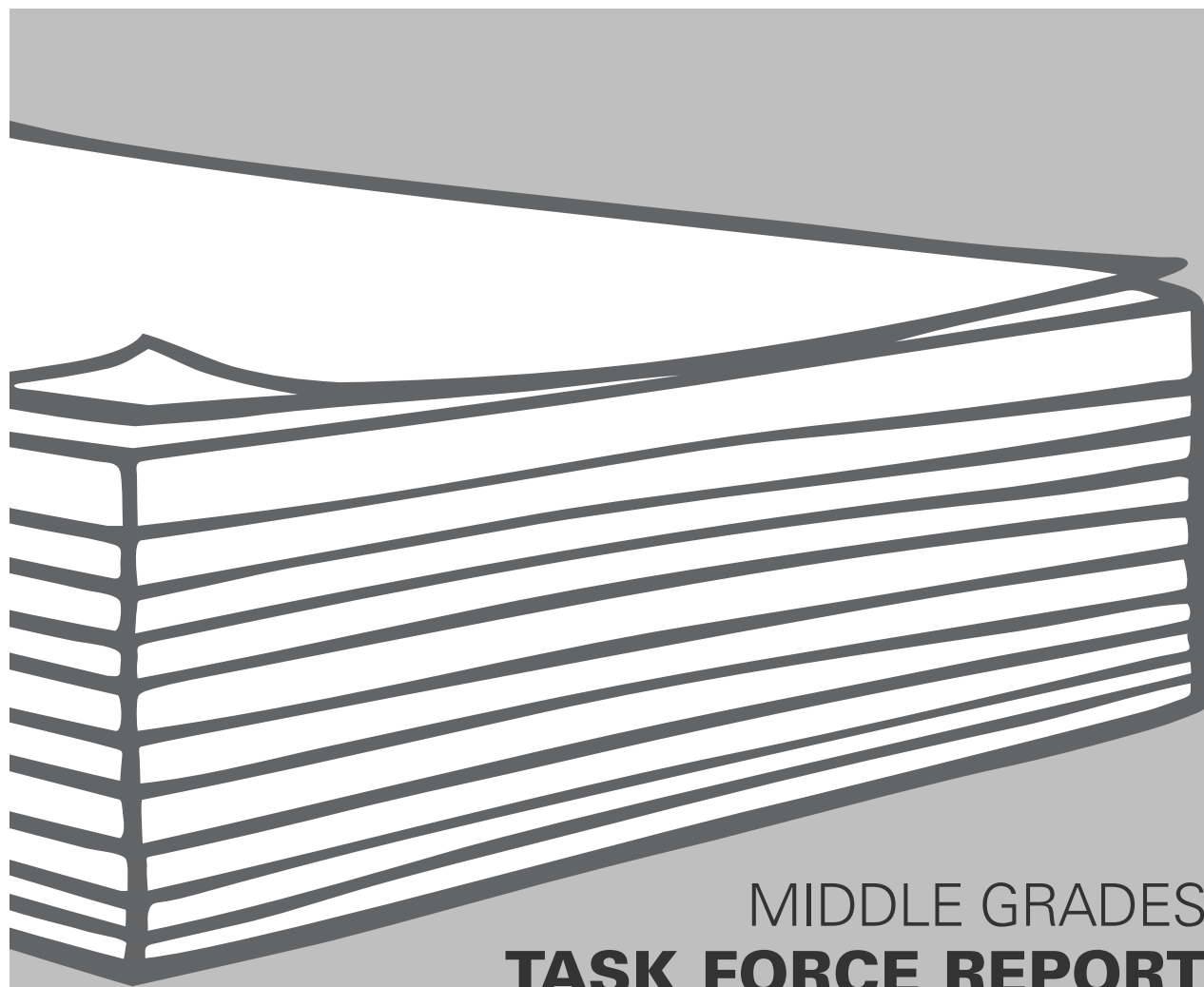


LAST BEST CHANCE 2004

EDUCATING YOUNG ADOLESCENTS IN THE 21ST CENTURY

Fall 2004



MIDDLE GRADES
TASK FORCE REPORT



PUBLIC SCHOOLS OF NORTH CAROLINA

State Board of Education | Department of Public Instruction

STATE BOARD OF EDUCATION

HOWARD N. LEE

Chairman
Raleigh

JANE P. NORWOOD

Vice Chair
Charlotte

KATHY A. TAFT

Greenville

MICHELLE HOWARD-VITAL

Wilmington

EDGAR D. MURPHY

Durham

EVELYN B. MONROE

West End

MARIA T. PALMER

Chapel Hill

ROBERT "TOM" SPEED

Boone

WAYNE MCDEVITT

Asheville

JOHN TATE III

Charlotte

PATRICIA NICKENS WILLOUGHBY

Raleigh

BEVERLY PERDUE

Lieutenant Governor
New Bern

RICHARD MOORE

State Treasurer
Kittrell

NC DEPARTMENT OF PUBLIC INSTRUCTION

Michael E. Ward, State Superintendent

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

In compliance with federal law, including the provisions of Title IX of the Education Amendments of 1972, NC Public Schools administers all state-operated educational programs, employment activities and admissions without discrimination because of race, religion, national or ethnic origin, color, age, military service, disability, or gender, except where exemption is appropriate and allowed by law.

Inquiries or complaints should be directed to:

Dr. Elsie C. Leak, Associate Superintendent :: Office of Curriculum and School Reform Services
6307 Mail Service Center :: Raleigh, NC 27699-6307 :: Telephone 919-807-3761 :: Fax 919-807-3767
Visit us on the Web: www.ncpublicschools.org

Table of Contents

Forward.....	3
Acknowledgements	4
Introduction.....	6
A Decade of Change.....	8
Formation of the NC Middle Grades Task Force	14
Recommendations	15
Curriculum and Instruction.....	16
Diversity	18
Educator Preparation	20
Organization and Culture.....	22
Partnerships.....	24
Glossary of Terms	26
Appendices.....	31-D1
References.....	32

Forward

Public education has undergone significant change since *Last Best Chance*, North Carolina's ground breaking study of middle level education, was published in 1989.

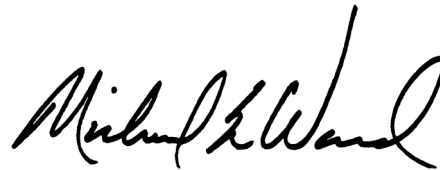
Last Best Chance advocated for specific reforms in middle level programs and services, and became the guiding light as schools and districts instituted sweeping changes at grades 6-9 in the 1990s.

Last Best Chance 2004: Educating Young Adolescents in the 21st Century extends the solid foundation of research and best practices of the 1989 report. It is especially appropriate as we look at the demands of No Child Left Behind that we focus once again on the middle grades.

This Agency is indebted to the task force members listed on pages 4-5 for their commitment to the research, shared vision, and practical understandings of an academically rigorous middle school that are inherent in this document.

I commend this report to you for intensive study.

Sincerely,

A handwritten signature in black ink, reading "Michael E. Ward". The signature is written in a cursive style with a large, prominent initial "M".

Michael E. Ward
State Superintendent
August 2004

Acknowledgements

Chairs:

Dr. Nancy Farmer, Retired Associate Superintendent, Orange County Schools, Hillsborough, NC
Dr. John Harrison, Executive Director, North Carolina Middle School Association,
Pinehurst, NC

Members:

Dr. Ann Adams-Bullock, Associate Professor, East Carolina University, Greenville, NC
Dr. Liz Alston, Principal, Western Middle School, Alamance-Burlington Schools,
Elon College, NC
Dr. Warren Baker, Dean, School of Education, University of North Carolina-Pembroke,
Pembroke, NC
Thomas Blanford, Past Executive Director, NC Professional Teaching Standards Commission,
Raleigh, NC
Novella Brown, Principal, Terrell Lane Middle School, Franklin County Schools, Louisburg, NC
Edye Morris-Bryant, Assistant Principal, Carroll Middle School, Raleigh, NC
Rose Cooper, Assistant Principal, Robbins Elementary School, Robbins, NC
Carol Deal, Retired Associate Superintendent, Watauga County Schools, Boone, NC
Cecilia Gregory, Director of Middle Schools, Harnett County Schools, Lillington, NC
Dr. Suzanne Gulledge, Professor, University of North Carolina-Chapel Hill, Chapel Hill, NC
Jeanne Haney, Director of Middle Schools, Davidson County Schools, Lexington, NC
Greg Hicks, Principal, Person County High School, Roxboro, NC
Rob Matheson, Principal, Kestral Heights Charter School, Durham, NC
Vicki Moss, Executive Director, Testing & Accountability, Randolph County Schools,
Asheboro, NC
Dr. Terry Mozingo, Assistant Superintendent, Charlotte-Mecklenburg Schools, Charlotte, NC
Dr. Ken McEwin, Professor, Appalachian State University, Boone, NC
Dr. Toni Parker, Education Department, Meredith College, Raleigh, NC
Dr. Dina Requena, Business Representative, IBM, Research Triangle Park, NC
Ann Rollins, Parent Representative, NC Parent Teacher Association, Raleigh, NC
Mary Slagle, Teacher, Smoky Mountain Elementary School, Jackson County Schools,
Whittier, NC
Jim Surles, Retired Principal, South View Middle School, Cumberland County Schools, Hope
Mills, NC
Rod Teal, Principal, W.G. Pearson Elementary School, Durham County Schools, Durham, NC
Betty Terrell, Director of Middle Schools, Burke County Schools, Morganton, NC
Dr. Beth Tyson, Assistant Professor, Western Carolina University, Cullowhee, NC
Dr. Larry Upchurch, Deputy Superintendent, Moore County Schools, Carthage, NC

NC Department of Public Instruction, Instructional Services Task Force

Facilitators:

Dr. Elsie Leak, Associate Superintendent
Dr. June Atkinson, Director
Dr. Wandra Polk, Assistant Director
Martha Campbell, Information/Computer Skills Consultant

Dian Cooley, Family & Consumer Sciences Consultant
Dr. Johna Faulconer, English Language Arts Consultant, 6-9
Dr. Fran Hoch, Section Chief, Second Language, ESL, Information, & Computer Skills
Christie Howell, Music & Dance Consultant
Dr. Mike Kestner, Consultant, US Department of Education
Penny McGuire, Social Studies Consultant, 6-8
Linda Patch, Mathematics Consultant, 6-8
Clara Stallings, Science Consultant, 6-8
Michelle Wallen, Health & HIV/AIDS Education Consultant

Special Presentations

Dr. Sondra Cooney, Retired Executive Director, Making Middle Grades Matter, Southern
Region Education Board, Atlanta, GA
Brock Murray, Section Chief, Licensure, NCDPI
Dr. Ken McEwen, Appalachian State University
Gary Williamson, Section Chief, Reporting, NCDPI

Feedback

Dr. Debbie Andrews, Director of Teacher Education, NC State University, Raleigh, NC
Dr. Charles Coble, Retired, University of North Carolina General Administration,
Chapel Hill, NC
Dr. Madeleine Grumet, Dean, School of Education, University of North Carolina,
Chapel Hill, NC
Dr. Jeanneine Jones, Associate Professor, University of North Carolina-Charlotte, Charlotte, NC
Dr. Jerod Kratzer, Chair, Education Department, Meredith College, Raleigh, NC
Tim McDowell, Director of Government Relations, North Carolina Independent Colleges and
Universities, Raleigh, NC
Dr. Karen Nery, Dean, School of Education, Campbell University, Buies Creek, NC
Dr. Kathy Sullivan, Director, Human Resources Management, NCDPI
Dr. John Swope, Professor & Chair, East Carolina University, Greenville, NC
Dr. Manuel Vargas, Dean, School of Education, Winston-Salem State University, Winston-
Salem, NC

Districts/organizations that provided feedback: Alamance, Burke, Charlotte-Mecklenburg,
Cumberland, Durham, Edenton-Chowan, Elizabeth City-Pasquotank, Franklin, Gates, Guilford,
Halifax, Harnett, Jackson, Moore, Perquimans, Person, Randolph, Wake, Watauga, Warren,
Wilkes, Northwest Middle School Advisory Board, North Carolina Middle School Association
Board, Southwest Regional Education Service Alliance. Additional input was gathered from
teachers attending an informational session at the North Carolina Middle School Association
Annual Conference (2002).

Introduction

Middle Level Education

Public education in North Carolina is divided into three separate levels of instruction — elementary, middle, and secondary. The middle level serves children from ages 11-14 while they are transitioning from childhood into adolescence. The grade configurations in North Carolina that encompass these ages come in many forms. The “typical” middle school contains grades 6-8, but may also be 5-8, K-8, 6-9, 7-12, or any number of other configurations. The overwhelming majority of recently built schools in North Carolina, and nationwide, reflects a “middle school” organization with grade 7 and at least two other grades being housed in the school. The traditional “junior high” familiar to so many is rapidly fading from the scene. Fewer than ten remain in North Carolina, and several of those will be phased out as new middle schools are built.

The middle school years are a time of tremendous physical, intellectual, social, emotional, and spiritual growth and development. (See Appendix A) At no time other than the first years of life does a person undergo the enormous changes that adolescence brings. While growth may be faster at birth, the infant unlike the adolescent, is not staring into the mirror looking at the changes that are occurring—sometimes daily. It is indeed a special time in a child’s life that requires special ways of schooling. It is essential when educating the middle level student to take into consideration these vast changes in intellectual, physical, spiritual, and emotional development. Students experience changes in the way they think and learn that are every bit as pronounced as the physical changes they undergo. Students who are the same age may be in very different places with respect to their academic or emotional development. These same students, when viewed a year later, can be expected to show marked changes among peers. Indeed, growth and development can best be described as “erratic.” Middle school philosophy attempts to address those needs.

It is the very nature of the middle level child that requires providing learning experiences both within and outside of the classroom expertise that allow for positive physical and developmental growth, attention to personal and social concerns, as well as a strong focus on academic learning. Middle level education does not sacrifice one of these areas for the sake of another. All are of critical importance to the developing child. In the past decade, middle schools were sometimes criticized for over-emphasizing the social development of the child at the expense of academics. In recent years, many educators have interpreted the state’s accountability standards to mean an overemphasis emphasis on test scores. In truth, research shows a balance of social and academic experiences provides the “best” conditions in which all young adolescent students can achieve and thrive.

This task force, has been challenged to help chart the course for middle level education in North Carolina. As the task force went through the process of examining middle level education, as it is now the members continuously asked, “What should it look like in order for all children to be successful?” A distinction was made between “change” and “progress.” Education researcher Seymour Sarason’s work (Sarason, 1990) clarifies the difference between change and progress:

To confuse change with progress is to confuse means with ends. Keeping those ends in mind is a responsibility that too often fades into the background in the turmoil of change. The means become ends in themselves and, therefore, the more things change the more they remain the same, or worse. It is the rare reform that has been true to its initial vision.

There has been a subtle shift in focus over the last decade regarding what people want education to provide for their children. Previously countless mission statements and goals stress the long-term development of the child into a “productive citizen and life-long learner.” Now there is a focus on the part of some with limited vision on the short-term goal of an education that provides the child with “good scores” on standardized tests. Virtually all middle grades educators welcome high standards and believe in high achievement for all students, but the goal should not be at the expense of the development of the whole child. The task force stresses that legislators and educators must be cautious against “sacrificing our students on the altar of accountability.”

In order to accomplish the many tasks set before middle level educators today, organizational patterns and practices generally used in the past must be reexamined. North Carolina’s middle schools are up to the challenge of meeting the many varied needs of our students while providing an academically rigorous curriculum. It is not enough to look at middle school as something that will prepare students to be academically successful in high school. Middle level education has more to offer in and of itself in the lifelong development of the child.

A Decade of Change

A National Agenda *Turning Points*

In 1986 The Carnegie Corporation of New York established the Carnegie Council on Adolescent Development to place the plight of 10-to 15-year-olds higher on the nation's agenda. In 1987, the Council created a Task Force on Education of Young Adolescents drawing members from leadership positions in education, research, government, health, and other sectors. The result of the task force's work was the 1989 classic, *Turning Points: Preparing Youth for the 21st Century*, a groundbreaking report that was a clarion call to all concerned about the future and fateful choices for 10 to 15 year olds (Carnegie, 1989).

Turning Points urged state governments to build consensus and strengthen the capacity of local communities to improve middle grade schools. Specifically, it asked every state superintendent of education or governor to lead the effort and immediately "convene a task force to review the recommendations in *Turning Points* and determine what must occur to enable their adaptation to the needs and circumstance of local communities." (Carnegie, 1989)

North Carolina's Initiative *Last Best Chance*

In 1989, then State Superintendent, now Congressman Bob Etheridge announced the formation of the Superintendent's Middle Grades Task Force. A 44-member task force, representative of a variety of groups involved in serving young adolescents, met for one year. The task force concluded its work in 1990 and produced *Last Best Chance*. *Last Best Chance*, supported by grant money from the Carnegie Foundation, analyzed the recommendations in *Turning Points* and, where needed, made important suggestions for improvements in North Carolina middle level education. *Last Best Chance* advocated specific reforms in middle level education in the areas of: school organization, curriculum, instruction, student success, health concerns, teacher preparation, technical assistance, professional staff, parents, and communities. (Arnold & Farmer, 1991)

The report, presented to the State Board of Education and approved as recommendations for local consideration, was the first state-initiated roadmap for fundamental reform of middle level programs and services, and became a reference point for planning and change at the district and school level.

In 2001, as a result of the collaborative efforts of the North Carolina Middle School Association and the North Carolina Department of Public Instruction, the General Assembly officially recognized "middle school" as a classification with the passing of House Bill 15. This legislation amends the existing classifications to include middle school along with elementary, high school, junior and senior high school, and union school.

Making Middle Grades Work

In 2000, North Carolina joined the Southern Regional Education's (SREB) initiative, *Making Middle Grades Work*. This initiative is designed to help states, districts and schools look at what they expect, what they teach and how they teach young adolescents to prepare for success in further education. Too many students leave the middle grades unprepared to take advantage of all that high school can offer and unable to be successful in career opportunities after high school.

Making Middle Grades Work is a network of schools, districts, and states committed to implementing ten essential elements in a comprehensive improvement framework. The *Making Middle Schools Work* brochure (see Appendix B) details the essential elements and other component of the framework. The elements focus on a rigorous and challenging academic core curriculum for all students and on the teaching and learning conditions that support continuous improvement in student achievement.

With the support of the Edna McConnell Clark Foundation, SREB provides member states and schools with technical assistance, publications, assessments, and networking services. As school sites identify the help they need to implement the framework, SREB links them to specific professional development resources. A summer conference enables sites to learn what works with other middle grades and high schools and to plan further actions to improve student achievement.

North Carolina Schools to Watch

In 2002, North Carolina received the distinction of being named one of three states chosen to pioneer the National Forum to Accelerate Middle Grades Reform's "Schools to Watch" program. This program recognizes middle level schools that have demonstrated a sustained trajectory of improvement and success in three key areas—academic excellence, meeting students' needs, and social equity. The *Schools to Watch* criteria (see Appendix C) are being used in middle level schools across the state as a road map for school improvement and reform efforts.

Schools to Watch is a collaborative effort of the North Carolina Middle School Association and the North Carolina Department of Public Instruction, and involves the participation of a number of other education and business partnerships in identifying and recognizing high performing middle level schools. Since 2003, ten schools across the state have received *Schools to Watch* designation and have had numerous visitors from across the state and nation.

Changes in Middle Level Education Since 1990

Teaching and learning environments today are quite different than those found in 1990 because of the many changes in North Carolina's educational landscape. Listed below are some of the significant changes occurring over this timeframe that have directly affected middle level education.

Curriculum and Instruction

1. Categorical funding for teaching positions for the **Basic Education Program*** (BEP) is no longer mandated by the General Assembly.
2. The State Board of Education requires greater district and school accountability for student performance with set standards of rewards and consequences through the “**ABCs**” **School Accountability Program**.
3. Research data show a continued problem with the reading skills of young adolescents.
4. District and school test data is widely publicized both locally and across the state. Educators and students operate in a “**high-stakes testing**” environment.
5. School plans for improvement in student performance are more driven by national, state, and local test data.
6. There is recognition that science and social studies, in particular, are receiving less attention because they are not included in the state accountability plan.
7. The use of technology as a learning tool and means of internal and external communication has increased dramatically across the state.
8. Students leaving 8th grade are now required to choose a four-year plan for their entire high school program, which will result in a university prep, college/tech-prep, or career prep course of study. A small group of exceptional education students will follow the occupational course of study.
9. The General Assembly has required the inclusion of specific topics such as character education, abstinence until marriage in the *North Carolina Standard Course of Study*.
10. Competitive sports have increased in availability for both boys and girls at the middle level.

*Note: Words appearing in **bold type** are defined in the Glossary of Terms

Diversity

11. Although performance gaps among and between populations of students still exist, significant strides have been made toward closing these academic performance gaps.
12. There has been an increase in the number of Hispanic students and the need for services to **Limited English Proficient** (LEP) students.
13. The number of children identified with special needs has increased. **Academically or Intellectually Gifted** and **Learning Disability** student populations have increased greatly, with significant concern expressed about the lack of minority students in advanced classes and their overrepresentation in lower level classes.
14. A North Carolina Commission on **Closing Gaps** and Raising Achievement was convened and has formulated an action plan to ensure success for ALL learners in an increasingly diverse society.
15. A “Closing the Gap” section was created in the State Department of Public Instruction’s School Improvement Division in 2001.

Educator Preparation

16. The **initial licensure** process had undergone great change to include a longer period of induction. A comprehensive portfolio was required for initial licensure, but because of numerous concerns this requirement was rescinded by the General Assembly. A mechanism for accountability that will replace the portfolio is yet to be determined.
17. Support for new teachers has been formalized through the creation of Induction Academies, **mentor** programs, and other state and local efforts.
18. The teacher shortage in certain subject areas has reached near “code-red” status across the state.
19. The number of **lateral entry** teachers and teachers entering the profession using **alternative routes** has increased dramatically.
20. The turnover of licensed teachers and administrators continues to increase at an alarming rate.
21. More teachers are demonstrating their knowledge and skills by obtaining **National Board Certification**. North Carolina leads the nation with 6,636 and over 7% of North Carolina’s teachers are now nationally certified.

Organization and Culture

22. Middle level educators consistently voice concern about class size and their ability to meet the ever-increasing needs of diverse students.
23. Administrators in the school and at the district level no longer have tenure and sign individual term contracts.
24. The vast majority of young adolescents in North Carolina now attend Grades 6-8 schools that are organized into academic “**teams**.”
25. Year-round and modified calendar programs have increased at the middle level.
26. Many schools have initiated “**block scheduling**”— increasing flexibility at the team/grade level in some schools while decreasing it in others.
27. Issues of school safety are paramount. This has resulted in an increase each year in the number of school resource officers working in middle grades schools.
28. HIV, teen pregnancy, and other health-related concerns are now critical middle level education issues.
29. A number of federal regulations stemming from legislation such as the **Individuals with Disabilities Education Act (IDEA)**, the **Elementary and Secondary Education Act (ESEA)**, the **No Child Left Behind Act** of 2001 (NCLB), and the McKinney-Vento Homeless Assistance Act, have forced the state and local school districts to implement new and alter existing policies and procedures.
30. Articulation among the three levels of schooling (elementary, middle, and high) has improved but still has not reached an appropriate level of coordination and planning.
31. Many school counselors are now extensively involved in meeting testing demands, and this has resulted in a diminished level of guidance services being provided to students.
32. Middle level educators are asked to do much more to meet the academic, physical, social, and emotional needs of young adolescents, within the confines of the same school day and year, and in a high-pressure, high-stakes testing environment.

Partnerships

33. The Department of Public Instruction has been dramatically reduced in size while maintaining many of the functions it had as a larger agency. There is no longer a single middle grades administrator whose primary function is to facilitate a unity of effort across service areas within the department.
34. The Center for Early Adolescence, affiliated with the University of North Carolina School of Medicine and nationally-recognized as a research and service center focused on the needs of this age groups, lost financial support and is no longer in existence.
35. The North Carolina Middle School Association has grown greatly in size and services and remains the leading advocate for serving the needs of middle level educators.
36. Parent involvement in school improvement is no longer a general expectation but a statute-mandated requirement.
37. Parent involvement in schools has seen an increase in support from the corporate world in release time to attend conferences, serve on committees, and volunteer.
38. Greater parental choice has been supported in North Carolina through the creation of public-supported **charter schools**.
39. The greatly increased need for coordination and articulation of health and human services with schools has resulted in the creation of a comprehensive school health program.

Formation of the NC Middle Grades Task Force

With the passage of more than a decade and the numerous educational changes mentioned previously, several disturbing factors began to elevate concerns about middle level students in North Carolina. (See Appendix D) Disappointing achievement data at the sixth grade indicated drops in performance for these students and prompted continuing concerns about reading and writing performance in all middle school grades. The problems of recruiting and retaining teachers at this level were also gaining attention. These were just a few variables among others that began to raise concerns. John Harrison, Executive Director, and the officers of the North Carolina Middle School Association, met with Mike Ward, State Superintendent, to express their interest and support for a joint initiative to improve middle grades education. In 2002, key leaders in the Division of Instructional Services at the North Carolina Department of Public Instruction offered their leadership in convening a second statewide task force that could offer recommendations for improvement in the context of middle level education. With the support of the State Superintendent, June Atkinson and Wandra Polk from the Department of Public Instruction, John Harrison and Nancy Farmer, a former co-chair of the first task force, were asked to provide leadership to this effort.

Twenty-nine of North Carolina's education leaders in public schools, universities and colleges, state Parent Teacher Association, business organizations, and the North Carolina Middle School Association, in addition to Department of Public Instruction staff, were selected for membership on this task force. Their work, strengthened by significant focus-group input from across the state, produced *Last Best Chance 2004: Educating Young Adolescents in the 21st Century*. This document provides an updated and valuable framework for how to improve middle grades education in North Carolina. Yet it is only the beginning. Future action plans are needed to provide much more "flesh on the bone" to guide practitioners in their efforts to implement the recommendations. The journey continues!

Recommendations

The Middle Grades Task Force spent considerable time discussing a large number of middle level issues, priorities, and challenges that have a profound impact upon the education of young adolescents in our state. Throughout the recommendations, the task force interprets “all young adolescents” to be inclusive—comprising students of diverse ethnicity, race, language, religion, socioeconomic status, gender, regional or geographic origin, culture, family composition, and those with exceptional needs.

From a long list of important topics, consensus was reached on five broad categories that many consider to be the most important issues in middle level education in North Carolina. All possible recommendations were examined through the following filter:

- Does the recommendation advance the improvement of middle level education in North Carolina?
- Does the recommendation offer suggestions that are practical, “do-able,” and relevant?
- Does the recommendation support the needs of middle level schools in North Carolina’s high-stakes testing environment?

These five topics are presented in alphabetical order though the task force considers them all equally essential and important. There was consideration given to adding “research” as a separate category, but the task force considers research to be an overarching area that is a part of each goal area. As a general recommendation, the task force notes that it is essential to continue the middle level research agenda through higher education institutions, and through collaborative and partnership efforts with schools and other organizations. The expectation of the task force is that schools and districts will incorporate these recommendations into their policies and procedures.

The major topic areas, with a brief description of the focus of that area, are as follows:

Curriculum & Instruction: includes the *North Carolina Standard Course of Study*, differentiation of instruction, remediation, student-centered learning, best practices, acceleration of high-performing students, pedagogy, assessment, literacy, accountability, testing, electives.

Diversity: includes closing the achievement gap between white and minority students, equity issues, and awareness of cultural differences.

Educator Preparation: includes both pre-service and in-service teacher preparation, licensure issues, hiring and retaining qualified staff, career-long professional development, principal leadership and development.

Organization & Culture: includes school organization, scheduling, class size, transition from elementary to middle school and from middle school to high school, student effort, extra-curricular, after school, and Saturday activities.

Partnerships: includes reaching out to parents and extended families, local businesses, and the community as well as fostering increased involvement in schools.

Curriculum & Instruction

Curriculum and Instruction in North Carolina’s middle level schools have been greatly influenced by the school accountability movement. One positive result of the drive for greater accountability is that teachers are more focused on the curriculum and are ensuring that they are teaching what is tested—the objectives of the *North Carolina Standard Course of Study*. On the other hand, there is much concern over the effects of “high-stakes testing” on children, adults, and the overall school climate. Many teachers have expressed concerns over losing the “teachable moment” in the race to cover the materials that will be on the state test. A recent study by Ken McEwin, Melanie Greene, and Doris Jenkins (2001) from Appalachian State University shows a significant reduction in time spent on subjects that are not currently tested.

It is the recommendation of the task force that:

1. Middle level schools continue the strong emphasis on teaching the core subjects with significant amounts of instructional time being devoted to English language arts, math, science, and social studies. The current trend towards under-teaching science and social studies must be reversed.
2. The required healthful living curriculum as well as a variety of elective courses including **arts education**, second languages, and career and technical education are important and should be available to all students.
3. The curriculum, based on the *North Carolina Standard Course of Study*, must be comprehensive and challenging, and allow for the acceleration of learning at all levels. Greater emphasis is needed on higher-level academics and intellectual development so that students become responsible partners and participants in their own learning. Teachers must receive ongoing training in new taxonomies and instructional strategies to improve student learning.
4. Teachers must be **highly qualified** and knowledgeable about the importance and relevance of all content areas as well as their inter-relatedness and connections across disciplines. Teachers must integrate content knowledge and skills across the curriculum.
5. Educators must recognize that reading comprehension is fundamental to success in middle school. Special attention must be given to reading comprehension and writing skills in all areas. (Also note Educator Preparation section).
6. Classrooms should provide student-centered learning based on high expectations and the *North Carolina Standard Course of Study*. Greater emphasis must be made to ensure that middle level students are actively involved in their own learning. The learning process of conceptual development is supported by **Socratic dialogue**, **cooperative learning**, and independent research.

7. Teachers will use continuous, appropriate, and **authentic assessment** and evaluation to determine if students have mastered the objectives in the *North Carolina Standard Course of Study* and to provide information to students, teachers, and family members to plan further learning. Some examples of these assessments include the following: informal checks for understanding; traditional quizzes and tests; interviews; questionnaires; conferences; performance tasks; projects; simulations; formal debates; exhibitions; position papers; scientific experiments; individual and group projects; rubrics; and portfolios.
8. Educators must identify, appreciate, and celebrate growth and achievement of students, and be particularly careful to note the improvement of all students working below grade level. Students demonstrating significant improvement should be noticed and celebrated. Some examples of achievement to recognize and celebrate include the following: attendance, bringing up grades, growth made on end-of-grade tests, and honor roll.

Diversity

Throughout the meetings of the task force, the sentiments described by the participants strongly echoed the National Middle School Association's position statement (NMSA, 1999) on diversity. The Association

values diversity and views differences as a vital, positive, and enriching force in the continued development of society and especially in the educational processes of schools. Diversity is a symbol of strength and a positive force, which encompasses differences that make each of us unique. While recognizing the importance of our similarities, diversity is the understanding that through those differences each person brings a unique and important perspective to life.

North Carolina was recognized by *Education Week* (Viadero, 2000) as being in the vanguard of states making an effort to reduce the disparity in achievement levels between white and minority students. *Education Week* noted that the state did not want to "close the gap" by holding any children back, but instead by ensuring that all students were successful.

Yet, despite the increased focus on issues of diversity over the last several years, and the dramatic progress being made in eliminating disparities based on race and socioeconomic status, there is still a long way to go. New challenges, such as the tremendous growth in our Hispanic communities and the accompanying explosion in English as a Second Language programs, have only strengthened the importance of diversity as a "front-burner" issue and necessity in our state.

It is the recommendation of the task force that:

9. Middle level educators have the knowledge and skills to respond effectively to the diversity found in **young adolescents**. This issue addresses not only physical, social, intellectual, and emotional development, but also cultural, ethnic, and linguistic differences. Middle level teachers must incorporate best practices addressing diversity into planning and implementing curriculum, and in the differentiating of instruction.
10. School districts, individual schools, and institutions of higher education should expand pre-service, induction, and career staff development for all middle level educators to include the knowledge, skills, and dispositions needed to support the learning of all students; including students with limited English proficiency, students from varying socioeconomic, ethnic/cultural backgrounds, academically and intellectually gifted, and exceptional needs children. Attention must be paid to the National Council for Accreditation of Teacher Education (NCATE, 2001) Standards on Diversity and Equity.
11. Emphasis must be placed on providing a rigorous, accelerated (when possible) and enriched academic experience for ALL students. It is of paramount importance that students at all levels of achievement and in all reported sub-groups show growth, with particular attention being paid to increasing the growth of our highest and lowest performing students. Middle level schools must reduce **academic tracking** that creates

permanently fixed performance levels, recognizing the intent of the state's Academically or Intellectually Gifted Program to increase access to challenging and rigorous courses and activities. The task force recognizes that short-term flexible grouping of students to address specific curriculum needs is NOT tracking.

12. The task force endorses and affirms the recommendations and actions of the North Carolina Advisory Commission on Raising Achievement and Closing Gaps, and strongly encourages school districts, individual schools, and institutes of higher education to support their efforts.

Educator Preparation

Several recent reports from the Southern Region Education Board (1998, 1999) assert that state policy needs to send a clear message through licensing and certification that teacher quality in the middle grades is a priority. These studies also challenge states to provide incentives and remove barriers to increase the quality of teacher preparation.

Other studies have pointed out that one of the most critical elements affecting student learning is the quality of the classroom teacher (Education Commission of the States, 2000). The federal mandates of No Child Left Behind require teachers who are highly qualified in their content area. The task force believes that teachers must also be prepared to successfully teach young adolescents. North Carolina is regarded throughout the nation as being in the forefront of middle grades education, and many of our country's preeminent middle level educators and researchers have ties to the state. While the state has reason to be proud of our long history and contributions to the field, the fact remains that there is a desperate shortage of teachers at the middle level. Most colleges and universities across the state have small departments that do not begin to approach turning out the number of teachers needed at the middle grades. In 2000, only 245 middle grades education students were graduated from North Carolina's public and private universities and colleges. These 245 graduates represent just 7% of the annual pool of new teachers coming from our state's undergraduate programs. The task force believes that it is imperative that the North Carolina Department of Public Instruction, colleges and universities, the North Carolina Middle School Association, and other interested stakeholders make a commitment to promote middle grades education as a career path.

It is the recommendation of the task force that:

13. The North Carolina Department of Public Instruction and local school districts should require middle school professional development focusing on young adolescents, middle schools and best practices for all teachers who hold or are seeking lateral entry or add-on licenses at the middle level within their first year of teaching at the middle level. For example, high school teachers who receive an automatic add-on of middle grade licensure (6-9) should receive preparation in meeting the needs of young adolescents in high performing middle level schools within one year of beginning their teaching at the middle level.
14. Undergraduate degree-seeking candidates should be required to complete one teaching concentration in the core areas of mathematics, science, social studies, or English language arts with an enhanced literacy component of reading, writing, or English as a Second Language. Two teaching concentrations in the core areas of mathematics, science, social studies or English language arts are strongly encouraged. If an institution of higher education chooses to require two teaching concentrations, the literacy competencies must be met.

- Example One: A student may have an academic concentration in mathematics, science, social studies, or English language arts. In addition, the student will also have a literacy component of reading, writing, or English as a Second Language.
 - Example Two: A student may have an academic concentration in mathematics, and another concentration in science. The student will also complete the literacy competencies through this coursework.
15. The current licensing structure should be changed to better reflect the needs of young adolescent learners to K-5, 5-8, and 9-12. Note that the overlap at grade five is intentional, and addresses the fact that the transitional nature of the fifth grade may appropriately be addressed through either elementary or middle school licensure. Ninth grade, in the vast majority of schools in this state, is no longer contained in middle or elementary school, and ninth graders, while benefiting from many aspects of middle school philosophy, should be taught by those with high school licensure. The task force will delay discussions of this recommendation until after the June 30, 2006 mandated requirements for highly qualified teachers for No Child Left Behind are implemented.
 16. The Commission on Teacher Quality should develop standards for literacy (reading comprehension, writing, and English as a Second Language) to ensure that all teachers develop the knowledge and needed skills.

Organization & Culture

Most elements of education reform at the elementary, middle, and high school level have focused on curriculum, instruction, and testing issues. Middle level educators are aware that relationships do matter, and form a critical link between the teacher and the student, and between the student and his/her team. Research demonstrates that students do try harder and achieve more if they believe that their teacher is interested in their success and if they feel they are part of a group of peers and adults who support each other in their efforts to achieve (Goodenow, 1993). Likewise, research also shows that students who feel “left-out” of the process, who feel that their success does not matter, or that their teachers believe them incapable of academic success, will lower their own expectations accordingly (Kraner, 1992). It is the classic “self-fulfilling prophecy” in action. Half a century of research also tells us that teachers who believe their students are bright and capable will have higher achieving classrooms than those who believe their children are not high achievers (Arnold, 2001).

Given that we know the importance of teacher-student relationships to student success, it is critical that middle level schools are organized in ways that maximize the creation and growth of high-achieving, supportive, learning communities. Schools organized around the middle school concept of the team quite simply achieve more; have better attendance, and have fewer discipline problems than schools that do not use teams (Pounder, 1998). A recent important study of education in North Carolina’s middle grades found that schools recognized as “exemplary” by the state’s accountability program are more likely to have an organizational culture that reflects middle school philosophy (McEwin, Greene, & Jenkins, 2001). The use of **teaming** and **interdisciplinary teaching**, flexible scheduling, and an emphasis on de-tracking students is not only good for adolescent development, but also for high achieving and high performing schools.

It is the recommendation of the task force that:

17. Middle level schools have an advisory program to address the academic, social, emotional, and citizenship development of responsible young adolescents. The curriculum and instruction of this program must be carefully planned, articulated, and implemented. Administrators, teachers, counselors, and other staff must understand and contribute to the school’s plan for and implementation of its student advocacy, guidance, and advisory program. Every middle level student will have an adult advocate.
18. Middle level administrators, teachers, counselors, and other staff have the knowledge, skills, and display dispositions reflecting middle level organization and philosophy. To this end, district and school administrators will require and support middle level principal and staff participation in professional development activities—both in-service and conference—focused on middle level organization, philosophy, practices, and assessment. To achieve this, the task force encourages the consideration of an additional five days of employment at regular salary for middle level staff to provide training on middle school organization, programs, and practices.

19. Middle level schools will look at what teachers, students, parents/ community, test scores, and other data, say about the performance of the whole school, and of groups within the school. If there are differences, the next step is to examine the curriculum and instruction practices that affect each group of students, keeping in mind that the *North Carolina Standard Course of Study* represents a minimum set of requirements, and that all students should be challenged and grow.
20. Middle level schools have a “living” **School Improvement Plan** that ensures every student’s success and is focused on effective middle school research. Expectations for middle level organization, staffing, administration, curriculum and instruction, special programs, student activities, assessment/evaluation, and parental involvement will be addressed. It is not sufficient to set goals for improved test scores if those increases come at the expense of a quality middle level experience for all students.
21. Middle level teachers, in order to maximize the teaching/learning process, must have the structure and flexibility in the schedule that provide opportunities for teacher collaboration and planning to focus on:
 - a. Curriculum alignment
 - b. Reading and writing across the curriculum
 - c. **Integrated**/interdisciplinary instruction across all content areas
 - d. Development of policies concerning instruction, homework, assessment and evaluation, discipline, etc. that can be consistently implemented across all content areas
 - e. **Vertical articulation** with elementary and high school
22. Middle level schools must recognize the importance of individual and team planning time and keep such time inviolate. Teachers, like other professionals, require protected time in which to plan. Middle level educators need, and must wisely utilize a “team-planning” time during the instructional day.

Partnerships

Many educators and researchers have stated the obvious point that involvement by parents, family, and the community has a profound impact on student success (Henderson and Berla, 1994). Regardless of race, socioeconomic, or other factors, students who have significant adults actively involved in their education are more successful than those whose parents are not involved. A large body of research supports the fact that parents—even those very active in the elementary school—become scarcer at the middle level. Over 90% of parents in a recent survey believed that distancing themselves from direct involvement in their child’s schoolwork was an important part of maturation. Some parents become intimidated by the increasing difficulty of coursework at the middle level. Still others may not have had positive middle school experiences themselves. To engage parents and the community in meaningful ways, effort must be made to lower existing barriers. To clear these barriers requires constant and effective efforts on the part of the school to reach out to the school community. Forming partnerships is an essential part of that outreach. In addition, it is essential that partnerships are formed among and between key players in the school, business, and other communities.

It is the recommendation of the task force that:

23. Teams and teachers in the middle school are the primary partner with parents in their child’s school. Schools and teachers can cultivate parent involvement by preparing teachers and teams to include, communicate with, and respond effectively to parents.
24. School Improvement Plans must address the active involvement of parents and extended family members in their child’s educational learning experience. Conscientious and strategic efforts should be made to educate parents on how children learn, the middle school concept, the nature of young adolescents, and specific instructional program opportunities.
25. Schools should provide ample opportunities for parent involvement in their child’s education. Some ways schools can encourage parents to be involved include tutoring, mentoring, taking part in career development plans, grade level or team parents, direct communication with their child’s teachers, school committees, Parent Teacher Association, and Parent Teacher Organization.
26. Local districts will develop plans to establish partnerships at the local education level within school attendance zones to provide seamless transitions from elementary to middle school and from middle to high school and post-secondary institutions.
27. The North Carolina Department of Public Instruction, in conjunction with the North Carolina Middle School Association and North Carolina Parent Teacher Association will establish a state Middle School Council, with regular meetings, inclusive of policy makers, educators, family, community groups and agencies, and businesses to advocate for best practices in middle level education.

28. School districts are encouraged to forge collaborative connections that are persistent and flexible among schools, families, communities, businesses, and institutions of higher education. These connections should provide students and family access to services, career exploration opportunities, expand learning beyond regular school hours and outside of school walls, and advocate for school improvements critical to ensuring success for every student at all levels.
29. School districts are expected to develop a meaningful two-way communication process that is interactive and integrated. Multiple strategies such as public forums, focus groups, community forums, use of technology, web pages, newsletters, speaker's bureaus, communication with community centers and faith-based institutions, and other means can be utilized to promote communication about middle level education among all stakeholders.

Glossary of Terms

“ABCs School Accountability Program”	A restructuring plan for public education in North Carolina developed by the Department of Public Instruction as a directive from the General Assembly. Following a proposal and a year of piloting, the General Assembly in 1996 approved the State Board of Education’s plan for “Accountability,” “Basics,” Local Control,” and “Safety” – the ABC’s.”
Academic Tracking	The practice of grouping students according to ability and placing these students into separate curricula tracks or courses. The tracks cover distinctly different material, are binding across all academic subjects, and often lead to different destinations upon graduation from high school.
Academically or Intellectually Gifted	A category of students who perform or show the potential to perform at substantially high levels of accomplishments when compared with others their age, experience or environment. The students exhibit high performance capability in intellectual areas, specific academic fields, or in both intellectual areas and specific academic fields. They require differentiated education services beyond those ordinarily provided by the regular educational program. Outstanding abilities are present in students from all cultural groups, across the economic strata, and in all areas of human behavior.
Add-on Licensure	A type of provisional license that may be issued to individuals who hold a license in one field and are seeking an additional license in another field.
Advisory Commission on Raising Achievement and Closing Gaps	A North Carolina Commission appointed in 2000, and charged with advising the State Board of Education, the state superintendent, and local school systems on ways to raise achievement for all students and close the gaps that exist in student achievement outcomes and student participation in the instructional process.
Alternative Routes to Certification	A non-traditional approach to licensure restricted to those persons who hold a Bachelor’s Degree and seek certification only, add-on certification, renewal credit, and/or those in a Lateral Entry appointment. The lateral entry license is a provisional with annual mandates.
Arts Education	A K-12 Sequential program in the <i>North Carolina Standard Course of Study</i> that includes the following four curriculum areas: dance, music, theatre arts, and visual arts.
Authentic Assessment	A method of analyzing student performance using clearly defined objectives, clear achievement expectations, and methods of assessment that reflect what a student knows.

Basic Education Program (BEP)	1985 legislation that began a more comprehensive view of basic educational programming in the public schools of North Carolina. It included a K-12 curriculum plan, recommended staffing, support programs, class size, definition of an instructional day, and rigorous standards for student achievement. Though never fully funded or implemented, the BEP created a beginning framework for school reform in the state.
Block Scheduling	A method of class scheduling that provides more time than the traditional ‘high school period’ for student learning. There are a variety of approaches such as “Alternating Day,” “Semester Block,” and “Embedded Schedule.”
Charter School	North Carolina public schools that operate under a charter granted by the State Board of Education. The Charter allows the school to receive public funds, but the school may operate without many of the policies, procedures, and guidelines that govern traditional public schools.
Closing the Gap	Reducing the differences in the academic performance among students such that lower performing students make greater academic gains while all students continue to grow and achieve at higher levels. In North Carolina, the Department of Public Instruction has a section devoted to research and best practices and implements the recommendations of the Advisory Committee on Raising Achievement and Closing Gaps.
Cooperative Learning	A type of instructional strategy where students work cooperatively and collaboratively in learning teams. To be successful in having students complete group tasks within a cooperative framework, there must be: clear set of specific student learning outcome objectives; clear and complete set of task-completion directions or instructions; heterogeneous groups; equal opportunity for success; positive interdependence; face-to-face interaction; individual accountability; and post group reflection (or debriefing) within group behavior.
Differentiated Instruction	An approach to teaching that involves content, activities, and products developed in response to varying learner needs. It targets instruction using a variety of strategies such as: tiered assignments, learning centers, contracts, compacting, independent study, and learning buddies. A variety of student groupings may be used including learning in pairs, triads, quads, student-selected groups, teacher-selected groups, random groups, and as a whole class.
Diversity	An acknowledgement and recognition of, and appreciation for, the differences among the variety of students’ backgrounds which leads to improved achievement for <u>all</u> students.

Elementary & Secondary Education Act (ESEA)	A landmark 1965 legislation that provided federal funding for education on a massive scale. It was reauthorized as the “No Child Left Behind Act of 2001” with specific regulations and mandates that address student achievement, teacher certification and quality, and other critical issues.
Heterogeneous Grouping	A method of organizing for instruction that groups students without respect to performance levels or current achievement.
High-Stakes Testing	The use of large-scale achievement tests as instruments of educational policy. States and school districts are using such tests to make decisions on promotion/retention; program, class, or school assignment, and graduation.
Homogeneous Grouping	A method of organizing for instruction that groups students of similar performance levels or current achievement.
Individuals with Disabilities Education Act of 1997(IDEA)	Federal legislation that includes components that strengthen academic expectations and accountability for the nation’s 5.4 million children with disabilities.
Induction	A formalized process that takes a beginning teacher and provides him/her with a mentor, support, and training through the initial years of teaching.
Initial Licensure Program	A North Carolina initiative to provide support and assessment for beginning teachers. A three-year program is uniquely developed in each school district and may include such activities as ongoing staff development, mentor support, and extra days of employment.
Integrated Curriculum	A type of curriculum that includes goals and objectives from more than one discipline (i.e., Math and Social Studies, Science and Math, etc.). This approach to curriculum recognizes that knowledge is interconnected and that single-subject disciplines are artificial boundaries in learning.
Interdisciplinary Teaching	A method of teaching that applies the knowledge, principles, and/or values of more than one area of study. These disciplines may be related through a central theme, issue, problem, process, topic, or experience.
Lateral Entry	A policy that allows skilled individuals outside of the public education system to enter the teaching profession. While enrolled in an approved program, a lateral entry license entitles the holder to be employed by and serve as a teacher in the North Carolina schools. Lateral entry license holders must meet program and testing requirements within five years.

Learning Disabled (LD)	Students that have various processing disorders presumed to be intrinsic to an individual (e.g., acquisition, organization, retrieval, or expressions of information). For the purpose of special education services, school-age students classified as learning disabled are those who, after receiving instructional intervention in the regular education setting, have a substantial discrepancy between ability and achievement.
Limited English Proficiency (LEP) Student	Students whose language is other than English and scores below “superior” on a language proficiency task.
Mentor	A person that has demonstrated mastery of the critical competencies for a job role. Public school mentors assist initially-certified persons towards mastery of specific educational competencies. Through modeling, relationship building, observation/diagnosis, prescription, coaching, and reflection.
Middle School Licensure	A license issued in subject concentration(s) and valid for teaching in grades 6 through 9. For middle grades licensing, an individual’s university/college education should include completion of at least two of the four following subject areas: English language arts, mathematics, science, and/or social studies.
National Board Certification	Certification through the National Board for Professional Teaching Standards that recognizes exemplary teaching. An extensive portfolio and testing process is involved in earning this recognition.
No Child Left Behind (NCLB)	A sweeping reform of the Elementary and Secondary Education Act of 1965 (ESEA) that redefines the federal role in K-12 education. It is based on four basic principles: stronger accountability for results, increased flexibility and local control, expanded options for parents, and an emphasis on teaching methods that have been proven to work.
North Carolina Standard Course of Study	North Carolina’s mandated curriculum for the public schools. It includes the subject or skills areas of arts education, English language arts, guidance, healthful living, information/computer skills, mathematics, science, second language studies, social studies, and career-technical education.
School Improvement Plan	A detailed, annual plan developed by a local School Improvement Team (administrators, instructional personnel, instructional support staff, and parents of children enrolled in the school) that addresses academic achievement, parent involvement, school safety, and other components of school success. Individual School Improvement Plans are a legislative mandate.

Socratic Dialogue/ Method	A method of teaching in which the teacher asks questions that lead students to examine the validity of a statement. This process leads to a deeper examination of course content.
Teams	A group of teachers who share a group of students for most of the instructional day.
Vertical Articulation	A method of moving students through the K-12 educational system. Vertical articulation refers to careful examination and discussion about students' experiences in different grade levels in an effort to reduce overlap in content.
Workforce Development Education (Career and Technical Education)	A competency-based program in the <i>North Carolina Standard Course of Study</i> offered in eight program areas that help empower students for effective participation in an international economy as world-class workers and citizens. The area of study has been previously called Vocational Education.
Young Adolescent	Youth between the ages of 10 & 15 who are characterized by differences in intellectual, moral, physical, educational/psychological, and social development.

Appendices

Appendix A

Characteristics of Young Adolescents A1

Appendix B

*Making Middle Grades Work: Raising the Academic Achievement
of All Middle Grade Students*..... B1-7

Appendix C

North Carolina Schools to Watch Criteria..... C1-6

Appendix D

Comparison of School Reform Priorities D1

Appendix A

Characteristics of Young Adolescents

Social Characteristics

1. Often become rebellious towards parents and authority figures
2. Feel confused and frightened by new school and social settings
3. Are often argumentative
4. Require frequent affirmation and love from adults

Psychological Characteristics

5. Are often erratic and inconsistent in behavior
6. Are highly sensitive to criticism
7. Are often moody, restless, and self-conscious
8. Are optimistic and hopeful
9. Are searching for identity and acceptance from peers

Intellectual Characteristics

10. Are very curious
11. Prefer active to passive learning experiences
12. Relate well to real-life problems and situations
13. Are self-centered
14. Experience meta-cognition (they can think about thinking)

Moral and Ethical Characteristics

15. Are idealistic
16. Have a strong sense of fairness
17. Are reflective about their thoughts and feelings
18. Confront moral and ethical dilemmas directly
19. Ask large, ambiguous questions about the meaning of life

Physical Characteristics

20. Have irregular growth spurts
21. Experience changes in metabolism that cause restlessness and listlessness
22. Are often ravenously hungry
23. Mature at varying rates of speed
24. Are very sensitive to bodily growth and changes

Source: National Middle School Association

Appendix B

Making Middle Grades Work:

Raising the Academic Achievement of All Middle Grades Students

Southern Regional Education Board
592 10th St. N.W.
Atlanta, GA 30318
(404) 875-9211
www.sreb.org

Imagine a school where all middle grades students are engaged actively in learning challenging content taught by well-prepared teachers who know their subjects and how to teach them— a school where everyone receives the help he or she needs to achieve high standards. This school builds on a solid elementary background and prepares each student for a high school experience that leads to a successful adult life.

Most adolescents realize they are preparing for their future as adults and believe that it is important to strive for success in the workplace. However, the workplace for today's eighth graders will be vastly different from the one for which their parents and teachers prepared.

How well are American schools preparing students for this changing world? Too many young people are unprepared to succeed in high school when they leave the middle grades. There is a growing consensus that high school students need to complete a college-preparatory curriculum. Yet national data indicate that about 40 percent of students who leave the middle grades are performing below the basic levels in reading, mathematics and science. The National Assessment of Educational Progress 2000 mathematics data reveal that only 28 percent of eighth graders are performing at the proficient level, which shows readiness to do college-preparatory work in high school.

Higher failure rates in grades nine and 10 also indicate inadequate preparation for high school. Data from six states reveal that the percentages of students retained at grade nine are four to six times higher than the averages for earlier grades. One state estimates that mandatory retention for students who have not demonstrated mastery of content by the end of eighth grade would result in retention for half of all eighth graders.

In the mid- to late 1990s, the Southern Regional Education Board began analyzing data about academic achievement in the middle grades, which were identified as the “weak link” in education. SREB found several causes for this weakness:

- an unclear mission for the middle grades;
- middle grades teachers' insufficient content preparation and lack of knowledge of how to teach young adolescents;
- the lack of specific indicators or criteria for high school readiness; and
- the false belief that young adolescents cannot deal with challenging work because of puberty.

Making Middle Grades Work: Mission and goals _____

Middle grade schools should have concrete, measurable mission statements. The following is an example of a clear mission statement:

The mission of this middle school is to make sure that all students leave eighth grade with the knowledge and skills to be successful without remediation in a college-preparatory curriculum and with plans for what to study to complete high school and prepare for future education and careers.

A school could measure its progress toward this mission by requiring each exiting eighth-grader to have a five-year plan for high school and one year beyond and by reviewing data on ninth-graders' participation and performance in college-preparatory courses.

SREB's Making Middle Grades Work effort has several goals that support the middle grades mission:

- **Increase the percentages of eighth-graders who perform at the proficient levels in academic subjects.**
- **Provide educational experiences that increase students' knowledge and skills in reading, mathematics, language arts, science and social studies.**
- **Provide students with opportunities to apply their skills in the fine arts and to explore careers and new technology.**

SREB believes that schools will achieve these goals if they base their efforts on a comprehensive improvement framework of key practices and essential conditions.

The comprehensive improvement framework _____

School and classroom practices and student performance are more likely to change if they are aligned to a framework that provides direction and meaning to comprehensive school improvement. SREB's comprehensive improvement framework and essential conditions guide and support the changes necessary to raise student achievement.

Essential conditions for raising student achievement _____

There is no "quick fix" for getting students to learn and to apply what they learn. Teachers, school and district leaders, and community members must work together to design improvement strategies, allocate resources and develop an accountability process. Implementing the comprehensive improvement framework requires a sustained effort and support from the entire educational system. Certain conditions provide a structure for

A comprehensive improvement framework

- **An academic core that is aligned to what students must know, understand and be able to do to succeed in college-preparatory English, mathematics and science** — All students in the middle grades need an academic core curriculum that accelerates their learning, challenges them and appeals to their interests.
 - ⌘ In mathematics, all students satisfactorily complete Algebra I or pass a pre-algebra test of proficiency and use algebra concepts to reason and solve problems.
 - ⌘ In science, all students use laboratory and technology experiences to learn scientific concepts in physical, life and earth/space sciences.
 - ⌘ Reading instruction is incorporated into all content areas in the academic core curriculum through grade eight.
 - ⌘ The language arts curriculum requires students — before they leave eighth grade — to use language correctly and effectively to find, organize and communicate information.
 - ⌘ The social studies curriculum requires students — before they leave eighth grade — to describe their heritage, their government, their world and economic principles through key issues of the past, present and future.
- **A belief that all students matter** — Each student needs to have a personal relationship with an adult who takes an interest in his or her successful learning, goal-setting, educational planning and personal growth.
- **High expectations and a system of extra help and time** — Students learn in different ways and at different rates. Middle grades students need enough time and help to meet more rigorous, consistent standards for all eighth-graders. The middle grades curriculum should accelerate achievement for all students.
- **Classroom practices that engage students in their learning** — Young adolescents need varied learning activities linked to challenging academic content and opportunities to use new skills and concepts in real-world applications.
- **Teachers working together** — All teachers need time to plan together, to develop and coordinate learning activities, and to share student work that meets proficiency standards.
- **Support from parents** — Parents must understand clearly and must support the higher standards for performance in the middle grades.
- **Qualified teachers** — Middle grades teachers must know academic content and how to teach young adolescents.
- **Use of data** — States, districts and schools continuously must use data on student, school and teacher performance to review and revise school and classroom practices as needed.
- **Use of technology for learning** — Middle grades students and teachers must have opportunities to explore and use technology to improve knowledge and skills in English/language arts, reading, mathematics, science and social studies.
- **Strong leadership** — Middle grades schools need strong, effective principals who encourage teachers and participate with them in planning and implementing research-based improvements.

changes in climate, practices and personnel. These conditions help schools focus on the elements in the framework that must be strengthened.

- **Commitment** — State partners, the local school board, district leaders and the community must commit to implementing the comprehensive improvement framework fully.
- **Planning for continuous improvement** — District and school leaders must create an organizational structure and a process that provide teachers and administrators with the time and means to discuss and plan strategies to raise student achievement. Leaders and teachers decide what to teach, how to teach, what to expect students to learn and how to evaluate student learning.
- **Curriculum** — District leaders must encourage a review to assess the curriculum’s alignment with state, national and international standards. Content and performance standards will define the quantity and quality of work expected at each grade level.
- **Support for professional development** — District and school leaders must provide leadership and financial support for professional development that is connected directly to academic standards and gaps in student achievement. Professional development includes support for teachers as they implement teaching practices that have proven records of effectiveness.
- **Teacher preparation** — The local school board should encourage teachers without majors or minors in the subjects they teach to upgrade their content knowledge through academic courses. The board also should make an effort to hire teachers whose content backgrounds match their teaching assignments.

*A partnership for comprehensive school improvement*_____

SREB believes that a partnership with state and local leaders can accelerate change in the middle grades. By agreeing to implement a comprehensive improvement framework, each participating state, district and school site can share strategies that accelerate student achievement.

Each state agrees to:

- designate a state middle grades coordinator to represent the state at semiannual meetings of the middle grades board;
- create a network of middle grades schools that work together, share resources and solve common problems;
- assist middle grades schools through technical assistance visits, regular discussions of progress and barriers, and annual reviews of action plans;
- support schools’ improvement efforts by identifying professional-development experiences that address specific needs;
- attend SREB’s annual staff-development conference and other middle grades conferences and workshops;

Benchmark: Raise expectations and provide extra help _____

- The school expects high-quality work from all students, and all students participate in challenging classes.
- The school systematically identifies struggling students and provides them with extra help in multiple ways.

	Percent of students who say their schools meet the indicators			
	2000 (baseline)	2002	2004	2006 (goal)
Students report that teachers often set high standards and are willing to help them meet these standards.	_____	_____	_____	<u>85</u>
Students report that teachers often indicate the amount and quality of work necessary to earn an A or B.	_____	_____	_____	<u>85</u>
Students and families receive examples of work that meets guidelines and standards.	_____	_____	_____	<u>70</u>
Teachers require students to revise work until it meets standards.	_____	_____	_____	<u>70</u>
Students who earn below a C are required to attend extra-help sessions several times a week.	_____	_____	_____	<u>85</u>
Students report that they have easy access to extra help when they need it.	_____	_____	_____	<u>85</u>
Students report that their teachers and other adults at the school are available before, during and after school to help them.	_____	_____	_____	<u>85</u>

- identify outstanding practices in schools statewide; and
- prepare annual reports that summarize state and school accomplishments and address challenges to improving student achievement.

Each participating school or district agrees to:

- promote a vision of high achievement for all students;
- obtain school board support for SREB's middle grades initiative and the changes required to implement the comprehensive improvement framework;

- appoint a site coordinator to coordinate planning, professional development, technical assistance and the Middle Grades Assessment;
- establish school goals based on benchmarks of middle grades achievement;
- develop a three- to five-year improvement plan;
- support teachers with professional development, materials and the time they need for working together to implement the comprehensive improvement framework and for participating in national, state and school professional development;
- participate in a technical assistance visit in the first year of membership in the network and a technical review visit 18 months later;
- administer the biennial Middle Grades Assessment; and
- share information and ideas with other members of the middle grades network.

SREB agrees to:

- work with states to conduct site development workshops that apply the comprehensive improvement framework to schools and result in action plans for school improvement;
- manage and/or lead a three-day technical assistance visit to each school;
- provide schools with consultation and technical assistance as they implement the comprehensive improvement framework;
- help each school identify and plan professional-development opportunities that match its action plan;
- provide professional-development opportunities that address schools' common needs and link schools together to exchange "best practices";
- conduct a one-day technical review visit to assess progress at each school 18 months after its technical assistance visit;
- provide research briefs and guides on school improvement and issues associated with the comprehensive improvement framework;
- provide information and dissemination services to support schools and districts through publications, videos and the Internet;
- establish a technology-based network and support system for schools that includes listservs, informational Web pages and Web-based courses;
- evaluate schools' progress in raising student achievement; and
- describe outstanding practices and exemplary schools that raise student achievement.

For more information _____

For more information on Making Middle Grades Work, contact:
 Gene Bottoms, senior vice president, Southern Regional Education Board, (404) 875-9211, Ext. 277, or gene.bottoms@sreb.org
 Sondra S. Cooney, director, Making Middle Grades Work, (404) 875-9211, Ext. 288, or sondra.cooney@sreb.org
 Barbara Moore, associate director, Making Middle Grades Work, (404) 875-9211, Ext. 296, or barbara.moore@sreb.org.

Support for SREB's middle grades network is provided by member states and the Edna McConnell Clark Foundation.

About SREB

The Southern Regional Education Board, the nation's first interstate compact for education, was created in 1948 by Southern governors. SREB helps educational and governmental leaders work cooperatively to advance education and, in doing so, to improve the region's social and economic life.

SREB assists state leaders by directing attention to key issues; collecting, compiling and analyzing comparable data; and initiating studies and discussions that lead to recommendations for state and institutional action.

Appendix C

North Carolina Schools to Watch Criteria

For more information on Schools to Watch or the criteria, visit us on the web at www.ncmsa.net, contact NCMSA at (800) 424-9177 or e-mail us at info@ncmsa.net

Academic Excellence: High-performing schools with middle grades are academically excellent. They challenge all students to use their minds well.

1. All students are expected to meet high academic standards. Teachers supply students with exemplars of high quality work that meets the performance standard. Students revise their work based on feedback until they meet or exceed the performance standard.
2. Curriculum, instruction, and assessment are aligned with high standards. They provide a coherent vision for what students should know and be able to do. The curriculum is rigorous and non-repetitive; it moves forward substantially as students' progress through the middle grades.
3. The curriculum emphasizes deep understanding of important concepts, development of essential skills, and the ability to apply what one has learned to real-world problems. By making connections across the disciplines, the curriculum helps reinforce important concepts.
4. Instructional strategies include a variety of challenging and engaging activities that are clearly related to the concepts and skills being taught.
5. Teachers use a variety of methods to assess student performance (e.g., exhibitions, projects, performance tasks) and maintain a collection of student work. Students learn how to assess their own and others' work against the performance standards.
6. The school provides students time to meet rigorous academic standards. Flexible scheduling enables students to engage in extended projects, hands-on experiences, and inquiry-based learning. Most class time is devoted to learning and applying knowledge or skills rather than classroom management and discipline.
7. Students have the supports they need to meet rigorous academic standards. They have multiple opportunities to succeed and extra help as needed.

8. The adults in the school have opportunities to plan, select, and engage in professional development aligned with nationally recognized standards. They have regular opportunities to work with their colleagues to deepen their knowledge and improve their practice. They collaborate in making decisions about rigorous curriculum and effective instructional methods. They discuss student work as a means of enhancing their own practice.

Responsiveness to Students' Needs: High-performing schools with middle grades are sensitive to the unique developmental challenges of early adolescence.

1. The school creates a personalized environment that supports each student's intellectual, ethical, social, and physical development. The school groups adults and students in small learning communities characterized by stable, close, and mutually respectful relationships.
2. The school provides access to comprehensive services to foster healthy physical, social, emotional, and intellectual development.
3. Teachers use a wide variety of instructional strategies to foster curiosity, exploration, creativity, and the development of social skills.
4. The curriculum is both socially significant and relevant to the personal interests of young adolescents.
5. Teachers make connections across disciplines to help reinforce important concepts and address real-world problems.
6. The school provides multiple opportunities for students to explore a rich variety of topics and interests in order to develop their identity, discover and demonstrate their own competence, and plan for their future.
7. Students have opportunities for voice -- posing questions, reflecting on experiences, developing rubrics, and participating in decisions.
8. The school develops alliances with families to enhance and support the well-being of their children. It involves families as partners in their children's education, keeping them informed, involving them in their children's learning, and assuring participation in decision-making.
9. The school provides students with opportunities to develop citizenship skills, uses the community as a classroom, and engages the community in providing resources and support.
10. The school provides age-appropriate co-curricular activities.

Social Equity: High-performing schools with middle grades are socially equitable, democratic, and fair. They provide every student with high-quality teachers, resources, learning opportunities, and supports. They keep positive options open for all students.

1. Faculty and administrators expect high-quality work from all students and are committed to helping each student produce it. Evidence of this commitment includes tutoring, mentoring, special adaptations, and other supports.
2. Students may use many and varied approaches to achieve and demonstrate competence and mastery of standards.
3. The school continually adapts curriculum, instruction, assessment, and scheduling to meet its students' diverse and changing needs.
4. All students have equal access to valued knowledge in all school classes and activities.
5. Students have on-going opportunities to learn about and appreciate their own and others' cultures. The school values knowledge from the diverse cultures represented in the school and our nation.
6. Each child's voice is heard, acknowledged, and respected.
7. The school welcomes and encourages the active participation of all its families.
8. The school's reward system demonstrates that it values diversity, civility, service, and democratic citizenship.
9. The faculty is culturally and linguistically diverse.
10. The school's suspension rate is low and reflects the diversity of the student population.

Organizational Structures and Processes: High-performing schools with middle grades are learning organizations that establish norms, structures, and organizational arrangements to support and sustain their trajectory toward excellence.

1. A shared vision of what a high-performing school is and does drives every facet of school change. Shared and sustained leadership propels the school forward and preserves its institutional memory and purpose.
2. Someone in the school has the responsibility and authority to hold the school-improvement enterprise together, including day-to-day know-how, coordination, strategic planning, and communication.
3. The school is a community of practice in which learning, experimentation, and reflection are the norm. Expectations of continuous improvement permeate the school. The school devotes resources to ensure that teachers have time and opportunity to reflect on their classroom practice and learn from one another. At school everyone's job is to learn.
4. The school devotes resources to content-rich professional development, which is connected to reaching and sustaining the school vision. Professional development is intensive, of high quality, and ongoing.
5. The school is not an island unto itself. It draws upon others' experience, research, and wisdom; it enters into relationships such as networks and community partnerships that benefit students' and teachers' development and learning.
6. The school holds itself accountable for its students' success rather than blaming others for its shortcomings. The school collects, analyzes, and uses data as a basis for making decisions. The school grapples with school-generated evaluation data to identify areas for more extensive and intensive improvement. It delineates benchmarks, and insists upon evidence and results. The school intentionally and explicitly reconsiders its vision and practices when data call them into question.
7. Key people possess and cultivate the collective will to persevere and overcome barriers, believing it is their business to produce increased achievement and enhanced development for all students.
8. The school works with colleges and universities to recruit, prepare, and mentor novice and experienced teachers. It insists on having teachers who promote young adolescents' intellectual, social, emotional, physical, and ethical growth. It recruits a faculty that is culturally and linguistically diverse.

The school includes families and community members in setting and supporting the school's trajectory toward high performance. The school informs families and community members about its goals for students and students' responsibility for meeting them. It engages all stakeholders in ongoing and reflective conversation, consensus building, and decision making about governance to promote school improvement

Appendix D

Comparison of School Reform Priorities

Last Best Chance	This We Believe	Making Middle Grades Matter	Turning Points 2000
School Organization	Educators Committed to Young Adolescents	Comprehensive Improvement Framework	Standards-base, Relevant Curriculum & Assessment
Curriculum	Shared Vision	Belief that all Students Matter	Instruction that Prepares All Students to Achieve
Instruction	High Expectations	High Expectations & System of Extra Help & Time	Organize Relationships for Learning
Student Success	Adult Advocates for Every Student	Classroom Practices that Engage Students	Govern Democratically, Involving All Staff
Health Concerns	Family & Community Partnerships	Teachers Working Together	Staff School with Experts, Ongoing Staff Development
Technical Assist.	Positive School Climate	Support from Parents	Provide a Safe & Healthy Environment
Professional Staff		Qualified Teachers	Involve Parents & Communities
Teacher Prep.		Use of Data	
Parents		Exploring & Using Technology	
Community		Strong Leadership	

References

- Arnold, J. & Farmer, N. (Eds.). (1991). *Last Best Chance: Middle Grades Task Force Report*. Raleigh, NC: Author.
- Arnold, J. (2001). High expectations for all. In T. Erb (Ed.), *This we believe...and now we must act*. Westerville, OH: National Middle School Association.
- Education Commission of the States. (2000). *In pursuit of quality teaching*. Denver, CO: Author.
- Carnegie Council on Adolescent Development (1989). *Turning points: Preparing youth for the 21st century*. New York: Carnegie Corporation.
- Cooper, J., Prescott, S., Cook, L., Smith, L., Mueck, R., and Cuseo, J. (1990). Cooperative learning and college instruction: Effective use of student learning teams. California State University Foundation, Long Beach, CA.
- Felner, R., Jackson, A., Kasak, D., Mullhall, P., Brand, S., & Flowers, N. (1997). The impact of school reform for the middle years. *Phi Delta Kappan*, 78, 528-532, 541-550.
- Goodenow, C. (1993). Classroom belonging among early adolescent students: Relationships to motivation and achievement. *Journal of Early Adolescence*, 13 (1), 21-43.
- Henderson, A.T., & Berla, N. (Eds.). (1994). *A new generation of evidence: The family is critical to student achievement*. Washington, DC: Center for Law and Education.
- Jackson, A.W., & Davis, G.A. (2000). *Turning points2000: Educating adolescents in the 21st century*. NY: Teachers College Press.
- Johnson, D.W., Johnson, R.T., and Smith, K.A. (1998). Active learning: cooperation in the college classroom. Edina, MN: Interaction Book Company.
- Kramer, L.R. (1992). Young adolescents' perceptions of school. In J.L. Irvin (Ed.), *Transforming middle level education: Perspectives and possibilities*. Boston: Allyn & Bacon.
- Marzano, R. (2000). *Designing a new taxonomy of educational objectives*. Thousand Oaks, CA:Corwin Press.
- McEwin, C. & Farmer, N.J. (1992). *Middle level education in North Carolina: A status report on programs and practices*: Raleigh: North Carolina League of Middle Level Schools.
- McEwin, C. & Dickson, T. (2001). Educators committed to young adolescents. In: T. Erb (Ed.), *This we believe...and now we must act*. Westerville, OH: National Middle School Association.

McEwin, C., Greene, M., & Jenkins, D. (2001). *Where do North Carolina's middle schools stand in the 21st century?: A status report on programs and practices*. Pinehurst: North Carolina Middle School Association.

National Council for Accreditation of Teacher Education. (2001). *Standards for professional development schools*. Washington, DC: Author.

National Middle School Association. (1995). *This we believe: Developmentally responsive middle level schools*. Columbus, OH: Author.

National Middle School Association (1999). *National Middle School Association position statement on diversity*. Columbus, OH: Author.

Nurrenbern, S. (1995). *Experiences in cooperative learning: A collection for chemistry teachers*. Institute for Chemical Education, University of Wisconsin Board of Regents, Madison, WI.

Pounder, D.G. (1998). *Restructuring schools for collaboration: Promises and pitfalls*. Albany: State University of NY Press.

Sarason, S. (1990). *The predictable failure of education reform: Can we change course before it's too late?* San Francisco: Jossey-Bass.

Slavin, R.E. (1995). *Cooperative learning: Theory, research, and practices* (2nd ed.). Boston: Allyn & Bacon.

Southern Region Education Board (1998). *Education's weak link: Student performance in the middle grades*. Atlanta, GA: Author.

Southern Region Education Board (1998). *Raising the bar in the middle grades: Readiness for success*. Atlanta, GA: Author.

Southern Region Education Board (1998). *Improving teaching in the middle grades: Higher standards for students aren't enough*. Atlanta, GA: Author.

Southern Region Education Board (1999). *Leading the way: State actions to improve student achievement in the middle grades*. Atlanta, GA: Author.

Southern Region Education Board (2001). *Closing gaps in the middle grades*. Atlanta, GA: Author.

Viadero, D. (2000). NC launches broad assault on the achievement gap. *Education Week*, 19 (35), 23.