

**A Curriculum Audit™ of the Design, Delivery, and Alignment of the
Academically or Intellectually Gifted (AIG) Curriculum**

of the

WAKE COUNTY PUBLIC SCHOOL SYSTEM

Raleigh, North Carolina

Executive Summary

CMSi



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EXECUTIVE SUMMARY
CURRICULUM AUDIT™
FOR
WAKE COUNTY PUBLIC SCHOOL SYSTEM AIG PROGRAM

Officials of the Wake County Public School System demonstrated their commitment to student achievement, particularly in the Academically or Intellectually Gifted Program (AIG), by authorizing a curriculum audit of the program and its component parts. The district is, at the same time, concerned about the underrepresentation of subgroups of students in the AIG program as well as the performance of identified gifted students and the achievement gap between groups of students in various regions of the district.

Auditors found that the district has identified more than 28% of students in grades 4-12 as gifted and is desirous that every gifted student (identified or not identified) achieve at the highest level possible. Auditor found the need for the district to enhance its general curriculum while accommodating the differential needs of students. Implementation of the AIG curriculum and program is disparate, caused by inconsistent and incongruent delivery by various schools sites. Restructuring the district table of organization can assist in ensuring consistent adherence by each school to the AIG program components.

The commitment of district staff at all levels to challenging, rigorous, but attainable learning encourages staff to be willing to adjust and change its efforts for the improvement and achievement of each child in the district.

The auditors found a high level of caring and commitment to children at the board, district, and school levels. Principals, especially, along with community members, exhibit a strong desire to meet the diverse needs of the children in their building and it is clear that they and most of their teachers are working very hard to do so. The auditors found the district schools and administration to be warm and welcoming and strong advocates for children.

General quality control assumes that at least three elements must be present in any organizational and work-related situation for it to be functional and capable of being improved over time. These are: (1) a work standard, goal/objective, or operational mission; (2) work directed toward attaining the mission, standard, goal/objective; and, (3) feedback (work measurement) that is related to or aligned with the standard, goal/objective, or mission.

When activities are repeated, there is a "learning curve," i.e., more of the work objectives are achieved within the existing cost parameters. As a result, the organization, or a subunit of an organization, becomes more "productive" at its essential short- or long-range work tasks.

Within the context of an educational system and its governance and operational structure, curricular quality control requires: (1) a written curriculum in some clear and translatable form for application by teachers in classrooms or related instructional settings; (2) a taught curriculum that is shaped by and interactive with the written one; and, (3) a tested curriculum that includes the tasks, concepts, and skills of pupil learning and is linked to both the taught and written curricula. This model is applicable in any kind of educational work structure typically found in mass public educational systems, and is suitable for any kind of assessment strategy, from norm-referenced standardized tests to more authentic approaches.

The Curriculum Audit™ assumes that an educational system, as one kind of human work organization, must be responsive to the context in which it functions and in which it receives support for its continuing existence. In the case of public educational systems, the support comes in the form of tax monies from three levels: local, state, and federal.

In return for such support, mass public educational systems are supposed to exhibit characteristics of rationality, i.e., being responsive to the public will as it is expressed in legally constituted bodies such as Congress, state legislatures, and locally elected/appointed boards of education.

In the case of emerging national public school reform, more and more this responsiveness is assuming a distinctive school-based management focus, which includes parents, teachers, and, in some cases, students. The ability of schools to be responsive to public expectations, as legally expressed in law and policy, is crucial to their future survival as publicly-supported educational organizations. The Curriculum Audit™ is one method for ascertaining the extent to which a school system, or subunit thereof, has been responsive to expressed expectations and requirements in this context.

A curriculum audit is basically an “exception” report. That is, it does not give a summative, overall view of the suitability of a system. Rather, it holds the system up to scrutiny against the predetermined standards of quality, notes relevant findings about the system, and cites discrepancies from audit standards. Recommendations are then provided accordingly to help the district improve its quality in the areas of noted deficiency.

The curriculum audit of the AIG program in Wake County Public School System adhered to its protocols and procedures. The audit uses three sources to gather information regarding the program: 1) Documents (board policies, curriculum guides, state/local reports, assessment data, plans, etc.); 2) Interviews (confidential interviews of district, school, and community members); and 3) Observations (tour of all building sites—classrooms, labs, playgrounds, restrooms, and offices—for instructional practices, condition, and safety).

The audit is based on five standards: Control, Direction, Connectivity and Equity, Feedback, and Productivity. Following are the Findings, Recommendations, and Summary Statement for the audit of the AIG program in Wake County Public Schools conducted from March 5-8, 2013.

A. FINDINGS

STANDARD 1: A School System Is Able to Demonstrate Its Control of Resources, Programs, and Personnel.

Quality control is the fundamental element of a well-managed educational program. It is one of the major premises of local educational control within any state’s educational system.

The critical premise involved is that, via the will of the electorate, a local board of education establishes local priorities within state laws and regulations. A school district’s accountability rests with the school board and the public.

Through the development of an effective policy framework, a local school board provides the focus for management and accountability to be established for administrative and instructional staffs, as well as for its own responsibility. It also enables the district to assess meaningfully and use student learning data as a critical factor in determining its success.

Although educational program control and accountability are often shared among different components of a school district, fundamental control of, and responsibility for, a district and its operations rests with the school board and top-level administrative staff.

What the Auditors Expected to Find in the Wake County Public School System:

A school system meeting CMSi Curriculum Audit Standard One is able to demonstrate its control of resources, programs, and personnel. Common indicators are:

- A curriculum that is centrally defined and adopted by the board of education;
- A clear set of policies that establish an operational framework for management that permits accountability;
- A clear set of policies that reflects state requirements and local program goals and the necessity to use achievement data to improve school system operations;
- A functional administrative structure that facilitates the design and delivery of the district’s curriculum;
- A direct, uninterrupted line of authority from school board/superintendent and other central office officials to principals and classroom teachers;

- Organizational development efforts that are focused to improve system effectiveness;
- Documentation of school board and central office planning for the attainment of goals, objectives, and mission over time; and
- A clear mechanism to define and direct change and innovation within the school system to permit maximization of its resources on priority goals, objectives, and mission.

Overview of What the Auditors Found in the Wake County Public School System Academically or Intellectually Gifted Program:

- Auditors found that board policies are inadequate to provide guidance for curriculum management and to establish quality control. Almost all board policies are older than five years with many approved in 2007. Policies lack sufficient clarity and complete content to adequately address expectations for Academically or Intellectually Gifted (AIG) students in such areas of educational program management as design and delivery of the curriculum, professional development, program evaluation, equitable student access to offerings, program-focused budgeting, and other related aspects of policy guidance for systemic direction.
- Confusion regarding systemic control of the district's curriculum has resulted in a lack of clarity related to the roles and responsibilities of various central office personnel. In many cases, personnel interviewed by auditors related instances when there was a lack of communications between various departments and divisions in the central office as well as between the central office and school campuses.
- Schools frequently undertake making decisions that are in the purview of a district's standard of control and oversight. Central office departments function independently and in somewhat isolation of each other diluting curricular directions to school sites. Without adequate board policies to direct the district's written, taught, and tested curriculum, confusion exists and central office and site administrators are uncertain about the extent of their authority to make decisions regarding curriculum direction. Some district personnel interviewed by auditors expressed that they seldom used or referred to board policies thus defaulting to customary practices and processes as the authoritative direction in the district.
- The board of education has established the district's mission, vision, and core belief statements but its policies lack the clarity to direct written curriculum that is more rigorous than state and national standards. Such policies direct the decision-making responsibilities to ensure consistency, non-duplication of tasks, and product requirements. School site decision-making authority directs the processes to ensure consistent implement of the curriculum designed and adopted by the board across the district.
- When reviewing the current status of the Wake County Public School System in relationship to the principles of Standard One, system control and oversight, the auditors found the current organizational chart does not meet audit criteria for sound organizational management. Functions are not grouped logically. Scalar relationships are not accurately represented on the organizational chart, with positions at different levels of responsibility and compensation depicted on the same horizontal plane. Some positions (principals, teachers, counselors, assistant/vice principals, and non-professional staff) are not depicted on the organizational chart.

Finding 1.1: Board policies lack adequate guidance needed for effective management of the AIG curriculum and related functions, consistency in organizational operations, or program quality control.

Well written policies regarding curriculum management and direction for a school system are critical in providing system control and communicating governance expectations of the administration and instructional staff. Such policies establish an operational framework for management of the curriculum and related functions by providing a structure for the design, delivery, and assessment of the district curriculum, ensuring the consistent connectivity of the curriculum across the district, and a means for managing innovation and change in the school district.

Comprehensive board policies provide foundational direction to the day-to-day operations of the school district. It is through policies that commonly understood standards are established and maintained over time for the design and delivery of all written, taught, and tested curriculum.

For policies to be effective decision-making guides at all levels of the organization, they must be current and broad enough to avoid micromanagement, but specific enough that managers can refer to them for direction in making decisions about teaching, learning, and related district operations. If policy direction is absent, outdated or unclear, or if it is not specific enough, educational decisions are left to the discretion of individuals. Results of these decisions may or may not be congruent with the intent of the district's board of education.

The auditors found that the district policies are inadequate to direct a sound curriculum management system and to establish quality control of the educational program and organizational operations. Without clarity provided by board policies, staff cannot accomplish the expectations of the board. Without clear board policy direction for the delivery of the gifted program in the district, the board's expectation for serving AIG students cannot be ensured. Additionally, auditors found the use of the policies to guide decision-making has been minimal. Policies reviewed lack specificity regarding the lines of authority and clarity to ensure consistent implementation of the curriculum across the district.

Auditors reviewed district regulations, which are the directives approved by the superintendent to carry out the board policies. They provide the actions, procedures, and processes in a precise manner to bring the policy to attainment. Auditors found that less than a quarter of the board policies have a corresponding district regulation to direct implement of the policies.

Finding 1.2: Evidence of planning is found in the Wake County Public School System; however, the AIG program lacks a systematic, cohesive planning process. Planning efforts are not tightly connected and monitored for gifted students' results.

District planning is a process by which district officers envision the district's future and develop the necessary procedures and operations to achieve that future. The focus of planning is about how senior officers can adjust to circumstances in planning. Planning is about the ability of leadership to be planners and carry out that planning. In this process multiple data sources are used. Decisions are made with clear future goals in mind.

Auditors focused on planning within the Academically or Intellectually Gifted (AIG) program. North Carolina requires the development of a local AIG plan every three years. The depth, thoroughness, and challenges of the local AIG plan are critical to increase the achievement of those students identified as gifted by the WCPSS.

Finding 1.3: The organizational chart for AIG positions does not meet audit criteria for sound organizational design. Most job descriptions do not meet audit criteria for current, accurate, and clear specifications of responsibilities, curriculum linkage, and role relationships in the district.

Clarity of administrative role relationships is important to an organization in the productive grouping and management of its tasks and functions. A functional and accurate delineation of administrative relationships is generally depicted in graphic form and called an "Organizational Chart" or "Table of Organization". An organizational chart graphically depicts the line of authority and responsibilities from the board of education and superintendent to site principals and classroom teachers for producing student learning.

Job descriptions are clearly written summaries of duties and qualifications of persons employed by the school district. They provide information regarding the necessary background to qualify for specific jobs and how those positions function within the organization. The descriptions should include assignment of supervisory relationships and the critical components of the job duties. A clear set of job descriptions supports the district's internal and external communication by explaining who performs what duties within the organization. Adequately designed job descriptions also make graphic depiction of administrative relationships on the organizational chart more readily accomplished.

STANDARD 2: A School System Has Established Clear and Valid Objectives for Students.

A school system meeting this audit standard has established a clear, valid, and measurable set of learning standards with objectives set in a workable framework for their attainment. Unless objectives are clear and measurable, there cannot be a cohesive effort to improve pupil achievement in the dimensions in which measurement occurs. The lack of clarity and focus denies educators the ability to concentrate scarce resources on priority targets. Instead, resources may be spread too thin and be ineffective in any direction. Objectives are, therefore, essential to attaining local quality control via the school board.

What the Auditors Expected to Find in the Wake County Public School System Academically or Intellectually Gifted Program:

Common indicators the auditors expected to find are:

- A clearly established, board-adopted, system-wide set of goals and objectives for all programs and courses;
- Demonstration that the system is contextual and responsive to national, state, and other expectations as evidenced in local initiatives;
- Operations set within a framework that carries out the system's goals and objectives;
- Evidence of comprehensive, detailed, short- and long-range curriculum management planning;
- Knowledge, local validation, and use of current best practices and emerging curriculum trends;
- Written curriculum that addresses both current and future needs of students;
- Major programmatic initiatives designed to be cohesive;
- Provision of explicit direction for the superintendent and professional staff; and
- A framework that exists for systemic curricular change.

Overview of What the Auditors Found in the Wake County Public School System Academically or Intellectually Gifted Program:

Standard Two incorporates actions that provide direction to teaching and learning in school districts. In applying this standard, the auditors looked at the general direction for teaching and learning in both the district and for the Academic or Intellectually Gifted (AIG) Program.

Auditors reviewed various documents, including board policies, job descriptions, and district-level documents, that provide some direction for curriculum management functions. However, the Wake County Public School System lacks a comprehensive written curriculum management plan to provide formal direction for the design, delivery, deployment, and revision of curriculum. Further, there is no clear direction for the inclusion of specific program goals (Academic or Intellectually Gifted, English Learner, Special Ed., etc.) within this curriculum management process. While policy is in place to direct the development of roles and responsibilities for monitoring and managing curriculum delivery, implementation is inadequate.

Policy defined design expectations for district curriculum documents, but no cohesive plan was presented to guide, support, or provide monitoring the implementation for the general curriculum or special program learning goals. Although some elements of a curriculum management plan existed in a few documents, no clear explanation of the intended process within the current organization, nor any coordination among the various departments, was evident.

Auditors examined the scope of the written curriculum in the four core content areas (English/language arts, mathematics, science, and social studies), as well as two non-core areas (art and world languages). Written curriculum is present at all grade levels, but the scope does not provide sufficient direction for teaching and learning in the core program areas. The scope of the written curriculum in the core content areas was adequate at the elementary level, but inadequate at the middle and high school levels. The scope was inadequate for K-12 arts, with the noted exception of high school honors and AP art. World languages scope was adequate at

the middle school but not at the high school level. Overall, the scope of the curriculum was determined to be inadequate to direct teaching.

Auditors assessed the quality of 143 curriculum guides for minimum audit components and the specificity needed to adequately direct instruction. The curriculum documents vary greatly in level of adequacy for addressing prerequisite skills, assessment tools, resources, and instructional strategies. Auditors determined that the district's curriculum documents lacked consistency in format and in providing adequate information for the alignment of a written, taught, and tested curriculum. With the exception of elementary (K-5) mathematics, the quality of the written curriculum documents is inadequate to direct teaching, promote deep alignment, and provide a rigorous educational program for student achievement. In addition, a random review of high school pacing guides did not meet audit criteria. Overall, auditors determined that the quality of curriculum documents in WCPSS was inadequate to direct teaching and to ensure horizontal coordination.

Curriculum guidance resources contain mixed levels of internal consistency between learning objectives, instructional materials, and instructional practices impeding cohesive instruction and effective student learning. Results of the auditors' internal consistency analysis of the WCPSS curriculum documents revealed a local curriculum that is aligned to the common core standards content objectives and recommended enrichment strategies in math, science and social studies with the same exceptions as described in the finding details. However, English-language arts across grades 4-12 lacked internal consistency. The cognitive complexity required in curriculum materials, classroom activities, and assessment items to enhance and extend gifted student learning is inconsistent. In particular, the lack of internal consistency fails to support differentiated instruction to meet the specific needs of the Academically and Intellectually Gifted students.

The auditors found that programs in Wake County Public School System were not systemically designed, implemented, monitored, and evaluated to provide alignment with the curriculum and to increase student achievement. No evidence of procedures, standards, or selection criteria for programs implemented in the district was presented to the audit team.

Finding 2.1: Curriculum management of the AIG Program is fragmented and lacks coordinated direction to ensure alignment and cohesion with the district curriculum management plan.

A comprehensive curriculum management plan creates an organizational framework for all teaching and learning activities within a district. Under its direction, all curriculum and specific programs are guided and controlled to create a cohesive learning system throughout the district for all students. The curriculum management plan establishes guidelines and procedures for the design, delivery, and evaluation of the curriculum.

A well-designed and consistently implemented curriculum management plan provides a system of quality control. Such a plan, designed to function in coordination with other major plans (e.g. the Academically or Intellectually Gifted Plan, the district's strategic plan, school improvement plans, the professional development plan, and the budgeting process) outlines the goals, processes, and personnel positions involved in designing, developing, evaluating, and revising quality curriculum documents. The plan also establishes expectations and guidelines for the delivery of curriculum, increasing the likelihood that the implementation will be manageable and integrated at all levels of the system. In this way delivery is consistent and access to the delivered curriculum is possible for all students throughout the district.

Finding 2.2: The scope of the written curriculum is adequate at the elementary level to provide a cohesive framework of the goals and objectives for student learning; the scope of the written curriculum is inadequate at the middle and high school levels in the four core subject areas of ELA, mathematics, science, and social studies.

Clear, comprehensive, and current curriculum documents give direction for teachers concerning objectives, assessment methods, prerequisite skills, instructional materials and resources, and classroom strategies. A complete set of curriculum documents includes guides for all grade levels and courses taught in the district. This is known as the scope of the written curriculum.

The lack of a curriculum guidance document for a subject or course causes teachers to act independently and rely on other resources in planning and delivering instruction. These other resources may not be in alignment

with the instructional goals for AIG students of the district and/or the state. In addition, they may not provide consistency and focus across grades, courses, and schools.

Focus and connectivity by the administration and board is greatly reduced when decisions involving content and delivery are left to school sites and classrooms functioning in isolation. Fragmentation of the taught curriculum can lead to inconsistent and poor student achievement.

Finding 2.3: The quality of the district's adopted written curriculum is inadequate to direct teaching, to promote deep alignment, and to provide a rigorous educational program for AIG students.

Quality curriculum guides connect the written, taught, and tested curriculum. They support instruction so the efforts of teachers are guided in achieving the educational priorities of the system. Curriculum guides provide direction and communication of instructional objectives, align objectives to the tested curriculum, specify prerequisite skills, list instructional materials, and provide teachers with instructional approaches.

Quality curriculum documents make the curriculum operational by providing work plans for teachers. They provide connectivity vertically and horizontally within the school system. In essence, curriculum documents provide a blueprint for teachers in planning and implementing lessons. When guides are incomplete or nonexistent, teachers must make instructional decisions utilizing whatever resources they have. Instruction is more likely to be inconsistent and not aligned to the written curriculum.

Finding 2.4: AIG instructional content and strategies to extend learning for AIG students are inadequate to provide consistent enrichment and a cohesive system of learning aligned to district and state standards.

A school system supports student learning and achievement through documents that clearly explain the intended and extended curriculum and provide the means and resources to ensure its implementation with tight linkages among the written, taught, and assessed curricula. When additional resources are needed for special needs (AIG), the resources are provided for easy access and coordination with the district-adopted curriculum.

Deep alignment in curriculum begins with design: curriculum guides incorporate the concepts, skills and knowledge students are expected to master for success on high stakes tests. The learning is presented in various contexts so students are prepared to transfer learning to varied and multiple test and real-life situations.

To ensure that the delivery of curriculum is aligned with design, written curriculum guides should be strong in suggesting approaches for teaching the required content and incorporate suggestions for quality student activities that engage students appropriately for their learning needs. Quality delivery of instruction should focus on challenging activities that are engaging and productive and meet the specific needs of students in special categories such as Special Education, second language learners, and gifted students. These activities should integrate the content, contexts, and types of cognition prevalent on assessments, whether high stakes, criterion-referenced, AP, or International Baccalaureate. These resources should be user-friendly and comprehensive to ensure that all teachers use them.

STANDARD 3: The School District Demonstrates Internal Consistency and Rational Equity in Its Program Development and Implementation.

A school system meeting this curriculum audit standard is able to show how its program has been created as the result of a systematic identification of deficiencies in the achievement and growth of its students compared to measurable standards of pupil learning.

In addition, a school system meeting this standard is able to demonstrate that it possesses a focused and coherent approach toward defining curriculum and that, as a whole, it is more effective than the sum of its parts, i.e., any arbitrary combinations of programs or schools do not equate to the larger school system entity.

The purpose of having a school system is to obtain the educational and economic benefits of coordinated and focused program for students, both to enhance learning, which is complex and multi-year in its dimensions, and to employ economies of scale where applicable.

What the auditors expected to find in the Wake County Public School System Academically or Intellectually Gifted Program

The CMSi auditors expected to find a highly-developed, articulated, and coordinated curriculum in the school system that was effectively and specifically delivered to AIG students, and efficiently monitored by the administrative and supervisory staffs at the central and site levels. Common indicators are:

- Documents/sources that reveal internal connections at different levels in the system;
- Predictable consistency through a coherent rationale for content delineation with the curriculum;
- Equity of curriculum/course access and opportunity;
- Allocation of resource flow to areas of greatest need;
- A curriculum that is clearly explained to members of the teaching staff and building-level administrators and other supervisory personnel;
- Specific professional development programs to enhance curricular design and delivery;
- A curriculum that is monitored by central office and site supervisory personnel; and
- Teacher and administrator responsiveness to school board policies, currently and over time.

Overview of what the auditors found in the Wake County Public School System Academically or Intellectually Gifted Program

The auditors noted the student demographics of the AIG program do not reflect the ethnic representation of the student body. Minority groups are underrepresented in the overall total of identified AIG students. Students from low socioeconomic areas in the county are also underrepresented in the AIG program.

Identified AIG students are a subgroup compared to the student population as a whole. Board policy dictates AIG students will receive differentiated instruction. Through classroom snapshots, auditors discovered differentiated instruction is less likely to be taking place in high schools. Use of differentiated instruction was difficult to identify in elementary and middle schools. The level of work from collected artifacts across the grade levels did indicate that differentiated instruction is not taking place as much as intended.

The Wake County Public School System is making the transition to Common Core State Standards and is presently emphasizing the CCSS in its professional development activities. Nonetheless, an emergent theme for AIG professional development is to provide differentiated instructional strategies to AIG teachers and train other classroom teachers with the practice of differentiating instruction to better assist the identified AIG students in their classrooms. But auditors observed inconsistent application of the training received in differentiation in individual classrooms. In part, this may be a result of smaller numbers of AIG teachers in the district and the autonomy of individual school sites to decide the level of implementation of AIG instructional strategies.

Finding 3.1: Demographics of identified AIG students are not representative of the student demographics in the district. The district lacks a plan to increase identification of underrepresented subgroup students.

In an effective school system, all students have equal access to the programs and services available in the district. Access to these programs and services should not be determined by gender, ethnicity, attendance area, or socioeconomic status. The auditors expect to find similar proportions of students by gender and ethnic origin in the AIG program as reflected in the general student population. No one student group should be disproportionately represented in retention and suspension rates, graduation rates, and enrollment in various special programs and services.

While the term equal means “exactly the same,” the audit refers to “equity” as the allocation of resources based on need. Rather than distributing resources based on a per pupil allocation, equity requires that additional resources be directed to students with greater needs. Without equal access to programs and services and equitable distribution of resources, school systems perpetuate the disparities among students that a public school education was designed to ameliorate.

Finding 3.2: Instructional practices do not reflect district and program expectations for AIG students. Monitoring is not formalized to provide consistent feedback to guide curriculum delivery for AIG students and improved student achievement.

Effective delivery of the curriculum provides the foundation for successful learning experiences for all students. Quality classroom instruction is essential to a district's ability to positively influence student achievement. Teaching strategies that transcend students' ethnicity, gender, and socioeconomic status and provide for research-based approaches that are stimulating and focused promote high levels of student achievement across all segments of the student population. A teacher's knowledge of diverse student learning styles and use of varied teaching methods are critical in promoting student learning, especially AIG students, and creating a classroom environment that provides opportunities for every learner to reach his/her potential.

In general, auditors found that instructional practices they observed reflected some of the district focus and staff development emphasis for AIG students. Many rooms were arranged to facilitate collaborative learning, particularly at the elementary schools. Teachers' single predominant activity was large group instruction followed by monitoring, but at the elementary and middle school levels this quite often involved teachers working with a class as a whole and then allowing students to work in collaborative groups or with a partner in a large group setting. Technology was observed being used by students mostly in labs or where students were working one-to-one with iPads in their classrooms. Auditors noted that the majority of classrooms that had desk-top computers for student use did not have any students using those computers. Approximately 33 percent of the computers available to students were being used but mostly in computer labs.

Auditors found that due to low numbers of AIG students in many of the schools, there was rarely an opportunity to visit a classroom with all AIG students. The vast majority of the AIG students were working with their classmates in the regular classrooms.

Finding 3.3: Professional development for AIG teachers is inadequately planned, coordinated, monitored, and evaluated system-wide and does not consistently provide sufficient in-depth training and support for successful implementation in the classroom leading to increased achievement by AIG students.

A quality professional development program enhances the knowledge and skills of all employees with the objectives of improving employee performance and increasing student achievement. Professional development that is centrally coordinated with other district and school improvement plans is powerful when it is data-driven, focused on organizational change, and congruent with the organizational mission and goals. Such congruence is the primary reason school districts provide professional development. To improve student achievement, focused professional development programs follow consistent needs assessment, planning, implementation, monitoring, and evaluation procedures that are aligned with the district's curriculum and attainment of its goals.

Long-term change requires sustained, detailed staff development and focused implementation plans. Funding for this program should be an identifiable budget item. High quality staff development policy and planning includes provisions for assessing the effect of staff development on student outcomes and may also address participants' reactions to training, learning, and use of skills acquired through the various aspects of the program.

A focused and effective professional development program is guided by a comprehensive plan that provides all staff with the knowledge and skills to be productive in meeting the long-range goals of the district. Effective professional development programs offer a variety of delivery models coupled with intensive monitoring and evaluation to support district and program achievement goals. Follow-up activities include meaningful practice on what was presented. High quality professional development programs are ongoing and utilize research-based strategies to guide improvement. Monitoring and evaluation professional development strategies help to effectively measure the success of the training in improving student achievement.

STANDARD 4: A School System Uses The Results From System-Designed And/Or -Adopted Assessments To Adjust, Improve, Or Terminate Ineffective Practices Or Programs.

A school system meeting this audit standard has designed a comprehensive system of assessment/testing and uses valid measurement tools that indicate how well its students are achieving designated priority learning goals and objectives. Common indicators are:

- A formative and summative assessment system linked to a clear rationale in board policy;
- Knowledge, local validation, and use of current curricular and program assessment best practices;
- Use of a student and program assessment plan that provides for diverse assessment strategies for varied purposes at all levels—district, school, and classroom;
- A way to provide feedback to the teaching and administrative staffs regarding how classroom instruction may be evaluated and subsequently improved;
- A timely and relevant data base upon which to analyze important trends in student achievement;
- A vehicle to examine how well specific programs are actually producing desired learner outcomes or results;
- A data base to compare the strengths and weaknesses of various programs and program alternatives, as well as to engage in equity analysis;
- A data base to modify or terminate ineffective educational programs;
- A method/means to relate to a programmatic budget and enable the school system to engage in cost-benefit analysis; and
- Organizational data gathered and used to continually improve system functions.
- A school system meeting this audit standard has a full range of formal and informal assessment tools that provide program information relevant to decision-making at classroom, building (principals and school-site councils), system, and board levels.
- A school system meeting this audit standard has taken steps to ensure that the full range of its programs is systematically and regularly examined. Assessment data have been matched to program objectives and are used in decision-making.

What the Auditors Expected to Find in the Wake County Public School System Academically or Intellectually Gifted Program

The auditors expected to find a comprehensive assessment program for all aspects of the curriculum, Pre-K through grade 12, which:

- Was keyed to a valid, officially adopted, and comprehensive set of goals/objectives of the school district;
- Was used extensively at the school level to engage in AIG program review, analysis, evaluation, and improvement;
- Was used by the policy-making groups in the system and the community to engage in policy review specific to the AIG program for validity and accuracy;
- Was the foci and basis of formulating short- and long-range plans for continual improvement in the AIG program;
- Was used to establish costs and select needed curriculum alternatives for AIG students; and,
- Was publicly reported on a regular basis in terms that were understood by key stakeholders in the community.

Overview of What the Auditors Found in the Wake County Public School System Academically or Intellectually Gifted Program:

The auditors determined that Wake County Public School System assessment planning was adequate to allow for comprehensive planning, implementation, and measurement of the effectiveness of student assessment or program evaluation. A consistent method exists for monitoring and evaluating the large number of programs in the district. However, AIG programs were not being evaluated for the impact on AIG student achievement.

Policy and other documents provide direction for assessment; however, the scope of assessment is inadequate to provide the necessary data to inform the staff and community about AIG student mastery of the curriculum or to provide a basis for sound decisions about curriculum design and delivery.

Wake County students at every grade span made steady academic gains in 2011-12 according to newly released results from the North Carolina Department of Public Instruction. As a group, AIG students consistently scored at performance Level IV on state tests. However, student achievement data shows that certain subgroups of AIG students are achieving at a lower level than other AIG subgroups. At the present yearly growth rate, some AIG student subgroups will not reach parity with other AIG subgroups for many years, if ever. Inconsistencies were found in AIG achievement across district regions.

Auditors determined that processes and procedures were in place in WCPSS schools for analyzing and using data. However, the use of assessment data to inform AIG services and remedy achievement gaps specific to AIG students is inadequate across the district.

Finding 4.1: Assessment planning is adequate to guide the design and delivery of student assessment and program evaluation. However, AIG programs are not being evaluated for the impact on student achievement. Delivery of AIG assessment planning that directs assessment of AIG student achievement and evaluation of AIG programs is fragmented.

Planning for comprehensive Academically or Intellectually Gifted (AIG) student identification, assessment and program evaluation guides the collection, analysis, dissemination, and use of data to facilitate informed decisions about the design and delivery of the curriculum. It is a vehicle for examining the equity in identifying students for the AIG program, quality of student performance, and determining if programs are actually producing the desired results. When the district leadership does not adequately plan for identifying AIG students, assessing student achievement and evaluating AIG programs, the board and administrative leaders may lack reliable, systematic feedback regarding the effectiveness of programs, student learning, and instructional strategies. Further, parents and students may get incomplete information about the AIG program and feedback about student learning.

Finding 4.2: The scope of formal assessment for core and non-core subjects and courses in the Wake County Public School System is inadequate to effectively monitor Academically or Intellectually Gifted student achievement and to provide sufficient data for making sound curricular decisions.

The scope of a district's assessments describes the extent to which subjects and courses taught to students in each grade are covered by system-wide assessments. A complete scope of assessment is designed to measure student mastery of major learning objectives in every subject and course in each grade. When assessments are administered in each course and grade, they generate data that inform stakeholders of the extent to which students have mastered the entire curriculum. Assessment results also identify courses and subjects where the curriculum and/or instructional techniques need to be improved, thereby providing vital information for the district's decision makers. When the scope of assessment does not cover all courses and subjects, teachers, administrators, parents, and students lack reliable measures of student learning for the entire curriculum; data available for decision-making is diminished; and the quality of decisions can be degraded.

Finding 4.3: Disparities exist in AIG student achievement across the WCPSS regions. Analysis of test data indicates substantial achievement gaps between subgroups of AIG students that will never close at the present annual growth rates.

Comparative student assessment data enables the board, educational community, parents, students, and others to assess how well the school system's AIG students are performing when compared to students across the nation, state, or other school districts. More importantly, comparative assessment data allow educators to determine how well district AIG students perform over short and long terms. Effective school districts and schools use comparative data from student assessment instruments to establish instructional goals and to target performance gap reductions.

Trend analyses provide information how assessment results change over time. In a productive school district, one would expect to see improvement over time in student performance on various student assessment instruments

and a reduction of any performance gaps that might exist. Another expectation is that, over time, the achievement of students would be better than the predicted level of achievement based on student demographics. Limited variation in performance across time reflects stagnation, even when student achievement is high.

Finding 4.4: The availability and use of formative and summative assessment data specific to informing instruction for subgroups of Academically or Intellectually Gifted (AIG) students is inadequate across the district.

The use of data from a variety of sources is essential for sound curriculum management and responsible decision-making in planning for various district functions and classroom instruction. A data-driven school system collects data and uses it as feedback to improve the design and delivery of curriculum to enhance student achievement. Effective assessment resources include benchmark, formative, and summative student test data; surveys and follow-up studies; program evaluations, audits, and reviews; and staff evaluations. The resulting data need to be made available to staff at all levels of the school system in formats that can be readily understood and effectively utilized in the effort to improve student achievement. Administrators and teachers require data from test item analysis and disaggregated achievement data specific to student populations so they can monitor and adjust curriculum design or delivery. Systems that fail to create and utilize these data resources lack the basis for sound decisions involving curriculum, instruction, and supporting operations.

Auditors determined that processes and procedures were in place in WCPSS schools for analyzing and using data. However, the use of assessment data to inform AIG services and remedy achievement gaps specific to AIG students is inadequate across the district.

STANDARD 5: The School District Has Improved Productivity.

Productivity refers to the relationship between system input and output. A school system meeting this standard of the CMSi Curriculum Audit™ is able to demonstrate consistently improved pupil outcomes, even in the face of diminishing resources. Improved productivity results when a school system is able to create a consistent level of congruence between major variables in achieving enhanced results and in controlling costs.

What the Auditors Expected to Find in the Wake County Public School System Academically or Intellectually Gifted Program:

While the attainment of improved productivity in a school system is a complex process, caused in part by the lack of a tight organizational structure (referred to as “loosely coupled”), common indicators of a school system meeting this audit standard are:

- Planned and actual congruence among curricular objectives, results, and financial allocations;
- A financial database and network that can track costs to results, provide sufficient fiduciary control, and be used as a viable data base in making policy and operational decisions;
- Specific means that have been selected or modified and implemented to attain better results in the schools over a specified time period;
- A planned series of interventions that have raised pupil performance levels over time and maintained those levels within the same cost parameters as in the past;
- School facilities that are well-kept, sufficient, safe, orderly, and conducive to effective delivery of the instructional program; and
- Support systems that function in systemic ways.

Overview of What the Auditors Found in the Wake County Public School System Academically or Intellectually Gifted Program:

The auditors found that Board policies are adequate to direct the development of a performance-based budget process for the district, but the process for the AIG program lacks the components necessary to link resource expenditures to program needs and priorities.

The auditors found that the Wake County Public School System AIG Program has implemented a number of interventions to support academic performance of identified students. The auditors did not find a current, commonly used, program-wide process for the development, implementation and evaluation of these interventions.

Finding 5.1: The budgeting process for the Wake County Public School System AIG Program lacks the components necessary to link resource expenditures to program needs and priorities.

A school program's productivity is improved when clear linkages exist between performance and the budget. Cost-benefit analysis requires a clear delineation of costs compared to documented system gains or results obtained from allocations. Such linkages provide for a budgetary process that is driven by data-based program needs, educational priorities, and planned goals. Linkages between the budget and program are critical to identify how the district allocates fiscal resources to support and implement its programs to achieve desired student learning results. Thus, the written budget is the numerical expression of the district's priorities and should reflect program expectations.

Finding 5.2: The AIG Program lacks a formalized process for selecting, planning, implementing, monitoring and evaluating program interventions to increase student achievement with the same or reduced costs.

Over time, school districts are expected to show improvement in the use of resources and become more effective at achieving their objectives. District productivity can be enhanced when the staff relies on an adequate base of performance data to identify needs. In turn, these needs are used as a basis to alter or enhance the design and/or delivery of curriculum so that student academic performance can be improved or maintained at a high level. Such alterations in design or techniques are referred to in the audit as interventions.

Interventions frequently take the form of programs. In addition to being derived from a documented need, interventions should be well planned, appropriately funded, fully implemented, and evaluated to determine if they accomplish their intended purposes. When the need for an intervention program is not well documented, planned, adequately funded, implemented as intended, and evaluated, the probability that it will accomplish its purpose is diminished. Also the absence of periodic evaluation often increases the probability that the intervention will be continued, regardless of its effectiveness.

Auditors expect a district to obtain its desired results within the same or reduced resource parameters. External dollars that are short-term in nature provide funding to initiate new efforts but are seldom on-going or long-lasting. Major interventions usually require that changes be taken with existing resources. However, if external funds are used, they ought to be considered long-lasting, such as Title I funds and state AIG funds.

B. RECOMMENDATIONS

Recommendation 1: Establish district-wide expectations, direction, and system guidance for the AIG program through board policies and administrative regulations that reflect district program goals and support systemic quality control of the educational program.

Recommendation 2: Develop and adopt an organizational chart with direct, uninterrupted lines of authority and corresponding written job descriptions and appraisals that will provide sound, consistent management of the AIG program district-wide to promote increased student achievement.

Recommendation 3: Develop and implement coordinated planning processes that will create an AIG Plan congruent with district and school plans; link the planning for AIG with curriculum management, professional development, student assessment, program interventions and evaluation, and budget development.

Recommendation 4: Develop, document, and implement a comprehensive curriculum management plan that incorporates the academic expectations for AIG students, meets audit criteria, provides quality control, ensures deep alignment, and supports effective delivery. Monitor the delivery of an enriched written curriculum to AIG students for congruence with district expectations.

Recommendation 5: Implement actions focused on eliminating barriers to equitable access to the AIG program and AIG services.

Recommendation 6: Revise the student assessment and program evaluation processes to ensure acquisition of data on AIG achievement and the effectiveness of AIG program services. Provide comprehensive data to make informed decisions to increase AIG student achievement, eliminate achievement gaps between subgroups of AIG students, and equalize AIG enrollment between subgroups and across district regions.

Recommendation 7: Develop, implement, monitor, and evaluate a comprehensive, centralized professional development plan that provides essential training for teachers and administrators, and supports the goals of the AIG program.

Recommendation 8: Develop and implement a multi-year plan for implementation of a performance-based budgeting process for the Wake County Public School System AIG Program that links resources to planning, student achievement, and reflects the educational priorities of the district.

C. AUDIT SUMMARY STATEMENT

With the direction outlined in the district mission and vision statements, the school district is at a natural point for reviewing, evaluating, and affirming or changing its practices and plans for Academically or Intellectually Gifted (AIG) students. This juncture is an ideal time to request an external review such as that provided through the Curriculum Management Audit and its analysis protocol. The audit invitation also expresses the commitment to ongoing improvement on behalf of the district and school leaders.

The Wake County Public School System Academically or Intellectually Gifted (AIG) Program faces numerous challenges, not the least of which is adapting to its student population, the escalating number of second language learners, and the attendant issues related to classroom instruction. Most school systems are facing a tightening of revenues, increasing requirements of the upcoming new federal performance standards, and an increase in the diversity of needs among students. For the Wake County Public School System AIG program the important element of planning will continue to be an emphasis on data-driven decisions and practices and the commitment to develop a tightly aligned gifted curriculum to help staff members meet the challenges of the decade.

The intent of this program audit report is to identify areas in which the educational program and supporting district operations do not meet audit criteria for effectiveness, and to offer reasonable recommendations related to the identified areas of need. The report contains 16 findings, for which auditors have provided eight (8) comprehensive recommendations with action steps to help bring the specified conditions to a status of congruence with audit standards.

When reviewing the current status of the Wake County Public School System and its AIG program in relationship to the principles of Standard One, which addresses system control and oversight, the auditors found that the current organizational chart does not meet all audit criteria for sound organizational management. Functions are generally not grouped effectively with problems identified in the logical clustering of functions. Scalar relationships are not accurately represented on the organizational chart, with positions at different levels of responsibility and compensation depicted on the same horizontal plane. Incongruity in the chain of command is a result of the discrepancies in the organizational chart. Individual personnel do not comprehend their place within the chain of command.

The district lacks strong, “tightly held” control of its curriculum, professional development activities, and learning expectations. Central services personnel function without clear delineation of authority to direct and promote the goals of the board and the components of the AIG plan. Many personnel function in isolation of other departments, which results in conflicting directions and independent incongruent actions by individuals and school sites. Without a strong central chain of command to ensure curricular and instructional consistency across the district, student learning is dependent upon which school a student attends rather than unified expectations established by the board for every student in the district.

Board policies are inadequate to provide guidance for curriculum management and to establish quality control of the educational program. Board policies lack sufficient clarity and thoroughness of content to adequately

provide clear expectations in such areas of educational program management as design and delivery of the curriculum, monitoring of curriculum implementation, student assessment, program evaluation, student access to offerings, and other related aspects of policy guidance for systemic direction.

Board policy direction for school improvement planning is clear and strong. However, there is little direction for district-wide planning in the areas of curriculum management, professional development, student assessment and program evaluation, instructional technology, and budget development. The required school improvement planning is happening, but other planning has been minimal to non-existent. The district is void of district improvement efforts and long-range planning that create a paradigm for schools to follow. The district has an active strategic plan, but board policy is void of long-range planning standards and expectations.

Current documents do not meet audit criteria to provide quality direction for ongoing improvement efforts and to cohesively link those efforts across units and functions within the school district. Planning in the district focuses on accomplishment of operational tasks, not on achieving better student results. Planning is perceived as a task of compliance rather than a means to improve student achievement.

The job descriptions related to the AIG program presented to auditors by the district are extensive in the description of the tasks to be accomplished by a particular position, but lack clarity and specificity related to the responsibilities and relationships as they pertain to achieving the district's present curricular focus for rigor and excellence. Almost all job descriptions reviewed by auditors have not been updated and revised in recent years. In the current status of reform across the nation, the district must address the new local, state, and federal directions. Job descriptions lack a clear causal connection between the efforts of personnel and the academic performance of students; rather they focus on the completion of specific operational functions and tasks.

Under the parameters of Standard Two, the auditors examined the district's direction for teaching and learning. Specifically, they looked for systematic curriculum management planning, representation of curricular offerings in high quality written curriculum guides, and clear alignment of the written, taught, and tested curriculum. The auditors found that the Wake County Public School System does not have a comprehensive curriculum management plan to provide direction and expected processes for the design and delivery of the curriculum. A single plan that provides a comprehensive and cohesive approach to curriculum management is not available.

The scope of the written curriculum (the existence of a written document) that focuses on promoting rigor and differentiation for gifted students in the core subject areas of English language arts, mathematics, science, and social studies is adequate at the elementary level but inadequate in the middle and high school levels. The scope is inadequate in selected non-academic courses at the elementary and high school levels.

A written curriculum for all offerings promotes quality control and contributes to consistency in the curriculum provided to students across the schools, which promotes student access and achievement at the desired level. However, the auditors found that the Wake County Public School System curriculum documents in the core academic subjects do not meet the basic components considered essential to quality curriculum guides. Student equal access to the curriculum is seriously obstructed without quality guides in all subjects and grade levels to provide instructional cohesion and consistency.

Alignment of the written, taught, and tested curriculum is crucial to ensure student learning of the essential curriculum. District documents were available to teachers online, but lack the critical characteristics of quality curriculum guidance. The district's focus on achieving acceptable ratings on the state End-of-Grade and End-of-Course exams has resulted in a narrow focus on the learnings presented in the district and state content standards. As a consequence, the quality of instruction and student performance has narrowed in the level of rigor presented and lacks the degree of instruction desired by the board. Differentiation of instruction for gifted students is inadequately supported in district curriculum documents. Thus, equal access to a rigorous, district-created curriculum is not available to all students.

During brief visits to all schools and most classrooms, the auditors observed that the predominant instructional practices in the classrooms are inconsistent with the expectations outlined in the teachers' evaluation form. The dominant instructional practice was direct, whole-group instruction. During classroom visits, auditors observed limited examples of differentiation of instruction, the use of best practices in instructional strategies, effectual

use of instructional technology, and effective instructional pedagogy. Instruction is generally limited to lower level cognitive types. Lecture-type, whole-group instruction is the common mode of instructional delivery of the curriculum.

In Standard Three analysis, the auditors study both equity and connectivity within the system. The connectivity focuses on professional development as the critical means to connecting organizational intent with worksite delivery, or classroom instruction. When considering equity issues, the auditors are looking for equal opportunities being enhanced by needs-based differentiation in such areas of the AIG program as special services, placement and instructional practices, school-based activity practices, and funding access.

The auditors found that the Wake County Public School System professional development program is inadequate to develop the necessary professional skills for effective design and delivery of the curriculum. There is no district-level planning or coordinating framework that directs the content and methods for professional development, aligning them with district goals. Professional development decisions are predominantly school-based. Planning for professional development content is not consistently based on data and evidence of student needs for mastery of the curriculum objectives as determined by assessment data.

The auditors' review of comparability of student access to the Academically or Intellectually Gifted program courses and services surfaced several concerns about equity and equal opportunity. Subgroups of the student population show varying results in performance on assessments in core academic areas, with underrepresented subgroups experiencing the least comparable success.

Some evidence indicates that the practices in student access and placement have contributed to this phenomenon. An identified imbalance was the placement/enrollment patterns in the gifted program. Although the board has expressed its concern regarding the identification of AIG students from underrepresented subgroups, current district policy and practices have failed to develop successful alternative criteria for student identification. Auditors also found disproportionate AIG representation by regions of the district.

The leadership of the Wake County Public School System has implemented a number of interventions to support student academic achievement needs. The auditors did not find a district-wide process for the selection, development, implementation, and evaluation of these interventions.

In Standard Four, the focus is on feedback of various types and how the system uses those data. Typically, the information might come from student assessments, program evaluations, surveys, or follow-up studies with former students. Auditors found that the Wake County Public School System comprehensive student assessment and program evaluation system is present to guide decision making in the district, but is inadequate within the AIG program. As a result, the system does not have access to the information needed to adequately plan for the design and delivery of the gifted curriculum to improve and enhance AIG student learning.

Formative assessment efforts exist in the district but are inconsistently utilized with AIG student achievement across various schools and do not reflect a district-wide requirement or effort. The scope of assessment is inadequate in the gifted program. Many of the course offerings in other subject, non-core subject areas are not included in the district's student assessment program.

The district's Academically or Intellectually Gifted students' performance on state assessments is consistently at Level IV, but achievement is inconsistent among certain subgroups of AIG students. If achievement gap trends persist, some AIG student subgroups will not reach parity with other AIG subgroups for many years. Inconsistencies in AIG student achievement also exist between various regions of the district.

By analyzing the implications of data trends reviewed, the auditors determined that educational changes are needed in order for the Wake County Public School System gifted program to reach desired levels of excellence. How a school district uses data in making important decisions can significantly affect the quality and outcomes of those decisions.

Auditors found that the collection, dissemination, and application of data to inform instruction and to plan for improving student performance on local, state, and national tests are an extensive practice. The district and

school improvement plans use data in establishing goals, and have targeted the district's assessment and state assessment information to help improve instruction, interventions, and curriculum content.

In analyzing Standard Five, the auditors found that the Wake County Public School System had not characteristically employed processes for budget development that meet audit criteria for a curriculum-driven, program-focused budget. Evidence did not indicate that student assessment results had influenced allocation decisions, and no systematic process was in place for evaluation of discrete programs and the use of those results in budget planning. No cost-benefit analysis was systematically incorporated into the budget planning process to force consideration of various levels of funding for existing programs and services in the budget year being planned.

AIG program funding is strictly formula based and is devoid of addressing equity issues that occur in schools with a lower count of gifted students. Inconsistent, non-program based funding can impact both student identification and student achievement. Absence of these systematic steps may impede results over time by not maximizing use of data for results-based decisions.

Overall, the audit team found the motivation and intent of professionals in the Wake County Public School System to be emerging into a future-oriented willingness to learn, grow, and meet the changing needs of students. AIG students generally perform at the highest level, but classroom instructional practices are not adequate to challenge gifted students nor provide the board's desired academic rigor.

The AIG plan is generally viewed as the prerogative of the AG department. Few school improvement plans included specific emphasis for gifted students' achievement, but, rather, focused on providing remediation and interventions for lower performing students. The AIG teachers assigned to school sites have been relegated to the role of being the major provider for AIG services on campus. Some staff opinions reflected implicit socioeconomic biases and resistance to the changes in the school communities, implying that these are the "excuses" for some students not being included in the AIG program.

The district's chain of command de facto assigns the responsibilities for gifted learning outside of the clear line of authority from the board and superintendent to principals and classroom teachers. This has resulted in inconsistent implementation of the AIG plan on every campus in the district. With decision-making centered at the school site, the implementation of the AIG program is seen by principals and school sites as optional, not a mandate.

Research clearly shows that these circumstances are simply barriers to be overcome, and that they can be overcome with aligned curriculum, effective teaching practices, and system- and community-wide support for improved student achievement by gifted students. With the professional backgrounds, experience, and commitment of so many district and school leaders and staff members, the auditors firmly believe that the Wake County Public School System will move to higher levels of excellence.

The CMSi audit team has suggested numerous steps for improving the AIG program in areas in which the current status precluded meeting audit criteria. While additional actions might be developed by the district administration and staff to implement these recommended changes, most of the recommendations that have been offered have a history of success in similar school systems. The first step is for the superintendent to direct the development of a work plan for responding to the findings and recommendations. With eventual approval by the board of education and active implementation by the administration over the next two to five years, this blueprint can bring organizational effectiveness and gifted student achievement to new heights.