "technical literacy," which is the ability to:

- Read, comprehend and communicate in the language of the career field;
- Use mathematical skills, reasoning and understanding to solve the kinds of math problems necessary for entering and advancing in the career field;

- Demonstrate understanding of essential technical principles and procedures necessary for continued learning in the career field; and
- Use technology to perform essential tasks in the career field.

For some career fields of study, states can adopt suitable employer's exams that assess technical literacy and numeracy knowledge and skills. For other fields, states will need to develop their own well-developed, valid and reliable assessments. Because of the cost of developing such exams, states may want to work together in order to share resources, knowledge, experience and expense.

Finally, states must provide opportunities and support to help career/technical teachers upgrade their skills so that they are prepared to teach students the skills they need. On the *High Schools That Work* survey of more than 25,000 teachers, more than half admitted that they did not have the necessary academic foundation and did not know how to develop assignments that require students to use academic knowledge and skills to solve work-related problems and complete work-related projects.

These are **not** bad teachers. Instead, they are teachers who were prepared by a system designed in the 1970s. As employers' needs have changed, too often the preparation and certification standards for career/technical teachers have not. Career/technical teachers have a great concern for the needs of the "ordinary" student, but they need states' support in upgrading their skills so that they are better prepared for their role in preparing "technically literate" graduates for the 21st century workplace, which is the primary mission of high school career/technical studies.

NCACTEA

North Carolina Association of Career and Technical Education Administrators

Presentation to the Joint Education Oversight Committee
January 14, 2003

- Grading is and should be determined and managed by Local Boards of Education.

- VoCATS post assessment prepares students for other paper and pencil tests required for national professional credentialing and licensure (i.e., Certified Nursing Assistant, Automotive Service Excellence, Pesticide Management, Landscape Management, and A+ Certification). The community college system requires paper and pencil test for placement. Students are even required to take a pencil and paper test to obtain a driver's license.

- VoCATS is a data management system with standardized results to help us improve quality instruction. It has become an increasingly important standardized measure for Career and Technical Education as school district work towards preparing students for "No Child Left Behind". It supports our efforts across the curriculum areas to teach the necessary skills in reading, math and writing. It gives us an additional source of information for measuring achievement gaps.

- VoCATS is used as one of the criteria for granting college credit for articulated courses between high school and the community colleges. Without a standard measure of achievement for Career and Technical course content, students could not earn community college credit.

- Subjective performance based assessment and teacher evaluation is 75% or greater of the student's final grade. We need a combination of both subjective and objective assessment.

- The State Board of Education has upheld VoCATS as a valid and reliable data source for measuring students' achievement as determined by multiple validity and reliability studies. The State Board of Education's Commission for Accountability and Testing is also on record for supporting VoCATS as an accountability measure.

- The majority of Career and Technical Education teachers support the usage of VoCATS. We recognize the importance of being accountable to taxpayers.

- The post assessment scores and data meet the technical attainment measure required in Perkins III. These measures of accountability are the basis for 32 million dollars per year to North Carolina in federal money. If we expect students to take the test seriously, we must count it as part of their final grade.

Accountability in NC Career-Technical Education

Focus on accountability

Over the last decade, schools have faced increasing demands for accountability. Taxpayers, business people, and others with a stake in the educational system want to be sure money going into education at all levels is being spent wisely. Parents want their children to be well prepared for the future. Elected officials want to know what learning is taking place in local classrooms.

In recent years, the focus has been not only on doing a good job, but on acquiring valid and reliable data that illustrate the quality of education.

State requirements for accountability in Career-Technical Education

By state statute (§115C-154) the State Board of Education is required to provide "…Appropriate minimum standards for vocational and technical education programs, services, and activities" and to establish "…A system of continuing qualitative and quantitative evaluation" that measures how well Career-Technical Education in North Carolina meets these standards.

Federal role in accountability for Career-Technical Education

The Carl D. Perkins Vocational and Technical Education Act of 1998 (Perkins III) set a new vision for vocational and technical education in the 21st Century. This act provides the mechanism for federal funding of secondary and postsecondary vocational education. North Carolina received about $32 million for the 2001-2002 year, much of which was passed on to local education agencies.

> *"Perkins III promotes reform, innovation, and continuous improvement in vocational and technical education to ensure that students acquire the skills and knowledge they need to meet challenging State academic standards and industry-recognized skill standards, and to prepare for postsecondary education, further learning, and a wide range of opportunities in high-skill, high-wage careers."*
>
> http://www.ed.gov/offices/OVAE/CTE/2pgperk.html

With the funding come significant requirements for accountability. Each state works with Department of Education officials to set state standards and determine how they will be measured. The four categories for standards are:

- Student Attainment: Student proficiency in academic and technical skills.
- Credential Attainment: Student secondary or postsecondary graduation and attainment of an advanced credential.
- Placement and Retention: Student placement in, retention in, and completion of postsecondary education or advanced training, placement in military service, or placement or retention in employment.
- Participation in or Completion of Non-traditional Programs: Student placement in and completion of programs leading to non-traditional training and employment.

(Continued on next page)

Accountability in NC CTE *(continued)*

Federal requirements

To meet the provisions of Perkins III, each state must demonstrate, at the minimum, "…Student attainment of challenging State established academic, and vocational and technical, skill proficiencies" (§ 113). State standards must be "objective, quantifiable, and measurable," and provide for continuous improvement in the performance of CTE students. Extensive public input is required in establishing these proficiencies and is summarized in the State Plan. The State Plan, which is approved by the Office of Vocational and Adult Education of the U.S. Department of Education, is for the years 2000-2004.

Performance Indicators

North Carolina established seven indicators of performance used in conjunction with the federal system of accountability.

1. **Attainment of Academic Proficiencies.** By school year 2003-2004, 59.7 percent of vocational concentrators in North Carolina will score at or above the national mean on each of the four ASSET tests: reading, writing, numerical skills, and elementary algebra.
2. **Attainment of Vocational and Technical Skill Proficiencies.** By 2003-2004, 58.2 percent of career and technical education enrollees in North Carolina will score at Level III or above (65% or better) on Career-Technical Education postassessments.
3. **Attainment of Credentials.** By 2003-2004, 76.8 percent of graduating career and technical education concentrators in North Carolina will have completed a Tech Prep or a combined Tech Prep/College Prep course of study. (The remainder graduate with a Career Prep or Vocational course of study.)
4. **Placement.** By 2003-2004, 96.4 percent of graduating vocational and technical education concentrators in North Carolina will go on to further education, work, or both the year following graduation. (The remainder are unemployed seeking employment.)
5. **Nontraditional Enrollment.** By 2003-2004, 26.6 percent of students enrolled in vocational and technical education courses in North Carolina leading to nontraditional employment and training will be from underrepresented genders.
6. **Nontraditional Graduation.** By 2003-2004, 16.3 percent of students completing vocational and technical education programs in North Carolina leading to nontraditional employment and training will be from underrepresented genders.
7. **Career Development Plans.** All local education agencies in North Carolina will maintain their baseline percentages of WDE enrollees with Career Development Plans.

(Continued on next page)