STANDARDS-BASED EDUCATION REFORM IN THE 1980s AND 1990s: GEORGIA AND THE ELEMENTARY PRINCIPAL EXPERIENCE IN CLARKE COUNTY

by

EVELYN MARIE LAMB WAGES

(Under the Direction of John P. Dayton)

ABSTRACT

The purpose of this study was to trace how the education standards based reform journey across the history of the United States and specifically Georgia set the stage for later reform implementation. The goals of the study were to examine how officials in Georgia focused the path of education, to discover how practitioners in a local system experienced the 1980s and 1990s, and to compare the local experience to documents.

To find out the history of education law and policy, a legal research method was used to study legal documents and public records. A qualitative case study method was used to uncover how happenings in a local school system context interacted with policy changes in a given time period. Retired educators who served as elementary school principals at eight schools in Clarke County, Georgia were interviewed to get their perceptions of local issues and how they experienced the first state mandated curriculum.

The findings of the study reveal practitioners are very much able to report happenings during their tenure as principals even after years have passed. Their insights into leadership, intent as well as policy, and effects of local happenings in the day-to-day

work are valuable to understanding education during their time of service. The findings suggest that state changes have often been reactive to national demands or to complaints from subgroups of people, and there was not much communication about how local needs would be met. Leaders recognize the best changes were those that helped particular students, and that was typically when there was top-down support and bottom-up collaborative problem solving.

INDEX WORDS: Education reform, Quality Basic Education Act, Clarke County School District, Integration, Racially balanced schools, Controlled Choice, PL94-142, Equity, Educational Access

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DEDICATION

This dissertation is dedicated to God who guides my life and continually amazes me. He is the keeper of promises and the designer of every part of life. The timing of this work makes little sense by all other standards as it has been done after reaching eligibility for retirement, and thus an act of obedience as I perceive His will in my life. In 2000, while completing coursework for leadership certification, professors encouraged me to complete a doctoral program of study. In prayerful consideration of that suggestion, the closest thing to an audible answer I've ever gotten came to me. It was as if God spoke to me, "Not now. You have until 2015." I told my Bible study group that it must be my destiny to die in 2015, and they offered the idea that maybe God had something special planned for me in 2015. As life often does, mine took several twists and turns with wonderful family experiences and the opportunity for the best job in the world. Then a friend and colleague suggested we apply for admittance to the UGA doctoral program together, and I prayed again. In support of the friend, who ended up choosing a different path, I applied and began this journey. By any logical timeline, this project would have been complete some time ago, but again life took a few turns with family events that slowed the pace. Now it is 2015, and the work is complete. Some will say this is all coincidental, but I know the timing is completion of the plan God tried to share with me as a fifth grader who told friends I would complete a doctorate someday. The reason and the result of this work is dedicated back to God in appreciation for His

presence with me every day, and as I close this chapter of life, I trust that He will fulfill whatever purpose He intended with this work.

This dissertation is also dedicated to the memory of my Dad who introduced me to God, taught me that a good work ethic is priceless, and showed me that a life lived with integrity is the only life worth living. The many conversations we had over time still inspire me today.

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Nothing accomplished in the dissertation process would be possible without my husband Lamar who patiently ate alone and dealt with the books and articles around the house as I worked. My daughters, Natalie and Cynthia, have made sure I remembered to take time to dance as well as study, and Natalie and Jon's wedding was a fun interlude in the middle of the work. My school family at Rocky Branch Elementary School has been supportive and encouraging, and they make me want to be a better leader. My church family at Gordon's Chapel United Methodist Church have prayed for me and encouraged me along this journey. Bill and Jo Jackson took a special interest in me, and their encouragement has meant a lot to me. My dissertation committee helped me find my own dream of what I wanted to study. Dr. Dayton promoted my ownership of this work, and made sure I always knew the main goal was to learn what I wanted to know. Dr. Williams pointed me back to a time in history that ended up defining my work. Dr. DeBray suggested that adding the case study would make the work more meaningful, and that turned out to be a wonderful experience. My sister, Kathy, has helped to care for our sweet mother when I needed to focus on the work, and my mother, who dealt with her own challenges during this time, persisted in asking me when I was scheduled to finish. All of you together have helped me tremendously, and this project only happened because you were there for me.

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CHAPTER 1

PROBLEM, PURPOSE, AND RESEARCH QUESTIONS

I. Introduction

A. History

Through the 1950s, the United States supported state and local control of schools, but since then there has been an increasing national priority on education as the means to keep the country competitive globally. Education policy in the 1950s was more simple than today in terms of length, content, and implementation plans, and the influence of organizations and interest groups was much less (Kaestle, 2007). Some, like Diane Ravitch, question the appropriateness of allowing the influence of wealthy foundations and interest groups to enter the arena of school reform when they are not accountable by election or trained in education-related fields. In her book, The Death and Life of the Great American School System - How Testing and Choice are Undermining Education, Ravitch discusses how her personal views have changed about education reform after realizing those with influence are not necessarily experts on educational research, and their advice has been faulty. (Ravitch, 2010). The progression of education reforms in the past sixty years has led to more federal control of schools, more outcome-based

measures of school success, and greater demand for achievement of subgroups of students.

In the late 1950s, the *Brown v BOE* decision was still new and implementation plans were unsure (Kaestle, 2007). The *Brown* decision was the first big federal intervention into school operations. The case addressed the issue of access to education as a civil rights issue, and the resulting judicial action began federal involvement in the education system (Pinder, 2010; Reed, 2007). By the late 1950s, events like the violence over desegregation in Little Rock, Arkansas and the Soviet launching of Sputnik led the public to more acceptance of federal intervention in education (Kaestle, 2007; Ogletree, 2004). The National Defense Education Act (NDEA) was passed in 1958 to support the teaching of science, math, and foreign language as a way to protect the United States' standing in the world. The NDEA was the first of a series of categorical aid bills passed that increased the role of the federal government in education into the 1960s and 1970s (Kaestle, 2007; Nelson, 2005).

The Elementary and Secondary Education Act (ESEA), passed in 1965, remains a key part of education policy today. The passing of ESEA situated education at the center of President Johnson's "War on Poverty" as part of his "Great Society" effort, and it expanded the federal role in the realm of education. The bill designated federal funding for schools in an attempt to rectify inequities of resources available to children living in poverty. ESEA was the educational counterpart of several pieces of legislation enacted to combat poverty during Johnson's term (DeBray, 2006; Kaestle, 2007; Reed, 2007).

There was ongoing involvement in the Vietnam War, an economic slump, Middle Eastern conflict, and the Watergate scandal to divert attention from education during the

Nixon administration. When Nixon resigned from the presidency, Vice President Gerald Ford stepped into the position as the only president to take the office following appointment (rather than election) to the Vice Presidency. There was little focus on education as Ford's short term was spent dealing with war, economic woes, and the tainted view of presidential integrity. In 1979, Jimmy Carter's administration, with influence from the National Education Association (NEA) created the Department of Education (Pinder, 2010; Ravitch, 2010). Some supported the creation of a cabinet level position for education while others argued this step was a waste of funds or constitutionally inappropriate (Ravitch, 2010).

From 1980 until now, each presidential administration has felt the need to reinvent the role of the federal government in education, and the changes have created a sort of "zigzag" pattern. Following increased spending on education in the 1970s, the funding for schools was decreased and enforcement of civil rights slowed during the Reagan administration. Reagan resisted efforts to increase federal regulation of education and continually supported state responsibility and authority. (Kaestle, 2007) His attempt to dismantle the Department of Education failed when "A Nation at Risk" was published in 1983, as it reported education in the United States was in dire need of overhaul (Pinder, 2010; Vinovskis, 2009). There were concerns about the quality of the report, but in spite of that, it launched an era of school reform and influenced public opinion of schools (Kuehl, 2012; Vinovskis, 2009). During the late 1980s, interest in improving the quality of education led to reforms that tended to involve "standards". The definition of standards has evolved since that time, but the move toward standards-based reform has its

roots in the late 1980s, and the word "standards" began to be used in discussions of how improvement would come to be (Spillane, Reiser, & Reimer, 2002).

George Bush became president in 1989, and he called governors together in Charlottesville, Virginia for a summit to discuss education. During the summit, the governors agreed upon six goals for education, and thus began a collective push for tougher and more effective standards (Heise, 1994). The National Governors Association (NGA) worked with President Bush to create the goal list Bush then presented as "America 2000" in his state of the union address. Even though there was no federal means to monitor or require specific curriculum goals, America 2000 was presented for adoption by states and local school systems. States were prompted to accept the National Education Goals and to adopt standards that would lead to the goals. (DeBray, 2006) The NGA and the president worked together to create the National Education Goals Panel (NEGP) to serve as a bi-partisan group to report on progress toward the goals (Kaestle, 2007; Vinovskis, 2009).

When Bill Clinton, former governor of Arkansas and active member of the NGA, began his presidency, he wanted to strengthen the federal role in education. Commissions such as the National Commission on Education Standards and Testing (NCEST) were recommending federal support to states to help set benchmarks for student learning, and many states were working to create such standards (DeBray, 2006). Clinton pushed for passage of the Goals 2000: Educate America Act, which included additional items to the America 2000 goals and expanded the role of the NEGP. It also created the National Education Standards and Improvement Council (NESIC) (Heise, 1994; Vinovskis, 2009). The bill was signed into law in 1994 after receiving bipartisan support in

Congress. During the remainder of Clinton's administration, he fought to maintain funding and support for the initiatives set forth (Kaestle, 2007). Goals 2000 increased the role of federal government in controlling education policy while also increasing the ability of the federal government to pass educational costs along to states and local school systems (Heise, 1994).

When George W. Bush was elected, he was expected to move away from federal control and influence over the standards movement. Instead, he supported stronger federal influence, and his reauthorization of ESEA, commonly known as the No Child Left Behind Act (NCLB) pushed federal control to a higher level (DeBray, 2006; Kaestle, 2007; Vinovskis, 2009). NCLB is the most recent reauthorization of ESEA, and during the Obama administration, states have presented flexibility waivers to attempt to get relief from some of its mandates. The education initiative of the Obama administration has been Race to the Top which set new requirements for states (who apply for funding) to help close gaps between subgroups of students. Also, during the Obama administration, states have adopted Common Core Standards supported by the NGA and encouraged in the Race to the Top and NCLB flexibility waiver application requirements.

B. Local Impact

Reports from local settings can offer some idea of how reforms and changes either produce positive or negative results. For example, the Supreme Court ruling in the *Brown v BOE* case brought federal control over local systems in terms of racial balance,

but it also led to other groups beginning to challenge local system decisions. In Alexandria, Virginia, for example, groups such as parents of children with special needs began to push from the grass roots level to ask for better services long before there was a federal push for those services (Reed, 2007).

Another impact in Alexandria was the changed relationship between the school systems, the local community, and state and federal officials. People realized that communication with the local school officials was not their only means of asking for services. They could bypass the old line of communication to go directly to the judicial system or to lobby for federal legislation to gain leverage to force the local school system to offer specific services (Reed, 2007).

Beyond the local community, the response to desegregation in Alexandria (and from Virginia's Governor Almond) also represents a new power struggle between federal, state, and local entities. Push-back from state or local officials, schools, or community groups presented implementation challenges that altered the intended outcome of a federally imposed decision (Reed, 2007). It seems that the local context influenced the outcome and level of influence of the Supreme Court's call for the end to state mandated segregation.

In another local context, the city of Boston sought federal money while hoping to maintain local control of decisions. When money was designated for students in poverty, for special education students, or for non-English speaking students, they found ways to designate more students in those categories. Their local need for funds to handle the expanding population led to interpretation that did not align with the intent of legislation. Eventually, their strategies to gain federal funding led to federal demands for them to

change practices that had created racially segregated classes. Officials in Boston learned, over time, that use of federal funds comes with federal guidelines and control that can lead to sanctions and loss of money. Balancing parent demands, costs of adding facilities, state legislation and federal mandates created dilemmas for Boston's school system. While Boston has led the nation in many respects throughout the reform efforts, local needs have continually colored the interpretation and implementation of reforms handed down from state and federal entities (Nelson, 2005).

C. Problem Statement – Rationale

Educational reform has been of public interest, particularly since the publishing of the report "A Nation at Risk" by the National Commission on Excellence in Education in 1983 (Vinovskis, 2009). In response to the report, special interest groups began to see greater need to include education as a crucial component of their agendas. Those groups increased in number and membership, and they added to an emotional debate regarding education (Kaestle, 2007). The report generated concern that American students were losing academic ground compared to students in other countries. In response, government and school officials have attempted to create policies to foster improved student achievement. Presidents, governors, legislators, departments of education, state and local superintendents, and school boards have added policy or interpretation of policy with the intent of improving education. Success of these efforts is elusive and often undefined. While there are successes by some measures, other measures indicate limited or no gain.

Not as much has been written about the earliest standards-based reform as about the No Child Left Behind (NCLB) reauthorization of ESEA. NCLB and the move toward Common Core Standards since then have received a lot of attention from researchers and journalists. The current emphasis on the standards-based movement and its impact on education can be better understood by determining its roots. To really understand the present status of standards based reform and the federal role in the process, the changes during the 1980s and 1990s give a lens to make clear what is seen now (Kaestle, 2007). In the progression of the movement to standards within individual states, most of the influence can be traced to the 1980s and 1990s (M. Musick, personal communication, February 17, 2014).

The early 1980s were a time when states were beginning to move toward a common curriculum with state control. How schools responded during that era might explain (or could have predicted) how schools would respond to the later legislation and direction of joint state efforts. Each state has experienced a different journey in the standards-based movement, and states were at very different stages of education reform when emphasis turned from a focus on equity of opportunity to equal outcomes. Because of this, a national perspective is hard to achieve. Consideration of how states dealt with desegregation, planned for funding of quality schools, decided on curriculum, or managed state-specific needs could lend understanding to how prepared states were to move forward with reform expectations. To fully understand how a state approached NCLB accountability requirements or made decisions about whether or not to adopt Common Core standards, it is necessary to trace the journey from the beginning of the standards based movement. Georgia's journey is of particular interest in terms of when

governors began to participate in the NGA discussion and the timeline of decisions up to the passage of NCLB (M. Musick, personal communication, February 17, 2014).

II. Purpose Statement

The purpose of this study is to trace how the standards based reform journey across the country and specifically in the state of Georgia in the 1980s and 1990s set the stage for implementation of later reforms. The goals are to examine how officials in Georgia focused the path of education in the 1980s and 1990s, to discover how practitioners in a local school system interpreted and responded to reform efforts during that time, and to compare local experience to documents and records from the 80s and 90s that may have influenced reform implementation since that time.

III. Research Questions

1. How did Georgia's education legislation and policy from1980 to 2000 set the stage for implementation of more recent reforms?
2. How do practitioners who served as elementary principals in Clarke County, Georgia in the 1980s and 1990s describe their experience as school leaders and their understanding of local, state, and national education priorities?
3. How do practitioners describe past reforms as compared to how state and local documents report the same time period?

IV. Methodology

Legal research consists of studying documents such as the United States Constitution, state statutes, court decisions, Department of Education and school board policies, and similar documents of public record. Legal research can inform this study as reform movements consist of statutes and policies (Dayton, 2013). Using the legal research method, documents such as the Quality Basic Education Act will be reviewed. Related policies or implementation documents created by the state or local Board of Education or other professional support agencies will be examined. Documents will also include those from agencies such as the National Council Education Standards and Testing (NCEST), Southern Regional Education Board (SREB), and the NGA,

Study of the legal and policy documents alone, however, will not produce an understanding of policy implementation in a local setting. Keeping a historical perspective and adding personal stories will help determine how decisions were experienced by people within the time and setting. This will include a study of published opinions from newspaper articles, for example, as well as in-depth interviews of people who served as elementary school administrators in Clarke County, Georgia in the late 1980s and 1990s. Reflections on that time period will be valuable in determining whether or not the documents yield a true picture of the experience and outcomes. Use of interviews as the case study method of research will contribute perspective and balance to the study of recorded documents.

To analyze the interview data and to synthesize it with the legal research data, a process suggested by Michael Fullan's work will be implemented. In his book, The New Meaning of Educational Change, 4th Edition, Fullan discusses the fact that educational change is a phenomenon only understood by considering both the large and small picture of how the change is experienced. Because change is experienced in local settings at the classroom, school, and system levels as well as at the state, regional, and national levels, many factors interact that influence how change is viewed and then implemented. Fullan notes that full understanding or analysis of any reform must "make sense" of the differing points of view, the emotions involved in change, and the impact of culture on action (Fullan, 2007). Interviews in this study will consider the experiences of educators in a local setting as compared to the legal and historical perspectives of the early period of standards-based reform. The interviews will lend the opportunity to find out how changes generated emotion, motivation, or school culture pressure that had effect on implementation in the school setting.

A. Case Study - Interview Participants

Individuals who served in the role of elementary school administrator in Clarke County, Georgia in the 1980s and 1990s will be invited to participate in interviews. Invitations to participate in the study will be extended to the individual who served the greatest length of time at each elementary school during the 1980s and 1990s. In some cases, that person is deceased, and if there is another person who served as principal during that timeframe, that person will be invited to participate.

V. Limitations

The study will be limited in terms of accuracy because those being interviewed will be supplying information from memories of their perceptions during the 1980s and 1990s. Life experiences, both personal and professional, have continued for these people, so to isolate memories of their interpretation of reforms, feelings, and concerns from decades back could be difficult. Often, case studies include observations of the setting related to interviews (Yin, 2009). In this case, because the case study is being conducted years later, the observation component is not possible.

Accuracy of information may also be limited in the legal research component because some agencies did not create a permanent record of meeting minutes or archive files of their work during the 1980s and 1990s in a way they can be found today. Because digital records were not as common then, some records in storage boxes may have been destroyed, or they may not be housed in a location of public access. In some cases, there is not a record of where the records were moved, so current employees do not know where records are or even if they exist (personal conversations with an AskDOE employee, December 3, 2014 and February 18, 2015). The results will be as accurate as possible, but may not provide the whole truth of the era's impact on education today. Clarke County School District records are destroyed as soon as permitted by law, according to a policy adopted November 12, 1987 (www.clarke.k12.ga.us).

In terms of scope, the study will be limited by the consideration of one geographic location. The experiences of one Northeast Georgia community may or may not be representative of the nationwide experience. What the study will provide is how the

context of location and time influenced perceptions and actions when reforms were implemented at the direction of government entities. Within Clarke County, some schools may not be represented in this study if retired administrators are not available because they have deteriorating health, are deceased, cannot be located, or decline to participate..

CHAPTER 2

LITERATURE REVIEW

I. Introduction

In many ways, education has played a role in the shaping of Amercian society across time (Bell, 1985). Decisions regarding education in the United States have been shaped by stakeholder perceptions of problems in each era of the nation's history. In the early days, schools were accountable to the citizens of the community, and each local community developed school policies to support community needs. Over time, a move toward school systems and to state oversight seemed a more efficient way to address problems. An awareness of diverse groups of people and parental input led to an expectation that more students be given access to education. As more students were given access to education, groups of people noticed discrepancies between the levels of quality of education provided in different locations and for various segments of the population. The new problems identified pointed to lack of equity of educational opportunities. Moving into more recent times, public concern shifted to accountability in addition to equity, and the operational definition of accountability became equal achievement by all groups of students (Jennings, 2012).

Policy makers employ their understanding of problems in order to generate solutions. How they define policy problems is influenced by their proximity to issues,

their understanding of the community, and their understanding of economic structures that support education (Stein, 2004). To understand the progression of education reform in the United States requires a historical understanding of the shift of viewpoint from local to global. It also requires an understanding of the progression of the American definition of who is included in the community of the educated and the progression of thought about economic responsibility for education. The ever-changing notion of accountability, how to hold schools accountable, and to whom schools are accountable are part of the historical progression of American schools.

Following an emphasis on access as the definition of accountability, equity became the primary accountability measure in education for quite some time (Jennings, 2012). In the United States, education is one of the most inter-governmental policy arenas with federal, state, and local governments sometimes competing for, and sometimes sharing, authority. More recently in the history of the United States, the primary accountability measure has become the performance of students on standardized tests (Jennings, 2012; McDermott, 2011). In the latter half of the twentieth century, equity began to mean similar quality of performance outcomes rather than equalized funding or experience (McDermott, 2011).

Educators implemented testing long before the modern accountability movement. Ability and achievement testing were first done to provide information for teachers, and the purpose for testing evolved over time to measuring the extent to which educational settings have prepared students. Rewards and sanctions for test results, and public use of data to compare schools, make tests the means of evaluating quality of schools (McDermott, 2011). Although the No Child Left Behind Act (NCLB) accountability

components have been the most evident measures of school progress, the models of state measures prior to NCLB led the way in the consideration of performance outcomes as a measure of success of public schools (McDermott, 2011).

The inter-governmental system includes a changing balance of local, state, and federal elements, and over time, a trend toward centralization has occurred. Since the middle of the twentieth century, states have exerted their constitutional rights to control education both in supportive and supervisory roles. Federal intervention on behalf of subgroups of students has increased the federal role and reinforced state efforts to direct the path of public schools (McDermott, 2011). Also, during that time, external groups have exerted influence, changing the political management and demands for education (McDermott, 2011; Ravitch, 2010).

II. History

A. Constitution

In a democratic society, the role and governance of public schools is determined by community expectations (Gomez-Velez, 2008). The tenth Amendment to the United States Constitution establishes that states or the people have all rights not expressly given to the federal government in the text of the Constitution. Since authority over education is not expressly given to the federal government, such authority belongs to individual states or to the people (Dayton, 2012; Guthrie, 1997; U.S. Const. amend. X). At the founding of the country, citizens of the United States had a distrust of centralized government, and established a balanced system with executive, legislative, and judicial

branches to prevent the abuse of power by the government (Gomez-Velez, 2008; US Const.). In the early days, each community had the power to establish a school, and responsibility for the funding rested with the citizens of the community. Each community determined who would be educated by whom. Accountability for the school was defined by and enforced by the community. Over time, responsibility shifted to the state level which is constitutionally supported. Further centralization has led to much debate about whether or not the Constitution supports involvement by the federal government, and more importantly, whether any power for decision-making related to the education system belongs to the federal government.

B. American Beliefs and Early Schools

A collective American belief that education improves society and that education itself should always be improving, dates back to the country's beginnings. Education is viewed as the means to sustain democracy and global standing (Bell, 1985; Hochschild & Scovronick, 2003; Tyack & Cuban, 1995). Only with increased mobility and technology, though, has there been a real need to consider a broad employment market in conjunction with locally identified expectations for schools (Guthrie, 1997). As society and culture changes, expectations for public schools change as well. As democracy was established, the goal was to create citizens to support democracy. Along the way, as the country expanded geographically, technologically, and culturally, the expectation has changed to a focus on how to prepare citizens to be successful in the expanded setting (Cremin, 1964; McDermott, 2011). Expectations for outcomes change in any era, but the basic

American belief that education is the solution to all problems remains (Cremin, 1964; Tyack & Cuban, 1995).

Dating back to the founding of the United States, public schools began as local enterprises with control being separate from other governmental entities. The early American schools often had a religious component, and until the common schools movement in the 1830s and 1840s, schools were not designed to be universally available (Gomez-Velez, 2008; Tyack & Cuban, 1995). During the common schools movement, the purpose of schools was seen as preparing good, moral citizens (Gomer-Velez, 2008). Even though schools varied from place to place, and many groups of people were excluded, the common schools established the idea of a "common education" with the goal of educating literate citizens who could participate effectively in society (Gomer-Velez, 2008). In an effort to provide access to education of more citizens, more and more local communities created schools to educate their children (Cremin, 1964; McDermott, 2011).

Because the majority of the population was not very mobile, local communities identified what was needed in the local job market, and schools were designed to fill local needs (Guthrie, 1997). Accountability in the education arena in the early American schools was based on the community expectation that a teacher keep good order in the classroom. Also, the community held teachers accountable through scrutiny of their personal life, and there was a clear expectation that teachers should serve as positive role models for students. Many schools were created before state and federal governments were created, so local control and accompanying accountability could only be defined by

the community. Evaluation of schools was by direct visit of officials in the local community (McDermott, 2011).

Early American schools were operated with local funding and control, but eventual local political corruption led "reformers" to consider consolidating schools in order to create districts that would be more efficient in terms of financial expenditures and organizational structure (Gomer-Velez, 2008; McDermott, 2011). The Progressive Era of the early twentieth century introduced the idea there was a "science" to education and included reforms such as professional standards for educators, curriculum, and testing (Gomez-Velez, 2008; McDermott, 2011; Tyack & Cuban, 1995). School governance became more centralized (Gomer-Velez, 2008), and educational policy was seen as a rational planning process rather than a political bargaining system. It was believed that larger schools could provide more differentiated instruction to meet a wide variety of student needs, and schools were consolidated to create more options. Student time in school was increased as the drive to improve education led to higher expectations of what students should know before exiting public school (McDermott, 2011; Tyack & Cuban, 1995).

Efficiency in education became a focus as people tried to determine how best to provide differentiated education to a growing population of students. Student talents and abilities were assessed, and an attempt was made to prepare each student for his or her likely adult role in society. This was the new definition of equity in education, and student "tracking" became popular. A move toward having decisions made by professional educators rather than the community seemed the next logical step (McDermott, 2011). There was a growing awareness of how various states and local

systems provided different opportunities because of variance in the tax base. There was also a growing awareness that public education did not include minority students as often as white students, and children with disabilities were often not expected to attend school at all (Tyack & Cuban, 1995). In terms of accountability, the progressive era saw a shift toward bureaucratic accountability in that "experts" were the ones making decisions (McDermott, 2011; Michael, 2006). Administrators were trying to create an image of a profession where trained individuals guide the work. Political accountability at this time was based on a belief that politics and education should be separate, and school governance was completely separated from municipal government (McDermott, 2011).

C. The Move Toward Federal Interest in Education

The World War II era was a time of economic expansion and a baby boom that had great impact on schools (Gomer-Velez, 2008). Following World War II, federal involvement in education has grown continually as more groups push for the right to a quality education. National security issues created concern that citizens should be educated enough to generate competitive solutions, and technology advances changed the potential economic market. The struggle for control of education has intensified between local, state, and federal government bodies (Kaestle, 2007).

D. Brown v. BOE

In the 1950s, fear of communism led to suspicion that some educators might be teaching communist principles in the public schools (Gomez-Velez, 2008). Special

interest groups like the National Catholic Welfare Council (NCWC) and the National Association for the Advancement of Colored People (NAACP) began to organize efforts to recognize people marginalized in the United States (Kaestle, 2007). The *Brown v BOE* case in 1954 put a legal end to state-required segregation by declaring it a violation of the Fourteenth Amendment, and thus unconstitutional, as well as establishing access to education as a civil right (Ogletree, 2004; Pinder, 2010). The case brought attention to the fact that black children were not being educated, especially in southern schools. Thus, a new federal role in education was ushered in as the federal judicial branch was involved trying to enforce desegregation (Gomer-Velez, 2008; Heise, 1994). The Supreme Court decision included wording that stimulated thought about all subgroups of children as they noted it would be doubtful that any child would be expected to succeed in life if denied an education (Brown v Board of Education of Topeka, 1954; Tyack & Cuban, 1995). This landmark case brought attention to equity as related to racial opportunity to participate in education, and it defined equity as access to the same schools, with equalized funding, for all children (McDermott, 2011). The earlier view of access was "separate but equal", but the evidence presented in the *Brown* case made it obvious there would never be equal access in a dual system (Patterson, 2001).

The initial ruling in the *Brown v BOE* case implied equality of education was soon to be reality, but the implementation plan determined in the second wave of the hearings included a compromise intended to give states time to work out details. The Court's addition of "all deliberate speed" to the wording of the desired rate of implementation removed the force of the decision and opened the door for non-compliance by states (Ogletree, 2004; Patterson, 2001). State sponsored segregation was

legally ended, but racism was still in practice. Equality of social experience as well as education was still far from reality (Guinier, 2004). Desegregation, more than any other issue, brought to light conflicting paradigms related to the American dream. On one hand, there is the belief that education for everyone provides for a better future. On the other hand, there is a personal interest that limits how much one segment of the population is willing to consider the best interest of others. The philosophy of providing better education to help all citizens create a better future is hard to realize, in actuality, because personal interests interfere with the big picture implementation (Hochschild & Scovronick, 2003).

E. NDEA

Congress became involved in education as they passed the National Defense Education Act (NDEA) in 1957 in an attempt to improve science, mathematics, and foreign language education so the United States would remain competitive in the world (Gomer-Velez, 2008; McDermott, 2011; Rentschler, 2006). The launching of Sputnik resulted in a space race, and concern regarding the intentions of the Soviet Union, that led to educational reform as an outgrowth of the NDEA (Ford, Yore, & Anthony, 1997; Pinder, 2010). Education was viewed as the means for maintaining status as a world power, and President Eisenhower and Congress decided federal funding was needed to support education (Pinder, 2010). This legislation in response to the perceived Soviet Union technological dominance designated funding for technology (spent on equipment that was not always used), and money spent to provide low interest education loans for

potential teachers which did not always yield a more qualified teaching staff. Although the legacy of NDEA is questionable (Guthrie, 1997), citizens were willing to accept federal involvement in education due to the fear for national security (Kaestle, 2007). Public concern about the quality of education was increasing, and now that access to education was more universal, attention was turning to what was being learned and how effective schools were (McDermott, 2011). NDEA increased expectations of state responsibility for curriculum and actions of local school systems as well as promoting an educational ideal of equalized opportunity (Michael, 2006). Public perception shifted from a focus on access to education toward consideration of whether all students were receiving an education that would allow the United States to fare well in competition with other countries (Jennings, 2012).

F. War on Poverty

Over time, the legislative and executive branches of government began to take action in support of desegregation, and they moved away from the gradual approach resulting from the Supreme Court ruling for *Brown*. The Civil Rights Act of 1964 barred discrimination based on race, color, or national origin in any place receiving federal funding (Nelson, 2005; Tyack & Cuban, 1995). This legislation included authority to cut funding from school districts with continued segregation and prompted states to act to create more equitable school environments (Patterson J, 2001). . In some places, reports of de facto segregation led to investigations that resulted in loss of funds until the investigation into discrimination was satisfactorally completed (Nelson, 2005). The

passage of the Civil Rights Act represented the federal government defining educational accountability in terms of equity and solidified the establishment of a reform period based on equity (Jennings, 2012).

The Elementary and Secondary Education Act (ESEA) of 1965 became another equity tool for the federal government (Jennings, 2012). The passage of the ESEA, under the influence of President Lyndon B. Johnson, introduced federal spending as a means of increasing federal control over education. This legislation was intended to address concerns that students living in poverty, like minority students, were not being provided an adequate education. Other federal initiatives, such as the school lunch program, were implemented with a goal of improving education for all students across the country (Gomer-Velez, 2008). Debate over ESEA in 1965 was centered around whether or not education was a legitimate federal concern or a local issue. Those who argued for a more centralized approach saw the issue of poverty as a concern for all citizens, and they believed that to end poverty and its complications would improve the country's future. Title I was included in ESEA as a means to fund educational efforts for the poor as a means to end poverty (Rentschler, 2006; Stein, 2004). It was also a politically acceptable way to provide educational funding for minority students without labeling it as such. While education was seen as the solution to the problem of poverty, it was also seen as a culprit in the sense that poor students often attended less adequte schools, and federal funding was seen as a means to equality of educational opportunity (Stein, 2004).

The Title I portion of ESEA was in part responsible for the move toward standardized testing as a means of holding schools accountable for student learning. Objective measures were required both for determination of which students would be

eligible for support through Title I funding and as a means of measuring effectiveness of Title I progams (Stein, 2004). With subsequent reauthorizations of ESEA, more accountablity was added, and the 1994 reauthorization, titled the Improving America's Schools Act, explicitly denied Title I funding to any school not having standards and corresponding assessments to measure student achievement (Rentschler, 2006).

Even though the intent of Title I was to equalize educational opportunity, the requirement to instruct students in a separate instructional environment created the requirement for schools to isolate Title I students. Often, the federal requirements created segregated classrooms that worked counter to the notion that students would learn best when all students have access to the same settings. Only with revisions in the 1990s were Title I funds allowed to be used in schoolwide efforts (Stein, 2004). Three decades after the passage of ESEA, evaluative reports indicated the Head Start program portion of the new initiatives was far more beneficial than the pullout instructional programs required under the Title I portion of the act (Guthrie, 1997). President Johnson's stand for federal involvement to improve education, whether completely successful or not, set a precedent that all subsequent presidents have followed. Each one has experienced pressure to generate higher expectations for schools across the country and to reinvent the education system (Kaestle, 2007). The National Assessment of Educational Progress (NAEP) was created to measure how students in each state and the nation as a whole were progressing, and standardized testing results were viewed by policymakers as a means of evaluating education (McDermott, 2011).

Bilingual education was added to ESEA in the 1968 reauthorization. Title VII included funding for school systems to incorporate educational strategies to help

bilingual students (Stein, 2004). Quality of education for non-English students was a new concern, and this subgroup of students was added to the monitoring of how schools educate "all" students.

G. Swann v. Mecklenburg and Focus in the 1970s

Solutions to accomplish desegregation continued to be sought throughout the 1960s, and a related legal case, *Swann v Mecklenburg*, was decided in 1971. Equality of education was still a concern, and the Supreme Court declared busing would be an appropriate strategy to help systems remedy the dual school systems established in neighborhoods where families live in racially segregated clusters (Swann v. Charlotte-Mecklenburg Board of Education, 1971).

Also in the focus on equality in the 1970s, tracking of students was viewed as discriminatory rather than as appropriate educational differentiation. Statistics reported indicated students with higher levels of education were able to enjoy higher incomes, and parents did not want their own child tracked into classes that would not prepare them for admittance into post-secondary educational institutions. Equity of educational opportunity for students considered "at risk" (racial minorities, economically disadvantaged, non-English speaking, and special education) had been defined as equal access and funding, but now attention turned to quality of education for all students. Citizens wanted quality education for their children regardless of their circumstances because education was seen as a way to improve future possibilities. Southern states began to adopt policies focused on test scores as the accountability measure for school

systems and this trend soon spread to other states as well. Testing companies started to sell "criterion-referenced" exams meant to measure student progress toward mastery of a specific level of information detailed in a state's standards (McDermott, 2011).

H. PL 94-142

Congress passed Public Law 94-142 (PL94-142), also known as the Education for All Handicapped Children Act, in 1975. The law created procedural protections for the legal rights of children with identified handicaps and was aimed at creating access to a free public education for those who had previously been excluded from public schools (Dayton, 2012). In essence, this law added handicapped individuals to the definition of "all" in terms of who should be included in educational settings. While some schools were providing services for handicapped students prior to P.L 94-142, the law defined qualifications for teachers of those students, set guidelines for how student needs were to be diagnosed, and helped to define the intergovernmental responsibilities necessary to provide for these students (Dayton, 2012; Heise, 1994). It ended the practice of being able to label a student as handicapped based on racial, cultural, or economic status (Nelson, 2005).

PL94-142 was renamed in 1990, when it became known as the Individuals with Disabilities Education Act (IDEA), and it requires a Free Appropriate Public Education (FAPE) and related services for students who are diagnosed as disabled. Terminology changed in the updated law, and students are referred to as disabled rather than handicapped. This law continues the status of special education students having the right

to access to education. It promotes equity of both opportunity and excellence in the expectations of which accommodations will be provided through special education services (Dayton, 2012).

I. A Nation at Risk

In 1983, the release of "A Nation at Risk" brought national attention to the quality of education in the United States, particularly noting declines in student achievement levels (Bell, 1985; Gomez-Velez, 2008). With the new conception of equity based on the notion that all students should master a basic body of knowledge, standards based reform efforts included sanctions for low performing schools (McDermott, 2011). Wording in the report shifted the rhetoric about education goals away from equality toward seeing individual students as competitors in the economic realm. Whereas the focus on equality had pointed out resources for schools provided by government funding, the shift to how students would fare in a competitive realm generated a focus on accountability for schools to create capability for the competition (Bell, 1985; Kuehl, 2012).

Presidents since the release of "A Nation at Risk" have spoken about measuring success based on holding individual schools accountable rather than holding government officials responsible for providing needed resources for learning (Kuehl, 2012). The publication of the report marks the beginning of a shift to what has become known as standards-based reform as the focus shifted to outcomes of, rather than opportunity for, education. President Reagan drew public attention to expanded federal spending on education while Scholastic Aptitude Test (SAT) results declined. He approached the

public about the discrepancy between "inputs" into education and "outputs" of student achievement. Reagan argued for higher standards as a means of improving education. Bush, while sharing the focus on accountability, spoke of accountability as a means to end racism. He pushed for testing that would track subgroups of students as well as the collective population. His focus on "outputs" generated a new vision for measuring and stratifying schools as a means of defining success (Kuehl, 2012).

J. Concerns About Reform

In 1985, at the Southern Education Conference, some speakers raised concerns about how education reform could be successful universally. Donald W. Burnes, who had served on the Education Commission of the States, posed questions about how much attention was being given to research that clearly showed that unless teachers, administrators, parents, and community members were involved in the creation of reform, the reform would fail. He wanted to know how local successes could be identified, published, and duplicated. He also posed questions about how to maintain public support for expensive initiatives and how to measure success of reforms. He had great concern about how to keep "at risk" populations and teachers from being victims of reform. At the same conference, Beverly Cole, Education Director of the NAACP, addressed a similar concern about the negative possibilities of an over-reliance on testing. At that time, nineteen states had high school exit exams, and ten states had promotion guidelines tied to tests. Cole asserted that any test should be for the purpose of planning instruction for specific children rather than as a goal in and of itself. She feared having particular test

score goals as the end in mind would punish struggling students rather than leading to the help they would get if test data was used as the means to diagnose knowledge to plan instruction (Southern Education Foundation, Inc, November 13-14, 1985).

K. Politics, Bureaucracy, and Private Sector Influence

During the Clinton administration, there was an emphasis on using private sector systems within governmental institutions, and this was applied to schools as well. Charter schools were viewed as healthy competitors that would stimulate school improvement as parents could choose their preferred education setting (Ravitch, 2010). The last quarter of the twentieth century was a time of shifting of the definition of education accountability. Bureaucratic accountability continued, and legal accountability expanded to include teacher and student rights of due process as well as federal and state requirements for desegregation and civil rights. Increasingly, school administrators had difficulty keeping politics out of education, and organizations began to input opinions about the direction for education (McDermott, 2011).

III. Reform – Federal, State and Local Impact on Reforms.

Diane Ravitch writes that she once thought the accountability movement would produce positive results for student achievement. After learning about the impact in local settings, though, she changed her mind. She began to seriously question the involvement of foundations and other private sector agencies when those people have not been elected

and are in no way accountable for the outcomes of their suggested education reforms (Ravitch, 2010).

At the federal level, the contribution to educational reform has been administratively heavy handed. The intention of creating an effective education system to benefit all students has resulted in some productive and some unproductive decisions. Congress and presidents have effectively identified and communicated needs related to education. For example, pointing out the limited educational opportunities for minority, poor, and disabled children helped to redefine who is included in education for "all". Awareness of issues allows policy-makers to consider measures toward improvement. In terms of solving problems, though, the federal government has been ineffective and reform efforts have wasted billions of tax dollars without bringing substantial improvement (Guthrie, 1997).

Accountability measures vary from state to state so that some states, such as Kentucky, have demonstrated improved student achievement based on state measures but not much improvement when compared nationally. The United States is the only major industrial nation that has not established a national performance examination (Guthrie, 1997). Funding of education varies from state to state so that each state is operating in isolation, and states are not equally equipped to achieve higher standards (Guthrie, 1997; Hochschild & Scovronick, 2003).

In individual cities, reforms have both intended and unintended consequences. Adam Nelson studied the school system in Boston from 1950 through 1985, and he wrote about the struggle of balancing federal funding guidelines as local school officials tried to manage growth and change. In this city, trying to maximize funding to provide an

education for expanding minority, poor, and non-English speaking populations led to *de facto* segregation as services were provided in pullout settings. While trying to meet the needs of these students and seeing a federal emphasis on funding for students with disabilities, Boston identified many as disabled in order to continue to keep students in small classes. Targeting subgroups to earn federal funding caused the system to compromise the integrity of services, and students were viewed in terms of special categories rather than as a body of learners. Boston officials learned their goal of local control while accepting federal funding was not attainable. Federal funds came with strings attached along with the punishment of loss of funds for lack of compliance. (Nelson, 2005).

One aspect of education reform that has an impact on federal, state, and local entities is the financial obligation to carry out programs. At the local level, inequities exist because some towns have access to more tax dollars than others. Local systems suffer the burden of trying to implement state and federal mandates that are not supported with complete operational funding. At the state level, even though many states have increased the dollar amount spent on education, there is not enough funding to completely implement the most promising innovations (Southern Education Foundation, Inc, November 13-14, 1985). In local settings, some experiments have been attempted in order to raise student achievement. The New York City schools were reformed several times within just a few years when placed under the authority of Mayor Michael Bloomberg at the beginning of the twenty-first century. Schools were operated on a business model, and tremendous funding was provided. Schools that made student achievement gains were allowed autonomy in some areas of decision making while still

being required to test students on a given schedule. Achievement gains were noted, but it was unclear whether the business model "reform" was the reason or whether this was more a case of impact of funding on outcomes. Mayoral control without input from educators or parents is not a solution that proved to work in other cities, and the New York results were likely due to inputs and desire for local autonomy (Ravitch, 2010).

IV. Elementary School Reform

Elementary school teachers are generalists as they teach all academic subjects. Because of this, the elementary setting is a vital part of how reforms are managed. National associations and organizations generated 21st century standards that stated what students should know in each subject. Subject associations generated standards in individual reforms, and while each subject report was critiqued by experts within the academic field, there was no evaluation of the composite expectation for elementary education (Ford, Yore, & Anthony, 1997) Rapid change brings resistance, and the simultaneous standards proposed in mathematics, language arts, social studies, and science were generated without time for teachers to master one before being presented with another. Implementation in one area can affect another subject area, and the overall result is not the desired result of any of the individual reforms (Ford, Yore, & Anthony, 1997). .

One example of the implementation of content-specific efforts was the National Science Foundation (NSF) efforts to generate improved science instruction during the NDEA era following the Sputnik launch. The materials produced were of high quality, but there was no support for materials or professional development for teachers, so

elementary implementation occurred in 20-27 percent of classrooms according to teacher self-reports (Ford, Yore, & Anthony, 1997). Elementary teachers report they are more likely to implement reforms when reforms match what they have learned about best practices, when the reform allows for school-level decision making, and when they work in collaborative settings that have a developed practice of collective problem solving that allows teacher input into strategies of implementation (Cremin, 1964; Ford, Yore, & Anthony, 1997). A top-down form of administration negatively impacts reform implementation (Ford, Yore, & Anthony, 1997).

Unlike a high school where teachers are focused on one content area and participants are isolated, the elementary school setting experiences reform in a more integrated way. To focus on academic reform in one area means the teacher has less time to plan for other subjects. The organization is effected in total as all teachers are involved in change. When multiple subject changes occur too quickly, implementation is far less than intended (Ford, Yore, & Anthony, 1997)

In the 1990s, elementary teachers were bombarded with standards from national organizations. The National Council for the Social Studies, the National Council of Teachers of English, the International Reading Association, the National Council of Teachers of Mathematics, and the National Research Council all produced standards with a scope and sequence of what elementary students should learn (Ford, Yore, & Anthony, 1997). Any one of these might have been implemented successfully, but teachers could not keep up with the pace of publication of expectations.

V. Case Study – Boston

Adam Nelson provides an in-depth look at how the public school system in Boston has dealt with the multiple phases of educational reform in the eras of emphasis on access, equity, and excellence. He also considers how local, state, and federal governments influence decisions in a local context. In his book, The Elusive Ideal, Nelson points out that he chose Boston because decisions in the city often began trends prior to federal initiatives. In the urban setting, Boston faced the question of who would have access to education as the population increased and became increasingly ethnically diverse. Also, parents of disabled children in Boston pushed for access to education for their children in the 1940s, long before the issue was addressed nationally. The city provided access first before considering equality, and each targeted group of students began with isolated classes that gave them some access to education even if their opportunity did not match what was offered to others (Nelson, 2005).

As federal programs were initiated, and funding was available, Boston's school officials attempted to maximize eligibility in order to provide services for an expanding number of students. When special education was the category of focus, students were readily identified as having special needs. Programs for identified children were offered in isolated classrooms, and this led to de facto segregation as many students labeled as having special needs were minority students. Trying to maintain local control of decision making while accepting federal funding proved to be futile as federal sanctions began to jeopardize Boston's funding based on the segregated settings. Boston was forced to switch the focus from access to equity in services for each subgroup of students. Later,

as accountability measures were put in place, the focus had to shift to excellence based on student outcomes (Nelson, 2005).

Each time Boston officials thought they had found a great solution for funding issues, the rules were changed by federal or state law or policy makers. Attempts to "fix" one problem created another problem. Increasing services to one subset of the population meant another subset was neglected. Each time a new group was identified as needing access to education, the next need was equality, and then excellence was expected. In the urban setting, neighborhoods were segregated so that meeting desegregation requirements became challenging. Poverty in pockets of the city created needs that were difficult to meet under Title I requirements without ignoring expectations for racial balance. Meeting the needs of special education students posed a challenge while trying to meet both Title I and racial balance requirements. Students needing English as a second language also often fit into one or more of the other subgroups so that providing the needed instruction almost guaranteed sanctions on funding. Accountability measures for student achievement pose specific challenges for this urban setting based on the subgroups of students. Even with these challenges, the experience in Boston led to solutions, or at least conscientious effort to meet a new need, that influenced new reform waves (Nelson, 2005).

VI Southeast Region

Historically, a high number of the country's minority and poor students have resided in ten southern states. From the Civil War through the 20th century, southern states dealt with race and class-based issues of equality and opportunity. By 1890,

approximately sixty percent of all southern school age children (fifty percent of black children) were enrolled in schools as compared to the national enrollment rate of seventy-one percent of white children. Financial resources in southern states were limited, and schools received less funding than in other regions. In 1930, the national per pupil expenditure was $97 per child while the average across ten states in the southeast was $37 per child. The average was not spent equitably as there was an average $45 spent per white pupil and only $12 per black child. Within states, districts were funded at various rates, so even the average expenditure does not reflect the dismal funding in some locations (Southern Education Foundation, 2007).

From 1930 through the turn of the century, the number of students living in poverty in the south fluctuated, but most counts find the number to be higher than that of other regions of the country. In some years, almost half of children in southern states lived in poverty. In 1989, fifty-nine percent of children in Mississippi lived in poverty, making it the only state in the nation with a majority of economically disadvantaged children. From 2004 – 2007, the whole southern region of the country had a majority of students in low income households. During the 2006-2007 school term, fifty-four percent of southern public school students were economically disadvantaged (Southern Education Foundation, 2007).

Governors and policymakers in the southeast, tired of being ranked lowest in the nation and worried about the economic future, showed increased interest in education reform, and states in the region began to implement student testing as a means to measure whether students were showing achievement gains (McDermott, 2011). In 1981, the Southern Regional Education Board (SREB) published a report titled *The Need for*

Quality which advanced the nation's first proposals for educational reform (McDermott, 2011; Southern Regional Education Board, 1987). Reform efforts increased expectations for teacher qualifications and accountability measures were used as a model for other states in the country (McDermott, 2011; Southern Regional Education Board, 1987). This report established an expectation of higher academic standards in schools and colleges, and stated the connection between schools and higher education (Southern Regional Education Board, 1987). In particular, Alabama, Tennessee, South Carolina, North Carolina, Arkansas, Florida, Mississippi, and Virginia enacted reforms and were led by "education governors" in an effort to make their states competitive in attracting businesses to locate within their borders (McDermott, 2011). The efforts in SREB states were soon the model across the country with increased academic requirements for high school graduation, specific credential requirements for certifying teachers, identified learning outcomes identified for students across a state, and testing to measure academic progress for students at varying ages (Southern Regional Education Board, 1987).

Following the 1983 publishing of "A Nation at Risk", state governments across the country began to take a more active role in education rather than leaving decisions to local school systems and state boards of education. The state and national pressure to improve education prompted policy discussion around how the focus on equity was such a priority that focus on excellence was lost. The work of Southern governors prior to the report set the model for how other states responded following the report. In 1985, when the Southern Education Foundation held its annual Continuing Conference, presenters considered the southeast a region of great education reform. Most of the states in the region had raised teacher salaries, created new programs for disadvantaged students, and

increased state funding for schools (Southern Education Foundation, Inc, November 13-14, 1985; Southern Regional Education Board, 1985). Georgia focused on P-16 reforms to coordinate and connect a vertically aligned education for students. Georgia was at the forefront of this kind of reform (Venezia, Callan, Kirst, & Usdan, 2006).

Mississippi passed its Education Reform Act of 1982 in an effort to overhaul its education system, but some of the initiatives were not fully funded (Southern Education Foundation, Inc, November 13-14, 1985). South Carolina's Education Improvement Act (EIA) of 1984 set aside increased funding for education, added support for students not meeting the state's basic skills standards, and added programs such as half-day PreK . The EIA also created School Improvement Councils at each school (Southern Education Foundation, Inc, November 13-14, 1985).The state of Arkansas, under the leadership of Governor Bill Clinton and Bob Nash, the Senior Assistant to the Governor, began to consider the relationship between education and the economy and the need to prepare students to enter the job market. Reform efforts there included involvement of industry representatives on education commissions (Southern Education Foundation, Inc, November 13-14, 1985).

Florida, Tennessee, and Virginia completed a pilot with the National Assessment of Educational Progress (NAEP) in 1985 to test the reading ability of 11^{th} grade students. This was the first time individual states had access to their state scores for comparison to the performance in other states. NAEP announced the 1985-86 performance data would offer an optional component to allow states to see their own data instead of just national results (Southern Regional Education Board, 1985).

Full-day kindergartens were added in several states during the 1980s, and some added pre-kindergarten programs for four year olds (Southern Education Foundation, Inc, November 13-14, 1985). Increased incentives to schools achieving success as well as incentives for individual teachers were prevalent tactics in the southeastern states in the 1980s. Teacher salaries were increased in an effort to attract a higher caliber of educator. Funding of all new programs was a realistic concern for southern states. While some had plans for promising initiatives, there was uncertainty about funding and sustainability. Many southern states added sales tax as a means of funding educational effort (Southern Education Foundation, Inc, November 13-14, 1985).

In the late 1980s, there was a noticeable shortage of qualified minority teachers in the southeast. All SREB states required potential teachers to pass a certification test, and the result was that fewer minority test-takers passed the tests (Southern Regional Education Board, 1985; Southern Regional Education Board, 1987). Traditionally minority colleges were supported to help design programs of study more likely to prepare students to pass the credentialing exams. A shortage of qualified math and science teachers was also noted, and SREB states began to offer incentives to attract qualified instructors. Several SREB states combined efforts with Connecticut and New York to contract with Educational Testing Service to develop a shared teacher certification test crossing all subject areas (Southern Regional Education Board, 1987).

The Southern Regional Education Board (SREB) reported in 1992 that all SREB states has established some form of accountability reporting mechanism that began with state or district reports. At the time of that report, most SREB states had added a component to rate individual schools. The requirement to post individual school reports

became law in Georgia in 1988. State and district reports were likely to include "input" data such as demographics, teacher qualifications, and financial reporting while school-level reports included attendance rates, teacher credentials, and collective student performance data. Individual student reports were not available in most states even though some were in the process of upgrading technology resources to allow it (Gaines & Cornett, 1992).

States in the southeast made a shift from administering tests for the purpose of comparing students to each other to measuring what each student knows and can do. As states developed standards and goals, they realized they would need to create tests that would measure how students were progressing toward meeting standards. Standardized tests of the past were not aligned to the state standards. In a similar effort to generate expectations for what students should be learning, the Department of Education awarded grants for development of national standards in core subjects. Groups such as the National Council of Mathematics began to work on developing standards that states could voluntarily adopt. As national standards were developed by the "expert" groups, the National Assessment of Educational Progress (NAEP) was expected to be aligned with content standards. The SREB, in its 1992 report, indicated southern states who were raising expectations through the setting of standards for learning and graduation rates appeared to achieve at a lower level because of measurement against a higher expectation. Understanding of the statistics was expected to cause difficulty as the public might not understand that old and new student performance reports would not be comparable. Each state had to determine who would create the standards and

expectations for their state as well as how to report to the public. To determine trends and progress, reporting over time had to also be considered (Gaines & Cornett, 1992).

In 1992, Zell Miller, Georgia's governor, established a lottery-funded Pre-K program, and Georgia became the first state to provide such a program for low-income children. The Pre-K program was then expanded in 1995 to include all four-year-olds regardless of income. Other southern states began Pre-K programs, and of all the state-initiated reforms aimed at addressing the inequity of education for less fortunate families, this reform has been the most promising. Southern states have not all funded Pre-K programs at the same level, but the region provides stronger Pre-K support than elsewhere in the country, and results are showing students who attend these programs are able to enter school ready to learn grade-level content better than their counterparts from previous years (Southern Education Foundation, Inc, 2007).

VII. Georgia's Progression

In April of 1985, the Quality Basic Education Act (QBEA) became law in Georgia following unanimous passage in both the state's Senate and House of Representatives (Southern Regional Education Board, 1987). Sponsored by Governor Joe Frank Harris, the QBEA established greater state funding for education and for the first time, required a set of state standards known as the Quality Core Curriculum (QCC) (Southern Education Foundation, Inc, November 13-14, 1985). The changes to Georgia Code 20 mandated that the Georgia Board of Education establish competencies in named subjects for Georgia students that would be reviewed every four years. QBEA established

the criteria for age eligibility to begin school, expectations for services for special education and other subgroups of students, and established a funding system based on weighted formulas for categories of students. It established Regional Education Service Agencies (RESA) to provide staff development opportunities and to oversee support services for students requiring special education services (Georgia's Quality Basic Education Act, 1985). Governor Harris saw the economy and education as closely tied in that schools cannot improve without a strong economy allowing funding for education, and the economy cannot improve without an educated workforce. His goal was to see all children in Georgia, no matter where they lived, get a quality education. Upon his election, he appointed a prestigious list of people to the Education Review Commission. He took their recommendations to the General Assembly, and the General Assembly supported the recommendations as well (Southern Education Foundation, Inc, November 13-14, 1985). The resulting QBEA addressed equitable funding across all school systems in the state through "equalization" of resources and the establishment of a school year of 180 instructional days across the state (Georgia's Quality Basic Education Act, 1985).

At that time, the state political leaders and the state Board of Education had a strong working relationship, and all agreed Georgia's students would be better served by setting expectations for what should be learned and providing additional funding. Governor Harris and the State School Superintendent thought the focus should shift from the process of education to the outcomes (Southern Education Foundation, Inc, November 13-14, 1985).

Under the leadership of Governor Zell Miller, reforms in Georgia included regional and state efforts for Pre-K through post-secondary education improvement rather

than the K-12 efforts in most states. Governor Miller instituted a P-16 Council charged with improving student achievement at all levels by examining models of teaching, professional learning for instructors, preschool through post-secondary curriculum and related assessments, higher acadmic standards for earning a high school diploma, and accountability for P – 16. Georgia was one of only a few states considering preschool education, and Zell Miller started the Office of School Readiness to work on programs for four-year-olds (Venezia, Callan, Kirst, & Usdan, 2006).

Whereas Governor Miller tried to improve education through executive order, Georgia's next governor, Roy Barnes signed into law House Bill 1187, also known as the A-Plus Education Reform Act of 2000. This bill put in place a formal structure (Education Coordinating Council) to monitor P-12 educational progress.

VIII. Case Study from Georgia – Richmond County

Systems in the state of Georgia were, in the years following *Brown*, working to deal with segregation without state level support. In fact, the Georgia legislature passed a law limiting funding for desegregated schools (Georgia Advisory Committee to the U.S. Commission on Civil Rights, 2007; Thurmond, 2001). In some school systems, desegregation strategies resulted in court mandates that have come into conflict with more recent education policy or legislation. One such example is Richmond County, Georgia where the NAACP had assisted in bringing a case that forced desegregated schools. The case, *Drummond et al. v. County Board of Education of Richmond County, Georgia et al.,* led to the creation of attendance zones with racially balanced school

assignments to replace the former dual system of schools. Following an original case in 1964, the 1972 legal proceedings resulted in a court order being issued requiring Richmond County to report any student assignment changes to the court for approval. Some changes were approved over the years, and by the 1980s schools were integrated but neighborhoods were still segregated. Demographics changed as white families moved out of the county. The school board opted to stay under the court order rather than petition to end this status because they felt there were still some issues with equity of facilities and staff. As they worked to improve these issues, the population continued to shift, and facilities were improved (Debray, 2004; DeBray-Pelot, 2007).

With the passage of No Child Left Behind (NCLB), Richmond County faced the dilemma of how to meet the demands of both the court order and the new authorization of ESEA. Because they had schools on the "Needs Improvement" list, NCLB required offering parental choice of a higher achieving school. To allow this focus on quality rather than equity would require Richmond County to ignore the court ordered requirement to approve zoning changes. To allow parent choice to focus on quality would also mean violating the Georgia class reduction mandate which was included in the state's 2000 education reform (HB1187) because Richmond County had limited schools meeting the higher quality portion of the mandated parent choice (DeBray-Pelot, 2007).

While the national focus for education turned to excellence, many counties were still in the midst of trying to solve equity issues. Neither court nor legislative mandates considered both, and therefore created unresolved conflict for local systems. As the focus shifted to educational excellence, or equity of outcomes, it seems equity for racial groups was lost. Parent choice of schools has shown to undo integration attempts.

IX. Clarke County

A. Desegregation

To understand the story of desegregation in Clarke County, Georgia requires consideration of the history of racial relationships and the black experience in the area prior to desegregation. It is noteworthy that Athens, Georgia in Clarke County was a center of celebration the moment Union soldiers came looking for Jefferson Davis and let it be known the slaves were soon to be freed. The nearly five thousand slaves in Clarke County and the city of Athens began a celebration known as Jubilee, and many from nearby areas traveled to Athens to join in the celebration as soon as they learned of their freedom (Thurmond, 2001).

During Reconstruction, black people in Athens and Clarke County demanded education and made it clear they would work for it, or even fight for it, to meet the goal. Across the years between then and *Brown v BOE*, the black community worked to improve the schools available to black children in the county. Funding was much less for the black schools, so the facilities were not comparable to white schools, but black leaders tried to make the schools as good as possible with the help of black churches and other black organizations. By 1916, black students accounted for sixty-three percent of Clarke County school children, but the black schools were only allocated thirty-three percent of the education funds. Compared to Georgia as a whole, this was better than the nine percent of state funds designated for black schools even a decade later. Even though Clarke County gave more attention to black education than the statewide efforts, there

was still a stark difference between white and black educational opportunities, and black teachers at that time were compensated at less than half the rate of white teachers (Thurmond, 2001).

Because of strong black educational leadership and support by some white members of the community involved in educational efforts, racial equity was a growing concern (Thurmond, 2001). The Clarke County Board of Education implemented a freedom of choice plan in 1959, but the option was not exercised until 1963 when the NAACP gave moral support to families to apply. Five of seven black girls were approved by the Board of Education Placement Committee to attend white schools (Rice, 2001). The four girls admitted to previously all-white schools were divided between three schools. While the students did not experience physical violence or public protests seen in other locations, they did experience the verbal abuse of teasing and ridicule by classmates. After slowly moving toward allowing black students to attend white schools, the next step for Clarke County was the sharing of teachers. In 1968 and 1969, the system began to assign a small number of black teachers to white schools and white teachers to black schools (Thurmond, 2001).

The decision in *Brown v BOE* had not forced desegregation as much as it had offered the option for minority families to apply for admittance to white schools, but the Civil Rights Act of 1964, Title IV, placed a duty on local school officials to discontinue the practice of dual school systems. Approval of desegregation plans submitted to the Department of Health, Education and Welfare (HEW) was required in order to receive federal funds for education (Rice, 2001).

By the end of the 1967-1968 school year, almost 800 black students were attending Clarke County schools that had previously been all-white schools through the school choice plan. Five of the 18 schools in the system were not yet integrated, and living patterns presented the problem of how to enroll students from segregated communities across the system. The Board of Education devised a plan to allow students in the more urban section of the county to use a choice plan while those in more rural areas would assigned to schools for the 1969-1970 school term. The plan (Plan A), as submitted was not acceptable to the Department of Health, Education and Welfare (HEW). The HEW suggested an alternate plan, labeled Plan B, requiring the system to reorganize elementary schools so that every school would have twenty to forty percent black students and creating some grade 1-4 schools and some grade 5-6 schools. In July of 1969, the Clarke County Board of Education voted to reject the HEW proposed plan and to adopt a new version of their Plan A (Rice, 2001).

Because Clarke County worked to integrate, court intervention was not enlisted to force desegregation. The system did not experience litigation as many Georgia systems did because the school system worked in congruence with the call to develop plans for desegregation (United States Commission on Civil Rights, 2007). Clarke County, which was home to the first accredited black high school during segregation, had involved black citizens who contributed to the efforts to educate black children, and black education leaders pushed for equal educational opportunities for black children. The Board of Education recognized the need to work to manage racial issues, and the choice plan was used to integrate white and black schools beginning in 1970. In 1978, the Clarke County School District Board of Education published the initial version of Michael Thurmond's

book A Story Untold: Black Men and Women in Athens History that recognized the efforts of the black community to support education in Athens (Thurmond, 2001).

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B. Busing Lawsuit

In response to the United States Department of Health, Education, and Welfare (HEW) proposal for school assignments, the Clarke County Board members spent two weeks developing the "Compromise Plan" which would create minimal busing and be less expensive than the HEW proposal. It organized all elementary schools as first through sixth grade schools. This plan would change formerly all-black schools to 50-50 schools. On August 13, 1969, parents and community members from University Heights brought legal representation to meet with the Clarke County Board of Education to voice disapproval of the "Compromise Plan" that would require children from their neighborhood to be bused past a nearby school to attend another school. They argued that Title IV specifically disallowed busing as a means to achieve racial balance. The school board voted to uphold the plan as they had written it (Rice, 2001).

Attorney E. Freeman Leverett represented the University Heights parents as well as white parents from the Oconee School and northside areas and black parents from the Rock Springs area in a challenge of the desegregation plan. Judge James Barrow of the Clarke County Superior Court consolidated the cases (Barresi v. Browne, Civil Actions 1969, 20453, 20454, and 20455), and ruled that the school system had made a good effort to meet federal requirements to end the practice of operating dual school systems. Even though the parents appealed the decision, the school opened as planned in September of 1969 with all schools except Burney Harris High School integrated (Rice, 2001). The

Supreme Court of Georgia heard the case in the spring of 1970, and ruled on June 15, 1970 that the Clarke County School District had made a racially discriminatory effort to meet the HEW expectation under the requirements of Title IV of the Civil Rights Act of 1964. The plan to integrate the thirteen elementary schools, the ruling said, treated students differently based on race because more black children were bused into zones farther from their home to establish racial balance (Barresi v. Browne, 175 S.E.2d 649 (Ga.1970), 1970).

The HEW pressed for complete integration of high schools, and after plans were published, the spring of 1970 was a time of racial tension in Clarke County. In January of 1970, Governor Lester Maddox had visited Clarke County to publicly oppose integration. As students from the high schools realized there would no longer be a white school and a black school in Clarke County, they became increasingly unsettled. April 16, 1970 was named "Rowdy Thursday" when high school students in both Athens High and Burney Harris became unruly and police were called to Athens High when Burney Harris students entered the school and vandalized the school. Students in both schools boycotted school the next day, and attendance issues continued for the remainder of the school year. During the spring of 1970, students from both high schools met to develop suggestions for the merger of schools, and the Board of Education approved some concessions including naming the integrated school Clarke Central and adopting one school color from each existing school. The 1970-1971 school year was the first school year all Clarke County schools opened as integrated schools (Rice, 2001; Thurmond, 2001).

The Georgia Supreme Court reversed the *Beresi* decision in agreement with the parents' reasoning that the desegregation plan violated the Fourteenth Amendment of the U.S. Constitution as well as Title IV of the Civil Rights Act. Superintendent Charles McDaniel and the school system challenged this ruling, and the case was appealed to federal court. The Georgia Supreme Court decision was reversed by the United States Supreme Court in April, 1971, and the ruling stated the Clarke County School District had met the requirements to create a plan to racially balance schools. Even though more black students had to walk to school for the "inner schools" and some white students were bused to balance "outer schools", the Court endorsed the plan saying it was not in violation of the federal requirements (Charles McDaniel, Superintendent of Schools, et al., Petitioners, v. Joseph Barresi, Jr. et al., 1971).

C. Zoning

Hank Johnson, reporter for the local newspaper, described 1990 as a tumultuous year for the Clarke County School District. In the spring of that year, zoning hearings were held and parents expressed their concerns about busing as a means to establish racial balance. The Board of Education created a plan that they felt would come close to equally balancing the schools. The plan included busing of black children from predominantly black neighborhoods within the city to several suburban schools that were more predominantly white. A parent filed a complaint with the U.S. Department of Education's Office of Civil Rights (OCR). Federal investigators studied the plan and determined an undue hardship had been placed on black children. The OCR report was

not released until 1994, and the Board of Education then spent the next year exploring options (Johnson, 1999).

In March, 1995 the Clarke County Board of Education approved a "Controlled Choice" plan to work around the federal objection to the busing required to integrate system schools. The idea for the plan was taken from a similar plan in Port St. Lucie, Florida (Johnson, 1999). Because schools were built closer to white neighborhoods, proximity to schools was not included as a deciding factor for school assignment. The plan required parents to complete a choice form, and student selection for each school was to be conducted by a computer program designed to assign students so that each school's enrollment matched the overall racial percentages of the district (GA District Adopts Controlled Choice Plan, 1995). The plan did not relieve the busing burden on black children, but it did increase the busing of white children as well (Johnson, 1999). By the end of 1999, race was deleted from the criteria for student placement, and only building capacity was a limiting factor for considering parent selection of schools (Gonzalez, 2000).)

Population growth in the 1980s created a need for more classrooms across Clarke County. In 1988, a bond referendum passed to allow building of three new elementary schools, replacement of four existing elementary school buildings, and additions to four elementary schools (Thomas, 2009). The three new elementary schools opened in 1990 and were added into the choices parents could consider requesting (www.advanc-ed.org; www.clarke.k12.ga.us).

D. Government Consolidation

Population growth, concern about maintaining services to citizens, preservation of historic landmarks, a booming artist focus, and new commercial developments dominated decision making in Athens and Clarke County during the 1980s and 1990s. During the 1980s, population in Athens surpassed Augusta's, making Athens the 7th largest city in the state. Clarke County is the smallest county in the state geographically, and this made the population growth challenging. County and city governments heard from citizens that they expected services to maintain their quality of life, and officials had to figure out how to afford the growing demand. The addition of a mall meant that businesses moved from the downtown Athens area into the new space, leaving the downtown area devoid of business. This shift prompted a need to recreate Athens as a city, and renovations included creation of music hubs and an effort to preserve historic buildings in a way that would generate public interest. Additions such as the new Classic Center were designed to bring events to Athens so that the city would not be lost as businesses moved outside the city limits. Citizens began to understand that unification of city and county governments might be more cost efficient for taxpayers (Thomas, 2009).

Governance of the city of Athens and that of Clarke County were consolidated in January of 1991 following voter approval in 1990. Supporters believed a combined government would provide more efficiency in providing services for residents, reduction of duplication of services, and a move to less government employees. Opponents shared case studies of consolidations that resulted in greater bureaucracy, greater expense, and limited efficiency. The consolidation details were not worked out before consolidation

occurred, so there was tension as decisions were made, and government employees worked in a state of uncertainty in the process. Some decisions overlooked unification possibilities. For example, the parks and recreation services existing prior to unification remained as before. Previous conflict about services for each department had likely encouraged voters to support consolidation, but two separate, fully-staffed departments were maintained. Former city and county government agencies engaged in "turf protection" so that unification was fragmented for several years. Bureaucrats took advantage of the restructuring by adding additional levels of supervision in their departments, partly because all previous government employees from both governments were given job protection, and partly because it was possible to establish tiered levels as each department was created (Condrey, 1994).

E. Distractions – Litigation

Clarke County School District not only dealt with desegregation and zoning issues in the latter part of the 20th century. Other concerns presented themselves that required financial resources and attention of system employees and board members. Litigation issues in the 1980s and 1990s were published in the local newspaper and required attention and resources from the school district. These cases are not directly related to the standards movement, but they may have impacted how much the school system could focus on or financially support the early stages of standards based reform.

Parents of a student described as autistic and severely mentally retarded challenged the special education services provided for their son. Diagnosticians at Emory University recommended residential placement when the boy was three years old.

He then entered school in Clarke County at age five, and he spent his second year as a student in the Georgia Retardation Center which provided residential care. Professionals then recommended an in-home trainer be provided, and the school temporarily provided the service with little success. After several attempts to find an appropriate placement, it was determined that there was not an appropriate facility in the state of Georgia (Drew v. Clarke County School District, 1989).

When the school district refused to pay for residential care for the child, the parents began the process of obtaining legal counsel and placed their child in a residential program in Japan. A district court decision stated that for this child to receive a "free and appropriate education" the school district must either provide a residential setting or reimburse the parents for care. The court supported the parents' claim that no residential placement for autistic children was available in Georgia, and no appropriate placement was available within the United States. In a separate order, the school system was required to make a partial reimbursement to the parents. The school board challenged the court's ruling regarding the now sixteen year old boy based on the *Rowley* ruling that a school system is not required to maximize a child's potential but only to provide access to education. The Court of Appeals upheld the district court decision stating that access for this student was not provided in the settings offered. The decision included a reminder that special education services must take into account the unique needs of an individual student until age 21 (Drew v. Clarke County School District, 1989).

Dr. Carol Purvis, who was the Clarke County School Superintendent from July, 1982 through December, 1991, was implicated in a 1991 audit of school system financial records. The audit raised concerns about whether or not the school system had paid all

required payments to the Teacher Retirement System while Purvis was employed as Superintendent. When Purvis retired in 1991, the school system was 4.4 million dollars in debt which raised public concern and the continued scrutiny of financial records. Purvis, along with two other district officials were charged with racketeering. All were convicted, but in a later trial, after serving a portion of a sentence, Purvis was found not guilty and released (Purvis v. The State, 1993). In 1997, Purvis sued the current Superintendent, John Ballantine, and several board members for defamation because of statements that were made to the local newspaper following the audit results. The court found that school board comments were related to the financial situation and not directed at Purvis personally (Purvis v. Ballantine, et al., 1997).

X. Conclusion

The American education system serves the national interest, and its improvement requires a national overarching perspective to configure a centralized view, but the federal government's track record is not one of effectiveness (Guthrie, 1997). What is needed is a national perspective balanced with locally generated solutions leading to national impact and considering state and local interests (Guthrie, 1997). Given the wide variety of local demographics and generation of funds, it is unlikely that a one-size-fits-all approach can work (Guthrie, 1997). Improvement to education must consider the best interests of the country while at the same time acknowledging how state and local events effect schools in the day-to-day work of educating students. Without keeping both national and local interests in mind, reformers cannot create changes that work (Fullan,

2007). History tells us Americans accept small changes better than huge shifts in the education paradigm (Tyack & Cuban, 1995). State and local events shape the implementation of even small changes, so that aspect cannot be overlooked as well. Studying the opposing view yields the greatest understanding (Fullan, 2007).

CHAPTER 3

METHODOLOGY

To accomplish the purpose of this study, which is to compare Georgia's early standards-based reform journey in the state of Georgia to the experience in the local context of Clarke County, multiple methods are used. The goal to examine how officials in Georgia focused the path of education in the 1980s and 1990s will be met using legal research to review laws, policies, and other documents from these two decades. The second goal to discover how practitioners in a local school system interpreted and responded to reform efforts during that time will require a more qualitative approach, and a case study offers the best opportunity to gather information from those who worked during the time period.

Michael Fullan, in his book The New Meaning of Educational Change, 4th Edition, presents a process to understand the phenomenon of changes in education. Recognizing the local view, or the "small picture" as Fullan refers to it, is necessary because schools and the people who work in them can only interpret changes in their setting with the understandings and knowledge base they possess. On the other hand, educational change is influenced by those outside the local setting as policymakers, state and/or federal government officials, system leaders, or other "big picture" thinkers often generate reform documents with a vision of how those reforms will be carried out. Fullan suggests that to understand the reality of reform implementation requires looking at the

reform from each perspective to "make sense" of various perceptions, the emotional experience of change, and the impact of culture on reform implementation (Fullan, 2007). Although Fullan's process is not a traditional research process, it provides information relevant to this study.

In order to consider all viewpoints to understand a local context in a time already past requires looking at information from former decades. To do this, it is helpful to use legal research methods to consider documents from the various levels of involvement in the progression toward standards based reform. Laws, policies, and litigation records offer insight into "big picture" thinking and trends of the latter part of the twentieth century when the seeds of standards based reform were being planted. Using a historical approach in legal research contributes the context of sentiment or emphasis from a national, regional, state, or local perspective. The country's history is relevant to how educational change plays out in any setting as shared beliefs influence the acceptance or rejection of reform efforts, and review of documents provides the broad picture (Dayton, 2013).

One important aspect of gaining a historical perspective is the "small picture" piece (Fullan, 2007). The legal documents do not include personal accounts of how reforms were experienced, so interviews of the people who were actually involved at a local level offer a balancing perspective. A case study approach is effective when the intent is to understand a real-life experience in a particular context. When the goal is to explain why or how specific events were experienced at a particular point in history, a case study can add understanding to review of documents that provide some information about the experiences (Yin, 2009). The design of this study will be purposeful sampling

to select a group of people whose experience makes them "information rich" about a local school and school system in the 1980s and 1990s (Patton, 2002). When combined with legal research to determine the influence of law, policy, or judicial decisions, a case study can be used to add the personal experiences related to the documents from a given time period. In this study, a case study is added to provide depth of understanding of the first steps toward standards-based education reform in Clarke County elementary schools in Georgia.

I. Legal Research

Legal research is generally thought of as applying to the practice of law, and it originated there, unlike other research methodologies that were created in the world of academia. Legal research methods are flexible in nature and not bound to particular steps because following a particular set of steps might cause the researcher to miss relevant evidence that would deny success of answering the question at hand. Legal research is used when the task is to consider relevant evidence including the law or policies, and to analyze relevant documents to develop a full understanding in a given situation. The researcher must synthesize the information found in various documents in order to make sense of the combined texts. It is up to the researcher to find the right documents for the problem at hand. This may include primary source documents, such as laws or written policies, or it may require secondary sources or accounts. The researcher must search for sources that are relevant to the questions at hand, and use whatever tools available to make sense of a situation (Dayton, 2013). Legal research, much like grounded theory,

works from a backward approach to some methodologies. Both are dependent upon gathering information first and then moving toward the development of theories that follow finding out what is happening in the real world rather than as an academic thought or a laboratory experiment (Dayton, 2013; Patton, 2002). In this study, legal research serves as the method for gathering information pertinent to education in Georgia in the 1980s and 1990s.

Legal research has a typical structure of inquiry that moves from a broad perspective toward a narrow focus, and then the analysis moves from the narrow focus toward reasonable application or generality (Dayton, 2013). To understand how educators perceived early standards reform in Clarke County requires considering the national and state views of education and the laws and policies that governed education prior to and during the time frame to be studied. For the legal research portion of this study, historical educational documents, laws, court cases, and policies must be reviewed to form the basis for understanding the interviews in the case study. Legal research will be partnered with a case study to get the "big picture" and "small picture" understanding of the time period Getting multiple perspectives of the same time period is necessary to gain a full understanding of the steps of education reform (Fullan, 2007).

Legal and historical documents yield information about the views of presidents, legislators, judges, and school officials. In any time period, people in leadership influence public perception by "framing". Presidents in the United States influence the direction of education this way in that the rhetoric they use persuades other politicians and the people to view particular actions in a certain way. Along with the rhetoric and definitions provided by each president, the "bully pulpit", as scholars have called the use

of presidential influence to sway Congress or the people, accounts for American direction even though the president does not have the authority to make all decisions. The term "bully pulpit" originated during President Theodore Roosevelt's term as he used reporters to get his thoughts into the public view. During each administration, speeches and meetings with selected individuals can provide citizens with a president's perspective that could influence their own thinking (Kuehl, 2012). In the same way, governors can impact thinking in their state or school superintendents can affect a community's thinking. Interviews with individuals will also yield information about whether they perceived framing was used in the 1980s and 1990s to steer education in particular directions.

II. Case Study Design

A meaningful case study incorporates five aspects of research design: purposeful questions, propositions (if any), unit or units of analysis, logic that links the data to the purpose, and a plan for interpreting results (Yin, 2009). The plan for this study includes a case study to provide the "on the ground" picture of education in the 1980s and 1990s. The results of the case study will be compared to published documents from the same time period. Even though the end result of this study will combine the case study with legal research, the case study portion is planned using the complete case study design.

A. The Question

The answer to one of the three questions guiding this study is dependent upon gathering personal accounts from people who served a particular role during a specific time. That question is: How do practitioners who served as elementary principals in Clarke County, Georgia in the 1980s and 1990s describe their experience as school leaders and their understanding of local, state, and national education priorities? Speaking with participants will provide the information needed for comparison between documents and how the time period was experienced in local schools within one school system.

B. Proposition

Michael Fullan's explanation (that context must be known before a complete understanding can be attained about how reforms are implemented) drives the proposition for this study (Fullan, 2007). Within each elementary school in Clarke County, Georgia, it is proposed that school-level experiences had an effect on how much focus was given to the initial state curriculum efforts. For some of the schools, changing demographics due to zoning efforts to achieve racial balance may have been a focus. For others, creation of new schools in the middle of this segment of history may have taken priority. The consolidation of city and county government might have played a role in how schools reacted to state changes. Considering each school's experience may lead to an understanding of the system-wide experience of this time period, and one proposition

would be that local events rather than state legislation could have been a greater focus to the education community in Clarke County.

C. Units of Analysis

Clarke County, Georgia has an interesting history of integration, zoning concerns, consolidation of city and county governments, building of new schools, and internal legal issues prior to and across the 1980s and 1990s (Condrey, 1994; Drew v. Clarke County School District, 1989; GA District Adopts Controlled Choice Plan, 1995; Purvis v. Ballantine, et al., 1997; Rice, 2001). If local context influenced the way state initiatives such as the Quality Basic Education Act or moving to a state lottery to fund Pre-K classes, the Clarke County experience is an important one to study. Elementary school principals who worked in Clarke County during the 1980s and 1990s will make up the participant group in this study.

The local school principal has information about a particular school in terms of how priorities were set, what the teacher and student demographics were, and which issues required the most attention. Because this case study aims at understanding the personal thinking of each principal as they reflect on years of service in a particular location, the unit of study will be the school. Once all participants have been interviewed, their responses will be compared to find themes and patterns across responses. In that process, the unit of analysis will become the school system. The goal will be to consider individual experiences and to also consider which elements of those experiences were shared across the school system in Clarke County.

D. Logic and Establishing Findings

Robert Yin describes strategies for analyzing case studies, and the preferred method is to go back to the propositions and to consider each response in terms of the proposition (Yin, 2009). In this case, interview transcripts and notes taken during interviews will be reviewed for items that were school-specific or system-specific. When each interview has been studied to determine which school-level happenings define the contextual perception, information across interviews will be considered. Patterns in responses or themes that emerge will be considered to determine the system-level perception of the educational happenings of the time period. That information will then be compared to the legal research information gathered about Georgia's education status for the same time period in order to answer the guiding questions about how the two perspectives compare. The findings in this study will be the report of how the legal research and the case study research results compare.

E. Participants

In this study, the purposeful sample includes individuals who served as elementary principals in Clarke County, Georgia during the 1980s and 1990s. Networking will be used to find some of the participants as all potential participants are retired, and as each one is located, they will be asked if they know some of the others. Local Board of Education records are used to determine who the principals were during

those years, and the case study sample size will depend upon how many of these people are still living and whose health allows them to be interviewed.

Participants will be interviewed to get their perspectives of what the priorities were, how they got information, and whether or not they shared the same focus as the national perspective. The interviews are intended to get the report of emotion, experience, and priorities experienced in one local setting. The intent of a qualitative study is to find insights and themes that run through responses and to gain understanding of the perceptions of people who experienced a particular event or time period (Patton, 2002), Interviews will be analyzed to determine with the purpose of gaining insight into the actual experiences at the school level.

The participants to be interviewed are now retired from their positions as elementary principals, and the questions will be intended to tap their memory of their past work. Starter questions to be included are:

1. What were the demographics in terms of diversity, parent involvement, teaching staff, and resources while you served as principal of _____ Elementary School ?
2. Which school superintendents did you work for? How did each of them contribute to your school and to education at large? What were the school system priorities? How did they guide the academic program in the schools?
3. How did the consolidation of Athens and Clarke County governments impact your school and the systerm? Did you have involvement in any of the decision making or implementation?

4. As a principal, how did desegregation, busing, or school choice impact your work? How much discussion was held among school leadership about this? Was discussion informal among principals or more formal? Did you have the experience of leading changes related to racial balance? If so, what did you do and were changes successful?
5. What was your experience with special education and changes in how students were identified and served during your tenure as principal?
6. What kind of training did you receive for implementing Quality Core Curriculum? Was it provided by the local system, the state, or a professional organization? What were the goals and the intent of the governor, the state Department of Education, and local system officials?
7. Which governor had the greatest impact on education in Georgia during your tenure as principal? How? (George Busbee – 1975 – 1983, Joe Frank Harris – 1983 – 1991, Zell Miller – 1991-1999, Roy Barnes – 1999 – 2003)
8. What was expected of you in terms of student achievement? What kind of support or professional development opportunities were provided for you as a principal?
9. What was the greatest challenge you faced as an elementary school principal?
10. What highlights of your tenure as principal at _____ Elementary do you hope are remembered most?

F. Interview Process

Because the events being discussed happened in the past, it may be necessary to refer to specific people or events rather than time periods. Materials taken to the interviews will include a list of past superintendents, governors, and presidents that were in office during each principal's particular years of service. Also, there will be on hand a list of specific events that were referenced in local newspaper articles during their tenure.

Once the interviews have been conducted and transcribed, they will be analyzed for similarities and differences and compared to the documents studied to "make sense" of the movement towards standards based reform. Responses will be analyzed for themes that run through them, and those themes will be explored to gain understanding of the experiences at the school level and possibly at the school system level (Patton, 2002). Participant names and school names will not be included in the report so that each participant remains anonymous. The intent is to find the themes within the responses rather than singling out and identifying any one individual or school.

CHAPTER 4

FINDINGS

I. Legal Research –Documents

The Literature Review of this study includes information about many documents and legal decisions. Those are not reiterated in this section but are important to the understanding of the documents found in the research for this study. The findings among documents specific to Georgia and Clarke County are included here. It is important to note that contacts to the Georgia Department of Education (DOE) to get help locating records of state Board of Education meetings and DOE files from the 1980s and 1990s did not at first yield results. People working at the help desk there could not easily find where the records had been stored, but later located someone who knew the only records saved are original documents housed at the Georgia Archives building in Morrow, Georgia. There were no digital records produced from the era being studied, so the only remaining information are original paper copies of items saved in files of individuals or boxes of Board of Education minutes. It is possible that other documents would have been of interest if they were available for review. Similarly, documents from Clarke County prior to the time of interest were housed in part in the local library, but no contacts to the library or school system yielded documents other than those listed and described here.

As early as 1975, the Clarke County School District defined expectations that teachers would participate in ongoing professional development. Policy GAD – R(2) establishes that teachers must earn ten hours of credit every five years to continue service in Clarke County (www.clarke.k12.ga.us).

In 1978, Georgia citizens wrote letters to Charles McDaniel, State Superintendent, making sure PL94-142 would be followed. Connie Poole, from the Georgia Association for Retarded Citizens, Inc., responded to McDaniel's recommendation to the Georgia Board of Education (BOE) to expand the Atlanta School for the Deaf program. Following the September recommendation, the letter dated October 6, 1978, demanded an end to segregation of exceptional students from peers in the public school (Poole, 1978). Other similar letters are housed at the Georgia Archives building. Dr. McDaniel responded to some, such as Barbara Amos of Riverdale, to acknowledge mail received. McDaniel thanked Ms. Amos for sending him information from a Philadelphia agency, and he assured her the state BOE was working to make sure all handicapped students in the state would be offered a Free Appropriate Public Education (FAPE) in keeping with PL94-142 (McDaniel, 1978).

Certification requirements for teaching gifted education were amended in August of 1981 to increase the expectation from fifteen to twenty-five quarter hours (Georgia Board of Education minutes, August 13, 1981). In October of that year, the BOE submitted a grant proposal to the U.S. Office of Education to support professional learning for regular and special education teachers through the Georgia Learning Resource Service (GLRS) (Georgia Board of Education minutes, October 8, 1981).

Standardized test scores were the topic of discussion at the November, 1981 BOE meeting. Fourth graders' scores matched the national average while eight graders appeared to be two months behind the national average. Tenth graders in Georgia scored five months behind the national average (Georgia Board of Education minutes, November 12, 1981).

Dr. McDaniel served on the steering committee of the Education Commission of the States, and he saved publications from that group suggesting merit pay, core competencies for graduates, technology, and hiring excellent teachers would be important next steps for states (Education Commission of the States, 1984; Box RCB-487, The Georgia Archives, Morrow, GA). Georgia's Education Review Commission offered two reports to Governor Joe Frank Harris and the Georgia General Assembly in November and December of 1984. The reports were titled "Priority for a Quality Basic Education". The documents served as the background information for the writing of the Quality Basic Education Act proposed in the 1985 legislative session (Box RCB-29813, The Georgia Archives, Morrow, GA). Those documents suggested the need for salary increases for teachers, mandatory kindergarten, higher accountability for outcomes, and a formula for providing funding based on student need should be the priorities of any legislation developed to improve Georgia's schools (Olson, 1984).

The Quality Basic Education Act was signed into law on April 16, 1985. The original document was sent to Superintendent McDaniel by Roy Barnes with a note telling Dr. McDaniel the document contained the original committee signatures and was intended for addition to historic records (Barnes, 1985).

Dr. Charles McDaniel died March 7, 1986 while serving as the Georgia Superintendent (Harris, 1986). The March 13, 1986 BOE meeting opened with a moment of silence and prayer in response to the loss. The minutes of the meeting referred to how happy Dr. McDaniel had been with the passage of QBEA (Georgia Board of Education minutes, March 13, 1986). Governor Joe Frank Harris appointed Dr, Werner Rogers to fill the position of Superintendent (Harris, 1986).

In Georgia Department of Education records for financial audits of local school systems in 1979 - 1980, Clarke County records are not included in the archived files. In box RCB-33514 at the Georgia Archives in Morrow, Georgia, the audits of many other systems are stored, and there is no explanation as to why Clarke County is missing from the file.

Following passage of the Quality Basic Education Act in 1985, the state BOE had to create and adapt policies to comply with all aspects of the new law. In April of that year, the state BOE approved capital outlay funding for Fiscal Year 1986 by sale of general obligation bonds. The Clarke County School District was allocated $277,140 from these funds (Georgia Board of Education minutes, April 11, 1985). In June of that year, the BOE approved Policy GBI which stated all professional school personnel receive five annual written evaluations each year to be eligible for annual increments on the salary scale. That policy was amended in November to move the effective date from March to July of 1986 in order to comply with the QBEA requirements (Georgia Board of Education minutes June 13, 1985; Georgia Board of Education minutes November 14, 1985). In preparation for the QBEA funding formula, Policy EFA required all school systems to report enrollment three times each year (Georgia Board of Education minutes,

July 11, 1985). To meet the student testing regulation of QBEA, the BOE adopted the California Achievement Test to be administered to students prior to entering first grade. A contract not to exceed $90,100 was approved with CTB/McGraw – Hill. A similar contract not to exceed $401,640 was approved for the company to provide the Iowa Test of Basic Skills for grades two, four, seven, and nine (Georgia Board of Education minutes, July 11, 1985).

In August, 1985, a QBE Update brochure was published that listed basic information about QBE. The brochure did not list an intended audience or how many copies were printed or distributed. The brochure stated the state BOE had adopted a 2.3 billion dollar budget for public education for the 1986-87 school year. There were 114 responsibilities assigned to the BOE in the QBEA. The brochure also included new policies about teacher certification under QBEA, and it stated that all certificates would be valid for five years beginning in January, 1985. The brochure was divided into sections: "Effective Immediately", "Guidelines Under Development", and "Ongoing Next Year". In the first section, the option for Special Education diplomas was explained. Students meeting IEP goals but not passing the Basic Skills Test would earn the new diploma. Full Time Equivalent (FTE) formulas to generate funding would be based on the attendance counts that were to be taken three times each year. For FTE purposes study hall, driver's education, teaching assistant assignments, and extra - curricular activities did not count. Beginning teacher salaries were established at $16, 000 per year. Full-day kindergarten programs were offered. Grants for staff development were in the "Guidelines Under Development" section of the brochure. Development of a career ladder and personnel evaluation instruments were listed in the

"Ongoing Next Year" phase. There were additional notes in a section titled "Other Provisions of QBE". These included an explanation of the testing before entering first grade, formulating taxes to equalize the mills collected, and requiring that ninety percent of all funds must be spent on instruction (Box RCB – 29813, Morrow, GA).

To comply with the Quality Basic Education Act passed in 1985, the Georgia BOE approved quite a number of policies in 1986. Documents preparing for meetings include background information for needed policies. Policy IDDB created a remedial program with components recommended by the Education Review Commission and mandated by QBEA. Policy IEC established maximum class sizes for general education, special education, and gifted education classes based on system averages. Funding allotments were based on the new Quality Basic Education funding formula. Policy AF was amended to remove references to four and a half hour Kindergarten programs. Science, Math, Foreign Language and Special Education were designated as critical teaching fields in compliance with QBEA. There were new regulations for identification of learners eligible for gifted education (Georgia Archives, Box RCB-10570).

In June, 1986, the Georgia BOE gave approval for the superintendent, Werner Rogers, to enter into a contract with the Georgia Vocational Education Statewide Management Information System. Clarke County School District was provided $167,000 to participate (Georgia Board of Education minutes, June 12, 1986).

The Georgia BOE voted on July 10, 1986 to add Speech Language Pathology as a critical teaching field following a recommendation from the State Advisory Panel for Special Education. Following another recommendation, special education funding weights were adjusted, and preschool special education programs were approved

(Georgia Board of Education minutes, July 10, 1986).. Policy GDBA was updated in September to specify qualifications required to serve in a paraprofessional position. In September the Board also heard a report from an appointed task force entitled "Report of Market Sensitive Salary Study" that included information about the salaries of various levels of employees across Georgia's school systems. The report also included information related to salary from those who had accepted or declined jobs within the education system (Georgia Board of Education minutes, September 10-11, 1986). The BOE voted on December 11, 1986 that teachers of students learning English as a second language must hold ESOL certification. The rule was a follow-up to discussion in November that educators teaching English should know language developmental stages and effective pedagogy for working with non-English speakers, and it took effect July 1, 1987 (Georgia Board of Education minutes, December 11, 1986).

Werner Rogers had a practice of sending thank you notes to journalists who published favorable remarks about education decisions in Georgia. For example, in December, 1986, after the Georgia Educators Association sued in an attempt to terminate the use of the Georgia Teacher Certification Test, Rogers thanked the Atlanta Journal for publishing an article stating the test was fair and helpful for identifying minimum competencies needed for successful teaching (Box RCB-41254, The Georgia Archives, Morrow, GA).

The Clarke County School District Board of Education developed policies to comply with state recommendations and QBE requirements. For example, in 1983, Policy IC was adopted to establish that the curriculum for Clarke County will meet or exceed state curriculum expectations. On November 12, 1987, they adopted the length of school

year as determined by the State Board of Education according to QBEA (www.clarke.k12.ga.us).

In 1987, Office of Civil Rights (OCR) complaint 04-85-1055 alleged handicapped children were discriminated against by the Georgia Department of Education under Section 504 of the Rehabilitation Act of 1973. Youngsters who had been served at the Parkwood Developmental Center in Valdosta, Georgia had not been considered as the responsibility of the DOE by leaders within the department, according to the complaint. Werner Rogers' statement to the Office of Civil Rights was that the OCR had no jurisdiction to investigate the case. (Box RCB-29815, The Georgia Archives, Morrow, GA).

Explicitly setting an expectation that Clarke County fund professional learning for teachers, Policy GAD – R(1) was adopted November 12, 1987 by the local Board of Education. The school system may fund or partially fund visits to other classrooms or schools, attendance at conferences, training events, involvement in professional organizations, or enrollment in higher education classes (www.clarke.k12.ga.us).

In preparation for a cross-state discussion scheduled for November, 1988, Gordon M. Ambach, Executive Director of the Council of Chief School Officers, requested a report of how Georgia was recruiting, preparing, and retaining minority teachers. Mr. Ambach's letter to Werner Rogers asked for a written report to be sent to him soon (Ambach, 1988).

In October of 1988, Attorney General Michael Bowers notified Dr. Werner Rogers, Georgia Superintendent, that a recent Georgia Supreme Court ruling would end "official immunity", making it possible for individuals to be sued personally rather than

just as part of an organization. He cited the cases of *Martin v. Department of Public Safety* (257 Ga. 300 (1987) and *Cooper v. Swofford* (258 Ga. 143 (1988). The letter was presented on letterhead from The Department of Law, State of Georgia, Atlanta (Bowers, 1988).

The National Council on Education Standards and Testing (NCEST) released a report in January, 1992 calling for national standards and assessments for the purpose of reforming education. Titled "Raising Standards for American Education", the report argued that testing individual students and large-scale samples such as provided by the National Assessment of Educational Progress (NAEP) would provide comparative data to measure success. The report suggested such assessments could eventually be used to determine eligibility for high school graduation as well as evaluating effectiveness of schools. Congressional testimony during consideration of the report agreed that educational standards in the United States were set lower than ideal, but there was also a negative opinion of the report's claim that national standards would result in improvement. The NCEST report was seen as a simplistic approach to a more involved problem. The report was criticized for suggesting that focusing on achievement with no consideration for teacher preparation or other "inputs" to improve instruction (Koretz, Madaus, Haertel, & Beaton, 1992).

A parent complaint about the busing plan in Clarke County led to an investigation by the Office of Civil Rights (OCR) to determine if black students were bearing more than their share of the burden of racially balancing schools. The complaint was made in 1990, and the investigation was conducted, but the school system did not receive the OCR report until 1994. The school system, after a year of studying possible plans, elected

to use a model seen in Port St. Lucie, Florida and created a Controlled Choice Plan. Parents completed a form designating which schools they would like their child to attend. If the racial balance of the school allowed their first choice, it was granted. If not, their child had to go to a school at one of the other choices. Busing costs soared as the plan was implemented, and test scores did not indicate increases, so the system came under attack. Families not wanting to have their child attend school outside their neighborhood left the county to attend in nearby counties with zoning defined (Johnson, 1999).

Recognizing teacher demographics did not match student demographics, the Clarke County School District adopted Policy GBC – R(1) on June 10, 1993 to implement a specific recruitment plan to increase the number of minority teachers. The recruitment plan includes advertising in minority publications, visiting historically black colleges, sending job announcements to those colleges, and using staff or other recruiters to influence minority teachers to apply in Clarke County. The policy is still in effect today (www.clarke.k12.ga.us).

In 1996, the Georgia legislative session included passage of the use of Special Local Option Sales Tax for capital outlay projects in schools systems. The new title became Educational Special Local Option Sales Tax (ESPLOST). Prior to this legislation, Georgia lagged behind other states in the building of new schools. Once the ESPLOST became an option, Georgia quickly approached the national average of new school facilities (Brunner & Warner, 2012).

In March, 1997, Clarke County citizens voted in favor of a local option sales tax to renovate several of its nineteen schools. Additions to several schools were included in

the plan approved by voters in order to meet growth needs in some areas (Gonzalez, 2000).

In December, 1999, the Clarke County Board of Education eliminated race as the factor for determining school placement in the Controlled Choice system. School capacity became the deciding factor for acceptance for enrollment in the school chosen by a parent. The change went into effort for the 2000-2001 school term. At the same time, the plan for middle schools was returned to a zoning plan (Gonzalez, 2000).

II. Case Study – Former Clarke County Elementary Principals

A. Introduction

Interviews conducted for this study were done with the promise of anonymity, so no principals or schools are named. Everyone who agreed to participate in the study still cares about the Clarke County School District, and in no way want their comments to be interpreted as disrespectful or unappreciative of their time there. Their candid responses are appreciated, and are being reported as a group even though they were interviewed individually.

Collectively, participants expressed hope that the Clarke County School District has a bright future given what they term as healing that has happened recently. They are glad to see a restored relationship with the University of Georgia as they experienced great professional opportunities and support when the relationship was strong during their tenure as elementary school principals.

Participants represent eight of thirteen elementary schools, both genders, and both white and black leadership. Contacts were made to people who served as principals in each of the thirteen schools for the majority of time during the 1980s and 1990s. In some cases, the second longest tenure was considered if the primary principal in that era is deceased. Some declined participation due to health, and some did not reply to the contacts. All those who were willing and able to participate are included in the study.

B. Demographics

Participants in the case study remember the student demographics as ever changing during their tenure as elementary principals. Near the beginning of the 1980s, school demographics matched that of the community in each part of the county. Principals report that schools in predominantly white neighborhoods had fifty-five to seventy percent white students with the remaining students being mostly black. Schools in predominantly black neighborhoods were the opposite. As time went by, the Hispanic population became more visible, and once the Controlled Choice plan was in place, some schools in predominantly black neighborhoods evolved to a majority of black students with the remaining students being almost exclusively Hispanic. In those schools, the percentage of white students decreased to as low as one to five percent. The evolution of schools in predominantly white neighborhoods involved both change in school demographics and community residence. Those principals report that the choice plan at first changed school demographics to an almost equal balance of white and black

students, but that white families moved out of the neighborhood until the schools became half black and the remaining half a mix of white and Hispanic.

Principals report the staff at every elementary school was mostly female. Some schools had one or two male teachers, but students mostly encountered female teachers. Most principals attempted to hire with an emphasis on diversity, but all report they never came close to having a staff that reflected the demographics of students in terms of race. Thinking back about staff rosters, some principals report that they worked hard to recruit black teachers and staff members, and at one time thought they were improving the balance. Then, as time went by, even though they looked for good black teachers, the overall balance often returned to more white, partly because good black teachers with an interest in leadership found positions as administrators. Participants in the study remember frequent conversations about needing to find more black teachers, and they also remember difficulty in fair evaluation of teachers because of the automatic perception that race was a driving factor if a black teacher's evaluation led to non-renewal. Concern for fairness to students and the community led them to search for more black teachers, but knowing there was less public support for removing a black teacher made the hiring process more crucial. Participants indicate trying to balance demographics took much of their time and energy, and the outcome was never perfect. In most cases, the staff ethnic balance was never close to the student ethnic balance during the tenure of those interviewed. The highest percentage of black teachers reported was 22 percent while the lowest percentage of black students at any school was 45 percent during that time period.

C. Superintendent Leadership

As each person reported on the superintendents they worked for, there were strong memories of some and less memory of others, and the report includes those who were mentioned by interview participants. Historical records would show others who served the role but are not mentioned here as they were not mentioned by participants. Some participants offered summarizing statements about the superintendents they worked for, and those comments reflected that superintendents mostly left the work of running the schools to the principals. There might be discussion of goals, but the direction of the work was up to the principal. As one said, "They left me alone to do my work." Throughout the 1980s and through much of the 1990s, there were few memories of a superintendent visiting the schools on any regular basis. Curriculum directors and content area specialists were seen as supporters rather than evaluators of schools, and it was those employees who interacted with schools.

Case study participants, while remembering various details regarding leadership, provided similar opinions about contributions and style of each Clarke County School District Superintendent during their tenure as principal. For two participants, there were memories or stories of others' memories about Charles McDaniel who went on to serve as the state superintendent after serving in Clarke County prior to the time of focus in this study. Both participants reported that Dr. McDaniel left a legacy of strong leadership that pulled Clarke County School District out of a financial dilemma he inherited as he entered the job. He was also remembered as the superintendent who led Clarke County through desegregation with the intent of fairness, practical solutions, and moving forward

with a united school system. Because of the respect he had earned in Clarke County, his tenure at the state level is remembered favorably, and his service at the state level included changes to education that led to legislation in the Quality Basic Education Act. The legacy he left in Clarke County was a measure subsequent superintendents were compared to. In the local realm, during the 1980s and 1990s, Dr. Carol Purvis served as the Clarke County School District Superintendent from 1980 – 1991. All former principals who participated in this study remember that Dr. Purvis had strengths that contributed to a period of growth and improvement for the system. His tenure is remembered as time when there was system affluence and principal requests for additional personnel or materials were most often met with supply of people or purchase of materials. Dr. Purvis is remembered as a listener and a learner who grew in his respect for the elementary schools' contribution to the system while he was there. Female participants report that even though Dr. Purvis had not worked with female administrators before, they felt his growing respect for their work as he focused on how to help students and was willing to acknowledge the contribution of female principals in improving curriculum and instruction in the elementary school setting.

For some principals, personal discussions with Dr. Purvis were a time of professional growth. Some remember his honest answers to their questions about their own abilities or reputation in the community. Principals perceived Dr. Purvis as supportive, so they were willing to have authentic discussions with him about their own practice. The affluence during his tenure allowed Dr. Purvis to support travel to conferences, and principals were allowed to travel to pursue individual interests related to their work.

Dr. Purvis is remembered as a leader who set priorities and worked toward specific goals. He initiated leadership retreats that took principals and system leaders out of Athens each summer to set priorities for the upcoming school year and to develop a plan to reach common goals. Many principals followed the model with the leadership team in their own schools. In support of school leadership, Dr. Purvis began to look at student achievement. At that time, this was more sharing of test scores across the system than pressure to reach particular goals, but principals remember it was with Dr. Purvis that they first started considering achievement data as information to help guide improvement planning.

Elementary principals were encouraged to meet as a group in addition to the leadership meetings that included all levels of leadership. Participants in this study credit those meetings for the positive innovations that happened in elementary schools. Dr. Purvis did not participate in the meetings, but system level curriculum supervisors did attend when the topic of the meeting related to their area of expertise. It was in those meetings that principals remember beginning to consider cause and effect relationships for achievement scores, and they valued the opportunity to work with colleagues to figure out ways to better serve the student population in their own school. From the district level, the years of Dr. Purvis' leadership are remembered as productive years with opportunities for learning from others, support for school needs, and support from district leadership. In addition to Dr. Purvis, principals felt supported by Dr. Helen Westbrook and Mrs. Elizabeth Ireland (affectionately referred to as "Liz") who helped principals with curriculum issues and were always encouraging and knowledgeable.

John Ballentine's legacy as Superintendent of the Clarke County School District is remembered as a time of turmoil and competition. All participants in the study remember a push for each school to develop a "theme" that would make their school stand apart from the others. This was interpreted as a means to gain favor with parents in each community. Some principals did not feel undue pressure from this as they were already engaged in an initiative that had been selected to improve student achievement. At those schools, communication to parents about the initiative met the superintendent's expectations of offering unique program. At other schools, principals felt the competitive side of the expectation hindered the collaboration that had been established across schools and was a distraction from the work that had been done at the school level to focus on student achievement. As a result, some principals decided to select one particular academic content area as the focus for their school, and others chose to skirt the issue of a theme and to stay focused on previously determined priorities. A couple of principals, in describing their response to the expectation to create a theme, said "I just didn't do it."

As principals describe Ballentine's leadership, there were stories of feeling they were intentionally intimidated from those who were interviewed by him or had discussions about particular concerns. The tone of his supervision and communication with parents was described as "cold", and a couple of principals who tried to discuss this with Dr. Ballentine were told he was intentionally implementing chaos leadership theory. There was a perception that Dr. Ballentine favored some principals over others, and this added to tension and competition that some saw as hindering the progress elementary principals had made before.

All participants interviewed mentioned two specific leadership issues that they perceive lessened the trust of the community. In 1994, an audit revealed misuse of funds during the years Dr. Purvis had been superintendent. Having left the system in 1991 as a highly respected leader, principals were deeply saddened by the report that Dr. Purvis, along with two other district leaders, had been arrested on racketeering charges. All were convicted. During the interviews, all participants expressed their belief that Dr. Purvis was not involved in racketeering, and the judicial system later agreed and reversed the decision against him. Principals did feel that Dr. Purvis made some errors in judgment by signing a financial report that was incorrect and in giving friends a chance to return diverted funds rather than firing them. Principals remember that their elementary principal meeting following the arrest was a time of tears and grief, and the following months were ones of growing distrust of school officials in the community. In 1995, then, Dr. Ballentine announced his plan for "Controlled Choice" to establish racial balance across schools. Some principals agreed with the plan philosophically as they wanted to achieve racial balance, but all of them came to see the decision as one that devastated the school system. Most of their meetings from the time Dr. Purvis was arrested until years after the choice plan was implemented were spent trying to figure out how to deal with the problems from those two issues.

Other superintendents were mentioned briefly in the interviews. Dr. Lewis Holloway was remembered as a superintendent whose meetings had the priority of clearing up people's concerns. Principals did not report a shared vision during his tenure, but saw it as a time of trying to quiet the voice of dissatisfaction without moving forward. There was more reaction than proactive planning as the principals recalled. Dr. Lucian

Harris was described as a quiet man who did not communicate with principals much. No principal reported any stated expectations of them from the system at that time, and some remember it as a time when there was little support for dismissal of incompetent teachers because it was a time of not making waves in the community.

Several participants mentioned Howard Stroud as a leader they respected during their tenure as principal. Serving as an Assistant Superintendent, Mr. Stroud was called on for leadership at various times between superintendents. Principals remember him as someone who knew instruction and wanted to help schools. Some also mentioned the contributions of Dr. John Jackson who served as an Assistant Superintendent because they felt his care for the system should not go unnoticed if they were to really tell the leadership story of Clarke County during their tenure there. During interviews, participants acknowledged the question asked them about superintendents they served under, but they requested that these two gentlemen be included in the findings from the study. These men were seen as people who helped bring racial healing and provided a sense of stability to the school system. The principals saw that having such dedicated black leaders helped keep racial harmony across the system.

D. Athens-Clarke County Unification

Most memories about the consolidation of city and county governments were in agreement that the direct impact on schools was not significant. A slide show prepared to share with citizens was shared with principals as a group, and their feedback was solicited. The Clarke County School District as a whole, and Dr. Purvis as the leader,

provided positive publicity to the community to support the unification plan. C.B. Lord, the Clarke County Board of Education chairman, is remembered as someone who tried to get the pulse of the schools and community, and he is remembered as having supported unification for the good of both.

One way the unification helped the schools, in the opinion of past principals, was that the community focus that had been directed at competing public services could be shifted to education. On the negative impact side, selection of school board members became by districts rather than for the whole system at large, and some principals saw that as a shift to service by people with more narrow priorities rather than the best interest of the whole system. Overall, though, participants saw this change as benign in its impact on their work in the schools.

E. Desegregation, Busing, and Controlled Choice

There are not words adequate to report how significant desegregation, busing and the choice plan were in the lives of the schools and in the day-to-day job of elementary school principals in the 1980s and 1990s. Regardless of gender, race, or the school demographics each participant served, the issue of racial balance was one all principals describe as being at the heart of every issue and decision.

Moving into the 1980s, participants report that the living patterns of Clarke County residents posed problems with achieving racial balance even though many residents philosophically wanted all children to have an equal opportunity to become educated. Some participants stated that living in Athens with the influence of the

University of Georgia helped in many ways as there was an "educated liberal presence" that led to a push for change. Some participants who had lived in Clarke County in earlier decades remember the disparity of school facilities when the schools were segregated. Those school leaders were determined that all students in Clarke County would receive the same opportunities in schools. As they worked toward that goal, they encountered the fact that the living patterns within the county created problems for racial balance within the schools. The location of most schools was in either more prevalently black or more prevalently white neighborhoods. As they tried to lead schools, the principals realized the reality of integration was harder to achieve than just believing it should happen.

In terms of time spent discussing how to racially balance schools, one principal said the issue was discussed "ad nauseam" with no real solutions being found. The reality was that to get racial balance across the system meant someone had to leave their neighborhood. When system leadership developed a plan to bus students to achieve racial balance, principals realized they were ill-equipped to handle the issues that arose. For some who had worked in predominantly white schools and had little experience with the black population, they discovered it would take time to build trust with parents. Some credit Liz Ireland with helping them understand the culture of the black students coming into their schools, and she was a great help to those white principals assigned to work in schools in mostly black neighborhoods. Principals who got to work with Ms. Ireland along the way expressed great appreciation for her honesty in explaining how to best communicate with black parents and students. She was able to share what it had been like for them in the black schools during segregation and the fears and beliefs they

likely held. Ms. Ireland taught principals that just believing in racial equality was not the same as respecting the culture in the southern black communities, and she helped some principals realize where their own prejudices, even if unintentional, were communicated to black students. While Ms. Ireland's contribution to curriculum development was substantial, participants in this study made it clear that she also was a strong contributor to racial awareness and was a bridge builder in Clarke County.

One obstacle to achieving equality of education in Clarke County was poverty. Principals saw clearly that students living in public housing were mostly black while middle class residential neighborhoods were mostly white. Just getting racial balance did not mean equality as more black students lived in poverty and had less chance for experiences that supported learning as compared to their white classmates. All participants remember the elementary principal meetings were the place where they openly discussed the issues of race and poverty, and they worked together to try to find solutions.

As Clarke County built new schools, there was always the hope that dividing some neighborhood racial pockets would help lead to natural racial balance. Locations available for building, though, only added to the imbalance. Some schools were in very close proximity to housing projects with mostly black families while others were built in close proximity to subdivisions of white families. Housing projects were divided into sections so that students living there were sent to multiple schools, but this plan disproportionately bused black students from their neighborhoods. Principals dealt with angry parents of children being bused away from, or to, their schools. Study participants also remember there was political bartering over which housing projects would send

children to which school. Described as "white power" by participants, some schools had involved white parents who influenced which black students would be allowed to attend their child's school. Principals remember getting calls from system leadership to say a particular group of students they were expecting to enroll for an upcoming school year would no longer be coming, but a different neighborhood would be attending. Reasons for the changes were never spoken directly to the principal, but the "community buzz" was that influential white parents had complained enough that changes were made to the attendance plan.

Participants all remember the steps of implementing the Controlled Choice plan that went into effect in 1995. Some were in favor of it originally as it seemed a fair way to balance schools. Others report they instantly knew the plan could not work because of the tremendous cost of transportation across the county. All came to see Controlled Choice as a disaster, but for different reasons. Some who served schools with students living within walking distance had to deal with families who were worried that their child would have to leave the neighborhood even though they had intentionally bought a house based on the school. Schools located in black neighborhoods suddenly became smaller because they were under-selected by white families and only a comparable number of black students could attend to keep the percentages within the given range. Those schools then had empty classrooms, and in order to use the space, special education programs were moved there, so parents of students with special needs were left to deal with busing of their children. Two participants reported that with the choice plan they never knew how many classrooms they would need to set up until right before school began. Their student numbers were adjusted as people made choices, and sometimes

balanced requests meant a grade level was increasing while unbalanced requests meant some students were moved to another location. There was no opportunity to plan or to have the teachers prepared for what the year's class would be. Principals learned that realtors in the area were no longer showing Clarke County houses to white families as they did not want to explain the choice plan. The racial balance of the student population in Clarke County suddenly shifted to majority black as white families moved out of the county rather than be bused. Families in public housing did not have the same options, and the percentage of students living in poverty in Clarke County increased rapidly. Principals remember trying to keep up with the changes and trying to find ways to support student learning in an ever-changing population, and they struggled to find success.

There were a couple of schools in Clarke County where there was naturally a racial balance that met the overall percentage plan. People who served as principals there did not experience much change due to Controlled Choice. It was only after many white families left Clarke County that their schools saw a change that included an ever-increasing number of Hispanic students. The balance under Controlled Choice moved from being a balance of "black" and "white" to being a targeted balance of "black" and "other than black".

One principal reported one of the biggest losses for the school was the loss of University of Georgia (UGA) influence. At one time, the neighborhood included many professors who had supported racial balance and had provided the school with materials to make sure all students had what they needed to learn. Teachers had been given support with professional learning opportunities and volunteers to help in the classroom.

Once the choice plan went into effect, those supports began to be absent from the school. The principal reported this was in part due to the loss of trust for the school system after the arrest of Dr. Purvis as well as the sense that the school system was not supporting neighborhood schools. Another principal also reported a sense of loss as relationships with UGA were severed through lack of appreciation for what UGA could offer. All principals, looking back, think the Controlled Choice plan was a philosophically acceptable notion that, in reality, set the system back tremendously in terms of the education students were provided. They remember this as a focus of all of their work for the next few years, and they did not feel there was recovery during their own career.

F. Special Education

Participants in the study questioned the accuracy of their responses related to the timeline of the study. In the area of Special Education, for example, they did not remember the exact years changes occurred. Rather, they marked the time as soon after the passage of PL 94 – 142, before or after a specific special education law suit (Drew v. Clarke County School District, 1989), or after Controlled Choice went into effect. In the early 1980s, or the time they described as "not too long after" PL 94-142 took effect, principals heard the first mention of including special education students in regular classrooms. For more severely disabled students, even the discussion of having them in the schools rather than a separate center required a stretch of common thinking. Some participants remember having knowledge of classes at the psychoeducational center, but

they had no involvement with those students and no conversations about the education of those students.

Over time, some classes were moved from the Rutland center into the school system. Memories from each school relate to a specific type of class composition, but all principals describe the experience of receiving a self-contained class without preparation for themselves or the staff of the school. Principals were suddenly accountable for hiring special education teachers and for managing the day-to-day support of the students joining their school. In some locations, the students entering had a history of running away or becoming violent enough to require restraint. There are memories of students with Emotional and Behavioral Disorders (EBD) who came with no forewarning of what kind of strategies had been found to be effective. One principal stated the area of eligibility was not shared, so when a self-contained class was added the staff had no idea what to expect. Another principal remembers the first time there were severe and profoundly disabled student enrolled and how overwhelmed the staff was. It was traumatic not just because the staff did not know how to help the children, but also that many on the staff had never seen children with the level of disabilities presented. Staff members were shocked and grief-stricken for the families of the children, and their first reaction was emotional sadness and compassion for the families. Only later were they able to address how to help the children in the class. As satellite programs were established in schools, each school had to figure out how to take care of the students on their own.

When a Clarke County family sued the system for monetary support of their child's education outside the system, leadership meetings were filled with discussion of

the ramifications of the case. The case served as a stimulus for learning what an autism diagnosis means for a child and how an autistic student should be taught. School leaders were encouraged by system leaders to do whatever was needed to meet the needs of handicapped students in the context of the local school. Services were provided that had previously not been offered in hopes of averting any other potential legal problems. Self-contained services for autistic children became a part of the system offerings. Each school had at least one self-contained class offered for a specific disability. Those principals whose schools housed the Emotionally and Behaviorally Disordered self-contained class found these classes to be "tough" because the students exhibited behavior the school was ill-equipped to handle. Some principals felt they were fortunate when they found a great teacher who knew what to do in that environment, but they also felt as if they were "on call" as an administrator if needed to help the teacher because student outbursts could occur without forewarning.

The effect of Controlled Choice in some schools was the lowering of enrollment of general education students. If a school was predominantly one race, and not enough students of another race chose the school, the only way to racially balance the enrollment was to lower the number of students of the predominant race. Those schools in the middle of racially segregated parts of the county found themselves with a lower general education enrollment. Special education service locations were needed, so the empty classrooms in these buildings became space for the placement of self-contained special education classes. The memories of those classes made study participants think about how little preparation the schools received prior to the addition of these classes. Upon school opening, there were instantly quite a number of students with special needs in the

middle of a school with no staff training or experience to support the students. The positive side to this, as principals recalled, was that everyone in the school became bonded as a community where race and ability were not barriers. Everyone learned together how to work as a team. Also, because there were clusters of classes, special education teachers had a collaborative team to work with. Principals brag about the special education teachers of that era and think that the unpredicted housing them together helped improve special education as they all learned together. On the negative side, there was the challenge of how to supply adapted materials and services with so many needs in one building. Communication with principals was limited because the cases had been managed at another location, and one principal reported that a class was added to the school without existing staff being informed what the eligibility area was. That principal found it challenging to set the class up for success when there was no prior knowledge of what the needs would be. That information only became available after the principal was already responsible for the students.

For the years during the early implementation of Controlled Choice, participants remember special education services were only in self-contained rooms and resource settings. As they recall, it was nearing 2000 when inclusion was becoming a more common practice. Of course, schools implemented each phase at an individual pace, so some think there might have been some inclusion earlier somewhere in the system.

G. Professional Learning

During the 1980s and 1990s, staff development in Clarke County was provided mostly by system curriculum directors. Later in that time period, more of the training was provided by the local Regional Educational Service Agency (RESA). Those who served as elementary school principals recall that Dr. Helen Westbrook or Liz Ireland often led the learning sessions for teachers, and principals participated alongside them. Content area support was provided by the curriculum leaders within the system, and schools were able to call on those people as their school needed support in a given area. Once the Northeast Georgia RESA was open in Winterville, that resource was within Clarke County, and principals were able to set up specific training as they deemed necessary. During the 1980s and early in the 1990s, principals experienced strong connections with the University of Georgia, and they were able to have professors come to visit the school to provide training or to demonstrate pedagogy with children.

Because the system did not dictate what each school would work on, the schools had the opportunity to establish individual goals and areas of focus and to choose professional opportunities to support learning in those areas. The purpose of professional learning was to improve the educational experience for students, and leaders remember those days as a time when the focus was solely on the children without pressure from the system to consider other priorities. One frustration expressed about the professional learning provided by the system or RESA was that it tended to be hit or miss in terms of follow through. Teachers and administrators were provided with information, and after the learning session, they were on their own for implementation. Some teachers might

implement the ideas, but there was not consistent use of newly learned strategies in the classroom. Leaders also felt that change came too rapidly for evaluation of the impact of one professional learning session before a completely different one was introduced. Teachers had the opportunity to hear about a lot of things, but they did not fully implement many of them.

Other than learning along with teachers during staff development sessions, elementary administrators report it was up to them to find their own professional learning opportunities. During the Purvis years, there was funding that allowed principals to attend conferences, visit schools in other areas, or to participate in state offerings such as the Georgia Leadership Academy. There was enough money to support taking a group of teachers along with the administrator to see how new initiatives were carried out in other locations. The only assigned professional learning participants recall was preparation to administer the Georgia Teacher Evaluation Program that involved observations and evaluation of completion of duties and responsibilities. Some remember that training as time consuming and more involved than any other they participated in.

In terms of which professional learning helped them the most, all elementary principals report the work with their colleagues was the best learning opportunity. During the elementary principal meetings, they had the opportunity for true collaboration. Mentoring partnerships were developed, and those relationships are fondly remembered. In some cases, a new principal received support from a more veteran principal with daily phone calls or frequent visits to check in and ask for advice. The personal relationships were so strong that many of them continue to the present, and with each interview, participants expressed gratitude for the other principals they worked with during those

years. Any help for dealing with Controlled Choice, building community in diversity, working with Special Education students, supporting good instruction, or improving academic performance came from the strong collaborative learning culture the group established for themselves.

In response to how training related to the Quality Basic Education Act (QBEA) and the Quality Core Curriculum (QCC) was provided, no participant remembers training provided to them from the state level. They know they got a copy of the curriculum document, but the only conversation they remember about the meaning of the document was led by system leaders. Because all the schools had begun to develop improvement plans based on academics, teachers accepted the Quality Core Curriculum without any memorable resistance, but principals assert that the standards never really drove instruction during that point in history because textbooks were the basis of planning. Teachers were told to create lesson plans and assessments to match the QCC, and principals recall that teachers created those items using the provided textbooks and then looked to see if there was a matching standard to list on the plan.

H. State Leadership – Governors

When asked about the educational contribution of state governors during their tenure as elementary school principals, participants were somewhat split about whether Joe Frank Harris or Zell Miller made a bigger contribution. George Busbee was acknowledged by two participants as a contributor for improvement of career education, but he was not anyone's number one response. Joe Frank Harris was appreciated for his

attempt to bring some state unity through establishment of shared standards for all Georgia schools. Dramatic changes to school funding, curriculum, support for struggling students, and teacher preparation were seen due to the passage of the QBEA. Those who endorsed Zell Miller as their first or second favorite saw him as a friend to education. During his service years, Georgia teacher salaries were raised to the national average. He took bold steps to begin the lottery to fund PreK programs and the HOPE scholarship. Participants in the study listed positive contributions of Harris and Miller and their appreciation for both was enthusiastic.

Roy Barnes, on the other hand, was not viewed as a friend of education. In fact, some study participants saw his term in office as detrimental to education in Georgia. Barnes did not endorse salary increases for teachers, and teachers resented the actions they interpreted as lack of confidence in them.

I. Student Achievement

Participants in the study reported their personal evaluations did not focus on test scores of students. Some clearly remember discussing student achievement with a school superintendent, but most felt their evaluations were based on sound management of the school and building community support. As long as the school community was satisfied with a school, the principal was evaluated favorably. When system leadership meetings included the posting of test scores for all to view, elementary principals saw their schools received higher scores than middle and high school levels, and this may have been a reason there was not explicit pressure to improve by a certain amount. Some

principals remember the posting of scores was the first time they had seen the results from their own school, and they hoped their school's scores would be in the top half of all schools in the system. As long as that was the case, the school performance was acceptable. Another typical goal, according to participants, was for the individual school to score higher than the year before. Most felt successful as long as there was improvement along the way.

As time went by, scores of student subgroups became a focus. School personnel began to realize there were noticeable gaps between white and black student scores, and the elementary principals discussed this in their meetings. Curriculum leaders for the system were asked to come to their meetings to help brainstorm ways to help black students perform better in order to close those gaps. Title I reports were shared in group meetings, again without prior knowledge of principals, and a closer look at the learning of students who lived in poverty became a common practice in Clarke County. Black parents noticed their children were not as likely to be identified as gifted, and they wanted the disparity to be addressed. Principals involved system support and teacher discussion to try to learn how to use the data to improve instruction to close all identified achievement gaps.

Even though test score data became available during the 1980s and 1990s, study participants saw that data as one piece of information about students. Their observations of teachers indicated teachers were focused on achievement for individual students as judged by classroom work and tests rather than state assessments. For instructional planning purposes, group data was not considered as much as the performance of each

student. Teachers looked for ways to support individuals rather than how to raise the group's collective scores.

J. Challenges

Each study participant was asked to identify the greatest challenge they experienced as an elementary school principal in Clarke County in the 1980s and 1990s. Issues related to race were the top of most lists as they included dealing with white power, the system push to find black teachers, and the need to close achievement gaps between races. Related to that, some said a great challenge was keeping good teachers and getting rid of bad teachers. While that pertained to white and black teachers, some principals found it particularly true for black teachers. If they hired a great black teacher, that teacher often moved on to an administrative position in another school. If a black teacher was not competent, it was hard to let them go because of the assumption that the reason must be racial prejudice.

Controlled Choice brought some racially based challenges for participants. The pressure to make the school marketable was hard for some. Once the busing required for the choice plan consumed much of the budget, the Reduction in Force (RIF) plan was used to lower the cost of personnel. Principals remember being called to notify them they must inform some teachers their jobs had been cut from the budget, and the notice needed to be given that same day. Hysteria ensued, and the principals were left to be the ones to deal with the strong emotions. Over the next few months, many of the teachers were

rehired, and principals found this roller coaster experience one of the more challenging of their careers.

K. Legacy

. When asked what they hoped would be remembered about their service as an elementary school principal in Clarke County, many answers had to do with personal relationships. Participants hope they are remembered as fair, humanistic, honest, and caring. They hope the students in their buildings remember being loved, and they hope students know the principal believed each of them could learn. As for teachers and the community, principals hope they will be remembered as having high expectations, believing that teachers make a difference, empowering teachers and students, and being willing to try whatever would work to promote academic success.

CHAPTER 5

CONCLUSIONS

I. Introduction

The purpose of this study was to answer three questions:

1. How did Georgia's education legislation and policy from1980 to 2000 set the stage for implementation of more recent reforms?
2. How do practitioners who served as elementary principals in Clarke County, Georgia in the 1980s and 1990s describe their experience as school leaders and their understanding of local, state, and national education priorities?
3. How do practitioners describe past reforms as compared to how state and local documents report the same time period?

The history of education in the United States is important because it paints the picture of a progression from local to more centralized control of education, and a move from accountability based on access to evaluation of outcomes. Each time period in the historical story includes a reason why people, collectively, supported more governmental input or control of education. Each era represents the increasing awareness of groups who were not provided access to education, and later, to the evaluation of the quality of the education for each group of students.

It is with that history in mind that these questions of purpose are considered. The state approach, the local contextual view, and the interaction of the two must be seen as

small pieces of the puzzle of American education. History frames the picture painted in each state and local arena.

II. Georgia

State and local implementation of judicial or legislative decisions for the country takes years to accomplish. The *Brown* decision of 1954 was still being worked out in Clarke County when the Controlled Choice Plan was put in place in 1995. Even though the county had some integrated schools in the late 1960s, state level resistance to integration and lack of support for local change hindered effective implementation. At the state level, decisions can be years after federal decisions. For example, the NDEA of 1957 established critical fields of instruction that did not get named critical fields in Georgia until passage of QBEA in 1985. PL94-142, passed in 1975, did not affect the local schools in Clarke County until the 1990s. These issues and initiatives that were "done" in terms of becoming law were nowhere near full implementation at the local level before all aspects of the state QBEA was also supposed to be functional.

In some instances, policies in Georgia came about as reactions to concerns or complaints rather than as deliberate actions based on educational knowledge that particular practices would improve education. For example, most of the policies reviewed in this study that were related to compliance with PL94-142 were preceded by complaints from parents or organizations. It was not only federal legislation that promoted action, but the response of parents to that legislation that served as the catalyst for state decisions. This trend was established in Georgia's response to desegregation as

required following the *Brown v. BOE* decision. The state pushed back against federal mandates and only complied as a reaction to possible consequences. This pattern of reactive rather than proactive response meant that Georgia's education decisions were at times delayed. Rather than considering how to best educate minority and handicapped students for the benefit of those groups, no action was taken until public demand or legal requirements forced changes.

On the other hand, when a Georgia study group, Georgia's Education Review Commission made recommendations of strategies that would help Georgia schools better prepare citizens to be competitive in the economic arena, the passage of the Quality Basic Education Act followed. While the study focused on schools, the ultimate goal was improving the state's economic standing. State interests took priority over the outcome for each child, but the interests of students had to be served in order to meet the state goal. When state leaders determined that Georgia could not succeed economically without changes, the schools were considered the answer. The American paradigm that education is the hope for the future was very much a part of the Georgia thought process. Considering the economic future of the state also encouraged a more global view of who should become educated, and there was new support for particular aspects of the law to support subgroups of students. When state level issues made success of the education system a focus, state action was much more rapid than when changes were imposed from the federal level.

The many aspects of QBEA from establishment of class sizes to defining expectations for teacher preparation and ongoing professional development required an investment of funding. The whole package was endorsed, but funding promised across

time was not delivered. The pattern established across QBEA implementation began a trend in Georgia that continues into more recent reform eras. Asking local systems to implement state requirements without full funding from the state began with passage of the QBEA, and the local responsibility for funding has increased over time. .

With the passage of the QBEA, Georgia entered the arena of education as never before. From that action along with the later use of lottery funds to establish a statewide PreK, Georgia established a reputation for moving forward as a leader amid states in the south. In the 1980s and 1990s, Georgia changed paths from somewhat ignoring education trends across the country to trying to lead those trends.

III. Clarke County Practitioners

Listening to elementary principals who served in the Clarke County School District in the 1980s and 1990s sounds similar to the research findings of Andy Hargreaves published more recently (Hargreaves & Fink, 2004; Hargreaves & Shirley, 2009). Their best memories are of having the professional freedom to develop innovations based on the identified needs within their schools. They cherished the collaboration among the group of elementary principals who met regularly to discuss issues and to develop joint solutions. They shared a strong sense of appreciation for the history of the culture of Clarke County and a passion for helping students succeed and contribute to that culture. In the years when they felt there was a clear system vision, they felt empowered to create better schools. They found ways to involve parents and the community in the schools, and they embraced the challenges of meeting the needs of a

diverse population. A love of learning came through every interview, and the participants shared what they learned from colleagues.

When a lawsuit against the system was won by parents wanting to educate their autistic son, principals experienced a new focus within the system to make sure all students were provided for (Drew v. Clarke County School District, 1989). This case was the catalyst for many changes, and principals had to learn on-the-job how to deal with students who were moved from other locations into the schools. There was no training or preparation for this, and each principal was thankful to have the support of the other principals as they learned more about how to work with students with disabilities. Collisions between the intent of the law, state and local situations, and parent expectations based on the law created a dynamic for change that had unexpected positive and negative results. As parents demanded services implied in PL94-142, they collided with systems that isolated their children. Georgia and Clarke County were pushed to create new programs without training, so excellence took a back seat to access. Forcing schools to work with situations they were ill-equipped to handle led to collaboration that created better solutions than training might have offered. Conflict during implementation of laws and programs leads to both positive and negative results (Manna, 2011).

Another lesson participants learned during their tenure in Clarke County was that legacy can be changed in a moment. Dr. Carol Purvis was appreciated by principals for his listening ear, his support in providing resources, for his advice, and for his respect of them as professionals. They saw growth and improvement during his tenure, and felt that they were on the brink of building a racially cohesive system, designing great programs for students with disabilities, and developing sound instruction for students living in

poverty. One thing several of them learned from Dr Purvis was that a person's greatest strength is also their greatest weakness. He had honestly shared that thought with several of them who had asked for his feedback about their work. Then, when he was arrested on racketeering charges, they were devastated and realized his ability to build relationships had also been his downfall. When he found out about misconduct on the part of friends, he gave them a chance to correct the mistake instead of firing them. Trust was broken with the community, and even though he was later acquitted, the relationship of the system and the community was broken. Some remember the Purvis years in the words of Charles Dickens' opening sentence in the book A Tale of Two Cities: "It was the best of times, it was the worst of times…" (Dickens, 2011). It was a time of affluence and support, and then it was a time of lost trust and anguish. Each principal during that time learned a lesson that stayed with them through their career, and each worked to create a lasting legacy of professionalism, compassion, and passion for their work.

Participants each described a point in time when they realized that philosophy and reality do not align. For most, it was with the implementation of the Controlled Choice plan. Philosophically, they agreed with trying to racially balance schools, but the reality of what the plan cost each school was shocking to some. As they witnessed the falling away of community support and dealt with the unpredictable outcomes of the plan, they saw how one major decision can forever change the future. Of greatest loss to them was not the school demographics from before the plan was implemented. The greater loss was the relationship with the University of Georgia when the school system no longer wanted anyone in the schools who might report anything less than favorable about what they saw. Also, those professors who had children in the system pulled back their

support when they could no longer be sure their own children would attend a community school. In the interviews, participants expressed their joy at seeing the current Clarke County School District (CCSD) leadership rebuilding those relationships.

Definitely, the memories of participants make it clear that context indeed matters. The memories they have revolve around the community incidents, the workplace environment, and the particular issues and struggles they faced. Collaboration of colleagues is what they relied on for learning and support, and they most appreciated the system leaders who were supportive rather than condescending. They support the notion that leaders with vision help a system go forward while those who use more random strategies hinder the work.

IV. Documents and Memories

Memories of principals are accurate to the reported events during the 1980s and 1990s. Participants remembered details very clearly, and the challenges and opportunities they faced are articulated with precision. Comparing responses to documents only uncovered minor differences where a person remembered an event as having occurred a year or two sooner than the records suggest. When principals could not remember receiving specific information, there was no record that there was any communication specific to principals.

The principals could not remember much training related to QBEA, and the only document that was located that could have been the communication from the state level was a summary brochure (Box RCB – 29813, Morrow, GA). Otherwise, their memories

of local changes reflect Board of Education policies adopted to match state requirements. System support personnel provided the information related to changes, and there were not always connections made to QBEA even though the changes they remember were included in the legislation. The state focus on improving the economy was not the local focus as much as how to help students and teachers through the changes.

While the CCSD had forward thinking administrators and committed system leadership, the state reform at times moved forward at a speed they were not able to handle. The local issues stemming from continued work to racially balance schools forty years after the *Brown* decision is indicative of the rate of change reformers should consider. When national or state decisions are made, the implementation of needed changes may take a long time to see through to reality in a local setting. Integration and service of special education students took years to work out in the local setting, partly because the state level took a number of years to accept the decisions. When those expectations trickle down to systems, the local interpretation and lack of training and support effect the implementation. The emphasis on QBEA was not immediate in the local system where they were still dealing with prior issues that could not be resolved quickly.

From the QBEA experience, communication could have been established as a state priority for future reforms. Principals had no direct information or communication, so they generated their own "big picture" of the intent of QBEA from the pieces passed to them to implement. The huge change in the funding structure, for example, was learned in the practical application of handling the weighted formula and the three enrollment reporting periods. Also, since standards were a new notion, teachers relied on what they

knew, so textbooks still drove instruction. Communication about how to develop instruction based on standards would have been helpful, and training before implementation could have increased the effectiveness of the required Quality Core Curriculum.

When comparing state level documents to local reports, one interesting tidbit was the portrayal of Governor Roy Barnes. While principals thought highly of Governor Joe Frank Harris and Dr. Charles McDaniel for their support of education in the improvement of curriculum, funding, and teacher quality, they did not credit Barnes with any of this. State documents show that it was Barnes who supported QBEA in the state senate, leading the effort to get the bill passed. It was obvious that Barnes and McDaniel had spoken about the bill and shared enthusiasm for it (Barnes, 1985), but principals were unaware of this. Principals also remember Governor Zell Miller as a friend to education for helping push through the PreK plan and for helping to increase teacher salaries. His push for the state lottery was viewed as supportive action by educators. Barnes, on the other hand, did not support teacher pay raises as he attempted to earn a second term as governor, and that memory became his legacy with school level administrators. His participation alongside the men respected by principals was noticed by others across the southeast but not recognized much within the state (M. Musick, personal communication, February 17, 2014). His personal communication was seen as condescending whereas Harris, Miller, and McDaniel were seen as supportive, and that made a difference to educators.

State leaders can learn from the memories of Clarke County principals. Communication style and interpersonal approach lead to either trust or mistrust among

constituents. Listening to educators about educational issues is important if professionals are to support reform efforts. Respect for decision makers increases the likelihood reforms will be supported in the local system or school. Before statewide decisions are made, it is helpful to know which local concerns are consuming the time of school level educators and to keep those in mind as new initiatives are passed along..

V. National Perspective and Implications

The United States paradigm that both holds hope for education, and at the same time undermines the future of public education, poses a dilemma for reform efforts. If the blame leads to increasing measures of accountability, and results of standardized tests fail to show the desired improvement, dismantling the public school system could be one consideration of how to solve the problem of education in America. That scenario could either lead to a more productive system made up of many different components controlled by various entities, or it could be a total failure. From a governance point of view, if national assessments do not show marked improvement, the country would be left with no clear party to blame and no real plan for the future. Reformers face an incredible challenge if a new American paradigm is necessary to accomplish recommended changes in the education system.

Countries experiencing educational success, like Finland, hold different paradigms. Andy Hargreaves offers insight from a study of the practices he observed there that explain the paradigm citizens hold there for their education system. On his May 31, 2014 post, he noted that the nation collectively values the public education

system and there is high status for teachers in that system. Teachers are chosen from the best higher education students, and they are highly trusted to make sound education decisions. That trust defines the accountability system, and the citizens do not ask for test scores to measure success. Within the realm of education, there is a culture of collaboration in curriculum development, and educators have support for developing solutions based on locally determined needs. Hargreaves contrasts that system to the United States policy development system based on market competition and standardization, and by comparison, identifies the American way as ineffective (andyhargreaves.weebly.com/blog).

The United States education reform cycle of moving a step toward centralization, measuring results, blaming schools, and repeating the cycle with a new layer of imposed regulations each time, heads public schools toward an unsatisfactory end where a Free Appropriate Public Education (FAPE) is no longer a consideration and certainly not a possibility (Sheldon & Biddle, 1998). Stephen Covey, in his book The 7 Habits of Highly Effective People, shares his research about how paradigms determine the future. Using a simple "See, Do, Get" model, he explains that the way people see things effects what they do, and what they do determines the results they get. Results do not change unless the vision is changed (Covey, 1989). To really change the direction of public education in America would require a switch in the paradigm that places all hope and blame for the nation's future on the school.

Reformers most certainly face a challenge if they want to tinker with the way the public school system operates. To break out of one paradigm and to create another would be the greatest challenge reformers ever faced. Up until now reformers, who think they

are suggesting radical changes, are still operating under the American paradigm of what school is and can do (Tyack & Cuban, 1995). They continue to operate under the assumption that more punishment and funding incentives will work if schools do "as they are told". This goes against what has been learned about the motivation to achieve (Kohn, 1994) and the personal experiences reported in interviews in this study. Support and encouragement as a means of tapping into problem solving and talent of educators could be modeled after other countries where this approach is reaping academic gains for students (Hargreaves & Fullan, 2013).

Reformers must examine their own paradigms about public education and consider the role they could play that would more likely bring the changes they want to make reality. Rather than continuing the attempts to fix American public education as a whole using rewards and sanctions, they could be the voice that announces triumphs in local settings where leaders and teachers try new solutions based on their own school demographics and data. Supporting innovation in local settings, providing resources schools identify as needed, promoting trust and respect for educators, providing reliable measures of learning, and celebrating schools where improvement is seen would be a new way to "Do" their work. First, though, they would have to "See" that educators hired in local contexts want to provide a good education for all students in their schools. Until they see it, the pattern of reform currently in place will not change.

Research about school climate that supports teacher excellence and student achievement endorses high expectations, shared priorities, administrative support, and collaboration as key factors that help schools improve (Black, 2010; Leithwood & Riehl, 2003). Participants in this case study endorse the same working conditions for system

improvement. Education reformers should consider climate within the local context when introducing innovations, and if needed, should build capacity within the local context before beginning any new implementation. Along with building the capacity, making sure any initiative is fully funded, providing specific training directly would increase the chance of positive outcomes. Building a relationship with educators so that they can trust the intentions of reform writers is important. As the case study results are considered, it is clear that when educators are respected and included in decision making, they are more likely to be committed to new ideas. When there is a sense that leadership is not committed to students, directives are not supported.

VI. Recommendations for Further Study

Because this study included only one system, it would be helpful to have further studies of other locations to compare the experiences. Across settings or across time, consideration of specific contexts would provide information to either confirm or challenge generalizations made from this study.

Some research has been conducted related to the paradigms around education in other countries, but more research related to local schools or systems within those countries would provide a different lens for considering how local context influences reform implementation. In countries with differing philosophies about judging success of schools, it would be interesting to see how practitioners would describe their experiences when changes are suggested.

There seem to be some repeating cycles within reforms such as passage of policies and laws that are not funded completely. Respected leadership seems to be

followed by less popular leadership as reported in the positive reports for some superintendents and governors and less favorable reports of others who were seen as hindering progress. Research related to characteristics of governors, state school superintendents, and local superintendents who are known for effectively supporting schools could offer insight into how to prepare people to serve in those positions.

A study of student achievement in school systems working on a collaborative leadership model could be compared to systems based on competition. The reports of participants in this study indicate they saw greater achievement gains because of increased attention to student needs when collaboration was the model. It would be informative to system leaders to know if there is data to support this belief.

In whatever research studies follow this one, hopefully the researchers will find as much joy in interviewing people as was possible in this study. The shared story is rich, and it sheds light on how administrators dealt with layers of mandates and unresolved issues before they faced new challenges. Their insight explains the status of Georgia schools dealing with equity and excellence issues and reminds policy makers that planning and patience must be considered when a change is suggested.

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