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August 25, 2009

Mr. Rick Sherrill, Interim Superintendent  
Burke County Schools  
700 East Parker Road  
Morganton, North Carolina 28680

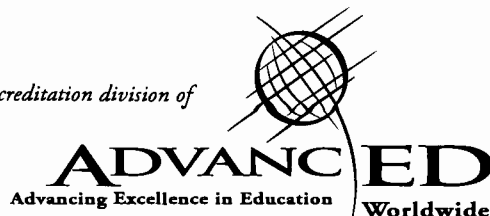
Dear Mr. Sherrill:

Enclosed is a copy of the report of the Special Review Team for the visit to the Burke County Schools on August 2-4, 2009. A copy of the report has been reviewed by the North Carolina Council on Accreditation and School Improvement of the Southern Association of Colleges and Schools (SACS CASI). Please note that it is the responsibility of school officials to share the contents of the report with the board of education and the community.

The findings and observations in the report indicate that there are significant challenges facing the Burke County Schools. The report recommends that the Burke County Board of Education fully address the recommendations outlined herein by May 1, 2010. To ensure progress is being made, the Special Review Team recommends that a follow-up visit be conducted no later than December 15, 2009 to assess the progress the Board has made in addressing the recommendations. A final review visit will be conducted prior to May 1, 2010.

Upon review of the report and the recommendation of the Special Review Team, the SACS North Carolina Council on Accreditation and School Improvement took action on August 24, 2009 on the Special Review Team's recommendation to place the high schools in Burke County on probation for violation of several standards for accreditation, including: Standard 1: Vision and Purpose; Standard 2, Governance and Leadership, and Standard 6: Stakeholder Communications and Relationships. The schools placed on probation include East Burke High School, Freedom High School, Jimmy C. Draughn High School, and Robert L. Patton High School.

*SACS CASI is an accreditation division of*



[www.advanc-ed.org](http://www.advanc-ed.org)

The accreditation standards found to be in violation are as follows:

**Standard 1: Vision and Purpose**

- 1.1: Establishes a vision for the district in collaboration with its stakeholders
- 1.2: Communicates the district's vision and purpose to build stakeholder understanding and support
- 1.6: Reviews its vision and purpose systematically and revises them when appropriate

**Standard 2: Governance and Leadership**

- 2.1: Establishes and communicates policies and procedures that provide for the effective operation of the district
- 2.2: Recognizes and preserves the executive, administrative, and leadership authority of the administrative heads of the district
- 2.3: Ensures compliance with applicable local, state and federal laws, standards, and regulations
- 2.4: Implements policies and procedures that provide for the orientation and training of the governing board
- 2.5: Builds public support, secures sufficient resources, and acts as stewards of the district's resources
- 2.9: Creates and supports collaborative networks of stakeholders to support system programs
- 2.11: Provides internal and external stakeholders meaningful roles in the decision making process that promote a culture of participation, responsibility, and ownership
- 2.12: Implements an evaluation system that provides for the professional growth for all

**Standard 6: Stakeholder Communications and Relationships.**

- 6.1: Fosters collaboration with community stakeholders to support student learning
- 6.2: Uses system-wide strategies to listen to and communicate with stakeholders
- 6.3: Solicits the knowledge and skills of stakeholders that enhance the work of the district
- 6.5: Provides information that is meaningful and useful to stakeholders

It is important that school officials begin to review and consider the findings and recommendations in the report. Additionally, it is the responsibility of the school system to identify and implement corrective action steps to address the recommendations and standard violations noted in the report. As such steps are implemented; school officials should ensure that appropriate evidence, including documentation, is maintained.

The intent of the enclosed report is to communicate recommendations that are designed to stimulate improvement throughout the school system. In addition, the accreditation standards serve as a guide to establishing and improving quality schools that promote and support student learning. As a school system, your schools and the community have made a commitment to meeting the standards for accreditation and a program of continuous improvement. We sincerely hope that the systemic problems impacting the schools shall be resolved and accreditation of the Burke County schools shall continue uninterrupted.

In closing, please contact us if you have any questions or concerns regarding the enclosed report.

Sincerely,

A handwritten signature in cursive script that reads "Donna James".

Donna James, Ed.D., Director, North Carolina SACS CASI

CC: Dr. Mark Elgart, President/CEO AdvancED  
Dr. Annette Bohling, Chief Accreditation Officer, AdvancED  
Dr. Sonna J. Lyda, Chair, North Carolina Council on Accreditation and School Improvement



**Report of the  
Special Review Team for  
Burke County Public Schools**

**Rick Sherrill**, Interim Superintendent  
**Tracy Norman**, Chair, Burke County Board of Education

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**Review Dates:  
August 2-4, 2009**

AdvancED is the parent organization of the North Central Association Commission on Accreditation and School Improvement (NCA CASI) Southern Association of Colleges and Schools Council on Accreditation and School Improvement (SACS CASI). NCA CASI and SACS CASI serve as accreditation divisions of AdvancED.

## About AdvancED and NCA CASI/SACS CASI

### Background

Founded in 1895, the North Central Association Commission on Accreditation and School Improvement (NCA CASI) and the Southern Association of Colleges and Schools Council on Accreditation and Schools (SACS CASI) accredit public and private schools and districts in 30 states, the Navajo Nation, Latin America, and the Department of Defense Schools worldwide.

In 2006, NCA CASI, SACS CASI, and the research and development arm of the accrediting associations, the National Study of School Evaluation, unified to form AdvancED. Dedicated to advancing excellence in education, AdvancED provides accreditation, research, and professional services to 27,000 schools and districts in 65 countries, serving 15 million students.

NCA CASI and SACS CASI serve as accreditation divisions of AdvancED. Through AdvancED, NCA CASI and SACS CASI have defined shared, research-based accreditation standards that cross state, regional, and national boundaries. Accompanying these standards is a unified accreditation process designed to help schools, school districts, and educational service agencies continuously improve.

### The Accreditation Process

To earn and maintain accreditation from SACS CASI, schools must:

- 1) **Meet the AdvancED Standards for Quality Schools.** Schools and their governing bodies must demonstrate adherence to the seven AdvancED standards that describe the quality practices and conditions that research and best practice indicate are necessary for schools to achieve quality student performance and organizational effectiveness.
- 2) **Engage in continuous improvement.** Schools and their governing bodies must implement a continuous improvement process that articulates the vision and purpose that the school district is pursuing (vision); maintains a rich and current description of students, their performance, school effectiveness, and the school community (profile); employs goals and interventions to improve student performance (plan); and documents and uses the results to inform what happens next (results).
- 3) **Demonstrate quality assurance through internal and external review.** Schools and their governing bodies must engage in a planned process of ongoing internal review and self-assessment. In addition, schools host an external quality assurance review team once every five years. The team evaluates the school's adherence to the AdvancED quality standards, assesses the efficacy of the school's improvement process and methods for quality assurance, and provides commendations and recommendations to help the school improve. The team provides an oral exit report to the school and a written report detailing the team's recommendations. The school acts on the team's recommendations and submits a progress report two years following the review.

SACS CASI accreditation engages the entire school community in a continuous process of self-evaluation and improvement. The overall aim is to help schools maximize student success and improve organizational effectiveness.

## **Introduction and Background**

### **Special Review Team and Burke County Schools**

Early in 2009 SACS CASI, an accreditation division of AdvancED, began receiving verbal, written, and electronic communications expressing concerns that the actions and behaviors of one or more of the Members of the Burke County Board of Education were in violation of AdvancED standards including but not limited to Standard 1, Vision and Purpose; Standard 2, Governance and Leadership; Standard 6, Stakeholder Communication and Relationships; and Standard 7, Commitment to Continuous Improvement.

As required by AdvancED policies and procedures, superintendents are notified about and asked to respond to any signed documents that contain allegations of standards violations. SACS CASI sent a letter requesting a response from the superintendent of Burke County Public Schools. Based on the information contained in the complaints and the superintendent's response, a Special Review Team was appointed by SACS CASI to make an on-site visit to the school district on August 2-4, 2009. The team's purpose in visiting Burke County Public Schools was to gather information and evidence needed to determine if the alleged actions and behaviors of the Members of the Burke County Board of Education are in violation of the AdvancED/SACS CASI Standards for Accreditation including but not limited to Standards 1, 2, 6, and 7.

The purpose of the Special Review Team was to:

1. Provide stakeholders the opportunity to supply information and evidence related to the stated concerns so that an informed decision could be made as to the validity and extent of the alleged violations relating to accreditation.
2. Evaluate the school board's and school district's adherence to AdvancED's Accreditation Standards and the impact on students, staff, parents, and community stakeholders.
3. Make recommendations, if necessary, that will require immediate and decisive corrective action.
4. Recommend to SACS CASI the appropriate standing relative to the accreditation status of the schools in the Burke County School System.

### **Activities of the Burke County Special Review Team**

During the on-site visit, the team conducted interviews with 6 board members; 16 central office administrators; 12 school-level administrators; 12 teachers; 2 parents; 13 business, civic, governmental and community members; 9 band and athletic booster club parent leaders; the board attorney; the interim superintendent; and the former superintendent. The team reviewed documentation and other evidence including but not limited to the following: board agendas and minutes, e-mails, letters, district policies, newspaper articles, petitions, video streams of board meetings and state statutes. The team engaged in professional deliberations to reach consensus on the schools' governing board's adherence to the standards for accreditation.

## **Findings of the Burke County Special Review Team**

Based upon the information collected and reviewed as described above, the Special Review Team found sufficient evidence to support that the actions and behaviors of one or more of the board members are not aligned with three or more of the AdvancED Standards for Accreditation, as well as accepted best practices of effective school boards.

The Team finds that the Burke County School Board is in violation of the following Standards and Indicators:

### **Standard 1: Vision and Purpose**

- 1.1: Establish a vision for the district in collaboration with its stakeholders
- 1.2: Communicates the district's vision and purpose to build stakeholder understanding and support
- 1.6: Reviews its vision and purpose systematically and revises them when appropriate

### **Standard 2: Governance and Leadership**

- 2.1: Establishes and communicates policies and procedures that provide for the effective operation of the district
- 2.2: Recognizes and preserves the executive, administrative, and leadership authority of the administrative head of the district
- 2.3: Ensures compliance with applicable local, state, and federal laws, standards, and regulations
- 2.4: Implements policies and procedures that provide for the orientation and training of the governing board
- 2.5: Builds public support, secures sufficient resources, and acts as a steward of the district's resources
- 2.9: Creates and supports collaborative networks of stakeholders to support system programs
- 2.11: Provides internal and external stakeholders meaningful roles in the decision-making process that promote a culture of participation, responsibility, and ownership
- 2.12: Implements an evaluation system that provides for the professional growth of all personnel

### **Standard 6: Stakeholder Communication and Relationships**

- 6.1: Fosters collaboration with community stakeholders to support student learning
- 6.2: Uses system-wide strategies to listen to and communicate with stakeholders
- 6.3: Solicits the knowledge and skills of stakeholders to enhance the work of the district
- 6.5: Provides information that is meaningful and useful to stakeholders

The evidence is overwhelming that staff at the district and school levels are in fear of their jobs, because of the behavior of one or more members of the Board. Board members have individually reviewed staff personnel records including but not limited to training records, leave records and transcripts. Staff recommendations were not acted on by the Board until the June board meeting, thus creating fear and apprehension about job futures. Fifty percent of the

central office administrators have departed, creating a situation where school administrators feel as if they must fend for themselves.

Interviews conducted by the Team revealed that the Board did not have an updated vision and mission. Board members, staff, parents, nor community members could share the vision of the district or state if one even existed. The recently written strategic plan was developed and approved without stakeholder input.

The Team reviewed the Board policy book and discovered that very few policies have been reviewed since 1991. Policies are being updated by a staff member without professional assistance and stakeholder input. The Board is allowing little to no public input into proposed policies and controlling the presentation of policies for a first reading by the Board in an apparent attempt to limit public discussion. There was no evidence of an Ethics policy. The Board was not following its own policies as demonstrated by the hiring of staff for positions that have not been posted or interviews conducted. Additionally the student transfer policy is being totally ignored as Board members are interviewing parents and students individually who are requesting transfers. One Board member had to be sanctioned for sending racial e-mails across the system e-mail. Although this sanction occurred on May 18, 2009, he has yet to fulfill the requirements of the sanction. These actions violate board and administrative policies and procedures. Interviews with staff revealed that Board members were bypassing administration and dealing with issues directly with staff, students, and parents.

The Board has become ineffective in conducting board meetings and maintaining respect and confidence with the parents, students, and community. As a result, the Sheriff and Police Chief have refused to provide security at board meetings and have voiced a “no confidence” stand with the Board.

The Chamber of Commerce has submitted a letter of grave concern for the actions of the Board and the negative impact their conduct is having on the business community and business recruitment. The Board of Commissioners have required the Board of Education to submit individual item requests for local tax dollars and are at a stalemate with the Board of Education over funding. The Board of Education has filed a lawsuit against the Board of Commissioners.

The Team reviewed the video streams of Board Meetings and interviewed stakeholders at all levels and found overwhelming evidence that the Board is not involving the stakeholders in the operations of the Board. The Board is even creating situations that prohibit stakeholder input. Attitudes and actions at Board meetings by members of the Board create a hostile environment. Meetings are scheduled at locations that do not provide for ample space for the public to attend and create an unsafe environment. Meetings are scheduled at times that make it very difficult for the public to attend.

All stakeholders interviewed stated they felt the Board had lost its focus on student learning and instead had brought the district to a standstill. By fighting with each other, the Board members have created an environment of chaos. Board members felt there was nothing they could or would do to settle the turmoil and chaos; they would just let the next election take care of things. The focus of the Board is clearly not on school improvement. Board members complained when they were not placed on the stage at public events. In response to the division within the community, principals changed the stage set up for graduation ceremonies. Students stated they would not shake the hands of Board members. Principals and teachers feel

they have to devote too much time to issues created by the Board Members and it is taking valuable time from students.

### **Recommendations of the August 2-4, 2009 Special Review Team**

It is the recommendation of the Special Review Team that the Burke County Schools be placed in the accreditation status of “**probation**” for the school year 2009-2010. The probation status provides the school district with an opportunity to correct the problems identified in this report before accreditation is revoked. The team further recommends that the Burke County Board of Education fully address the following expectations by May 1, 2010, at which time a Special Review Team shall conduct a follow-up visit to determine the future accreditation status of Burke County Schools. In the interim, a Review Team shall return to Burke County Schools no later than December 15, 2009 to assess the progress the Board has made on the following recommendations:

1. The Burke County Public School Board must establish and implement a collaborative process to involve stakeholder groups in the development and understanding of a system-wide vision and purpose to guide the continuous improvement process, allocation and alignment of resources, and daily actions of all members of the school community. Stakeholder groups must include school and district leadership, teachers, classified staff, parents, community and business leaders, students, civic and governmental leaders, ensuring representation of all demographic and geographical areas of Burke County.
2. The Burke County Board of Education must be able to validate that all actions and behaviors of board members are fully aligned with the official Board policies, and all applicable AdvancED Accreditation Standards.
3. The decorum of all board meetings must reflect the professionalism required of all those who are defining the quality of education for the community.
4. The Burke County Board of Education must develop and conduct an ongoing self-evaluation process using an approved, professionally developed instrument, to determine strengths and needs for growth of individual board members and the board as a body. Results are to be used to develop the professional development plan for the board.
5. The Burke County Board of Education and district leadership must develop and implement a plan for the professional development of all board members to include a timeline for deliberate and extensive training in the roles and responsibilities of the board, ethics, orientation of new board members, SACS CASI/AdvancED Standards, and parliamentary procedure.
6. The Burke County Board of Education must develop and implement a comprehensive process and timeline for the revision and communication of school district policies to review and update needed policies, garner understanding of the policies, their procedures, and the impact for the board and district leadership.
7. The Burke County Board of Education must develop, commit to, and individually sign an ethics policy and code of conduct that governs the actions, work, and behaviors of the board and staff, as well as appropriate steps when said policy is violated.
8. The Burke County Board of Education must engage in professional development for conflict resolution and team building communication skill development, engaging a professional mediator to establish productive communication and professional working relationships among board members, staff and community stakeholders.

9. The Burke County Board of Education must establish a written process and timeline to resolve issues and re-establish collaboration with governmental and civic entities in the county, i.e., law enforcement, the county commission, and chamber of commerce.
10. The Burke County Board of Education must expand the search for a new superintendent to include a process to gather and utilize significant stakeholder input into desired qualities, characteristics, and qualifications for the new superintendent, extending the search process to ensure national publication of the vacancy and to ensure quality applicants.
11. The Burke County Board of Education must ensure that all conditions of the censure of board member Hairfield are concluded within 30 days of the receipt of this report by the district.
12. The Burke County Board of Education must develop a written plan including a timeline for the provision of training board members in effective boardmanship. Continue to review and educate themselves on the policy changes, particularly in the area of board and superintendent/management team relations; in conjunction with this, develop and employ a written communication plan, which includes an implementation timeline for educating themselves, staff, and the public.

### **Closing Comments**

According to members of the Burke County community, the continuing accreditation of the schools in Burke County is highly regarded and a source of pride among the community and school district staff. However, continuing accreditation is in serious jeopardy, because the actions of Board members are in conflict with their own policies and AdvancED Accreditation Standards, and have resulted in the loss of respect and trust in the Board by the stakeholders of the school district. It is a fact that the current Board has not demonstrated its ability to provide positive and effective leadership in moving the system forward, and it is very evident that the current turmoil is having and will continue to have a detrimental impact on the quality of teaching and learning. Serving on the Board of Education is an admirable endeavor for those who seek to lead and support quality teaching and learning. Serving in this capacity is not the place to advance personal agendas, engage in petty politics, and impair the orderly process of conducting the business of the school district. Board members, who demonstrate behavior that create such disruptions, cause unnecessary injury to the work and reputation of the Board and school district, as well as untold harm to the learning process. Such behaviors breed fear, mistrust, confusion, and a lack of focus among school stakeholders.

During the process of the review, the Team had the pleasure to interact with a group of teachers and administrators dedicated to the students and the community. There was evidence that these individuals and hundreds like them are working diligently to create a vibrant learning environment in spite of the chaos created by the Board members. The Team met with community and civic leaders who are strongly committed to the school district and the students.

The schools belong to the community and it is time for the Board to listen to the expectations of the community and focus on school improvement or resign from their positions of trust.

## **Acting on the Report**

A copy of this report shall be sent to the superintendent within 30 days of the Team visit. The Burke County Schools are urged to use the Special Review Team report to guide its response to the findings and its improvement efforts. The district shall be held accountable for addressing the actions identified in this report. SACS CASI, and its parent organization, AdvancED, remains committed to the success of the Burke County schools and remains available to help guide the district in addressing the action steps stipulated herein.

## **Appendix**

### **Special Review Team Members**

**Dr. Davis Nelson, Chair**

**Dr. Cheryl Allread**

**Dr. Denise Jennings**

**Dr. Alvin White**