



# **Monitoring Visit Report**

**Wake County Public School System  
Raleigh, NC**

November 29-30, 2011

# About AdvancED® and NCA CASI/SACS CASI

## Background

Dedicated to advancing excellence in education worldwide, AdvancED provides accreditation, research, and professional services to 30,000 institutions in more than 70 countries. AdvancED provides accreditation under the seals of the North Central Association Commission on Accreditation and School Improvement (NCA CASI), the Northwest Accreditation Commission (NWAC) and the Southern Association of Colleges and Schools Council on Accreditation and School Improvement (SACS CASI).

## The Accreditation Process

To earn and maintain accreditation, an institution must:

- 1. Meet the AdvancED Standards and accreditation policies.**  
Institutions demonstrate adherence to the AdvancED Standards and accreditation policies, which describe the quality practices and conditions that research and best practice indicate are necessary for educational institutions to achieve quality student performance and organizational effectiveness.
- 2. Engage in continuous improvement.**  
Institutions implement a process of continuous improvement focused on improving student performance and organizational effectiveness.
- 3. Demonstrate quality assurance through internal and external review.**  
Institutions engage in a planned process of ongoing internal review and self-assessment. In addition, institutions host an external Quality Assurance Review team at least once every five years. The team evaluates the institution's adherence to the AdvancED Standards and accreditation policies, assesses the efficacy of the institution's improvement process and methods for quality assurance, and provides Commendations and Required Actions to help the institution improve. The institution acts on the team's Required Actions and submits an Accreditation Progress Report at prescribed intervals following the Quality Assurance Review. Monitoring visits may be conducted during this time to ensure that the institution is making progress toward the Required Actions.

## Special Reviews

At any point, a Special Review may be conducted in response to complaints or information about the institution and/or its system (district, board, or corporation) to determine adherence to the AdvancED Accreditation Standards and policies. The institution and/or its system must respond to the Required Actions of the Special Review Team. Monitoring Teams may be sent to the institution and/or its system at regular intervals to ensure that progress is being made toward the Special Review Team's Required Actions. Both Special Review Teams and Monitoring Teams are empowered to make accreditation recommendations based upon evidence obtained during said visit.

## A Process of Continuous Improvement

The AdvancED Accreditation Process engages institutions in a continuous process of self-evaluation and improvement. The overall aim is to help institutions be the best they can be on behalf of the students they serve.

# Monitoring Visit Report

## Introduction

The conclusions of the Special Review Team visit on February 16-18, 2011, found it critical for the Board of Education and the Superintendent to establish a cohesive governance-leadership team dedicated to serving all students attending Wake County Public School System. The Special Review Team determined that the Board of Education and the Superintendent must work to gain the community's trust and confidence in the school system and its ability to meet the needs of all students. As a result of the initial visit, Required Actions were designed to facilitate improvement in the governance of the school system.

The purpose of the November 29-30, 2011 Monitoring Visit was to review the school system's progress toward addressing the Required Actions.

## Activities of the Monitoring Team

In preparation for the monitoring visit, the Monitoring Team had the opportunity to study the institution's progress documentation and related material. Upon arrival the team engaged in an extensive schedule thoroughly organized by school system officials. The Special Review Team schedule included meetings and interviews with a comprehensive list of stakeholders.

- Superintendent
- All current board members
- All incoming, newly elected board members
- Superintendent's Cabinet
- Area Superintendents
- Principals
- Student Body Presidents
- Raleigh Chamber
- NC NAACP
- PTA Council Group
- University Representation
- Community College Representation
- Community Groups
- Coalition Groups
- Partnerships
- Assignment Offices

## Findings

The Wake County Public School System has demonstrated significant improvement since the Special Review Team visit in February 2011. Many of the actions are complete or nearly complete. It is clear the actions were taken seriously, and the system has been working diligently to address them. Interviewees indicated that the overall climate of the school system has improved dramatically since the February visit.

Board members and community members indicated that there is far less acrimony among board members and voting patterns have improved.

The Monitoring Team’s findings are organized by each of the Required Actions made by the February 2011 Special Review Team. For each Required Action, the Monitoring Team provides a progress status rating, summary of findings, directives to guide next steps, and recommendations to help ensure that the Wake County Public School System continues to sustain the progress it has made to date.

**REQUIRED ACTION 1:  
Create and implement a Strategic Plan to guide the future work of the school system.**

**Progress Status:** Please indicate the progress the institution has made toward addressing this Required Action.

	<b>Completed</b> – All necessary and appropriate actions have been taken and evaluated. The institution has documented evidence that supports fulfillment of the Required Action.
<b>X</b>	<b>In Process</b> – The institution is currently engaged in actions and processes but has yet to fully implement steps a necessary to address and/or complete the Required Action.
	<b>Has Not Addressed</b> – The institution has not taken any action at this time.

**Summary of Findings:**

The Special Review Team identified evidence that Required Action #1 is in progress, based on interviews with board members, staff, parents and community stakeholders. A thorough examination of process and primary documents, such as board agendas, work group minutes, and the draft Strategic Plan revealed that the Wake County Public School System is well on the way to the development of a functional Strategic Plan. It was evident that a collaborative process involving all stakeholder groups was used to develop the Strategic Plan, which has been designed to guide the work of the school system through the continuous improvement process and allocation and alignment of resources.

While the school system is still in the developmental phase of preparing the Strategic Plan, the foundational components exist categorically with pervasive stakeholder awareness of the vision, mission, and core beliefs. It is very apparent through widespread support for the system’s direction from the various stakeholder groups that the school system is refocusing its purpose on education of its almost 150,000 students. Internal stakeholder groups are aware of the strategic planning process and its current status. Although staff conveyed a high level of ownership in the work involved in developing a Strategic Plan, the Superintendent’s leadership team and other administrators seemed more informed about the plan. Provisions for each school to develop a plan aligned with the system’s plan will be another critical component of the process.

Evidence indicated that while the system is on course in creating the Strategic Plan, there are high expectations among stakeholders for not only its completion, but also its implementation. In completing the plan, an intense review is needed to ensure that each target is stated in measureable terms and objectives are feasible for accomplishing goals. Further, providing systemic and systematic professional learning to support implementation of the Strategic Plan was not clearly visible as a component of the process. Concern also was expressed regarding the school system’s capacity to fund the implementation.

An essential aspect of the strategic plan implementation process is meaningful, two-way communication with both internal and external stakeholders throughout the community. The Wake County Public School

System is in the favorable position of having various supportive groups that are patently interested in the school system, though from vastly different vantage points. Nevertheless, some external stakeholder groups are still clamoring for more information and a feeling of connectedness. Those interviewed indicated the development of a timeline for getting public engagement around the Strategic Plan is scheduled for an upcoming meeting. The system is compelled to provide information through various modes to communicate effectively with its constituents. Clearly revealed is a tremendous appreciation for the school system’s more recent efforts to communicate with the community, especially with more proactive public relations strategies.

**Directives:**

Evidence is clear that the Wake County Public School System is well on the way to the development of a functional Strategic Plan. With the guidance of an outside facilitator, work should continue along the current path. The school system must continue to strive for stakeholder participation in the plan development, including the improvement process and allocation and alignment of resources. The school system should develop professional learning and communication strategies to be implemented upon completion of the plan to ensure that internal and external stakeholders have a clear understanding of implementation and expectations. Effective implementation of the Strategic Plan with involvement of all stakeholder groups and clearly defined funding strategies will be critical to the plan’s success and re-building trust within the community.

**REQUIRED ACTION 2:**

**Analyze and revise the “node” system of assigning students to schools to ensure objectivity, transparency and consistency.**

**Progress Status:** Please indicate the progress the institution has made toward addressing this Required Action.

<b>X</b>	<b>Completed</b> – All necessary and appropriate actions have been taken and evaluated. The institution has documented evidence that supports fulfillment of the Required Action.
	<b>In Progress</b> – The institution is currently engaged in actions and processes but has yet to fully implement steps necessary to address and/or complete the Required Action.
	<b>Has Not Addressed</b> – The institution has not taken any action at this time.

**Summary of Findings:**

The Special Review Team recognizes the work of the Student Assignment Task Force and the progress made toward this Required Action. The team reviewed and analyzed the documents and other evidence collected by the school system, including but not limited to the following: Student Assignment Task Force minutes, Nine Courses of Action, criteria for evaluating courses of action, student assignment research sources, crowding projections maps, Student Assignment Task Force Community Input Sessions Presentation, Student Assignment Task Force Plan of Action, Superintendent’s letter to parents/families on Student Assignment Plan, and School Choice Brochure. The Board of Education members voted 9-0 at the February 2011 Board Meeting to assign the Superintendent with the responsibility for the Student Assignment Plan.

The change from Board leadership to the Superintendent and staff implementing the Student Assignment Plan represents a significant shift in procedures. However, this change was more widely accepted because of the Superintendent’s focus on “student achievement.” Reportedly, he seems to be active throughout the

community and focused on communicating the Student Assignment Plan. Staff members perceive equity for students in the Student Assignment Plan, and the choice model alleviates overburdening at any school.

The Superintendent identified school system experts and assigned a cross-functional team as the Student Assignment Task Force. The Student Assignment Task Force held 50 input sessions with Board of Education members, the Superintendent's Leadership Team, the Superintendent's Advisory Councils, PTA Councils, and the Wake County community. These community meetings, forums and listening sessions were held during the planning and preparation stage to gather input on the plan. The Student Assignment Task Force held 23 community input sessions to present the plan and answer questions from the community. There also was an on-line "test drive" simulation involving 21,000 participants.

The Special Review Team actively listened to feedback regarding the Student Assignment Plan. It was clear to the team members that the public varied in its consensus regarding the process that was used to engage them.

Stakeholders alleged that having a sense of trust in a stable future is difficult because there is still a lot of apprehension. However, some board members reported that initially stakeholders had an abundance of questions at a rate of about 300 daily. Now, there are fewer questions with the assumption that the community is becoming more knowledgeable and accepting of the plan.

After 7 ½ months of study, feedback and engagement, the Board of Education approved the Student Assignment Plan with a 6-2 vote on October 18, 2011.

When carried out successfully, public engagement provides genuine insight and creative thinking to improve policy outcomes, giving the public a real sense that they have been able to contribute to the outcome, in this case, the Student Assignment Plan. However, some community stakeholders have concerns about the swiftness of the execution to engage the public around the Student Assignment Plan and are skeptical because there are no results at this point to promote their confidence. Since the achievement of the overall goals, transparency and accountability of outcomes are of prime importance, careful evaluation of the process is needed.

### **Recommendations:**

The responsibility of assigning students to schools to ensure objectivity, transparency and consistency is a monumental and extremely important task. The improvements needed in this area are long overdue and necessary to manage the growth and diversity of the school system in an effective manner that promotes learning and improves achievement. The 7 ½ months taken to study student assignment were truly dedicated to producing a viable, workable plan. While all of this accomplishment is to be commended, there is still stakeholder uneasiness. The leadership of the Wake County Public School System should continue its efforts to inform stakeholders and make adjustments to the Student Assignment Plan when identified. Evaluation of the process using the following questions also may provide insights into improving the process in the future.

- Did the school system undertake the process that they originally planned to undertake?
- Did participants feel that they experienced a meaningful process?
- Did participants feel that the Student Assignment Plan conformed to the public engagement principles and the invitation to the public to engage?
- What will be the impact of the engagement on longer-term policy-making?
- Was there anything that the school system could have done better?

### **REQUIRED ACTION 3:**

**Establish and implement an agenda setting process to ensure that every member of the Board of Education and key system leadership are well-prepared for each Board meeting.**

**Progress Status:** Please indicate the progress the institution has made toward addressing this Required Action.

X	<b>Completed</b> – All necessary and appropriate actions have been taken and evaluated. The institution has been documented evidence that supports fulfillment of the Required Action.
	<b>In Progress</b> – The institution is currently engaged in actions and processes but has yet to fully implement steps necessary to address and/or complete the Required Action.
	<b>Has Not Addressed</b> – The institution has not taken any action at this time.

#### **Summary of Findings:**

The Board has been working to implement an agenda setting process to ensure that every member of the Board and key system leadership are well-prepared for each board meeting. Individuals indicated that agenda policy is moving in the right direction, however, there is a feeling that further changes will need to take place to ensure the fidelity of this implementation.

The agenda-setting process has been unequivocally a visible aspect of the transformation to design systematic, operational procedures. Most stakeholder groups described the process of submitting agenda items to the Superintendent and Chief of Staff who then conferred with the Board Chair to finalize the agenda. Board members verified receipt of meeting materials on the Friday preceding board meetings with some exceptions. Though expounding the process, the lack of consistent delivery of materials to board members indicates that this systematic operation has not become fully functional.

Various stakeholder groups specified that instances of modifying the agenda during board meetings have decreased significantly. In those cases wherein members changed the agenda, interviewees explained that the motion to do so is adopted with a two-thirds vote. Fine tuning the systematic preparation of board materials so that each board member is prepared prior to each meeting remains a vital necessity to move the school system toward even more efficient and effective governance. A common theme among stakeholders was that the Board's demeanor was part of the root cause for the initial evaluation of the system, and they indicated that the behavior had improved considerably. One board member was clear when alluding to some initial mistakes with the approach used, but the Board has begun moving in the right direction with the Superintendent being a stabilizing force.

#### **Recommendations:**

Continue implementing the process to develop and distribute board materials in a consistent manner. It is commendable that so many stakeholders were aware of the process and the attempts for improvements. New board members will need to be well versed in the process and the efforts taking place to ensure continued improvement.

**REQUIRED ACTION 4:**

Define in policy the purpose and role of adopting resolutions as a governing practice.

**Progress Status:** Please indicate the progress the institution has made toward addressing this Required Action.

	<b>Completed</b> – All necessary and appropriate actions have been taken and evaluated. The institution has documented evidence that supports fulfillment of the Required Action.
<b>X</b>	<b>In Progress</b> – The institution is currently engaged in actions and processes but has yet to fully implement steps necessary to address and/or complete the Required Action.
	<b>Has Not Addressed</b> – The institution has not taken any action at this time.

**Summary of Findings:**

The Special Review Team believes that Board Policy #1321 and #1322 should eliminate board behavior that contributed to the circumvention and distortion of the policy adoption process. The Special Review Team found evidence that these policies have gone through the policy revision process as set forth by the policies of the Wake County Board of Education. As with the other policies that are designed to guide the work of the Board, there must be a commitment to internalize the policy.

According to the review of documentation and interviews with various stakeholder groups, the Board has curtailed its use of adopting resolutions as a governing practice to effectuate operational changes. Further, board members have avoided presenting resolutions without providing supporting information to all board members and the Superintendent prior to the meeting and using the practice to circumvent the policy adoption process.

On November 22, 2011, the Board “included the role of resolutions in Board Policy #1321 and #1322 and ensured that the updated revisions are supported by General Statute.” Documentary evidence shows that on December 2, 2011, the system plans to use an orientation session for newly elected board members to review all policies in the 1000 series – including the role of resolutions.

This Required Action is in progress because the system needs to finalize documents for Board approval and communicate the specific content to each board member as well as to internal and external stakeholders.

**Directives:**

Continue the efforts to commit to consistently following Board Policy #1321 and #1322. The Board needs to demonstrate over a sustained period of time an understanding of the policies of the school system. The actions and behaviors of board members should reflect that understanding by appropriately carrying out the governing roles and responsibilities defined by such policies.

**REQUIRED ACTION 5:**

**Provide on-going cohesive and consistent training to all members of the Board of Education regarding their roles, responsibilities, and the strategic direction of the school system.**

**Progress Status:** Please indicate the progress the institution has made toward addressing this Required Action.

<b>X</b>	<b>Completed</b> – All necessary and appropriate actions have been taken and evaluated. The institution has documented evidence that supports fulfillment of the Required Action.
	<b>In Progress</b> – The institution is currently engaged in actions and processes but has yet to fully implement steps necessary to address and/or complete the Required Action.
	<b>Has Not Addressed</b> – The institution has not taken any action at this time.

**Summary of Findings:**

The Special Review Team heard repeatedly the value of re-establishing membership in the North Carolina School Boards Association. A good school board does not run the public schools; it ensures that they are well run. Like other skills, the principles of good governance have to be learned and practiced by the collective Board. On-going training regarding roles and responsibilities will build the capacity of new members of the governance leadership team while reinforcing the capacity of the more experienced members.

The Board and superintendent have participated in a series of professional learning opportunities related to their roles and responsibilities. Various stakeholder groups described the training in which board members have participated, citing retreats highlighting role-related topics, as examples. The team found that stakeholders, other than the Board and Superintendent, had significant awareness about the participation of the governing Board in activities to build their knowledge regarding their roles and responsibilities. Stakeholders consider the Board’s focus to be more centered now on educational issues to improve student learning and school system effectiveness. They perceive that the Board’s support of education will permit the school system to become more effective.

After becoming a member of the North Carolina School Boards Association (NCSBA) on June 27, 2011, the Board notably participated in the NCSBA Annual Conference in November 2011 which, according to the agenda, included a session on engaging your community in the Strategic Planning Process. Several professional learning opportunities have permitted board members to earn hours exceeding the minimum required by state law. The Board has diligently accumulated hours of training, continuing professional learning on a systematic basis related to roles, responsibilities, and conducting effective meetings. This is essential to help each member build skills and capacity for improvement focused on the school system’s strategic direction.

In response to the February 2011 Required Action stipulating the provision of training for board members related to their roles, responsibilities, and the strategic direction of the system, documentary evidence shows their participation in professional learning sessions scheduled through December 2011, specifically as follows:

- February 25, 2011 - Retreat-Work Session Reviewing Role-Related Policies
- June 18, 2011 - Retreat-Work Session Reviewing Role-Related Policies
- August 30, 2011- Wake Education Partnership- Wake County School Board Leadership Institute for new board members
- October 21, 2011 - Update for Newly Elected Board Members – Student Assignment Plan

November 13-16, 2011 - Attended North Carolina School Boards Association Annual Conference  
December 2, 2011 - Orientation for Newly Elected Board Members

However, it will take time and commitment for the new and experienced board members to develop the skills and knowledge to become a fully functioning effective Board capable of fulfilling its proper roles and responsibilities.

Considering that the existing Board has participated in four sessions during the past nine months, the depth of information about specific roles and responsibilities is still uncertain. Newly elected board members have attended one of two scheduled sessions with a critical need remaining for role-related training. With the arrival of three new board members, they will need extensive professional development in relation to their roles and responsibilities as well as strategies for integrating skills learned to advance the school system's vision. Developing a systemic and systematic professional learning plan would ultimately support the Board in its efforts to become a high-performing governing body, gaining the capacity to fulfill performance expectations of their roles and providing a framework for achieving the system's strategic goals. A visionary approach to professional learning would involve the Board's acquisition of knowledge and skills to support a culture of change as the system implements its strategic plan with specific improvement initiatives.

Another element of the process is promoting and maintaining stability in functioning as the governing body for a large, urban school system. Dialogue with the newly elected board members revealed that they have unresolved issues, questions, and concerns about plans related to the system's direction. Using professional learning to create conditions that support solidarity, productive change, and continuous improvement would promote the potential evolution of a cohesive, unified school Board modeling job performance in a manner that stakeholders can emulate at various levels throughout the system.

Advantageously, this historically successful school system has significant internal and external stakeholder support with an extraordinary commitment to advancing its vision. A common theme during interviews was the significance of the Superintendents' influence on the direction of the system in providing governance and leadership focused on student learning and system effectiveness. Described as a "calmer" Board, stakeholders attributed this change unequivocally to the Superintendent's leadership. Sustaining the change with support from professional learning experiences is essential for promoting the system's goals.

### **Recommendations:**

In essence, the Board has completed the stipulations of this Required Action by attending retreats and meetings and demonstrating more acceptable behavior during transactions. However, the Board is facing a significant transition, and it is unclear whether board members have the depth of procedural knowledge to handle the important challenge of consistently putting the needs of the students first as a part of the governance and leadership process to improve student learning and school system effectiveness. Challenges that have surfaced in the past include contention about the Student Assignment Plan and factions or polarization on issues that arise. To promote positive growth during the enculturation of incumbent and newly elected members, a pronounced focus on roles and responsibilities is paramount to ensure that each member of the Board attains a working knowledge regarding job performance and expectations that will facilitate successful implementation of the system's strategic plan. A primary goal is sustaining the Board's growth and functioning in accordance with system policies and AdvancED Standards for Accreditation.

**REQUIRED ACTION 6:**

Institute a policy review, revision, and adoption process that support related board policy development.

**Progress Status:** Please indicate the progress the institution has made toward addressing this Required Action.

<b>X</b>	<b>Completed Action</b> – All necessary and appropriate actions have been taken and evaluated. The institution has documented evidence that supports fulfillment of the Required Action.
	<b>In Progress</b> – The institution is currently engaged in actions and processes but has yet to fully implement steps necessary to address and/or complete the Required Action.
	<b>Has Not Addressed</b> – The institution has not taken any action at this time.

**Summary of Findings:**

The school system has reviewed approximately 45-50 policies since February 2011. Policy review is an essential aspect of building the capacity of the Board to provide effective governance for the system. Interviewees were informed about and able to describe the process for policy management. However, several stakeholder groups indicated that they did not receive information systematically about policies that the Board has adopted. Some internal and most external stakeholders noted that they receive informational electronic messages from the school system, but purported that the notifications did not include policy updates. Though the system has begun the policy review process, evidence lacked the inclusion of a timeline for continual policy management. Having a relatively new Board makes policy review procedures a major priority to strengthen the Board’s capacity and expand its knowledge base of rules that support the system’s strategic plan for continuous improvement.

**Recommendations:**

Board Policy #1510 clearly outlines a comprehensive process for the revision and communication of school system policies that warrant review and update. Continue the work started providing a timeline for continual policy management.

**REQUIRED ACTION 7:**

Ensure that policies and procedures guiding the work of the system are in alignment and support the newly formed vision, mission, and core beliefs.

**Progress Status:** Please indicate the progress the institution has made toward addressing this Required Action.

<b>X</b>	<b>Completed</b> – All necessary and appropriate actions have been taken and evaluated. The institution has documented evidence that supports fulfillment of the Required Action.
	<b>In Progress</b> – The institution is currently engaged in actions and processes but has yet to fully implement steps necessary to address and/or complete the Required Action.
	<b>Has Not Addressed</b> – The institution has not taken any action at this time.

**Summary of Findings:**

The Special Review Team members believe that board members need to demonstrate over a sustained period of time an understanding of the policies, procedures and process of the school system and that understanding should be reflected appropriately in their performance in carrying out the governing roles and responsibilities defined by such policies and the newly formed vision, mission, and beliefs.

The general tone from stakeholders indicated that they are in accord in terms of the school system's vision, mission, and core beliefs guiding the work of the system. Various stakeholder groups shared their awareness of these principles as well as their commitment to them. Responses from staff and community representatives confirmed their support of the system provided by the foundational framework. Generally, the communal perception is that the school system is moving forward with an education agenda including goals focused on student learning. However, while stakeholders view the system's actions in a much more positive manner, the limited timeframe had not permitted a high level of confidence in future outcomes. For example, cautious reservations existed in relation to the implementation of the Student Assignment Plan.

### **Recommendations:**

The overall perception is that the school system is moving forward with the education agenda including goals focused on student learning. The practice and the consistency of implementation have yet to be realized. Continue over time to refine and improve these efforts and accomplishments.

## **Conclusion**

The Wake County Public School System has made significant improvement since the Special Review Team visit in February 2011. The overall climate of the school system has improved dramatically. The directives and recommendations provided in this report are designed to help continue the positive results already achieved and complete all of the Required Actions.

While the overall atmosphere has dramatically changed, there is still a sense of fragility. The Student Assignment Plan was approved by the Board of Education in October 2011 and three new board members were installed in December 2011. These significant changes will test the school system's ability to continue its progress in a unified and focused manner. Wake County leaders are encouraged to continue their great strides with the completion and implementation of the Strategic Plan, while providing the necessary professional learning as it relates to strategic planning, the Student Assignment Plan, and board roles and responsibilities.

Overall, stakeholders share a greater sense of confidence in the school system, however, the Board must continue to be transparent, engage stakeholders and focus on student achievement to build trust within its community.

Based on the need for the Board of Education to continue its work in several areas and ensure recent changes are sustainable, the high schools in the Wake County Public School System will be **Accredited on Advisement** for the remainder of the 2011-12 school year.

The Wake County Public School System will be expected to submit an Institution Progress Report by November 1, 2012. The Institution Progress Report will be reviewed and a determination will be made as to the accreditation status of the high schools and any next steps, if warranted. The school system should review the directives and recommendations outlined in this report with AdvancED to gain clarity or support in directing their efforts to meet the Required Actions that remain In Progress. Additionally, the North Carolina AdvancED office remains available to assist with the school system's continued efforts.