

## **Abstract**

CHASE, ALAN ANTHONY. Educational Policy Formation: The Closing and Unclosing of The Governor Morehead School for the Blind. (Under the direction of Lance Fusarelli).

The purpose of this study was to explore changes in educational policy in North Carolina as it relates to the operation and maintenance of special schools for students with visual impairments on the continuum of alternative placements. Specifically, this study sought to explore the factors that led up to the decision to close Governor Morehead School in 2011 and what factors led to reversal of that decision in 2012. The intent of this study was to guide school leaders and policymakers in future decision-making. A qualitative case study research design was employed for this study primarily consisting of interviews, observations and document analysis. Kingdon's Multiple Streams Model was utilized as a theoretical framework because it has showed promise as a method to explain how educational policy reaches the decision-making agenda (Shepley, Song, & Young, 2010).

Baxter, Gartin, Hart, Love, Marx, Nelson, and Whitby (2014), Caldwell, Franklin, and Waterman (2008) and Bina (1999) all noted that special education is not a physical location, but it is a set of services that are provided in a variety of settings. As such, a continuum of placement options could include a special school, such as a school for the blind. Bina (1999) also suggested that new revolving door policies at schools for the blind support movement along the continuum based on the needs of the student. Nationally, the least restrictive environment mandate and preference for regular education placement has resulted in an increased need for specialized schools for the blind (Bina, 1999). Today, the existence of schools for the blind are not substitutions for a public school education, rather they are a supplement and complement to traditional public school education (Bina, 1999).

The results of this study indicated that the issues of declining enrollment and accountability came to the forefront when a national recession persuaded lawmakers to reduce government expenditures. Previous reports to the General Assembly with concerns of under-utilization and maintenance along with recommendations for campus consolidations served as the basis for this proposed policy solution. Political forces within the state government were in transition during that time and interest groups had significant influence within the General Assembly. Ultimately, the call to reverse the directive to close one of the residential schools came from within the state government itself after feedback from policy entrepreneurs and an innovative compromise of leasing space on the Governor Morehead School campus was realized.

Based on the results of this study, school leaders and elected officials should consider a comprehensive realignment and establishment of all blindness related programs under the Governor Morehead School to support early intervention, outreach services, short term placements, professional development, and transition. Additionally, a comprehensive short-term placement program should be established that allows students with visual impairments to transition to and from Governor Morehead School as they acquire new skills. This will require Governor Morehead School to align its academic programs with that of the local public schools so that students can seamlessly transition to and from without loss of instruction. Further, school leaders should develop and strengthen partnerships with North Carolina Central University Visual Impairment Training Program, Wake County Public School System, and other blindness related entities in order to increase opportunities for professional development, offer educational programming to students with visual impairments enrolled in the Wake County Public School System, and promote more efficient

use of campus facilities. Finally, researchers should consider studying the academic and functional achievement of students with visual impairments in North Carolina public schools as well as at Governor Morehead School in order to compare findings and make recommendations on instructional and curriculum modifications.

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Educational Policy Formation: The Closing and Unclosing of The Governor Morehead  
School for the Blind

by  
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## **Dedication**

As I reflect upon my educational career thus far, there have been countless individuals who have inspired, guided, mentored, and supported me in my pursuits. Narrowing that list of individuals is almost as challenging as writing a dissertation. Each individual brought forth a unique and powerful influence, for which I am forever grateful. First, to my grandmothers Ellen Poye and Judy Chase, I dedicate this dissertation to you. You inspired me to be creative, innovative, and imaginative. Thanks for spending countless hours motivating me to achieve. Second, to my grandfather, Anthony Poye, I dedicate this dissertation to you. You guided me through many difficult decisions and offered advice that ultimately lead me to pursue a doctoral degree. Thanks for the many quality hours we spent together. Third, to Barbria Bacon, Kelly Davis, Mary Helen Walker, and Debbie Lowery Bullard, I dedicate this dissertation to you. Your mentorship helped me to develop the skills, confidence, and knowledge necessary to be a competent and effective school leader. Thanks for your trust in my abilities and potential. Fourth, to my parents, Sue Chase and Alan Chase, and my brother, Thomas Chase, I dedicate this dissertation to you. Your support for my education through advocacy, time, and perseverance are a testament to your love for me. Thank you for believing in me. Finally, I dedicate this dissertation to the alumni, faculty, staff, students, supporters, and future students of the Governor Morehead School for the Blind. Collectively, each of you is part of an exponentially growing family that started with the founding of the Governor Morehead School in 1845. Each of you represents determination, hope, and success for individuals with visual impairments throughout the United States.

## **Biography**

Alan Chase was born in Cincinnati, Ohio on March 14, 1986. He was born with a visual impairment known as Aniridia. His family moved to Sunset Beach, North Carolina shortly thereafter. Chase attended Union Elementary School and Shallotte Middle School as a child. He frequently obtained the honor roll for his academic achievement. At Shallotte Middle School, Chase was inducted into the National Junior Honor Society. Further, he participated in the Students Against Violence Everywhere (SAVE) club. As a child, Chase had interests in teaching, law, cycling, and the beach.

Upon entering high school at West Brunswick High School, Chase continued his academic excellence by enrolling in honors courses as a freshman. The summer following his freshman year, Chase had the opportunity to attend the Rehabilitation Center for the Blind on the campus of the Governor Morehead School for the Blind in Raleigh, North Carolina. This experience exposed him to assistive technology, Braille, self-advocacy skills, and independent living skills. At the start of his sophomore year at West Brunswick High School, Chase was questioned by his individualized education program (IEP) team about his post secondary education and employment goals. Chase indicated he wanted to attend college to become a school administrator and that he required instruction in Braille, orientation and mobility, and independent living skills in order to do so. The IEP team rejected Chases' requests. As a result, Chase requested that he be allowed to attend the Governor Morehead School for the Blind.

Chase went on to attend the Governor Morehead School and the University of North Carolina at Pembroke. While at the Governor Morehead School, Chase had the opportunity

to live in a dormitory with other visually impaired peers. He also served as president of the student government and gained work experience as an assistant to the school director and a professor at North Carolina Central University. These opportunities helped him to develop public speaking, leadership, and advocacy skills. It was these experiences that motivated Chase to pursue a career in which he could advocate on behalf of those with visual impairments and ensure they had access to a quality education. Collectively, these experiences positioned Chase to successfully transition to higher education at the University of North Carolina at Pembroke. Chase continued to develop his leadership, advocacy, and public speaking skills while at the university. He served as vice president and president of the Disabled Student Organization and was inducted into Delta Sigma Omicron. Additionally, he served as a senator for the student government and a reporter for the school newspaper. Chase earned the Carla Jones Student of the Year Award twice while at the university and the Outstanding Leadership and Service award too. He also contributed to the university community by serving as an orientation leader and peer educator for incoming and rising sophomores. Finally, Chase led the creation of the endowed Braves Disabled Student Scholarship for upperclassmen students with disabilities at the university.

After graduating from the University of North Carolina at Pembroke, Chase continued his organizational leadership by joining the North Carolina Association of Blind Students. He served the organization as president and treasurer for a number of years and developed new programs to engage students with visual impairments throughout the state. Further, he joined the Wake Federation of the Blind and served that organization as a treasurer and member of the Board of Directors. Later, the National Federation of the Blind

awarded Chase a national scholarship. During this same period of time, Chase began working for the Wake County Public School System as a special education teacher. He taught students in kindergarten to fifth grade reading, writing, math, social skills, and organizational strategies. He earned the “Star Staff Member of the Week” recognition twice during his tenure. At the same time, Chase recognized a need in the area of post secondary transition because data suggested students with visual impairments attended college at the same rate as nondisabled peers, but that they did not graduate at the same rate. As a result, he founded the Envisioning Youth Empowerment Retreat as a summer camp to teach youth with visual impairments college success strategies. Also, during this time, Chase began taking classes at North Carolina State University to earn a master’s degree in special education. He graduated in 2012 and immediately began taking classes toward a doctorate in educational administration and supervision.

Aside from his graduate work and teaching, Chase had a number of interests. He began to attend an annual surf camp for the visually impaired sponsored by Indo Jax Surf School in Wrightsville, North Carolina. Additionally, Chase began to embrace his love for travel. He traveled to Las Vegas, New York City, Orlando, and Philadelphia on more than one occasion. He also traveled to London, Paris, and Rome. Further, Chase enjoyed cycling, both as a form of exercise and as a means of transportation. Finally, he began playing a sport called Goalball each week. This sport is specially designed for those with visual impairments.

After four years of teaching special education, Chase transitioned to Durham Public Schools as an exceptional children program facilitator. In this role, he mentored teachers,

oversaw IEP compliance, supported instructional programming, and led professional learning communities. Additionally, Chase became more active in supporting the Governor Morehead School and sought learning opportunities to position himself to become a leader in the field of visual impairments. Specifically, he began serving on the planning committee of the North Carolina Conference on Visual Impairment and Blindness and later served for two years as the chairperson of the committee. Also, he began presenting at conferences on a variety of topics related to visual impairments, advocacy, and college transition. These experiences helped Chase to develop a professional reputation as an expert in the field of visual impairments and a strong supporter of continued professional development for those working in the field. Specifically related to education, he began serving on the Governor Morehead School Human Rights Committee and Parent Teacher Association. In addition, he served on the Board of Directors of the Governor Morehead School Alumni Association for nearly ten years in various capacities. All of these commitments gave Chase a better understanding of the challenges faced by residential schools and the strategies that were being implemented to address them. Finally, he continued his work to address areas of need within the blindness community by developing a Goalball team to support recreation, socialization, and networking among youth with visual impairments and their families. Overall, Chase has demonstrated a commitment to the profession of visual impairments and a desire to improve the educational outcomes for students with visual impairments, while always making time to enjoy the beach, surfing, and travel opportunities.

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## Table of Contents

|  |      |
|--|------|
| List of Tables .....                                   | xiii |
| Chapter One .....                                      | 1    |
| Introduction.....                                      | 1    |
| Background of the Study .....                          | 1    |
| Statement of the Problem .....                         | 7    |
| Purpose of the Study .....                             | 10   |
| Significance of the Study .....                        | 10   |
| Overview of the Methodical Approach .....              | 15   |
| Organization of the Study .....                        | 17   |
| Chapter Two.....                                       | 19   |
| Literature Review .....                                | 19   |
| Introduction.....                                      | 19   |
| The Battle for Inclusion .....                         | 19   |
| Landmark Cases.....                                    | 21   |
| Case Law .....   | 25   |
| The Changing Landscape for Schools for the Blind ..... | 30   |
| A New Era for Schools for the Blind .....              | 32   |
| The Continuum of Placements .....                      | 33   |
| Selecting the Right Placement.....                     | 34   |
| A Political Issue .....                                | 37   |
| Kingdon’s Multiple Streams Theory.....                 | 39   |
| Summary .....  | 46   |
| Chapter Three.....                                     | 47   |
| Methodology .....                                      | 47   |
| Introduction.....                                      | 47   |
| Methodological Approach .....                          | 47   |
| Research Questions .....                               | 49   |
| Site Selection and Sample Criteria .....               | 49   |
| Data Collection .....                                  | 51   |
| Data Analysis .....                                    | 53   |
| Research Validity and Reliability .....                | 54   |
| Subjectivity Statement .....                           | 57   |
| Limitations of the Study .....                         | 58   |
| Summary .....  | 59   |
| Chapter Four.....                                      | 60   |
| Results .....  | 60   |
| Introduction.....                                      | 60   |
| Participant Interviews .....                           | 62   |
| Problem Stream.....                                    | 64   |
| Accountability .....                                   | 64   |
| Budget Reductions .....                                | 66   |

|  |     |
|--|-----|
| <b>Decreased Enrollment</b> .....  | 66  |
| <b>Federal Law</b> .....   | 68  |
| <b>Increased Operating Costs</b> .....   | 69  |
| <b>Maintenance</b> .....   | 70  |
| <b>Under-utilization</b> .....   | 71  |
| <b>Policy Stream</b> .....   | 72  |
| <b>A Compromise</b> .....  | 72  |
| <b>Consolidation</b> .....   | 74  |
| <b>Generating Revenue and the Local Economy</b> .....  | 74  |
| <b>Maintaining the <i>Status Quo</i></b> .....   | 75  |
| <b>Specialized Services</b> .....  | 76  |
| <b>Transferring Oversight from the Department of Health and Human<br/>    Services<br/>    to the Department of Public Instruction</b> ..... | 77  |
| <b>Political Stream</b> .....  | 78  |
| <b>Advocacy Groups</b> .....   | 78  |
| <b>Changing Political Parties</b> .....  | 79  |
| <b>Department of Public Instruction</b> .....  | 79  |
| <b>Emotions</b> .....  | 80  |
| <b>Legislators</b> .....   | 81  |
| <b>Parents</b> .....   | 81  |
| <b>Students and Alumni</b> .....   | 82  |
| <b>Special Education Law</b> .....   | 83  |
| <b>Teachers and Administrators</b> .....   | 83  |
| <b>Document Reviews</b> .....  | 84  |
| <b>Problem Stream</b> .....  | 87  |
| <b>Accountability</b> .....  | 87  |
| <b>Budget Reductions</b> .....   | 88  |
| <b>Decreased Enrollment</b> .....  | 89  |
| <b>Federal Laws</b> .....  | 90  |
| <b>Increased Operating Costs</b> .....   | 90  |
| <b>Maintenance</b> .....   | 91  |
| <b>Under-utilization</b> .....   | 92  |
| <b>Policy Stream</b> .....   | 93  |
| <b>A Compromise</b> .....  | 93  |
| <b>Consolidation</b> .....   | 94  |
| <b>Generating Revenue and the Local Economy</b> .....  | 97  |
| <b>Maintaining the <i>Status Quo</i></b> .....   | 98  |
| <b>Specialized Services</b> .....  | 98  |
| <b>Transferring Oversight from the Department of Health and Human<br/>    Services to the Department of Public Instruction</b> .....         | 100 |
| <b>Political Stream</b> .....  | 100 |
| <b>Advocacy Groups</b> .....   | 101 |

|   |     |
|---|-----|
| <b>Changing Political Parties</b> .....                                     | 102 |
| <b>Department of Public Instruction</b> .....                               | 102 |
| <b>Emotions</b> .....   | 103 |
| <b>Legislators</b> .....  | 104 |
| <b>Parents</b> .....  | 105 |
| <b>Students and Alumni</b> .....  | 105 |
| <b>Special Education Law</b> .....  | 106 |
| <b>Teachers and Administrators</b> .....                                    | 107 |
| <b>Observation</b> .....  | 107 |
| <b>Accountability</b> .....   | 108 |
| <b>Budget Reductions</b> .....  | 109 |
| <b>Decreased Enrollment</b> .....   | 109 |
| <b>Federal Law</b> .....  | 110 |
| <b>Increased Operating Costs</b> .....                                      | 111 |
| <b>Maintenance</b> .....  | 111 |
| <b>Under-utilization</b> .....  | 112 |
| <b>A Compromise</b> .....   | 114 |
| <b>Generating Revenue and the Local Economy</b> .....                       | 115 |
| <b>Maintaining the <i>Status Quo</i></b> .....                              | 115 |
| <b>Specialized Services</b> .....   | 116 |
| <b>Administrators, Advocacy Groups, Alumni, Parents, and Teachers</b> ..... | 117 |
| <b>Summary</b> .....  | 117 |
| <b>Chapter Five</b> .....   | 119 |
| <b>Discussion</b> .....   | 119 |
| <b>Summary of Major Findings</b> .....                                      | 119 |
| <b>Discussion</b> .....   | 122 |
| <b>Implications for Policy</b> .....  | 126 |
| <b>Implications for Research</b> .....                                      | 131 |
| <b>Conclusion</b> .....   | 133 |
| <b>References</b> .....   | 135 |
| <b>Appendixes</b> .....   | 141 |
| Appendix A: Interview Questions.....  | 142 |
| Appendix B: Recruitment Letter .....  | 143 |
| Appendix C: Participant Consent.....  | 144 |

## **List of Tables**

|   |    |
|---|----|
| Table 4.1: <i>Kingdon's Multiple Streams: Interview Responses by Frequency of Mention</i> ..... | 61 |
| Table 4.2: <i>Kingdon's Multiple Streams: Document Analysis by Frequency of Mention</i> .....   | 85 |

## **Chapter One**

### **Introduction**

#### **Background of the Study**

North Carolina has a rich history of providing a public education for its citizens. North Carolina was the first state in the nation to educate African American students who were blind or deaf and was ninth in the nation to establish a school for the blind (Department of Public Instruction, 2011). However, the treatment of blind and deaf students prior to a 1970 revision to the state Constitution focused on charity verses a constitutional right to education (Caldwell et al., 2008). In 1975, the United States Congress passed Public Law 94-142, which was formally named the Education of All Handicapped Children Act and later renamed the Individuals with Disabilities Education Act (IDEA) (Hoppey, Landers, McLeskey, & Williamson, 2012; Scott, 2009). This legislation provided for systematic identification, assessment, and education of students with disabilities (Scott, 2009).

Specifically, the law required that a continuum of alternative placements, including special schools, be considered for all students with disabilities (Anderson, et al., 2010; Rapport & Thomas, 1998; Smith & Wild, 2006). These placement decisions must be considered on an individual basis for each student based on their unique needs (Smith & Wild, 2006; Anderson, Brown, Gallegos, Green, & Walsh, 2010). The Office of Special Education (2014) mandated that each state, including North Carolina, must comply with provisions of this legislation in order to receive federal funding for students with disabilities.

In the United States, education is primarily a function of state and local government entities (Ruby, 2008; United States Department of Education, 2005). These entities establish

schools, develop curricula, and identify enrollment and graduation criteria (United States Department of Education, 2005). Funding for education is also primarily a role of state and local governments. As of 2012, the United States Department of Education (2005a) reported that nationwide about 88% of funding for elementary and secondary schools came from non-federal sources. In terms of funding for students with disabilities, grants under IDEA are provided to states from the federal government to help cover the excess costs of educating students with disabilities (New America Education, 2014). Since its enactment of Public Law 94-142, the federal government has never fully funded the legislation and as of 2014 it only funds about 18% of the excess cost of educating students with disabilities (New America Education, 2014). It is estimated that only about 9% of funding for special education comes from the federal government (New American Education, 2014). This concept of state and local control over education means that lawmakers and other stakeholders at those levels have significant impact on educational policy decisions, both directly and indirectly.

Prior to 1965, the State of North Carolina operated three special residential schools for students who were blind or deaf (Commission on Schools for the Blind and Deaf, Sanatorium System and Related Institutions of Declining Use, 1970). The Governor Morehead School consisted of two campuses in Raleigh, North Carolina, one on Ashe Avenue serving Caucasian blind students only and another campus on Garner Road serving African American blind and deaf students. The North Carolina School for the Deaf served deaf students only. In 1961, citing overcrowding at the North Carolina School for the Deaf, the North Carolina General Assembly allocated funds to establish a school for the deaf in

eastern North Carolina, which would later become the Eastern North Carolina School for the Deaf (North Carolina School for the Deaf Board of Directors, 1966). This school officially opened in 1965.

In 1969, the North Carolina General Assembly created the Commission on Schools for the Blind and Deaf, Sanatorium System and Related Institutions of Declining Use to, among other tasks, study proposals to consolidate Governor Morehead School onto only the Ashe Avenue campus and to establish a new school for the deaf in the piedmont region (A Joint Resolution Creating a Commission to Study and Report on the Operation and Needs of North Carolina Schools for the Blind and Deaf, the North Carolina Sanatorium System, and Related Institutions of Declining Use of 1969). A 1970 report to the General Assembly from the Commission on Schools for the Blind and Deaf, Sanatorium System and Related Institutions of Declining Use (1970) indicated that the Commission favored consolidating Governor Morehead School onto the Garner Road campus as opposed to the Ashe Avenue campus. Further, the Commission favored the establishment of a school for the deaf in Greensboro, High Point, or Winston-Salem. Following that, in 1971, the General Assembly acted on this report by establishing the Central North Carolina School for the Deaf. The legislature cited a recommendation by the North Carolina School for the Deaf Board of Directors, that increased opportunities for students to spend weekends at home with their families by having regional schools, cost savings by having more day students and fewer weekend stays by students, and increased enrollment at the North Carolina School for the Deaf as reasons for creating a third campus (An Act to Incorporate and Establish the Center North Carolina School for the Deaf of 1971).

Additionally, in 1973, the General Assembly passed legislation directing the consolidation of Governor Morehead School onto the Ashe Avenue campus no later than July 1, 1977 (An Act to Consolidate the two Campuses of The Governor Morehead School into the Ashe Avenue, Raleigh, North Carolina, Campus of 1973). The legislature cited a recommendation by the Governor Morehead School Board of Directors, that reduced operating costs in excess of \$275,000 and increased advantages to the students attending the school as the rationale for its campus selection.

A report by Marwick (1992) to the North Carolina General Assembly recommended closure of the Central North Carolina School for the Deaf in 1992. The report cited decreased enrollment at the schools for the deaf, increased operating costs, and legal mandates that students with disabilities be educated in the least restrictive environment as reasons for the proposed closure. However, the report also indicated that the recommendation was not new and that strong opposition from the deaf community was present (Marwick, 1992). The recommendation was formally carried out in 2001 when the legislature passed legislation closing the Central North Carolina School for the Deaf (An Act to Make Changes to the Operation and Structure of the Schools for the Deaf, to Require Further Study into the Organization of the Schools for the Deaf, and to Appropriation funds for these Purposes of 2001). However, the legislation also introduced new changes for both the remaining schools for the deaf and Governor Morehead School. The legislation clarified that the schools for the deaf are available to students who are deaf for which the Individualized Education Program (IEP) team determined that option would be the least restrictive environment if the Local Education Agency (LEA) could not provide an

appropriate education. Finally, the legislation created the Office of Education Services (OES) within the Department of Health and Human Services to provide management of the schools and it required that all of the schools participate in the North Carolina ABCs accountability program for student performance (An Act to Make Changes to the Operation and Structure of the Schools for the Deaf, to Require Further Study into the Organization of the Schools for the Deaf, and to Appropriation funds for these Purposes of 2011).

In 2009, the subcommittee for Health and Human Services proposed the closure of Governor Morehead School (Office of Education Services/Funds Transfer and Consolidation of Schools of 2009). The proposal directed the Office of Education Services to cease enrollment at the school starting with the 2009-2010 school year and to develop a plan for transition of the students to the Eastern North Carolina School for the Deaf and the North Carolina School for the Deaf. Ultimately, the proposal failed, but the approved 2009-2010 budget contained a provision that directed the Office of Education Services to study efficiency and educational services among all three schools (Cansler & Pearson, 2010). The report from the Office of Education Services provided four options for consolidation of the three residential schools. These options included two residential campuses, one residential campus, or enhanced services at the existing three campuses (Cansler & Pearson, 2010). Following that, in 2010, as part of the broader state budget, the legislature included a provision that dissolved the Office of Education Services and transferred oversight of the three schools to the Department of Public Instruction (An Act to Modify the Current Operations and Capital Improvements Appropriations Act of 2009 of 2010). The General Assembly cited the need for increased student performance as the reason for the transfer.

Next, in 2011, the legislature passed a provision as part of the state budget that called for the closure of one of the residential schools (An Act to Spur the Creation of Private Sector Jobs; Reorganize and Reform State Government; Make Base Budget Appropriations for Current Operations of State Departments and Institutions; and to Enact Budget Related Amendments of 2011). Again, the legislature provided a purpose statement for this action finding that the schools no longer served the student population they were established to teach. The Department of Public Instruction (2011) hosted three public forums and an online survey to gather public input. Ultimately, a Department of Public Instruction (2011) committee determined that Governor Morehead School was to be the campus to close. Interestingly, the recommendation of the committee sought to comply with the law, while at the same time circumvent it. The recommendation called for closing Governor Morehead School by eliminating its name and combining its programs with that of the Eastern North Carolina School for the Deaf, but allowing the students to physically remain on its Ashe Avenue campus. In early 2012, Superintendent Anthony Tata of the Wake County Public School System approached the Joint Education Oversight Committee of the North Carolina General Assembly about leasing part of Governor Morehead School campus for the Wake Young Women's Leadership Academy (WRAL, 2012). WRAL (2012) reported that Dr. June Atkinson, Superintendent of North Carolina Public Schools, indicated that the leasing of the campus generated the revenue that the legislature had been seeking and addressed the concern of underutilization of parts of the campus.

The original legislation calling for a closure of one of the residential schools was later repealed by the legislature in late 2012 (An Act to Modify the Current Operations and

Capital Improvements Appropriations Act of 2011 and for Other Purposes of 2012).

However, additional provisions were added that required specialized school improvement plans be developed for each of the schools with emphasis on student achievement, parent involvement, school safety, and instructional strategies. This legislation as well as subsequent legislation addressing the state budget specifically prohibited the Department of Public Instruction from reducing the budgets of the residential schools as a way to absorb broader educational spending reductions in the state budget (An Act to Modify the Current Operations and Capital Improvements Appropriations Act of 2011 and for Other Purposes of 2012).

### **Statement of the Problem**

The educational policy of the State of North Carolina shifted in 2011 to indicate that the state should not maintain an independent special school to educate students with visual impairments, but this policy statement was later reversed in 2012. The Governor Morehead School opened in 1845 in downtown Raleigh and moved to its Ashe Avenue campus in 1923 (The Governor Morehead School, 2014). In 1977, the legislature consolidated the two campuses of Governor Morehead School onto its Ashe Avenue campus. In 2010, the legislature proposed closing Governor Morehead School and consolidating its program with that of an existing school for the deaf within the state. In 2011, a committee of stakeholders from all the residential schools and Department of Public Instruction decided to close Governor Morehead School and to consolidate its programming with that of the Eastern North Carolina School for the Deaf. However, after leasing of parts of the campus to the

Wake County Public School System, the legislature repealed its legislation that prompted the decision to close Governor Morehead School.

The State of North Carolina is not the only state that has recently discussed the continued maintenance of special schools for those who are blind or deaf. Dailypress.com (2008) reported that the Virginia General Assembly voted to close the Virginia School for the Deaf, Blind, and Multi-Disabled in Hampton and to consolidate its programs with that of the Virginia School for the Deaf and Blind in Staunton. Declining student enrollment and increased savings for the state were noted as reasons for the consolidation. The debate over school consolidation began in the State of Virginia with a 1983 report that recommended consolidation (The Virginia Schools for the Deaf and the Blind Consolidation Task Force, 2003). This was followed by a 1985 report making the same recommendation. However, a 1989 and 1991 report recommended maintaining both campuses, but distinguishing them with unique programs at each site (The Virginia Schools for the Deaf and the Blind Consolidation Task Force, 2003). Despite this, in 1991, the Virginia Board of Education voted to close the Hampton campus by 1994. This decision was later blocked by the Virginia General Assembly.

Further, the State of Oregon closed its school for the blind entirely in 2009 citing decreased enrollment and increased cost per student expenses (Relating to the Oregon School for the Blind; creating new provisions; amending ORS 179.210, 179.460, 238.350, 240.205, 240.240, 326.543, 326.603, 327.023, 339.370, 339.877, 343.236, 343.239, 346.010, 346.015, 346.017, 346.019, 346.020, 346.030, 346.041, 346.047, 346.055, 346.080 and 656.135; repealing ORS 346.097, 346.099, 346.101 and 346.104 and section 53, chapter 858, Oregon

Laws 2007; appropriating money; limiting expenditures; and declaring an emergency of 2009). The Oregon legislature created a special fund to ensure students who returned to their local schools would have necessary supports. The legislature also mandated that the property occupied by the Oregon School for the Blind be sold and that proceeds from that sale be placed in a special fund to educate students with visual impairments.

The Council of Schools for the Blind (COSB), which is a consortium of schools for the blind from the United States and Canada, indicated in a 2010 position paper that many legislatures were considering restricting or closing schools for the blind due to the economic downturn in the economy and they strongly opposed any such moves (Council of Schools for the Blind, 2010). It was noted that the United States Department of Education had reported that some students with visual impairments have been inappropriately placed in regular education classes when the provisions of their Individualized Education Plans (IEP) could not be reasonably implemented in that setting. Additionally, it was noted that federal law requires that special schools be available on the continuum of alternative placements for students with visual impairments (Anderson et al., 2010; Council of Schools for the Blind, 2010; Rapport & Thomas, 1998; Smith & Wild, 2006). The Council of Schools for the Blind supports the use of a full continuum of placements and services, including special schools, outreach programs, separate classes, and regular classes and they acknowledge that student placements may change throughout their educational careers (Council of Schools for the Blind, 2010). As a result, this problem appears to be a matter of importance outside of North Carolina as well.

## **Purpose of the Study**

The purpose of this study was to explore changes in educational policy in North Carolina as it related to the operation and maintenance of special schools for students with visual impairments on the continuum of alternative placements. Specifically, this study sought to explore the factors that led up to the decision to close Governor Morehead School in 2011 and what factors led to reversal of that decision in 2012. Additionally, this study sought to explore future policy implications and directions for the State of North Carolina in terms of the maintenance of specialized schools for students with visual impairments. The research questions for this study included:

1. How did the proposal to close Governor Morehead School come to the attention of lawmakers?
2. Besides school closure, what other policy solutions were considered by lawmakers for Governor Morehead School?
3. How did the Department of Public Instruction determine that Governor Morehead School would be the campus to be closed?
4. What occurred following the school closure decision that prompted a reversal by lawmakers?

## **Significance of the Study**

This study is significant in that legal mandates, increased government spending, shifting student demographics and efficiency all are major factors in the policy discussion. The Individuals with Disabilities Education Act requires that a continuum of alternative placements be provided, including special schools (Anderson et al., 2010; Council of Schools

for the Blind, 2010; Rapport & Thomas, 1998; Smith & Wild, 2006). Further, the aforementioned law requires that students be educated in the least restrictive environment (LRE). This is defined in federal regulations as:

to the maximum extent appropriate, children with disabilities shall be educated with children who are not disabled, and special classes, separate schooling, or other removal of children with disabilities from the regular educational environment occurs only when the nature of the disability is such that education in the regular classes with the use of supplementary aids and services cannot be achieved satisfactorily.

(Rapport & Thomas, 1998).

The Office of Special Education Programs (2014) mandated that in order for the State of North Carolina to receive federal funding under this legislation it must comply with this provision as well as other provisions of the law. The United States Department of Education (2014) reported that in 2013 the State of North Carolina reported that 596 students with visual impairments were educated in all settings. In particular, 426 students with visual impairments were reported to be educated in a regular classroom for more than 80% of the school day, 94 were educated in a regular classroom between 40% and 79% of the school day, and 46 were educated in a regular classroom for less than 40% of the school day. Twenty-seven students with visual impairments were in a special school setting, two were parentally placed in a private school, and one received homebound instruction.

On the other hand, the United States Department of Education (1995) reported that in 1993 there were a total of 611 students with visual impairments educated in North Carolina. Of those, 367 were educated in a regular classroom more than 80% of the school day, 126

were educated in a regular class for 40% to 79% of the school day, and 45 were educated in a regular classroom for less than 40% of the school day. Seventy-two were educated at a special school and two were given homebound instruction. In comparison, these statistics look much different in that the regular classroom placement for 80% or more of the school day is lower in 1993 than in 2013, while the other more restrictive placements all are higher in 1993 than in 2013.

Generally, in 2003, this same trend continues, with the exception of regular classroom placement for less than 40% of the school day. The United States Department of Education (2005b) reported that in 2003 North Carolina reported 624 students with visual impairments in all settings. Of those, 403 were educated in a regular class for 80% or more of the school day, 106 were educated in a regular class for 40% to 79% of the school day, and 56 were educated in a regular class less than 40% of the school day. Forty-eight students with visual impairments attended a special school and one attended a private school.

In 1965, the student enrollment at Governor Morehead School was 439, but by 1970 this had decreased to 362 students (Commission on Schools for the Blind and Deaf, Sanatorium System and Related Institutions of Declining Use, 1970). Interestingly, despite this trend, a 1970 report to the General Assembly estimated that enrollment at the school would increase and by the year 2000 it would have 560 students (Commission on Schools for the Blind and Deaf, Sanatorium System and Related Institutions of Declining Use, 1970). However, in reality, Cansler and Pearson (2010) reported that the enrollment at the school in 2000 was 69. After 2001, the school observed a general overall increase in enrollment with

the peak being 83 students in 2008 (Cansler & Pearson, 2010). However, since 2008, enrollment has steadily declined again and as of 2017 the enrollment was at 51.

It must be noted that the enrollment of students at Governor Morehead School and the number of students with visual impairments educated in a special school setting do not align. The most logical explanation for this discrepancy is that some of the students enrolled at the school are identified under other disabilities categories. The Individuals with Disabilities Education Act sets forth 14 disability categories. It is possible for a student to be identified as having both a primary and secondary disability. Further, it is possible a student could be labeled as having multiple disabilities, which is a category of its own. The possibility of Governor Morehead School students having more than one disability identification is exemplified from data spanning 1999 to 2009 that indicated the school graduated 39 students with a high school diploma as opposed to 59 students with a certificate (Cansler & Pearson, 2010). Furthermore, Caldwell et al. (2008) reported that in January 2008, 14 students enrolled at Governor Morehead School had disability identifications other than visual impairment. At that time, the total student enrollment was 76.

During the 2008-2009 school year, Governor Morehead School students performed at a lower proficiency rate on End of Grade tests in both reading and math when compared to other students with visual impairments who were attending local public schools in North Carolina (Cansler & Pearson, 2010). For example, on the End of Grade test of reading, Governor Morehead School students earned a proficiency rate of 25%, while students with visual impairments elsewhere in North Carolina earned a proficiency rate of 62%. Furthermore, on the End of Grade test of math, Governor Morehead School students earned a

proficiency rate of 17%, while students with visual impairments attending local public schools earned a proficiency rate of 71%. This data supports the enrollment statistics presented previously because it is likely that students attending Governor Morehead School with multiple disabilities would not perform to the extent that their peers with only a visual impairment would on standardized assessments. However, assessment data from Governor Morehead School must be interpreted with caution because of the same sample size.

In 2009, the postsecondary outcome data for the three residential schools in North Carolina presented areas for improvement in terms of preparing students to obtain employment and further their education. For example, in 2009, a total of 16 students graduated from the three residential schools. Of those, zero were gainfully employed and six were identified as being unemployed. However, five of the graduates were enrolled in a two-year community college program, while two were enrolled in a four-year university program. One graduate was participating in a job training program. This data supports the enrollment statistics presented previously because it illustrates that most students at the residential schools are steered toward pathways that lead to certificates as opposed to high school diplomas. Finally, this data on postsecondary outcomes supports assessment data presented previously because it demonstrates that students at the residential schools are not academically prepared for higher education beyond high school.

In terms of government funding, in 1971, the State of North Carolina allocated \$1,801,592 for operation and maintenance of Governor Morehead School. In constant dollars, this is equal to 4.8 million in 2010. In 2001, Cansler & Pearson (2010) reported the operational cost had increased to \$6,398,983. In 2009, the cost to operate the school rose

slightly again to \$6,560,490 (Cansler & Pearson, 2010). However, in 2010, the Department of Public Instruction (2010) reported it decreased to \$5,523,830. More specifically, the cost per student has varied from year to year, but ranged from \$86,759 to \$117,528 during the period from 2001 to 2010 (Cansler & Pearson, 2010; Department of Public Instruction, 2010). Finally, associated with this issue is the underutilization of the campus. The Department of Public Instruction (2010) reported that in 2010, 21 of the 28 buildings on the campus were utilized by Governor Morehead School. At the time of the report, only 36 students resided on campus in dormitories, but the maximum capacity of the dormitories and cafeteria are over 200. Also, office and classroom space was not allocated in the most efficient manner to maximize space and usage. Overall, the Governor Morehead School campus was significantly underutilized at the time.

### **Overview of the Methodological Approach**

A qualitative case study research design was employed for this study primarily consisting of interviews, observations and document analysis. Consistent with the purpose of qualitative research, the goal of this study was to examine and explore the factors that led to the closure of Governor Morehead School as an independent special school and the subsequent reversal of that decision on the policy agenda. Inherent in qualitative research is the subjective search for meaning making. To this end, this study aimed to solicit the views of individuals in the North Carolina General Assembly and North Carolina Department of Public Instruction to help explain the policy trajectory in North Carolina related to special schools for students with visual impairments.

This study employed purposeful sampling in order to access individuals who had some relation to or experience with the discussions and decisions that prompted the school closure and its subsequent reversal. In order to access a variety of individuals, this study sampled a state legislator, a grandparent of a former Governor Morehead School student, and Department of Public Instruction staff. Participants were initially contacted by email or by phone in cases where the researcher knew the participant in order to ask permission to conduct the interviews. A consent form, letter of introduction, and copy of the interview questions were emailed to the participants before the interview to give them some details about the study.

A standard open-ended structured interview was used based on the interview protocol developed by Kingdon (2011). The interviews were conducted in person and audiotaped for transcription purposes. Two audio recorders were used in case one fails. In order to ensure anonymity, participant names were replaced with pseudonyms during the transcription. The digital audio files as well as the transcriptions were stored on secure computers. Once the interviews are transcribed, the transcripts were emailed to the participants for a member check in order to ensure accuracy and the integrity of the data.

The interview data was analyzed using theoretical coding based on Kingdon's Multiple Streams Model (2011) and open coding for responses that do not fit the framework. The Multiple Streams Model (MSM) by Kingdon (2011) is the model most often used to explain agenda setting. Agenda setting is the process by which policy comes to the attention of policymakers and ultimately onto their agenda. MSM is a modification of Cohen, March, and Olsen's (1972) garbage can model of organizational choice. Kingdon's model is based

on three process streams, including problems, political and policy. Based on the model, the streams develop independently of one another, but converge when a window of opportunity presents itself.

The problem stream describes how societal conditions, viewed as problems, come to the attention of government officials. The methods by which these problems are identified are in the form of indicators, focusing events or feedback. The political stream also explains how issues become important to government officials. Three methods for this stream are swings of national mood, the balance of organized political forces, and events within the government itself. The third stream, the policy stream, refers to the solutions of problems by policymakers. Policymakers can be inside or outside the government or policymaking body. It is when the policymakers in the policy stream recognize and take advantage of openings presented to them in the problem and political streams that policy is actually set. In other words, it is when policymakers identify a problem to link to their solution at the right moment.

### **Organization of the Study**

This chapter included an introduction to the topic of educational policy in North Carolina as it is related to the maintenance of special schools for students with visual impairments by providing the background and purpose of the study. Further, this chapter explained the significance of this topic in terms of state and national implications and the research questions that guided the study. In chapter two, a review of the current legislation and judicial opinions are summarized and synthesized as it relates to the concept of least restrictive environment for students with disabilities. Additionally, chapter two will explore

research that discusses the role of special schools, perceptions of special schools by stakeholders, and trends in educational placements for students with disabilities. Next, chapter three will detail the methods by which this study was conducted. In particular, chapter three will discuss a case study approach for this study and explore Kingdon's (2011) Multiple Streams Model as a framework for this study. Further, this chapter will specify the sampling criteria, data collection process, and data analysis practices. Finally, researcher subjectivity, reliability, and validity will be discussed. Then, in chapter four, the results of this study will be presented. Specifically, the results will be presented in three sections, including participant interviews, document reviews, and site observations. Finally, implications for policy and research will be presented in chapter five based on the results of this study.

## **Chapter Two**

### **Literature Review**

#### **Introduction**

The purpose of this chapter is to present and synthesize the relevant literature. This chapter begins by discussing the historical underpinnings of the least restrictive environment concept and the societal factors that prompted legal mandates. Next, significant judicial decisions are presented as well as subsequent case law that established standards and legal precedence. Then, trends associated with schools for the blind are discussed, including enrollment, contributions to the profession, and perceived necessity. Finally, this chapter concludes with a discussion of Kingdon's Multiple Streams Model and its applicability to educational research.

#### **The Battle for Inclusion**

In 1972, there were almost eight million children with disabilities in the United States and almost half of those did not receive any educational services (Douvanis & Hulsey, 2002; Wright & Wright, 2007). However, many of the children with disabilities who did attend school were still excluded from some educational opportunities (Rogers, Rogers, & Yell, 2012). Specifically, in 1893, the Massachusetts Supreme Judicial Court ruled that children who could not benefit from education or were troublesome could be excluded from school. Further, in 1919, the Wisconsin Supreme Court ruled that a student who had attended public school through the fifth grade could be expelled because he required too much teacher attention and disrupted the education of other students (Rogers et al., 2012). Next, in 1934, the Cuyahoga County Court of Appeals in Ohio ruled that a compulsory school attendance

law does not apply to children with disabilities. Additionally, in 1958, the Supreme Court of Illinois ruled that the state was not required to provide an education for children who were intellectually deficient. Finally, in 1969, the State of North Carolina made it a criminal offense for parents to continue to advocate for enrollment of their children with disabilities in the public schools once they were expelled (Rogers, et al., 2012).

In 1954, the United States Supreme Court ruled in *Brown v. Board of Education* that segregated schools for children of color deprived them of equal educational opportunities, even if the physical school facilities were equal to that of those for Caucasian children (Wright & Wright, 2007). Further, the court noted that segregated schools confer upon children of color the feeling of inferiority and resulted in less motivation to learn (Roger et al., 2012; Wight & Wright, 2007). Using this same logic, parents of children with disabilities began to file lawsuits challenging the exclusion or segregation of children with disabilities (Roger, et al., 2012; Wright & Wright, 2007). Following these court cases, Congress launched an investigation into the education of children with disabilities and found that millions were not receiving an education (Wright & Wright, 2007). This prompted Congress to enact Public Law 94-142 in 1975.

Alquraini (2013) and Taylor (1988) noted that the discussion of least restrictive environment actually began before the passage of Public Law 94-142. Reynolds (1962) introduced the idea of a continuum of placement options ranging from least restrictive to more restrictive in the 1960s. Following that, in the late 1960s and early 1970s, courts adopted this principle in their rulings. However, Biklen (1982) and Turnbull (1981) noted that the legal basis for these rulings centered on the constitutional principles of due process

and equal protection under the law. Finally, Congress included the principle of educating children with disabilities in the least restrictive environment when it passed Public Law 94-142 in 1975 (Alquraini, 2013; Taylor, 1988).

As a result of this history, the concept of the least restrictive environment is a product of both statutory law and case law. Statutory law is defined as a formal law enacted by a legislative body, whereas case law is defined as the rulings of courts based on their interpretations of law and the intent of lawmakers (Douvanis & Hulsey, 2002). Congress did not specify a definition of the least restrictive environment when it enacted Public Law 94-142 (Alquraini, 2013; Taylor, 1988). Furthermore, the United States Supreme Court has refused to specifically rule on the mandate of the least restrictive environment, which results in the judicial opinion of the United States District Court with jurisdiction over the dispute standing (Douvanis & Hulsey, 2002; Rapport & Thomas, 1998). This has resulted in various interpretations of the law by courts throughout the United States (Alquraini, 2013; Douvanis & Hulsey, 2002; Rapport & Thomas, 1998).

### **Landmark Cases**

The first two landmark cases addressing access to education for children with disabilities were *Pennsylvania Association for Retarded Citizens (PARC) v. Pennsylvania* in 1971 and *Mills v. Board of Education* in 1972 (Roger, et al., 2012; Wright & Wright, 2007). In *PARC*, the plaintiff claimed children with mental retardation were not receiving an education comparable to that of their nondisabled peers. Similarly, in *Mills*, the plaintiffs claimed that students with disabilities were being wrongfully excluded from school. In their

lawsuits, both *PARC* and *Mills* claimed violation of the equal protection clause under the fourteenth amendment to the United States Constitution.

The *PARC* case was later settled out of court and the State of Pennsylvania agreed to provide a free public education to all children with mental retardation between the ages of six and twenty-one as well as give preference for educating them in environments similar to their peers without disabilities (Roger et al., 2012; Wright & Wright, 2007). In contrast, the *Mills* case was resolved with a judgment against the District of Columbia Board of Education. Consequently, the District of Columbia Board of Education was required to provide a free public education for children with disabilities.

While these two cases resulted in similar outcomes, there are some distinct differences. First, in *PARC*, the settlement stipulated that parents must be involved in the decision making process for selecting the appropriate placement and that procedures be developed for dispute resolution (Wright & Wright, 2007). Secondly, in *Mills*, the court required that a set of procedural safeguards be developed for the identification, placement and exclusion of students with disabilities (Roger et al., 2012). Third, these cases also involved two distinct groups of students. The children represented in *PARC* all had mental retardation, whereas the children represented in *Mills* had a variety of disabilities, including behavior disorders, hyperactivity, and physical impairments (Roger et al., 2012). Overall, the outcomes of these two cases later provided the framework from which the provisions of Public Law 94-142 were based, including the requirement of parent participation and procedural safeguards (Roger et al., 2012). Interestingly, the court in *Mills* also specifically cited *Brown v. Board of Education* in their analysis and stated that if segregation of schools

based on race was unconstitutional, then segregation based on disability was equally unconstitutional.

The main purpose of Public Law 94-142 was to ensure that eligible children with disabilities received a free and appropriate public education (FAPE) (Yell, 2012). Specifically, the law required that the educational services be provided at public expense, meet state educational standards, provide an appropriate education for preschool, elementary, and secondary schooling within the state, and conform to the requirements set forth in each child's Individualized Education Program (IEP) (Yell, 2012). In order to implement Public 94-142, Congress required that each eligible student with a disability be provided with an Individualized Education Program. Within each IEP, consideration must be given to the location of services. Generally, the requirement for providing a free public education is not in dispute, rather the appropriateness provision is in question (Yell, 2012).

The first special education case to reach the United States Supreme Court was *Board of Education of the Hendrick Hudson School District v. Rowley* in 1982 (Wright & Wright, 2007; Yell, 2012). Amy Rowley was a student with deafness, whose parents were also deaf. When Amy entered kindergarten, a sign language interpreter was provided during a trial period (Yell, 2012). Following the trial period, Amy was provided with a hearing aid instead of a sign language interpreter. Upon entering first grade, Amy's parents requested a sign language interpreter, but that request was denied based on the recommendation of the kindergarten sign language interpreter (Wright & Wright, 2007; Yell, 2012). Amy's parents filed suit in the United States District Court overseeing the State of New York. The district court found that Amy was performing better than the average student in her class, but that her

deafness was impacting her ability to perform to her fullest potential (Wright & Wright, 2007; Yell, 2012). In other words, if she did not have deafness, she would be able to perform better in class and better understand what was occurring within the classroom. Further, the district court found that because Congress did not specify the requirements of FAPE, it was left up to the courts to determine when the provisions of FAPE have been satisfied (Wright & Wright, 2007; Yell, 2012). The district court ruled in favor of Amy's parents and the school district appealed to the United States Court of Appeals. The United States Court of Appeals affirmed the decision of the district court and the school district appealed to the United States Supreme Court.

The United States Supreme Court reversed the decisions of the lower courts and found in favor of the school district. The court noted in its opinion that the purpose of Public Law 94-142 was to open the doors of education for children with disabilities and did not guarantee any particular level of education (Wright & Wright, 2007; Yell, 2012). Further, the court disagreed with the interpretation of the lower courts that the law aimed to require an equal education for children with disabilities and to provide them the best education possible. Rather, the Supreme Court ruled that children with disabilities are only entitled to access to specialized educational services and support that aim to convey educational benefit (Wright & Wright, 2007; Yell, 2012). The court clarified that educational benefit can be met by showing passing grades and promotion from grade to grade. In this case, since Amy was performing better than the average student and she was promoted from kindergarten to first grade, the court found the school district has complied with the law (Wright & Wright, 2007; Yell, 2012). However, more importantly, the court developed a two prong test to determine

whether the provisions of FAPE have been satisfied. First, the court noted that the existence of extensive procedural safeguards in the law made them essential in the eyes of lawmakers. Secondly, the IEP developed should be designed so that the student can reasonably earn passing grades and move from grade to grade. Therefore, the two prong test requires that the school district 1) comply with the procedural safeguard requirements and 2) develop an IEP that is reasonably calculated to convey educational benefit (Wright & Wright, 2007; Yell, 2012). Finally, the decision clarified that courts should not impose their judgments or interpretations of educational methodology over those of educators (Rapport & Thomas, 1998; Wright & Wright, 2007; Yell, 2012). In other words, courts should recognize educators as experts within the field of education and rely on their expertise.

### **Case Law**

At the lower court level, there are two leading cases involving disputes of the least restrictive environment in which standards were developed to help courts determine if students are placed in the least restrictive environment. First, in *Roncker v. Walter* in 1983 school officials proposed changing the placement of a student with severe cognitive disabilities from a regular elementary school to a segregated county school (Anderson et al., 2010; Douvanis & Hulsey, 2002;). All parties agreed that the student should not be educated in a regular classroom setting. However, the dispute revolved around how much access the student should have to interact with nondisabled peers. In its ruling, the court developed a new standard to determine if a student with a disability is placed in the least restrictive environment (Anderson et al., 2010; Douvanis & Hulsey, 2002). The standard set by the court states that if a segregated setting is considered superior because it offers particular

services, then the court should determine if those services can be reasonably provided in the integrated setting. If they can, the segregated setting is inappropriate. However, the court also noted several factors that can be considered as part of the analysis. They include 1) the level of progress made by the student in the integrated setting as well as any supplementary aids provided, 2) a comparison of the benefits between the regular education and special education settings, 3) disruptive behavior in the integrated setting and 4) financial implication.

Next, in *Daniel R.R. v. State Board of Education*, the fifth circuit court developed another standard in which to determine if a student with a disability is placed in the least restrictive environment. In this case, a student with an intellectual disability and speech delays was placed in a half-day special education class and half-day regular education class for preschoolers (Anderson et al., 2010; Douvanis & Hulsey, 2002). After a period of time, school officials recommended full day placement in the special education class. The court found in favor of the school district in this dispute. In doing so, the court developed a new standard with two prongs. Prong one explores if the student with a disability can be educated in the regular education classroom with supplemental aids and services satisfactorily. If no, prong two explores to what extent the school attempts to mainstream the student with a disability while receiving special education services (Anderson et al., 2010; Douvanis & Hulsey, 2002). Further, the court stipulated some factors that could be considered when considering the standard. They include: 1) the level of accommodations provided in the regular education setting, 2) educational benefits compared between regular education and

special education settings, 3) the level of mainstreaming and 4) the impact the student with a disability will have on the regular education class.

In reviewing these two cases, it is notable that the school districts prevailed over the parents in both instances. Additionally, both cases involved students with intellectual disabilities. However, the cases are distinguishable in that the students were of differing ages and grade levels at the time of the disputes. Further, these decisions occurred in two different court jurisdictions. Ultimately, the two court rulings and subsequent standards both appear to simply use two different paths to reach the same destination. For example, both standards discuss integration into the regular education setting. However, under *Roncker* it first looks at the segregated setting and then works its way backwards to determine if a regular education classroom is the least restrictive environment. Alternatively, the court in *Daniel R.R.* starts at the regular education classroom setting and moves toward a segregated setting.

Following these rulings, both the fourth and eighth circuit courts adopted the standard created from the *Roncker* case. In *DeVries v. Fairfax County School Board*, the court found in favor of the school district because the student would not benefit from placement at a regular high school as opposed to a specialized vocational center (Anderson et al, 2010). The dispute arose when the student transferred from a private school to the local public schools and it was recommended he attend a specialized vocational center instead of his regular high school. In this case, the vocational center was superior because it provided individualized instruction and a specialized curriculum that could not otherwise be provided at the regular high school.

On the other hand, the third, tenth, and eleventh circuit courts adopted the standard set forth in *Daniel R.R.* First, in *Greer v. Rose City School District*, the court ruled in favor of the parents because the school district failed to consider a full array of aids and services (Anderson et al., 2010; Douvanis & Hulsey, 2002). In dispute was the placement of an elementary student with Down Syndrome. The school district proposed placement in a segregated special education class, while the parents requested placement in a regular education class with support. The court specifically noted that neither side presented any alternatives to these two extremes. Further, in *Oberti v. Board of Education of Borough of Clementon School District*, the court again ruled in favor of the parents after finding the school failed to implement the IEP as designed (Anderson et al., 2010; Douvanis & Hulsey, 2002). In this instance, an elementary student with Down Syndrome was recommended for placement in a segregated special education class at a school outside of the school district. However, upon mediation, the parents and school agreed to place the child in a special education classroom within the district and to implement mainstreaming opportunities. Finally, in *L.B. and J.B. ex rel. K.B. v. Nebo School District*, the court ruled in favor of the parents as well (Anderson et al., 2010; Douvanis & Hulsey, 2002). In this case, a student with autism was receiving specialized services through a private school setting, but the parents requested additional services from the local public schools. As a result, the school district proposed a placement within one of the district's special education classes, rather than the private school. The court found that the student was performing better in the private school setting and that this decision revolved around the least restrictive environment provision as opposed to the free and appropriate public education mandate. In making this

decision, the court was able to avoid drawing any conclusions about the educational methodology.

The three main cases that draw upon the standard in *Daniel R.R.* all involve students at the elementary school level and all resulted in favorable decisions for the parents. However, the similarities appear to end there. The students in these cases had varying disabilities, were at different grade levels, and were not all in public school settings. Also, the court in *L.B. and J.B. ex rel. K.B. v. Nebo School District* avoided other legal issues by focusing its analysis on the placement of the student.

Interestingly, the ninth circuit court combined both standards when it ruled in *Sacramento City Unified School District v. Holland*. This case involved a student with an intellectual disability who was exclusively being educated in a special education classroom (Anderson et al., 2010; Douvanis & Hulsey, 2002). The parents sought to have her placement changed from the special education class to a regular education class. The school district countered with a proposal to maintain placement in the special education class, but allow her to be mainstreamed for nonacademic classes. Ultimately, the court ruled in favor of the parents. The court found that educational supports and services could be provided in the regular education classroom, that her presence in the classroom was not a burden, and the costs of providing such support would not significantly impact other children.

The State of North Carolina falls within the jurisdiction of the fourth circuit court (Rapport & Thomas, 1998). As a result, the current case law governing cases arising out of least restrictive environment placement disputes is based on the *Roncker* standard in North Carolina. As a result, IEP teams in North Carolina who are considering more restrictive

placements, such as a special school setting, must first determine what makes the special school setting more superior to the regular education setting and then determine if those services can reasonably be provided in the regular education setting. If they cannot, the least restrictive environment setting would be the special school placement.

### **The Changing Landscape of Schools for the Blind**

In North Carolina, Caldwell et al. (2008) reported that the general process for accessing services begins with referral to an early intervention agency. For children who are blind, this process is not so clear and could take several years before a parent or specialist makes a referral. All children are placed with their local education agency (LEA) and an individualized education program (IEP) is developed. Funding and parental preference are not supposed to be influences on student placement (Caldwell et al., 2008). Therefore, North Carolina clearly follows a very legalistic approach to service delivery, whereas national trends are swaying from this model. Nationally, a holistic approach to service delivery is being encouraged, where collaboration and supplementary services are offered (Caldwell et al., 2008). This helps to ensure students receive timely resources, technology, and instruction.

Caldwell et al. (2008) surveyed 174 parents and 19 teachers of students with hearing or visual impairments in North Carolina to assess their priorities for residential schools within the state. Of the parent respondents, 69% indicated they were primarily concerned with qualified and trained staff. Additionally, 61% noted that decisions on placement and services should be based on assessment, rather than on available resources. Finally, 59% were concerned with access to both academic and nonacademic opportunities. The top two

areas of concerns for teachers included collaboration and placement based on assessment, with 59% of the respondents in each area. Also, 56% of teachers responded that education must be tailored to the unique needs of each student. Overall, the results of this parent and teacher survey seem to indicate a consensus that placement decisions should be based on assessment data and not based on availability of resources. Finally, it appears that parents and teachers also agree that a variety of educational opportunities that meet the needs of each student are needed. In 2005, the State of Washington conducted a similar study of professionals in the field of blindness. In their study, Beadles (2007) found that addressing personnel shortages, increasing outreach services, and developing regional programs were the most pressing issues within the state. These issues seem to connect to the issues faced in North Carolina as professionals seek ways to improve services for students with visual impairments as well as respond to staffing concerns.

Nationally, the least restrictive environment mandate and preference for regular education placement has resulted in an increased need for specialized schools for the blind (Bina, 1999). Prior to 1950, about 88% of students with visual impairments nationally were educated at a school for the blind, but by 1988 almost 88% were then being educated in a traditional public school (Ajuwon & Oyinlade, 2008). In 2006, it was estimated that about 9% of students with visual impairments were educated at a school for the blind, whereas 83% were at a traditional public school (Ajuwon & Oyinlade, 2008). As a result, today, the existence of schools for the blind are not substitutions for a public school education, rather they are a supplement and complement to traditional public school education (Bina, 1999).

## **A New Era for Schools for the Blind**

In the face of a changing landscape, schools for the blind today have transformed into centers of professional development and supplemental support to school districts (Ajuwon & Oyinlade, 2008; Bina, 2008). Many schools for the blind now offer summer programs, short-term placements, assessment services, and professional development for teachers. The need for such supplemental services to school districts, particularly those that are rural, is supported by the lack of trained professionals in the field (Bina, 2008; Smith & Wild, 2006). For example, only 33 universities in the United States offer teacher training programs for teachers of the visually impaired and those programs combined graduate approximately 200 students each year (Bina, 1999). This far outweighs the demand for teachers of the visually impaired (Bina, 1999). In response to these trends, many schools for the blind in rural states have sought to fill gaps when there is a shortage of teachers of the visually impaired (Beadles, 2007). They have done this through development of regional centers and comprehensive outreach programs. Nationally, the number of students with visual impairments being served through outreach services from a school for the blind has doubled from 2,500 students in 2002 to over 5,000 students in 2005. As a result, the number of teachers of the visually impaired needed to support those programs has nearly tripled from about 40 to near 110. There has also been a notable increase nationwide in summer school and short-term placement enrollment (Beadles, 2007). Additionally, it is estimated that in the coming years about 700 more teachers of the visually impaired will be needed for itinerate positions and about 143 teachers will be needed at schools for the blind.

## **The Continuum**

Baxter et al. (2014), Caldwell et al. (2008) and Bina (1999) noted that special education is not a physical location, but is a set of services that are provided in a variety of settings. As such, a continuum of placement options could include a special school, such as a school for the blind. Bina (1999) also suggested that new revolving door policies at schools for the blind support movement along the continuum based on the needs of the student. In other words, students can attend a school for the blind for a specified period of time to receive specific skills and then return to the traditional public school. Specifically, Caldwell et al. (2008) noted that an elementary student might benefit from a school for the blind placement to learn Braille, but then transition back to a traditional public school. Beadles (2007) noted that about 90% of students with visual impairments are served through an itinerate teacher model. In this case, a teacher for the visually impaired travels from school to school serving multiple students daily. This model allows students to remain at home, but provides infrequent and inconsistent service. Next on the continuum typically is a resource room setting. A resource room provides for a centralized location to offer students with visual impairments across a school district services in one location. This model sometimes requires students to attend schools farther away from their homes. Finally, the most restrictive setting on the continuum is a school for the blind. Recently, the average length of enrollment of students with visual impairments at schools for the blind has decreased to about 5.5 years. This represents a trend in which students are no longer attending schools for the blind for their entire school careers. This also represents a trend in more short-term placements and greater emphasis on outreach services at schools for the blind.

This type of service model aligns with policy guidance provided by the United States Department of Education. In particular, the United States Department of Education (2001) indicated that IEP teams must consider Braille instruction, orientation and mobility, and visual difficulties in a variety of environments. Braille instruction was the default requirement unless the IEP team determined, through assessment, that print was an appropriate reading medium. Visual impairments vary from person to person and from environment to environment (United States Department of Education, 2001). As a result, IEP teams should conduct functional vision assessments across settings and considerations must be given to how the student will access information, such as listening skills instruction. Further, there have been instances in which students with visual impairments have been inappropriately placed in regular education classrooms when it was impossible to implement the IEP in that setting. Similarly, there have been examples of students with visual impairments being unnecessarily placed in schools for the blind when their IEPs could have been implemented in a regular education classroom. It is for these reasons that the United States Department of Education (2001) reiterates that placement decisions must be individualized, include the parents, and consider the regular education classroom as the least restrictive environment, which follows the *Daniel R.R.* standard. Finally, the United States Department of Education (2001) noted that parents must be informed of the placement options available to their child.

### **Selecting the Right Placement**

McMahon (2014) conducted a survey of 31 schools for the blind across the United States in order to assess the current role they play in educating students with visual

impairments. Of the 31 schools for the blind, 25 provide direct instructional services to students with visual impairments. Additionally, about half of the respondents indicated they offered some form of short-term placements. Eighty-seven percent of the schools surveyed responded that they provide evaluation or assessment services. Furthermore, 100% of the schools stated that they provide training and internship opportunities for pre-service teachers of the visually impaired and 95% of the schools also participated in research activities related to students with visual impairments. Finally, 80% of the schools indicated that they engage in outreach activities by providing trainings to general education teachers as well as serving as consultants to school districts. This study appears to support the findings of Bina (1999) and Caldwell et al. (2008) in which fluid placements and a focus on professional development are the new norm for schools for the blind.

As noted with the *Roncker* and *Daniel R.R.* standards for determining the appropriateness of least restrictive environment placements, there are two major schools of thought in determining placements for students with disabilities. First, one philosophy is that the least restrictive environment is automatically the regular education classroom and any deviation from this setting must be justified (Baxter et al., 2014). This viewpoint is supported by both case law and federal regulations implementing Public Law 94-142. Alternatively, the second philosophy is that placement is determined based on the needs of the student (Baxter et al., 2014). This is also supported by federal regulations that require IEPs be developed on an individual basis and on case law that specifies courts lack the expertise to intervene in educational policy and as such the professional judgments of educators should be recognized (Baxter et al., 2014; Smith & Wild, 2006). Caldwell et al.

(2008) indicated that a national trend in the field of blindness is an emphasis on flexibility and fluidness in educational placements. This differs from the original mindset that placement is a location as opposed to an array of services. Smith and Wild (2006) noted that placement decisions are left to the IEP team, which includes both parents and educators. As a result of these differing philosophies, there are a variety of reasons IEP teams may reach particular placement decisions.

In a study of approximately 150 parents of children with visual impairments by Ajuwon and Oyinlade (2008), the researchers found that the top reasons for enrollment at a school for the blind were specially trained staff, specialized accommodations, social interaction, and academic and extracurricular participation. Bina (1999) also noted that students with visual impairments attending schools for the blind had access to extracurricular and independent living activities not otherwise available at the traditional public school. For example, one former student noted how residing on campus in dormitories ultimately prepared him for college life. Also, another student discussed how involvement in athletics helped improve his public speaking and confidence. These findings are further supported by Corn and Phillips (2003) who found that 34% of students with visual impairments attended a school for the blind because their traditional public school could not provide the trained staff, accommodations or technology needed for them to be successful.

Finally, Corn and Phillips (2003) found that students who are blind attend specialized schools because of the similar characteristics they shared with other students and the ease to which social interactions could be facilitated. However, some complained about strict rules of living in dorms, poor food, and isolation from the real world. Despite this, about a quarter

of the students interviewed stated that attending their public school would lessen their social status because sighted peers would not understand them, they would be made fun of, and they would be excluded from school activities. On the other hand, a majority of the students noted that their specialized schools supplied services and instruction that would not have otherwise been available to them in a traditional public school (Corn & Phillips, 2003). However, the students also noted that their specialized schools lacked advanced and honors courses that some wish they could take (Corn & Phillips, 2003).

### **A Political Issue**

As discussed in chapter one, the North Carolina General Assembly has more frequently been discussing the issue of consolidation or closure of Governor Morehead School over the past decade. This discussion is not unique to schools for the blind. Dean (1981), Berry and West (2008), and Berry (2006) all discussed the history of school consolidation across the United States. In 1920, there were slightly over 200,000 schools in the United States, but by the year 2000 this number had declined to near 100,000. Further, it was estimated that in 1927 almost 60% of all schools consisted of the one room schoolhouse variety, but by the year 2000 only about 400 of such schools remained. The broader school consolidation movement aligns with the consolidation of the two campuses of Governor Morehead School in the 1970s.

Dean (1981), Berry and West (2008), and Berry (2006) noted in their studies that the main purpose of school consolidation was rooted in economic and educational reform. For instance, they indicated that larger schools had the ability to offer more specialized classes and a uniform curriculum for all students. Additionally, larger schools provided more

efficiency in terms of a centralized administration and facilities at a lower cost. Finally, the consolidation of schools allowed for more accountability, better monitoring, and direct involvement by the state government in education.

Despite these reasons, Berry and West (2008) noted in their study that there was often fierce resistance to school consolidation and as a result state lawmakers often attached financial incentives to school consolidation mandates. Furthermore, they indicated that the school closing process is very politically motivated. Several interest groups, including parents, teacher unions, community groups and realtors all are stakeholders. Community members and parents have stated that school consolidations limit the opportunities for parent involvement and the use of school facilities as community focal points. Specifically, Wiles (1994) noted that neighborhood schools often coordinate health services and afterschool programs as a way to reach out to at risk youth. Also, Irwin and Seasons (2012) indicated that larger schools have increased crime and student dropout rates. Finally, larger schools cause students to lose their individuality.

Sargent and Handy (1974) stated that school consolidations are a very emotionally charged event for many of the stakeholders and policymakers alike. As a result, they proposed a two-step process for school consolidation decision making. The first step included sharing data with all stakeholders, including enrollment trends. The second step involved being transparent and clearly communicating with all stakeholders. However, Irwin and Seasons (2012) noted in his study that despite these procedures many community members see the process as one sided and merely a communication tool as opposed to a shared decision making process. Irwin and Seasons (2012) agreed with this assessment and

proposed that new processes be developed in which citizens have a greater participatory role in decision making when it comes to school consolidations. Specifically, he proposed two-way dialogue with decision makers through public hearings, websites, focus groups, surveys, advisory councils, and actionable steps aligned with stakeholder feedback. However, Irwin (2012) noted that the systemic nature of governmental boards means that ultimately school boards will continue to hold a majority of the power.

### **Kingdon's Multiple Streams Theory**

Kingdon's Multiple Streams Theory is a revision of Cohen, March, and Olsen's (1972) garbage can model. The garbage can model helps to describe how decisions are made at the organizational level over time given organizational structure, timing, energy, and identification of both problems and solutions. In other words, the garbage can contains a mixture of problems and solutions presented by organizational members. Specifically, Cohen et al. (1972) noted four streams that feed into the garbage can. First, an actual or perceived problem can be presented from individuals inside and outside of the organization. Second, solutions are ideas that are proposed, whether there is or is not a problem to be solved. Third, participants are those who are part of the organization that bring with them their time and energy. Fourth, decisions are the opportunities that arise for an organization to make a decision, such as spending monies, signing contracts, or hiring employees. In general, each of these streams flow independently of each other, but opportunities for decisions often arise when timing, energy, and stream linkages can be aligned.

These opportunities for decision-making are referred to as windows in Kingdon's model (Weiner, 2011). Windows are opened when each of the streams intersect with the other at any given moment. These opportunities typically are short in duration. Windows can open and close as issues are addressed, political powers shift, or major events fade into the past. For example, Weiner (2011) noted that a window of opportunity could be opened through policy diffusion among neighboring states. In other words, if a policy is effective, popular, or innovative in one state, then other neighboring states may consider adopting similar policies. Also, windows can be opened during election cycles when persons seeking public office seek to address relevant policy issues (Weiner, 2011).

Kingdon's Multiple Streams Model has showed promise as a method to explain how educational policy reaches the decision-making agenda (Shepley, Song, & Young, 2010). Unlike the garbage can model, this model only has three streams. First, the problem stream brings problems to the forefront through negative feedback, focusing events, or program evaluation (Shepley et al., 2010). Second, the political stream involves shifts in national mood, political shifts, and changes within the structure of the government itself. Third, the policy stream involves people inside and outside the government who advocate or expend their energy to propose solutions to an actual or perceived problem. Similar to the garbage can model, these three streams run independently, but their convergence provides opportunities for the government to act (Shepley et al., 2010). Kingdon's model has had limited application to educational policy at the state level to help explain how educational issues come to the forefront and when policy solutions are adopted (Chow, 2014; Shepley, et

al., 2010). As a result, this study will add to the existing body of literature on educational policy formation through the lens of Kingdon's Multiple Streams Model.

Mintrom and Vergari (1996) used Kingdon to understand the dynamics of educational policy reform in Michigan. In this instance, shifts in the political landscape lead to an abolishment of financial support of the public schools through local property taxes in an effort to increase state control over education. While this move was originally solely focused on school finance, advocates of school choice used this as an opportunity to push for the creation of charter schools. Similarly, Vergari (2007) used Kingdon to explain the unique political nature of charter schools. For example, Vergari (2007) discussed how school finance limitations, charter school creation caps, and accountability expectations are influenced by the performance of traditional public schools, teacher unions, advocacy groups, and private sector educational management organizations.

Lewis and Young (2013) applied Kingdon to the concept of how teacher education preparation programs have come to the attention of federal policymakers. Lewis and Young (2013) reported that the lack of student achievement and ineffective teachers has compelled federal policymakers to consider this matter. At the same time, two schools of thought fight to bring their solutions to the forefront. One school of thought is to deregulate education in an effort to create competition and increase accountability. The alternative school of thought is to professionalize the field of teacher education. Furthermore, McLendon (2003) used this model to understand the decentralization of higher education in Arkansas. In this case, college administrators who felt mistreated by the state oversight board for higher education submitted a plan to state lawmakers to limit the powers of the board. However, state

lawmakers dismissed the plan until Governor Tucker resigned following a grand jury indictment. Following that shift in governance, lawmakers considered the policy solution submitted by the college administrators.

Similar to the discussion of federal involvement in education above, Kingdon's Multiple Streams Model has also been used to describe local involvement in education as well. Liu, Lindquist, Vedlitz, and Vincent (2010) found that advocacy groups, the state government, and the federal government have the most influence on local educational policy. Further, they found that budget concerns typically drive decision making at the local level and that local governments are generally more interested in building collaborations with all stakeholders to resolve problems. In addition, Chow (2014) used Kingdon to help explain educational policy reform outside the United States. In Hong Kong, the implementation of a Moral and Civil Curriculum was met with significant opposition from parents and students. Despite several years of planning, consultations and increased funding to support the new curriculum, the streams did not converge at the opportune time. Ultimately, lawmakers abandoned the implementation despite pressure from other government leaders to continue implementation.

Building on the examination of policy through Kingdon's model, Brown (2007) used this model to help explain varying reforms in Wisconsin over a period of time. First, there was an intense power struggle among elected officials and government agencies over how to address the lack of student achievement. The governor sought to eliminate the Office of State Superintendent of Schools as well as the Department of Public Instruction. When these actions failed, in an effort to improve student performance, state officials passed legislation

creating end of grade tests from the fourth grade to eighth grade as well as a high school exit exam. Students were required to pass these exams in order to move to the next grade or graduate. However, parents, advocacy groups, and educators complained that determining student retention solely on one test score was inappropriate. After shifts in political control, this legislation was amended to allow for multiple indicators to determine student retention. Further, following that, budget reductions later resulted in the elimination of the high school exit exam altogether.

Lawton (2012) narrowed the scope of educational policy to examine only English Language Learners. In this case, Lawton (2012) noted that the passage of the No Child Left Behind Act signified a shift in federal policy from granting equal access for all children to ensuring equal outcomes for all children. Using Kingdon's model, Lawton (2012) described how educational policy within the state had been influenced by a variety of factors. Prior to 1969, the state's policy provided for student instruction only in English. In 1984, the first English as a Second Language policy was introduced and funded by the state legislature. This was the result of a compromise from other stakeholders who wished to have bilingual education. In 2000, a federal judge in *Flores v. State of Arizona* ruled that state funding was not adequate for English as a Second Language programs (Lawton, 2012). At the same time, proposition 203 was passed by the voters of Arizona, which required that English be taught in the public schools along with a one-year immersion program for those whose native language was not English. This proposition was fought by many educator associations, advocacy groups and several media outlets. Interestingly, proposition 203 was spearheaded by a single individual who was also successful in having a similar measure passed in

California. Lawton (2012) noted that public concerns regarding illegal immigration as opposed to educational policy might have contributed to the approval of this measure.

In a policy issue more closely related to this study, Steven and Stout (2000) examined multicultural educational policies passed in 1988 in the State of Minnesota. As part of these policies, schools were required to develop diversity committees, submit inclusive education plans, and ensure their curricula include disability, gender neutral and multicultural awareness. Later in 1997, following the release of failing test scores of minority students, the State Board of Education proposed changes to the multicultural education policies to include increased data reporting to the state on attendance, suspensions and other factors that could be impacting the education of minority students. This caught the attention of a local newspaper, who ran an editorial opposing the policy altogether. However, other newspapers subsequently ran editorials in support of the policy. Next, the governor publicly opposed the policy. Ultimately, the State Board of Education rescinded the policy, but lawmakers, who were unhappy with the overall work of the board, voted to dissolve it in 1999. In this case, Steven and Stout (2000) noted that other more pressing educational issues related to school desegregation policies actually overshadowed this matter and ultimately became intermingled with it. As a result, the State Board of Education felt it had no other choice but to abandon the issue altogether.

There are several limitations of Kingdon's Multiple Streams Model. First, Kingdon's model was developed using interviews from stakeholders in the transportation and healthcare sectors (Chow, 2014). His model has had limited application to the field of education (Chow, 2014; Shepley et al., 2010; Stevens & Stout, 2000). Additionally, Stout and Steven

(2000) and Chow (2014) noted that Kingdon fails to take into consideration the role traditional media and social media play in each stream. Finally, there is some disagreement as to how independent each of the three streams are from each other. Some assert that there is more interdependence among the three streams than Kingdon recognizes (Chow, 2014; Shepley et al., 2010; Stevens & Stout, 2000).

Overall, these aforementioned studies are all similar in that they have applied Kingdon's Multiple Streams Model to educational policy. Further, each of them described how the three streams converged at the most opportune moment to facilitate decision making and policy formation. For example, Mintrom and Vergari (1996) discussed how the issue of charter school formation was slipped onto the policy agenda through the formation of broader school finance reform. Also, in Arkansas, the issue of higher education didn't make its way onto the policy agenda until shifts in the political landscape. In addition, a majority of these studies dealt primarily with state level policy formation. The issues of charter schools, school finance and diversity were common among most of the studies. Finally, the underlying issue in all of these studies ultimately was the lack of student achievement and finding the most appealing solution to that problem. In each case, a variety of stakeholders became involved in the policy discussion at various points.

On the other hand, each of the aforementioned studies are unique in that varying stakeholders, political forces, and events led up to them. Additionally, each of the studies addressed a different policy issue, with some occasional overlap into other areas. For example, in Arkansas, Minnesota and Wisconsin, the major policy players were elected officials and government agencies, while in Arizona and Wisconsin advocacy groups were

more active in the debate. Also, these studies differed in that some involved media influence, while others included judicial intervention. Finally, while all of these studies focused on the lack of student achievement, the proposed solutions varied greatly. For instance, in Michigan school finance was the focus of the debate, while in Wisconsin standardized testing and student promotion was the focus. Many of these measures were not or could not be implemented until changes in political forces or governance occurred at various levels of state government.

### **Summary**

In summary, this chapter explores the current literature as it relates to the legal implications for the least restrictive environment placement for students with disabilities, the national role that schools for the blind play today in educating students with visual impairments, and application of Kingdon's Multiple Streams Model to examination of educational policy. In the following chapter, the methodology of this study will be introduced and presented.

## **Chapter Three**

### **Methodology**

#### **Introduction**

This study employed a qualitative research approach. Specifically, an intrinsic case study research design was utilized. Stake (1995) noted that an intrinsic case study is appropriate when the researcher has a genuine interest in the case. Generally, the researcher is seeking to better understand the case, but not necessarily an abstract concept or particular phenomenon (Creswell, 2007; Stake, 1995). Creswell (2007) noted that this approach is intended for unusual or unique cases. Case studies use a variety of data sources, which provide for various lenses from which to examine the case (Baxter & Jack, 2008; Creswell, 2007; Merriam, 1998; Yin, 2014). Further, Stake (1995) and Yin (2003) both suggested taking a constructivist approach to case study research since each person's perspective is relative to the truth. This approach allows the researcher to closely interact with the participants and to hear their stories from their perspective, which in turn enables the researcher to better understand their actions (Lather, 1992). Because this study aimed to explore changes in educational policy over a specific period of time as it relates to special schools for students with visual impairments, it was essential for the researcher to hear the stories and perspectives of those involved in the policymaking and budgetary processes so that their actions and decisions can be understood.

#### **Methodological Approach**

This study utilized a qualitative case study design. Yin (2003; 2014) stipulated that a case study should be considered when 1) it answers "how" or "why" questions, 2) the

behaviors of participants cannot be manipulated, 3) the context of the case is relevant, and 4) the boundaries between the case and context are not clear. In the case of this study, two research questions sought to answer “why” and another sought to answer “how.” Additionally, the actions of policymakers have already occurred and, therefore, cannot be manipulated. The context surrounding this case, which spans decades and cites numerous justifications, is essential to understanding the case. Finally, there appears to be overlap between the context and the case being studied. As a result, a case study is an appropriate selection.

A researcher is interested in a case because of its uniqueness and as a result not everything is a case (Stake, 1995). A case must be specific and bounded by time, place, or occurrence (Creswell, 2007; Stake, 1995). As a result, case study research is not intended to provide generalizations or explain other cases. The focus is on the selected case and its particulars (Stake, 1995). In this study, Governor Morehead School is a specific school and the action of the North Carolina General Assembly in 2011 directing the North Carolina Department of Public Instruction to select one of the residential schools to close represented a specific event. Additionally, the actions and decision of the North Carolina Department of Public Instruction to close Governor Morehead School represented another specific event. Finally, the reversal of the closure directive by the North Carolina General Assembly in 2012 represented a unique and unusual event. As a result, this case is bounded by a specific period of time beginning in 2011 and ending in 2012. Overall, this case represented a unique and specific occurrence since the North Carolina General Assembly took action and almost one year later reversed course. It is also unique because Governor Morehead School is the only

school in the State of North Carolina specifically serving only students with visual impairments.

### **Research Questions**

The research questions for this study included:

1. How did the proposal to close Governor Morehead School come to the attention of lawmakers?
2. Besides school closure, what other policy solutions were considered by lawmakers for Governor Morehead School?
3. How did the Department of Public Instruction determine that Governor Morehead School would be the campus to be closed?
4. What occurred following the school closure decision that prompted a reversal by lawmakers?

### **Site Selection and Sample Criteria**

The source of the policy debate is Governor Morehead School. Yin (2014) indicated that observations provide additional data that can supplement other sources. Further, he indicated that observations could be of people, activities, or places. Therefore, a site visit of the campus was conducted and observations cross referenced with other data sources. The campus is comprised of about 50 acres and is located on Ashe Avenue in Raleigh, North Carolina (Commission on Schools for the Blind and Deaf, Sanatorium System and Related Institutions of Declining Use, 1970). The campus is bordered by Central Prison, North Carolina State University, and Pullen Park. It is also bordered by a four lane highway and railroad tracks. Twenty-eight buildings stand on the campus, some of which are utilized by

other state government agencies (North Carolina Department of Public Instruction, 2011). The current student population is 51, but dormitory space will allow up to 256 students.

As indicated in chapter one, previous justifications for the closure of the school revolved around increased operational costs, declining student enrollment, lack of student achievement, underutilization of the campus, and that the school no longer served the populations for which it was intended. Some of these factors were observed. Specifically, the cost of maintaining the campus was observed by detailing the upkeep of the facilities and grounds. Further, the use or lack thereof of the campus was observed in terms of facility occupancy and the movement of people throughout the campus. Yin (2014) suggested that observations could be strengthened with multiple observers. In this instance, documents detailing previous observations of the campus by Department of Public Instruction staff were utilized.

This study employed purposeful sampling. Creswell (2007) indicated that purposeful sampling allows for varying perspectives on the problem, process, or event. Additionally, Stake (1995) and Yin (2014) both noted that cases should be selected for which the researcher has access to fieldwork and actors, or people, involved in the case. However, Yin (2014) indicated researchers must exercise care in protecting human subjects. Specifically, this should be accomplished through informed consent to participate in the study, confidentiality of personally identifiable information, voluntary participation in the study, and avoiding deception.

In this instance, actors, or people, involved in the policymaking process include state legislators and Department of Public Instruction staff. Specifically, former members of the

committee appointed by the Department of Public Instruction to determine which school should be closed were interviewed. Also, the Superintendent of the Public Schools of North Carolina and staff from the North Carolina Department of Public Instruction were interviewed because they carried out the directive of the legislature. Further, a member of the North Carolina General Assembly was interviewed because they issued the directive to the Department of Public Instruction and later reversed that directive. Finally, a family member of a former student of Governor Morehead School was interviewed because advocacy groups were significant players throughout this period of time. Because many of these actors remain elected officials or employed by the Department of Public Instruction, their identities were replaced with pseudonyms. Further, all actors were provided with informed consent prior to any interviews and were informed of their voluntary participation and right to discontinue at any time.

### **Data Collection**

The researcher collected data for this study through interviews, document review, and direct observation. Multiple sources of data are a hallmark of case study research (Baxter & Jack, 2008; Creswell, 2007; Merriam, 1998; Yin, 2014). This strategy provided for increased credibility. Yin (2014) cautioned that document review has the potential to be misleading in that Internet based documents could be bias and some government documents are edited prior to publication. Yin (2014) specified that documents should be used to verify or supplement other data sources. On the other hand, interviews are present in almost every case study and serve to provide information directly from relevant individuals through their perspective (Yin, 2014). Interviews are generally conversational in nature and structured

with open-ended questions. Finally, similar to document review, observations can serve to supplement other sources of data (Yin, 2014). They can be formal or informal and include observations of people, places, or activities. Yin (2014) suggested multiple observers to increase creditability.

First, the researcher contacted participants initially by email or by phone in cases where the researcher knew the participant in order to ask permission to conduct the interviews. A consent form, letter of introduction and copy of the interview questions were emailed to the participants before the interview to give them some details about the study. The researcher utilized a standard open-ended structured interview based on the interview protocol developed by Kingdon (2011). The interviews were conducted in person and audiotaped for transcription purposes (Yin, 2014). Two audio recorders were used in case one fails. In order to ensure anonymity, names were replaced with pseudonyms during the transcription process. The digital audio files and transcripts were stored on secure computers. Once the interviews were transcribed, the transcripts were emailed to the participants for a member check in order to ensure accuracy and the integrity of the data.

Next, the researcher conducted a document review of relevant documents associated with Governor Morehead School, North Carolina Department of Public Instruction, and North Carolina General Assembly during the period of time from 2011 to 2012 that pertains to the closure and subsequent unclosing of the school. In particular, the researcher reviewed pieces of legislation passed by the General Assembly during this time. Additionally, the researcher examined campus condition reports, public hearing transcripts, and written comments from stakeholders housed with the Department of Public Instruction regarding the

school closure process and decision. Finally, historical documents that were created prior to 2010 were reviewed in order to better understand the context and events that led up to the case being researched.

Finally, the researcher conducted two direct observations of Governor Morehead School campus in an attempt to verify and supplement information learned during interviews and document reviews. However, it should be noted that the present case occurred nearly three years ago and the current state of the campus does not reflect the state of the campus in 2011 or 2012. Regardless, the observations helped the researcher to better understand the reversal by the General Assembly to close the school and other changes that have resulted from this case. In particular, during the observation, building utilization, fiscal implications, and student enrollment were assessed. These observations were cross referenced with other data sources.

### **Data Analysis**

Baxter and Jack (2008) noted that one common flaw of case study research is the tendency to analyze data sources independent of each other. Alternatively, they indicated the purpose of case study research is to concurrently analyze data throughout the data collection phase and funnel data until it converges. In the same regard, Stake (1995) described the analysis as a continuous process, where the researcher reads and re-reads their sources of data. Finally, Baxter and Jack (2008) and Yin (2014) both suggested initially approaching data analysis with a framework of some type as well as propositions. They indicated that propositions are useful for clarifying and narrowing research questions. Propositions can be derived from professional experiences or the literature (Baxter & Jack, 2008).

Initially, propositions guided the researcher as he conducted interviews, reviewed documents, and conducted observations. These propositions are primarily derived from professional experiences as a member of the broader Governor Morehead School community and a review of literature, including legislation, court opinions, legislative reports, and peer reviewed journal articles. Specifically, the researcher asserted the following propositions: 1) a reduction in state government spending is the umbrella reason for closing Governor Morehead School and all other justifications are secondary, 2) the unclosing of Governor Morehead School was the result of leasing parts of the campus to the Wake County Public School System in order to generate revenue, 3) academic achievement of students at Governor Morehead School has remained below state averages for years and has only recently been mentioned, and 4) the legal mandate of least restrictive environment has been misapplied in North Carolina and resulted in declining enrollment at Governor Morehead School.

Aside from these propositions, data was initially analyzed using theoretical coding based on Kingdon's Multiple Streams Model (2011) and later by open coding for responses that do not fit the framework. The Multiple Streams Model (MSM) by Kingdon (2011) is the model most often used to explain agenda setting. Agenda setting is the process by which policy comes to the attention of policymakers and ultimately onto their agenda. Kingdon's model is based on three process streams, including problems, political and policy. Based on the model, the streams develop independently of one another but converge when a window of opportunity presents itself. The problem stream includes all sorts of issues that are brought to the attention of policymakers through formal and informal means. Policymakers are often

made aware of issues through normal monitoring procedures, such as budgetary expenses. However, focusing events, which are often disasters or major events, help to bring the problem to the forefront.

Next, the policy stream is composed of an impressive amount of proposals or ideas on how to address issues that are found in the problem stream. These proposals and ideas come from advocates, professors, government workers, organizations, and ordinary citizens, just to name a few. Some proposals and ideas are rejected immediately, but others are considered and discussed. In many instances, the public needs time to understand and accept the policy solution and this leads to extended periods of time passing between the onset of the problem and final action. Finally, the political stream involves policymakers and shifts in government. Specifically, this stream is impacted by lobbyists, elections, and public opinion. Public opinion often impacts the results of elections and as a result elected officials have agendas of their own. These agendas can be influenced by interactions with lobbyists and other events once they are in office.

After data analysis using propositions and theoretical coding, the researcher used an open coding method to identify any outlying themes. Glaser and Strauss (1967) described the constant comparison analysis as an ongoing cycle in which the researcher reads, codes, and analyzes repeatedly throughout the data collection and data analysis phases. Using this analysis, the researcher starts with comparing the data and moves toward integrating the data. This ultimately leads to the creation of codes and categories. Mellon (1990) stated that this method is the most popular among content analysis.

## **Research Validity and Reliability**

Creswell and Miller (2000) defined validity as the extent to which an account reflects the realities of participants and is considered creditable by them. This aligns with the constructivist thinking of Stake (1995) and Yin (2003), who stated that the truth is relative to each person's perspective. Guba and Lincoln (1985) renamed the term validity as trustworthiness to better reflect the diversity, interpretation, and contextual factors associated with constructivists. They coined the terms creditability for internal validity and transferability for external validity.

Creditability is defined as the extent to which the researcher thinks he has found what he is looking for (Scott, 2009). Transferability is defined as the extent to which the case can be generalized to other settings or participants (Guba & Lincoln, 1985). In order to strengthen the creditability and transferability of this study, the researcher employed several strategies. First, the researcher provided a thick and rich description of the context for the reader (Creswell & Miller, 2000). Next, the researcher used reflexivity to reflect on his own work through frequent memos and transparency in terms of potential bias. Third, triangulation was used to compare and contrast interviews, observations, and document reviews (Creswell & Miller, 2000). Following that, disconfirming information was sought by reviewing themes and codes for contradictory data. In other words, rival explanations were explored. Fifth, a peer debriefer was used throughout each phase to offer an independent perspective and different lens from which to view the process and data.

Dependability is the term given by Guba and Lincoln (1985) for external reliability. This is defined as the extent to which this study can be reproduced. Confirmability is the

term given for internal reliability. It is defined as the extent to which independent observers agree with what happened within the study. Yin (2014) reiterated that concerns with reliability often relate to unclear processes and data verification. As noted earlier, Creswell (2007) and Stake (1995) stated that qualitative research is not intended to be generalized. However, as Scott (2009) indicated, qualitative studies with rich descriptions can be used to spur discussions or form judgments about other similar occurrences. In order to strengthen the reliability of this study, the researcher sought to utilize several strategies to make the overall process transparent and data collection reviewable. First, the researcher provided a rich and detailed description of the case and the context. Next, he provided a summary of the types of individuals to be interviewed, a description of the site to be observed, and an outline of the documents to be reviewed. Third, the researcher clearly articulated the data collection process, including how data would be stored. Additionally, he noted the propositions and theoretical framework from which coding will be approached. Finally, the researcher detailed his own potential bias and shared strategies to overcome them.

### **Subjectivity Statement**

In order to ensure transparency and address potential bias, the researcher puts forth the following admissions. First, the researcher is a graduate of Governor Morehead School. The researcher attended the school as a sophomore, junior, and senior in high school. He and his parents advocated for enrollment in the school. Secondly, the researcher is an active and contributing member of the Governor Morehead School community. At the time of this study, he served on the school's Human Rights Committee. He also served on the Board of Directors for the North Carolina Federation of the Blind, which has advocated on behalf of

the school in the past, and as president of the Envisioning Youth Empowerment Retreat, which utilized the school's facilities for summer programming. Third, the researcher spoke during a public hearing regarding the proposed closure of the school, was interviewed by a television station on the topic, and submitted written comments on the proposal in favor of retaining the school. Finally, as part of his doctoral program, the researcher served as an intern under the supervision of the superintendent and education consultant of the Governor Morehead School.

In an effort to avoid potential bias, the researcher was overly mindful of reflexivity during interviews. Reflexivity occurs when the researcher unknowingly influences the participant during an interview, which leads to the participant's responses being unknowingly influenced (Yin, 2014). As a result, the researcher used a member check to ensure the content of the interview was accurately captured. Further, the researcher utilized a peer debriefer and met regularly with that person throughout each phase of the study. The purpose of this was to ensure the voices of participants are accurately reflected throughout each phase of the study. Finally, the researcher utilized reflection as a means to ensure that his own ideas, perceptions, and bias are not present. Specifically, he accomplished this through memo writing following interviews, observations, and document reviews.

### **Limitations of the Study**

There are several potential limitations to this study. First, this study is not intended to be generalized to other similar occurrences. It is specific to the unique political, educational, and advocacy environments in the State of North Carolina at the present time. Second, this study employed purposeful sampling of a small subset of individuals connected to this

broader conversation surrounding Governor Morehead School. More specifically, only those individuals within that subset who wished to participate did so and many of them remain active actors in this policy issue as either elected officials or employees of the Department of Public Instruction. This could potentially influence their candor. Additionally, this case occurred nearly three years ago and observational data may not be readily available or accurately reflect the state of the site during the period under study. Finally, this study focused on a specific event and policy issue. It did not seek to explore educational reform for Governor Morehead School, even though positive implications for future considerations might be derived from the data to support educational change within the school or other schools for the blind facing similar circumstances.

### **Summary**

This chapter detailed the methodological approach, sampling criteria, data collection process, data analysis process and potential limitations of this study. This study employed an intrinsic case study design. The case is specifically about Governor Morehead School and is bound in time between the years 2011 and 2012. State legislators and employees of the Department of Public Instruction associated with the decision-making process surrounding this case were interviewed. Documents were reviewed and two site observations were conducted as a way to supplement and verify data. Kingdon's (2011) Multiple Streams Model was utilized as the theoretical framework and guide the initial coding. Member checks, self-reflection by the researcher, a peer debriefer, detailed contextual background, and clear processes were used to help strengthen the validity and reliability of this study. In chapter four, the results of data collection and data analysis will be presented.

## **Chapter Four**

### **Results**

#### **Introduction**

The purpose of this study was to explore changes in educational policy in North Carolina as it relates to the operation and maintenance of special schools for students with visual impairments on the continuum of alternative placements. Specifically, this study sought to explore the factors that led up to the decision to close Governor Morehead School in 2011 and what factors led to the reversal of that decision in 2012. Additionally, this study sought to explore future policy implications and directions for the State of North Carolina in terms of the maintenance of specialized schools for students with visual impairments. The research questions that guided study included:

1. How did the proposal to close Governor Morehead School come to the attention of lawmakers?
2. Besides school closure, what other policy solutions were considered by lawmakers for Governor Morehead School?
3. How did the Department of Public Instruction determine that Governor Morehead School would be the campus to be closed?
4. What occurred following the school closure decision that prompted a reversal by lawmakers?

A qualitative research design was employed to collect and analyze data under Kingdon's Multiple Streams Model. The results are presented in the following three sections, including participant interviews, document reviews, and two site observations.

Themes were identified in each area using a simple frequency count of keywords, phrases, or concepts. Overall, the results of the interviews, document reviews, and a site observation generally yielded similar themes and results. Specifically, in the problem stream, accountability, budget reductions, decreased enrollment, federal laws, increased operating costs, maintenance, and under-utilization were common themes. Further, within the policy stream, a compromise, consolidation, revenue generation and the local economy, maintenance of the status quo, specialized services, and transference of oversight from the Department of Health and Human Services to the Department of Public Instruction were similar themes. Finally, for the political stream, advocacy groups, changing political parties, Department of Public Instruction, emotions, legislators, parents, students and alumni, special education law, and teachers and administrators were all noted as contributors to this process. The proceeding table displays a simple frequency count of keywords, phrases, or concepts during the interview phase of this study.

Table 4.1

*Kingdon's Multiple Streams: Interview Responses by Frequency of Mention*

| Streams                             | Frequency <sup>a</sup> | Percentage <sup>b</sup> |
|-------------------------------------|------------------------|-------------------------|
| <b>PROBLEM STREAM</b>               |                        |                         |
| <i>Problem Stream – Indicators</i>  |                        |                         |
| Theme 1 – Accountability            | 26                     | 100                     |
| Theme 2 – Decreased Enrollment      | 24                     | 82                      |
| <i>Problem Stream – Focusing</i>    |                        |                         |
| <i>Events/Crises/Symbols</i>        |                        |                         |
| Theme 1 – Budget Reductions         | 39                     | 100                     |
| Theme 2 – Federal Laws              | 12                     | 33                      |
| Theme 3 – Increased Operating Costs | 33                     | 100                     |

Table 4.1 Continued

Problem Stream – Feedback

|                             |    |    |
|-----------------------------|----|----|
| Theme 1 – Under-utilization | 12 | 82 |
| Theme 2 – Maintenance       | 26 | 66 |

**POLICY STREAM**

Policy Stream – Policy Considerations

|   |    |    |
|---|----|----|
| Theme 1 – A Compromise  | 25 | 66 |
| Theme 2 – Consolidation   | 2  | 16 |
| Theme 3 – Generating Revenue and the Local Economy  | 14 | 66 |
| Theme 4 – Maintaining the Status Quo  | 1  | 16 |
| Theme 5 – Specialized Services  | 17 | 66 |
| Theme 6 – Transferring Oversight from the Department of Health and Human Services to the Department of Public Instruction | 15 | 82 |

**POLITICAL STREAM**

Political Stream – Organized Political Forces

|  |    |     |
|--|----|-----|
| Theme 1 – Advocacy Groups                  | 26 | 100 |
| Theme 2 – Department of Public Instruction | 7  | 82  |
| Theme 3 – General Assembly                 | 18 | 100 |
| Theme 4 – Parents                          | 9  | 33  |
| Theme 5 – Students and Alumni              | 4  | 33  |
| Theme 6 – Teachers and Administrators      | 8  | 33  |

Political Stream -- Government

|                                      |    |    |
|--------------------------------------|----|----|
| Theme 1 – Changing Political Parties | 4  | 33 |
| Theme 2 – Emotions                   | 15 | 33 |
| Theme 3 – Special Education Law      | 21 | 66 |

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a (number of times a theme was mentioned)

b (percentage of respondents that mentioned a theme rounded down)

**Participant Interviews**

Six individuals participated in the interview portion of this study, including four individuals associated with the North Carolina Department of Public Instruction, one associated with the North Carolina General Assembly, and one associated with the Governor

Morehead School Parent Teacher Association. Each participant was assigned a pseudonym and limited demographic data was collected to ensure confidentiality because many are current state government employees still closely connected to the Governor Morehead School. Brief profiles of each respondent are provided below in no particular order. Pseudonyms are intentionally not associated with respondent profiles to further enhance confidentiality. These individuals represent purposeful sampling because the North Carolina General Assembly created the directive to close one of the residential schools and it was the responsibility of the Department of Public Instruction to make the determination and carry out an implementation plan. Finally, many stakeholders, including parents, advocated on behalf of the Governor Morehead School during this period of time.

Respondent one is a female who serves as an elected official overseeing the North Carolina Department of Public Instruction. Previously, she served as a career and technical education consultant for the Department of Public Instruction. Respondent two is a male who was formerly a section chief within the Division of Exceptional Children at the Department of Public Instruction, which had limited collaborations with Governor Morehead School during that time. Prior to that, respondent two served as a consultant for the visually impaired with the Division of Exceptional Children. Respondent two served on the committee designated to make a recommendation as to which residential school should be closed. Respondent three is a male who is currently an educational consultant for the Office of Education Services for the Deaf and Blind within the Department of Public Instruction. Previously, he worked on school accountability and transformation for the Department of Public Instruction. Respondent four is a male and the grandparent of a Governor Morehead

School graduate, who during this time period was a current student. Respondent four has served as an officer and member of the Governor Morehead School Parent Teacher Association since its creation. Respondent five is a female who serves as the Superintendent of the Office of Education Services for the Deaf and Blind at the Department of Public Instruction. Previously, she has served as a school leader at the South Carolina School for the Deaf and Blind and at the Maryland School for the Blind. Respondent five served on the committee designated to make a recommendation as to which residential school should be closed. Respondent six is a male who is a Democrat serving as a member of the North Carolina General Assembly. He represents a portion of Wake County, North Carolina and is an attorney by profession. Each respondent will hereafter be referred to by their pseudonym. Each pseudonym was taken from building names on the Governor Morehead School campus.

### **Problem Stream**

The problem stream describes how societal conditions, viewed as problems, come to the attention of government officials. The methods by which these problems are identified are in the form of indicators, focusing events, or feedback. Specifically, in the problem stream, accountability, budget reductions, decreased enrollment, federal laws, increased operating costs, maintenance, and under-utilization were common themes. The problem stream themes are presented and discussed below.

#### **Accountability**

One of the top three problems identified by the respondents was the issue of accountability. Specifically, this addresses student achievement as measured by End of Grade and End of Course assessments. All students in North Carolina, including those with

disabilities, participate in the state accountability system. Gladys indicated “there was a lot of concern about the low achievement of the students attending from all three of those schools.” John later clarified and implied that this issue is further complicated by the mindset that one would expect students who attend a specialized school to show growth toward grade level proficiency after a period of attendance. To the contrary, John states “the average stay of a student at GMS, this specialized environment designed specifically for children with visual impairments, is over six years and there still is no grade level achievement.” The problem of accountability seems to be a product of school culture as Cole summarized it: “we also got the impression that many of the staff at Governor Morehead had been here for years and years and continued to do whatever they had done in the past because that seemed to be good enough for them to get through the school year.” It appears that one major factor that had impacted assessment scores during this period of time was inconsistent and inexperienced leadership. As Cathey put it, “the administrators, they were trying to use were just simply special ed certified people. Not necessarily residential school trained or vision trained. And so they were really struggling with the overlaying of public school accountability, performance, processes and procedure.” Finally, another factor that affected assessment scores was a shift at the school to focus more on the Expanded Core Curriculum (ECC), which includes skills in advocacy, technology, independent living, travel, and more. Cathey summed it up nicely when she said, “EOG's impacted our children as we really began focusing on the Expanded Core.”

## **Budget Reductions**

The primary problem noted by the respondents was the need for budget reductions. During this period of time, the State of North Carolina and the United States was struggling through what John described as the “greatest financial crisis since the Great Depression.” As a result, the North Carolina General Assembly was seeking “5.5 million in savings” by closing one of the residential schools. Cathey also expressed that “this was just a time of tight budgets.” The problem of budget reductions from the state government is further compounded by the limitation of Governor Morehead School from accessing local dollars. Traditional public schools are able to “raise money through their local tax system,” but this is not an option for Governor Morehead School. Gladys summed it well when she said “I believe that the General Assembly was looking at that truly from a budgetary process, not its impact.” The problem of budget reductions is closely connected to other problems identified by respondents, which will be detailed below. In particular, increased operating costs and maintenance were the two most closely related topics as they both directly involve financial expenditures.

## **Decreased Enrollment**

The problem of decreased enrollment is closely connected to the problems of increased operating costs and federal law. As Gladys described it, “Each school has fixed costs. And if you don't have enough students to spread those fixed costs with breadth, then you continue to drive up the costs.” John followed up on the problem of federal law by explaining “the number of students enrolled in and attending GMS continued to dwindle, though this decline had been steady since the 1970s with the passage of Public Law 94-142.”

These two problems will be discussed in more detail below. However, information sharing was also a contributing factor to the declining enrollment. As Cole recalls IEP meetings and other meetings in the traditional public schools, “I don’t think Governor Morehead was brought up as an option.” Gladys echoed this same concern when she said that the three schools had “talked about not having the necessary information in the hands of parents to help parents make those decisions in the best interest of the children.” However, on the other hand, Cole explained that one parent had to “advocate very, very strongly on {student’s name withheld} behalf to have him even considered to come to Governor Morehead.” The problem of student enrollment processes and considerations will be discussed in more detail below.

Decreasing enrollment also impacted the educational programs offered by the school, which could potentially connect back to the problem of accountability. “When you have 50 children it's hard to have a staff of 30 cover all the academic, all the life skills, all the electives, and still offer a well-rounded program,” according to Cathey. She summed it up well by saying “declining enrollment was definitely a challenge.” However, enrollment for Governor Morehead School might be difficult to measure in that the school consists of multiple programs that serve students throughout the state besides its traditional K-12 residential program. The school hosts students from throughout the state for short periods of time, usually two weeks in duration, to work specifically on skills included in the Expanded Core Curriculum. Also, the school offers a summer program that offers enrichment activities that go beyond traditional academic instruction. Student enrollment in these programs are generally not reported or included in the fulltime student enrollment data because these

students remain enrolled in their home public school during the time of participation.

Cansler and Pearson (2010) reported that the enrollment at the school in 2000 was 69. After 2001, the school observed a general overall increase in enrollment with the peak being 83 students in 2008 (Cansler & Pearson, 2010). However, since 2008, enrollment has steadily declined again and as of 2017 the enrollment was at 51.

### **Federal Law**

John offered a historical perspective behind the creation of special education law. “If you look at the time lines, a lot of the special education legislation came along just after some of the big civil rights legislation was written because folks realized, oh this applies also to people with disabilities.” Special education legislation specifies a continuum of educational placements with placement decisions by a collaborative IEP team. However, John stated the perception in North Carolina is that Governor Morehead School would “make their own decisions on whether they would ‘accept’ students, rather than going through a collaborative process with the local IEP Team.” Additionally, compliance with federal law seemed to be an obstacle for the school as John recalled it. “You look at an IEP and there would be nothing on that IEP to justify being in a residential setting.” Cole also recalled that “The IEP however, I think, was viewed and still viewed as a necessary document as opposed to a working document.” This mindset by the school seems to spiral back to the problem of accountability in that the IEP should detail a plan to educate the child with a disability. In other words, as John put it “you don't decide your placement first. You decide the program.”

In essence, the type of program described in the IEP should be to such an extent that instruction is only appropriate in a residential setting. According to Cathey, the obstacle for

the school to overcome is to “find our way, especially with individual education programs to make sure the child's needs are being met.” In other words, Governor Morehead School had to find its niche. Generally, as Cathey described it “maybe academically they were still missing the ECC piece” and so to set itself apart from the traditional public schools Governor Morehead School has focused on providing instruction in the Expanded Core Curriculum as this is not often available in other settings. This is critical as students with visual impairments must have these skills in order to be active and contributing citizens. Cathey recalled, “we were having graduates that were academically successful but couldn't figure out how to manage themselves well enough to hold down a job or go to an activity or have a social life.”

### **Increased Operating Costs**

The problem of increased operating costs is closely related to the problems of budget reduction and decreased enrollment. It should be noted that when measuring increased operating costs, the most common measure is taking the overall costs and dividing it by the number of students. The results of this mathematical evaluation will provide the cost per pupil. However, as Cole noted, this is an “unfair comparison.” The Governor Morehead School distinguishes itself from other public schools in that its students reside on campus in dormitories, require statewide transportation services, and are served three meals per day while on campus. Additionally, the school occupies a roughly fifty-acre campus with some buildings that date back to the 1920s. Gladys acknowledged this when she said “the complexity of having residential schools, and the cost.”

However, even when comparing the per pupil costs to other residential schools for nondisabled children, the numbers are disproportionate. Gladys explained that “for example to the NC School of Science and Math. The cost there at that time was somewhere between twenty-five thousand and twenty-seven thousand. Compared to one hundred thousand at one of those three schools.” Increased operating costs are closely related to the problems of budget reductions and decreased enrollment. As mentioned previously, with fewer students the fixed costs of operating the Governor Morehead School increase per pupil and this leads to increased operating costs. As Cathey noted, the Eastern North Carolina School for the Deaf was “really struggling with their utilities costs.” Further, “it was on the radar” that student enrollment was declining and costs were going upward. Finally, increased operating costs are also connected to the problem of maintenance, which will be discussed in more detail below.

### **Maintenance**

“Aging facilities were definitely an issue for us,” recalled Cathey. Cole also noted that “the facility at Governor Morehead was certainly beat up and needed a lot of maintenance and TLC.” One could foresee that such maintenance of older buildings would require a certain threshold of funds. One contributing factor to the maintenance problem at Governor Morehead School spirals back to when the school was under the oversight of the Department of Health and Human Services. At that time, the agency had committed funds for Central Regional Hospital and as a result “the money for a lot of DHHS projects was being funneled toward Central Regional,” noted Cathey. “You take care of that project, then it becomes your turn.” However, before that time came, Governor Morehead School was

transferred to the Department of Public Instruction. Regardless of which state agency oversaw the school, Cole pointed out that “the state is kind of pointing fingers at themselves” simply because it is the responsibility of the state government to maintain their own facilities. In summary, the problem of maintenance was both a product of natural deterioration and scarce funding for regular upkeep.

### **Under-utilization**

As William noted “inefficiency or rather the deficiencies that could be gained by consolidation” was a major factor in the General Assembly calling for closure of one of the residential schools. This problem seems to be connected to decreased enrollment because fewer students would require less space for housing, instruction, recreation, and dining. However, this problem was easily reframed to reconsider how these unused spaces could be put to use, particularly to generate revenue. During this time, Tony Tata of the Wake County Public School System (WCPSS) was searching for space to house two new schools, but “he could not find a facility,” recalled Gladys. As a result of a leasing agreement, “this would drive down the cost per student.” This idea was innovative and unique. John noted, “it hasn’t happened anywhere else in the U.S.”

Further, discussion of a western campus of the North Carolina School for Science and Math on the campus of the North Carolina School for the Deaf was mentioned. The creation of a western campus had been under discussion in the General Assembly previously. In summary, the problem of under-utilization is primarily a result of decreased enrollment, but it served as a catalyst for a shift in mindset from focusing on the problem to seeking solutions

to the problem. As John put it, in the past, Governor Morehead School had always argued they are “being victimized by outside forces.”

### **Policy Stream**

The policy stream refers to the solutions of problems by policymakers. Policymakers can be inside or outside the government or policymaking body. It is when the policymakers in the policy stream recognize and take advantage of openings presented to them in the problem and political streams that policy is actually set. In other words, it is when policymakers identify a problem to link to their solution at the right moment. Within the policy stream, a compromise, consolidation, revenue generation and the local economy, maintenance of the status quo, specialized services, and transference of oversight from the Department of Health and Human Services to the Department of Public Instruction were identified themes. Each of these themes will be presented and discussed further below.

#### **A Compromise**

The aforementioned problems derived from the interviews, later manifested themselves in a series of possible solutions. The duty to decide which residential school to close rested with the Department of Public Instruction. Gladys described that after consideration of the special needs of students with visual impairments, it was clear that the two schools for the deaf “could not accommodate students who were visually impaired without a lot of renovation.” Therefore, she reflected “from my perspective that in a rational sense, that the school to be closed could not be the Governor Morehead School.” However, that was not her only consideration. She further remembered “legislators from both of those places called me, talked to me” as they made arguments for the schools for the deaf to remain

open too. “From a budgetary standpoint, from a purely rational sense, it made sense to close those schools” Gladys said, but the reality was that the Department of Public Instruction knew “we were not dealing with rationality per se, but that we were dealing with emotions.”

Specifically related to the time period in this study, a compromise was suggested to the General Assembly that would avoid closure of one of the residential schools. The proposed compromise “would meet the letter of the law but it would also allow all three schools to remain open,” said Gladys. Under this plan, space on the Governor Morehead School campus would be leased to the Wake County Public School System. Further, considerations would be given to leasing space at the remaining two residential schools as well. Specifically, a western campus of the North Carolina School for Science and Math on the campus of the North Carolina School for the Deaf was mentioned. The creation of a western campus had been under discussion in the General Assembly previously. As a result, “this would drive down the cost per student,” recounted Gladys.

The solution of a compromise really has its roots in the political system, which will be discussed in more detail below. In this case, “traditional geographic politics of legislators want things in their districts” comes into play said William. “It’s good for the economy. Jobs in the district and so forth,” as he recalled typical discussions within the General Assembly. This particular issue “got better than average vetting.” William noted that, “Some Republicans in the Wake delegation, more than others, were willing to stand up and fight for things, like GMS.” The political atmosphere was important because the Republican Party had a majority in the General Assembly at the time. Gladys recounted that the perspective from the General Assembly was that this issue was such a “hot potato that we don’t want to

put it on our shoulders or on our backs that we hurt kids.” Therefore, a compromise was reached and closure was avoided.

### **Consolidation**

This solution of consolidation has been an ongoing recommendation in order to address many of the problems discussed previously. For purposes of this study, the terms closure and consolidation generally have similar meanings because a closure of any one of the residential schools would result in its consolidation with one or more of the remaining two schools. Cathey recounted that in 2001 the General Assembly “closed the central school,” referring to the Central North Carolina School for the Deaf, due to declining enrollment. At that time, those students were sent to the remaining two schools for the deaf. Gladys echoed the same message when she explained how the Department of Health and Human Services “tried in the past and had failed time after time to consolidate those schools.” Therefore, the solution of consolidation had been presented in the past, but was met with limited success. The reasons for consolidation have remained generally unchanged over time and the solution of consolidation seems to also be a recurring proposed solution.

### **Generating Revenue and the Local Economy**

During the period of time of this study, the focus of the problem stream shifted significantly toward the policy stream. It appears that the mindset of stakeholders shifted from defending the problems to finding viable solutions to the problems. William described typical discussions in the General Assembly as, “It’s good for the economy. Jobs in the district and so forth,” meaning that maintaining jobs and supporting local economies was important to members of the General Assembly. John recalled during public hearings how

speakers commonly referenced how important the schools are as “an employment vehicle for this community” and “it’s too important as an economic engine.” In particular, Cole explained how “Wilson is hurting. And certainly, the impact of closing the school to Wilson is a significant impact compared to Governor Morehead School.” When presented with the proposed compromise of leasing the property, Gladys recounted that one legislator commented, “I think that’s a great idea.”

### **Maintaining the *Status Quo***

The solution of maintaining the *status quo* or keeping all three of the residential schools open came into play well into the decision-making process of determining which school was to be closed. This solution seems to be the most irrational in that members of the General Assembly who originally voted that one of the residential schools be closed ultimately are the ones to insist that the status quo be maintained. As John noted, “every single one of those legislators who spoke up, voted for the bill that mandated for us to do the study.” As part of the decision-making process, each of the three residential schools invited members of the General Assembly to visit their campuses. This strategy shifted the discussion away from closure and toward maintaining the *status quo*. It also reinforced an emotional appeal for keeping the three residential schools open. Gladys recalled that after visiting one of the schools for the deaf, one legislator came to her and discussed “not closing any of the schools.” Furthermore, she noted that while visiting the Governor Morehead School with another legislator she noticed that “he was emotionally touched by that visit.” Finally, William described how he had met students and faculty from Governor Morehead School in the past when they visited the General Assembly “to make doggone sure that

legislators know what's going on there.” Cathey further explained that “there were still enough people raising enough ruckuses that nobody wanted to take a direct hit.”

This seems to imply that members of the General Assembly were also persuaded by other outside forces, such as advocacy groups and constituents from their home districts. This will be explored further in the political stream themes below. In summary, visits to the residential schools by members of the General Assembly and a plan to generate revenue on the Governor Morehead School campus likely contributed to the ultimate decision to maintain the *statue quo* and allow all three residential schools to remain operational.

### **Specialized Services**

One solution proposed was shifting the focus of the Governor Morehead School to focus on skills that students with visual impairments would not have readily available to them in a traditional public school environment. This solution had already been in the implementation phase during the time period of this study. One significant shift from the student viewpoint was that “technology has grown,” reflected Cathey. “They are not really interested in Braille.” In response, Governor Morehead School has shifted its focus to the Expanded Common Core, which addresses skills in advocacy, social interaction, independent living, technology, travel, and more. As Cole recounted, his grandson had “very little socialization and interaction with the rest of the school community” while attending a public school in Wake County. Therefore, one reason for attending Governor Morehead School was “socialization.” Overall, as Cathey, Gladys, and John all imply, the purpose of Governor Morehead School is to serve students with visual impairments from all over North Carolina. Specifically, this includes meeting the individual needs of these students.

## **Transferring Oversight from the Department of Health and Human Services to the Department of Public Instruction**

This particular solution was proposed and implemented in 2010. From 2010 to 2016, the transfer has been met with mixed results. Gladys explained that many advocacy groups expressed that the residential schools were not previously getting “appropriate attention from DHHS.” Further, these advocacy groups felt that the residential schools would get more support from the Department of Public Instruction and that the educational missions of the schools would be better aligned with the work of the Department of Public Instruction. Overall, the transfer was intended to address issues with accountability, but did not focus heavily on the issue of rising operating costs.

One major obstacle was that the Department of Public Instruction did “not have processes for facilities,” noted Cathey. This resulted in challenges with requesting funds and submitting requests for maintenance. The Department of Public Instruction leases all of its buildings so they have never encountered such issues. For example, as Cathey explained, the Governor Morehead School spent nearly “one hundred thousand per year in utilities and leaking roofs and paving and sidewalks and parking and all of that.” This connects back to the perceived increased operating costs problem, in which these additional costs were not accurately reflected in the per pupil expenditures. Furthermore, unlike the Department of Health and Human Services who had staff “24/7” and experience with running residential type facilities, the Department of Public Instruction did not have experience with residential programs. This also created some challenges at the onset. Finally, as a result of the transfer some staff members of Governor Morehead School were assumed into similar roles directly

within DPI. “It decreased our services to student capacity and ability,” reflected Cathey. It is possible that this could connect back to the problem of accountability in terms of fewer qualified staff to serve student needs. Overall, the transfer brought with it some challenges in terms of facility maintenance and management.

### **Political Stream**

The political stream explains how issues become important to government officials. Three methods for this stream are swings of national mood, the balance of organized political forces, and events within the government itself. In the political stream, advocacy groups, changing political parties, Department of Public Instruction, emotions, legislators, parents, students and alumni, special education law, and teachers and administrators were all noted as contributors to this stream. The themes for the political stream will be presented and discussed below.

### **Advocacy Groups**

Based on the respondents, advocacy groups played a significant role in influencing the process by which one of the residential schools would be closed as well as the ultimate outcome. As the decision-making process unfolded, Gladys recalled “there was a very strong advocacy group for each of the schools.” She described these groups as being “very organized, very determined, and very vocal.” Cathey recounted that the advocacy efforts were “led by the alumni association pretty much.” Governor Morehead School alumni made their voices heard. “James went as part of that meeting,” recalled Cole as he reflected on a meeting with legislators representing Wake County. They spoke at meetings of the Joint Education Oversight Committee and at meetings with legislators representing Wake County.

Overall, it appears that the ability of advocacy groups to bring multiple people together for a common cause played a significant role throughout this period of time. John summed it well by saying, “advocacy has been good and strong and politicians have listened.”

### **Changing Political Parties**

During the period of time from 2011 to 2012, the majority party within the North Carolina General Assembly shifted to the Republican Party. As a result, Gladys recalled their priorities were to “balance the budget and to move forward with some of its own priorities.” In other words, the move from one party majority to another allowed the General Assembly “to flex its muscle of saving money.” William further elaborated that after winning the election, the Republican Party felt it “had a mandate to shrink the size of government” from the citizens of North Carolina. In summary, the shift in political power contributed to the scrutiny of state government spending, which connects back to several of the problems identified earlier in this chapter of decreasing enrollment, increased operating costs, and maintenance.

### **Department of Public Instruction**

The primary role of the Department of Public Instruction in this process was defining a process for making the closure decision and implementing that decision. This directive came as a surprise as “we hadn’t even had the schools for a year,” noted John. In other words, less than a year after transferring oversight of the three residential schools to the Department of Public Instruction, this directive was given by the General Assembly. The timing raises questions as to the directive’s motivation, rather than reflecting on the call for accountability.

According to Gladys, the first step was to “give opportunity for voices to be heard.” This was done through public hearings and surveys. John recounted that during these public hearings members of the General Assembly attended on behalf of the schools. “They were loud. And forceful.” Again, John pointed out “every single one of those legislators who spoke up, voted for the bill that mandated for us to do the study.” The next step was to develop a team of individuals to “examine the three schools from a variety of perspectives (e.g., educational, facilities, fiscal, etc.)” These individuals visited each campus. Ultimately, the team submitted its recommendation and “the rest is history” as Gladys put it.

### **Emotions**

Based on interview responses, it seems that a major factor in the political stream is emotions. It appears that advocacy groups and legislators were the most impacted by these emotions and they also happened to be the two major players in the process. As Gladys recalled, when the advocacy groups became determined and vocal, it was a perfect recipe to have “an impact on legislation.” She further clarified this was a classic example of “emotion overcoming facts and figures.” Individuals who wrote letters to their local newspapers during this time did so “primarily from an emotional appeal.” John noted that legislators “were listening.” Aside from the advocacy groups and public appeals, legislators themselves felt the emotions associated with this difficult decision. Furthermore, Gladys noted that while visiting the Governor Morehead School with another legislator she noticed that “he was emotionally touched by that visit.” In summary, it appears that the original motivation prompting the closure discussion was derailed and shifted by the emotional impact this decision had on many stakeholders.

## **Legislators**

“Politically a nightmare for them,” is how Gladys summed up the reason why legislators tried to delegate this decision to others. The General Assembly played a key role in this process before, during, and after. The General Assembly initiated this process by directing that the Department of Public Instruction close one of the residential schools. There were members of the General Assembly “who recognized wow this is such a hot potato” that they directed the Department of Public Instruction to determine which residential school was to close. However, during the decision-making process, some members of the General Assembly spoke in favor of keeping the residential schools open within their districts. William described typical discussions in the General Assembly as, “It’s good for the economy. Jobs in the district and so forth,” meaning that maintaining jobs and supporting local economies was important to members of the General Assembly. Therefore, the underlying issue here is that members of General Assembly desired budget reductions to take place, but not those that negatively impacted their districts. Finally, Gladys recalled that after visiting one of the schools for the deaf, one legislator came to her and discussed “not closing any of the schools.” It was at that time that the compromise discussed earlier really began to take shape and gain traction. In summary, the General Assembly played a pivotal role in initiating and dissolving the process of closure.

## **Parents**

As John mentioned, members of the General Assembly “were listening” to their constituents. Cole recalled they were in “close communication with Mr. Hunt,” referring to Senator Neil Hunt. Cole’s perspective is that this communication proved vital. “I think it

appeared to Neil factually and emotionally that he could communicate to the other parties hey, Governor Morehead is trying to do something about their situation in terms of under-utilization, etc.” During the decision-making process, parents attended meetings with state legislators representing Wake County as well as meetings of the Joint Education Oversight Committee. “A few of the parents were at that meeting,” noted Cole when talking about a meeting with legislators from Wake County. He had spoken at both meetings as well and wrote “countless memos.” Prior to this period of time, there was no Parent Teacher Association (PTA) at the Governor Morehead School. Cathey recalled “it helped {name withheld} rise to the top as a leader,” referring to a family member of a student at Governor Morehead School. As a result of this movement, a Parent Teacher Association was formed.

### **Students and Alumni**

This particular group emerged as a relatively small cohort. Besides current students, alumni are best categorized as an advocacy group. Despite this, students at Governor Morehead School made several trips to the General Assembly to advocate on behalf of their school. William described how the students and faculty came “to make doggone sure that legislators know what's going on there.” Cathey recounted that the advocacy efforts were “led by the alumni association pretty much.” John noted how members of the General Assembly had to “listen to their constituents who are pushing hard.” It is likely that students alone did not have much influence on this topic because members of the General Assembly did not consider them constituents. On the other hand, alumni had a greater influence because they were both members of an advocacy group and constituents of the legislators.

## **Special Education Law**

The theme of special education law emerged as potentially an indirect cause of some of the problems discussed earlier. For example, John noted that “the number of students enrolled in and attending GMS continued to dwindle, though this decline had been steady since the 1970s with the passage of Public Law 94-142.” Specifically, this federal law required that students with disabilities be educated in the least restrictive environment. Despite this mandate, John noted that “there's still that mentality that if you're blind then GMS is the place you go.” However, he went on to clarify that many still believe “that local schools don't have the ability to serve these special students.”

Based on the perceptions of respondents, it appears that the public schools have improved in terms of providing academic preparation of students with visual impairments, but that nonacademic skills are not being addressed. Specifically, as Cole noted there is “very little socialization” in the public school for his grandson. However, he also described how experiences varied from school to school. “Other schools for lots of different reasons were not as well equipped to deal with the VI community.” In particular, schools that had larger numbers of students with visually impaired students tended to have better services and supports. Overall, it appears that the experiences of students with visual impairments vary greatly across North Carolina and that the influence of federal law on Governor Morehead School may have led to some the problems discussed earlier, especially related to enrollment.

## **Teachers and Administrators**

Teachers and administrators appear to have had minimal direct influence on the process associated with the directive to close one of the residential schools. Cole explained

that the concern of school staff was “we can't advocate because that looks like we're trying to save our jobs.” Despite this concern, William described how the students and faculty came to the General Assembly “to make doggone sure that legislators know what's going on there.” The administration was active in attending meetings of the Joint Education Oversight Committee and legislators representing Wake County. The perception from outsiders is that the administration does not communicate as much as it could. However, communication has improved. Cole described that the administration is “willing to answer any question, but there's a difference between answering a question and just being forthcoming.” Overall, it appears that the school staff had a limited influence directly, but that they could have a more indirect impact by communicating more effectively with the broader school community. The school staff found themselves in a difficult position. As John put it, the blind community is “close knit” and this blurs the lines of professionalism and advocacy.

### **Document Reviews**

During the document review phase of this study, twelve related documents were analyzed to gather relevant information regarding the historical background of the perceived or actual problems and proposed solutions to those problems. Specifically, six pieces of legislation from 1973, 2009, 2010, and 2011 were reviewed. This included House Bill 573 from 1973, Senate Bill 1005 from 2001, House Bill 29 from 2009, Senate Bill 897 from 2010, House Bill DRH11169-MH-10 from 2011, and House Bill 200 of 2011. Further, four reports presented to the North Carolina General Assembly in 1970, 2008, 2010, and 2011 were included. This included A Study of State Institutions of Declining Use, North Carolina’s Educational Service Delivery Model for Children with Hearing and Vision

Impairments, Residential Schools Closure Report, and Plans to Achieve Efficiency of Scale and Ensure the Appropriate Education of Students with Visual and Hearing Impairments. Additionally, a WRAL news article from 2012 and transcripts from a public hearing in Raleigh, North Carolina in 2011 were analyzed. Also, a 2010 report by School Support Division of the North Carolina Department of Public Instruction outlining facility conditions and necessary renovations was reviewed.

Finally, nearly 900 responses from a 2011 public survey were analyzed too. This survey was developed by the Department of Public Instruction to gather feedback from all stakeholders, including, but not limited to, alumni, interested community members, parents, school staff, and students, as part of the residential school closure determination process. The survey contained five questions aligned with the five criteria specified by the General Assembly in House Bill 200. The five considerations included: 1) minimization on impact of services for students, 2) minimization of modifications needed at the two remaining residential schools, 3) net savings or funds generated by the closure, 4) minimization of travel time for students, and 5) historical and cultural significance of the residential school. Overall, the review of relevant documents aligned with the results and themes derived from the interviews presented previously. The documents support the results of the interviews. The proceeding table displays a simple frequency count of keywords, phrases, or concepts during the document review phase of this study.

Table 4.2

*Kingdon's Multiple Streams: Document Analysis by Frequency of Mention*

| Streams   | Frequency <sup>a</sup> | Percentage <sup>b</sup> |
|---|------------------------|-------------------------|
| <b>PROBLEM STREAM</b>   |                        |                         |
| <i>Problem Stream – Indicators</i>  |                        |                         |
| Theme 1 – Accountability  | 73                     | 86                      |
| Theme 2 – Decreased Enrollment  | 44                     | 78                      |
| <i>Problem Stream – Focusing</i>  |                        |                         |
| <i>Events/Crises/Symbols</i>  |                        |                         |
| Theme 1 – Budget Reductions   | 98                     | 100                     |
| Theme 2 – Federal Laws  | 73                     | 40                      |
| Theme 3 – Increased Operating Costs   | 97                     | 86                      |
| <i>Problem Stream – Feedback</i>  |                        |                         |
| Theme 1 – Under-utilization   | 51                     | 32                      |
| Theme 2 – Maintenance   | 142                    | 40                      |
| <b>POLICY STREAM</b>  |                        |                         |
| <i>Policy Stream – Policy Considerations</i>  |                        |                         |
| Theme 1 – A Compromise  | 42                     | 16                      |
| Theme 2 – Consolidation   | 447                    | 100                     |
| Theme 3 – Generating Revenue and the Local Economy  | 127                    | 78                      |
| Theme 4 – Maintaining the Status Quo  | 277                    | 40                      |
| Theme 5 – Specialized Services  | 191                    | 86                      |
| Theme 6 – Transferring Oversight from the Department of Health and Human Services to the Department of Public Instruction | 37                     | 24                      |
| <b>POLITICAL STREAM</b>   |                        |                         |
| <i>Political Stream – Organized Political Forces</i>  |                        |                         |
| Theme 1 – Advocacy Groups   | 28                     | 32                      |
| Theme 2 – Department of Public Instruction  | 25                     | 24                      |
| Theme 3 – General Assembly  | 25                     | 92                      |
| Theme 4 – Parents   | 31                     | 24                      |
| Theme 5 – Students and Alumni   | 20                     | 16                      |
| Theme 6 – Teachers and Administrators   | 43                     | 32                      |
| <i>Political Stream -- Government</i>   |                        |                         |
| Theme 1 – Changing Political Parties  | 2                      | 8                       |

Table 4.2 Continued

|                                 |     |    |
|---------------------------------|-----|----|
| Theme 2 – Emotions              | 131 | 16 |
| Theme 3 – Special Education Law | 47  | 32 |

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a (number of times a theme was mentioned)

b (percentage of respondents that mentioned a theme rounded down)

### **Problem Stream**

The problem stream describes how societal conditions, viewed as problems, come to the attention of government officials. The methods by which these problems are identified are in the form of indicators, focusing events, or feedback. Specifically, in the problem stream, accountability, budget reductions, decreased enrollment, federal laws, increased operating costs, maintenance, and under-utilization were common themes. The problem stream themes are presented and discussed below.

### **Accountability**

In 2001, the North Carolina General Assembly through Senate Bill 1005 created the Office of Education Services to oversee the residential schools to “improve student academic and postsecondary outcomes.” However, years later, “Data indicates that students at residential schools achieve significantly below their counterparts with visual impairments,” according to a 2010 report to the North Carolina General Assembly. Specifically, during the 2008-2009 school year, 66% of students with visual impairments attending North Carolina public schools were proficient on the End of Grade assessments. However, only 32% of students with visual impairments attending the residential schools were proficient. One possible contributing factor to this problem is the lack of qualified teachers. “Difficulty recruiting teachers licensed in specialized areas” was noted as a major obstacle in the report.

Finally, another possible factor is the current expectations and mindset of those overseeing the residential schools. It was noted by a respondent to the public survey that “it’s not reasonable to expect students at residential schools to achieve.” Therefore, the lack of student achievement appears to be a product of both low expectations and limited staffing. This problem will be discussed further when the participation of legislators is reviewed.

### **Budget Reductions**

The problem of budget reductions can be traced as far back as 1970. In 1970, the General Assembly directed in House Bill 573 that the two campuses of the Governor Morehead School be consolidated to “save the taxpayers of North Carolina in excess of two hundred twenty-five thousand dollars.” Exactly forty years later, this same problem resurfaced. A WRAL news story in 2012 indicated that the General Assembly wanted “to save 5.5 million a year” by closing one of the residential schools. During the period of time from 2010 to 2012 the State of North Carolina employed multiple strategies to reduce expenses at the residential schools. First, the school administration altered the student instructional day and transportation schedules to reduce expenses. Specifically, students returned to the Governor Morehead School campus each week on Monday morning instead of Sunday evening. The General Assembly later reversed this in House Bill 200 and directed the school administration to “reinstate the residential and instructional schedules” in effect prior to February 2010. In addition, in 2010, the General Assembly directed that the positions of principal and assistant principal at the residential schools be eliminated and those functions be combined with the functions of the school director. However, these staffing changes were also reinstated by House Bill 200 in 2011. In summary, the concept of

reducing expenses has been an ongoing problem for at least the past fifty years and will likely continue to be a problem in the future.

### **Decreased Enrollment**

The problem of declining enrollment appears to be the common origin from which all the other perceived or actual problems are forthcoming. Since 2001, the enrollment at the Governor Morehead School peaked in the 2006-2007 school with 83 students. However, the lowest student enrollment since 2001 was during the 2008-2009 school year in which 62 students were enrolled. In 2009, the General Assembly proposed House Bill 29 that directed the Department of Health and Human Services to not enroll any new students at Governor Morehead School and to “allow the census to decline” in order to prepare for the closing of the Governor Morehead School. Therefore, the State of North Carolina initiated the subsequent decreases in enrollment by publicizing such information to LEAs, parents, and the community, even though the legislation ultimately was not enacted. In 2010, this impact was clearly evident when the Department of Public Instruction completed an onsite visit of Governor Morehead School. An observation by the School Support Division noted “very few classrooms with students in them.” This observation corresponds to the under-utilization problem that will be discussed later.

However, during the period of time from 2001 to 2009, the Governor Morehead School Preschool saw a 62% increase in student enrollment. This can be attributed to an increased emphasis on early intervention services. It was noted in the Plans to Achieve Efficiency of Scale and Ensure the Appropriate Education of Students with Visual and Hearing Impairments sent to the General Assembly that “children who began receiving

services within the first six months made far greater strides than their counterparts who came to intervention at a later age.” The solution of specialized services will be discussed in more detail later. Overall, the issue of decreased enrollment seems to be the problem from which all other problems exist. However, upward shifts in enrollment trends associated with early intervention services should be noted.

### **Federal Laws**

During the interview phase, the problem of federal law exclusively discussed special education legislation. The document review phase supported this theme. It was noted that a “vast majority of students with disabilities are currently housed in the least restrictive environment of typical public schools.” This was a recurring topic in reports to the General Assembly. However, during the document review phase, compliance with other federal laws was noted as problems too. Specifically, it was observed that “ADA compliance issues exist” during a site visit by staff from the School Support Division of the Department of Public Instruction. This refers to the accessibility of campus facilities as it relates to the Americans with Disabilities Act. However, while there were concerns in this area it was also noted that “improvements were made” throughout the campus during the same site visit. Overall, the problem of compliance with federal special education law is a significant consideration, but compliance with other federal legislation must also be incorporated into planning.

### **Increased Operating Costs**

The problem of increasing operating costs spans many of the other problems identified during both interview and document reviews. First, the Plans to Achieve

Efficiency of Scale and Ensure the Appropriate Education of Students with Visual and Hearing Impairments report indicated “average cost per pupil increased” as a result of the decreased enrollment noted earlier. Second, the same report specified that the “high cost of appropriate related services staff and assistive technology” has resulted in additional costs for the residential schools. As noted earlier, with a shift in the student population to more students with multiple disabilities the need for related services and assistive technology to access educational services will be impacted. Additionally, the report noted that “the state could reduce operational costs while at the same time improving educational outcomes for students served in these facilities,” which support legislative language and interview results that accountability and increased operating costs were both major considerations. In conjunction with this, another report to the General Assembly suggested that a differentiated salary schedule be created for the residential schools. This connects to problem of accountability and interview results that recruiting qualified staff was an obstacle and could result in increased costs. Finally, a site visit by staff from the School Support Division of the Department of Public Instruction noted several million dollars is needed for repairs throughout the campus. This will be discussed further below. Overall, campus maintenance, per pupil expenditures, and specialized services and supports appear to be major factors. “Educating students with low-incidence disabilities is an expensive endeavor,” referring to the specialized services and equipment needed to support skill development of these students.

### **Maintenance**

The Governor Morehead School campus consists of 28 buildings, with the earliest being constructed in 1917 and the newest being built in 1977. “Twelve million in

repairs/renovations needed campus wide,” according to a site observation report from the School Support Division of the Department of Public Instruction. Generally, the report indicated “maintaining such a large number of separate buildings is very expensive.” Specifically, concerns surrounding fire suppression systems and asbestos were noted. Finally, additional concerns regarding handicap accessibility were noted throughout the campus. Overall, the document review supports the results of the interviews that maintenance is a costly and ongoing problem.

### **Under-utilization**

The problem of under-utilization is directly connected to the problem of decreased enrollment. The Residential Schools Closure Report to the General Assembly specified that “each campus is significantly underutilized due to decreased enrollment.” A site visit by the School Support Division of the Department of Public Instruction found “very few classrooms with students in them.” Additionally, the site visit found that many larger spaces, such as former classrooms, were converted into office space for a single person. Any efforts to use space more efficiently is further complicated because some staff at Governor Morehead School spend some or a majority of their time in the field serving students or clients. As a result, their offices are only used to store “their stuff.”

Furthermore, the site visit in 2010 found that at the time only 38 students occupied dormitory space designed to house up to 256 students. On the other hand, the campus is shared by “other agencies” and as a result some buildings on the campus are used for “other purposes.” At that time, the Division of Services for the Blind statewide and Raleigh regional offices were on the campus as well as the Rehabilitation Center for the Blind. Also,

the Department of Rural Health, Governor Morehead School Outreach Program and Governor Morehead School Preschool each occupied a building. In summary, while the campus housed many entities at the time and continues to do so today, more efficient use of space could be a solution to this problem. The idea of leasing of space will be discussed further as themes under the policy stream are explored below.

### **Policy Stream**

The policy stream refers to the solutions of problems by policymakers. Policymakers can be inside or outside the government or policymaking body. It is when the policymakers in the policy stream recognize and take advantage of openings presented to them in the problem and political streams that policy is actually set. In other words, it is when policymakers identify a problem to link to their solution at the right moment. Within the policy stream, a compromise, consolidation, revenue generation and the local economy, maintenance of the status quo, specialized services, and transference of oversight from the Department of Health and Human Services were identified as themes.

#### **A Compromise**

A compromise, which was described earlier, refers to the idea of closing the Governor Morehead School in name only and allowing its students to remain on the Raleigh campus, while leasing space on the campus to generate revenue. A WRAL news report from 2012 noted “it seems to be a win-win in every sense,” referring to keeping the Governor Morehead School open by leasing space to the Wake County Public School System. Also, it was pointed out how this collaboration would help the “pre-kindergarten program for visually impaired students” attending the Wake County Public School System. This connects

back to the emphasis now on early intervention services noted earlier. Further, the Residential Schools Closure Report to the General Assembly in 2011 indicated that consolidating some administrative functions between the Governor Morehead School and the Eastern North Carolina School for the Deaf would realize some financial savings too. The Department of Public Instruction would seek other ways to continue to close the gap on the 5.5 million the General Assembly sought to save by closing one of the residential schools. Some of these strategies included leasing space on the school campuses, consolidating more administrative positions, and reducing other operating costs. Overall, this compromise sought to comply with the letter of the law, while at the same time addressing the challenges faced by closing any of the three residential schools. The scenarios for consolidation and potential challenges will be discussed in greater detail below.

### **Consolidation**

The North Carolina General Assembly has received three reports, including “North Carolina’s Educational Service Delivery Model for Children with Hearing and Vision Impairments,” “Residential Schools Closure Report,” and “Plans to Achieve Efficiency of Scale and Ensure the Appropriate Education of Students with Visual and Hearing Impairments.” Each of these three reports outlined potential scenarios for consolidation of the residential schools. Generally, there are four scenarios that were presented consistently, including keeping all residential schools open, closing all residential schools, downsizing to two residential schools, and downsizing to one residential school. The scenario of keeping all residential schools open is on one extreme of the four options and will be discussed further later. On the other extreme, closing all the residential schools was proposed to the

General Assembly. “Some states do not have a residential school at all,” stated the Residential Schools Closure Report to the General Assembly. In addition, a site visit by the School Support Division of the Department of Public Instruction noted that operating residential schools costs about “ten times the cost of a typical public school.” Also, it stated “cost factors and declining enrollment” lead to this recommendation. Overall, these reports align with previously mentioned problems of declining enrollment and increased operating costs as a justification for proposing an option on one extreme of the continuum of options. The report also cited the actions of other states as a justification for considering this option.

In terms of consolidating or downsizing to one or two residential campuses, “each scenario for closure/consolidation presents a challenge to service delivery and to family/socialization concerns,” stated the Residential Schools Closure Report. One major factor in terms of family concerns is travel time to a consolidated residential school, according to an online survey. On the other hand, a factor in favor of consolidation was that “any of the three schools for the deaf or blind are capable of housing the entire current resident population” stated the School Support Division during its site visit. They also noted that other states have “combined their deaf and blind students on one residential site.” Therefore, the one or two campuses to be closed would need to be identified. The 2010 site visit report indicated that the Eastern North Carolina School for the Deaf should be the first pick for a consolidated campus and the North Carolina School for the Deaf should be the second. The report stated that “Governor Morehead School should not be considered,” due to concerns outlined previously with regard to facilities.

The Plans to Achieve Efficiency of Scale and Ensure the Appropriate Education of Students with Visual and Hearing Impairments report set the stage for discussion on programmatic changes to align with current trends for residential schools as noted in chapter two. Some of the positives of consolidation include more “concise programming” as staff and services would be more centralized. Additionally, consolidation would allow for better “budget management” and a “fluid” service delivery mode,<sup>1</sup> as more resources would be applied toward outreach programs. For instance, under the scenario of closing all the residential schools, the report suggested that one or more of the campuses would remain open as a “short term facility,” in which students come for short periods of time to receive “specialized training and instruction.”

On the other hand, some negatives with regard to consolidation included initial and upfront costs of increased outreach program staffing, moving and renovation costs, and possible reductions in staff. Under each scenario, a “revolving door” approach to service delivery would be employed in which students come for “shorter periods of time” to receive intense services and support. Either way, it establishes a shift in mindset as the method of service delivery is altered. Under one hybrid scenario, residential programs would be consolidated to one campus, but the remaining two campuses would function as day programs. This scenario could also be viewed as a compromise. In summary, the proposed consolidation scenarios aim to reduce costs, improve student outcomes, and enhance services available to students throughout the State of North Carolina.

## **Generating Revenue and the Local Economy**

Prior to the directive of the General Assembly in 2011 to close one of the residential schools, there were no discussions of generating funds by leasing space on any of the campuses. However, there were notations and discussion of more efficient use of the campuses. For example, it was noted that at the Governor Morehead School “buildings are used for other purposes,” referring to the shared use of the campus by Division of Services for the Blind and the North Carolina Department of Rural Health. The Plans to Achieve Efficiency of Scale and Ensure the Appropriate Education of Students with Visual and Hearing Impairments report to the General Assembly also indicated that a consolidation of the residential campuses would allow agencies already utilizing the facilities to potentially expand.

On the other hand, following the 2011 directive from the General Assembly, the discussion shifted to generating revenue for the residential schools. For instance, in 2011, the General Assembly passed House Bill DRH11169-MH-10 allowing the Department of Public Instruction to “accept public and private funds for the benefit of residential schools.” Further, respondents to a public survey in 2011 also suggested that “an annual telethon to raise revenue” be considered. Finally, as noted and discussed earlier, the Department of Public Instruction in 2011 suggested the leasing of space on the Governor Morehead School campus to the Wake County Public School System as a way to generate revenue. Overall, the topic of generating funds has shifted from a discussion of space utilization to leasing of space and other fundraising opportunities.

## **Maintaining the *Status Quo***

Keeping all of the residential schools open has been proposed to the General Assembly in the past. “All three schools would remain open offering day and residential education,” stated the 2011 Residential Schools Closure Report to the General Assembly. However, the report did not suggest that services should remain unchanged. This was addressed in the Plans to Achieve Efficiency of Scale and Ensure the Appropriate Education of Students with Visual and Hearing Impairments report, which indicated that enhanced services would include “technology and preparation for life” as well as additional services to address “additional disabilities and mental needs.” Unfortunately, the report also warned that such a model is not sustainable and would actually result in increased costs. Finally, the report states that this proposal would result in fewer services in the local communities of the students as these resources would be centralized and focused toward the residential schools. Overall, the solution of maintaining the current residential schools as they exist was not viewed as a viable option. As a result, it appeared that proactive measures of supporting – short-term placements and investing in outreach programs would be necessary.

## **Specialized Services**

During the period of time from 2001 to 2009, the Plans to Achieve Efficiency of Scale and Ensure the Appropriate Education of Students with Visual and Hearing Impairments report indicated the “Governor Morehead Preschool increased enrollment 62%,” referring to the trend that early intervention services are increasing. It was noted that “children who began receiving services within the first six months made far greater strides than their counterparts who came to intervention at a later age.” In a WRAL news story, it

was pointed out how some of the students attending the “pre-kindergarten program for visually impaired students” through the Wake County Public School System go on to attend Governor Morehead School. The school provides an opportunity for students to learn “orientation and mobility skills in an urban environment” and obtain instruction in “general curriculum and vision specific” areas, such as “adaptive play and vision devices.”

As noted previously, one of the justifications for enhanced services as opposed to consolidation or closure is to improve instruction in “technology and preparation for life” as well as additional services to address “additional disabilities and mental needs.” While it was noted that this would increase costs at the residential schools, this can be mitigated by providing more services within the local community. “Itinerant teachers of VI, social workers, O&M, and other specialized staff provide adaptive skills at home, preschools, and daycares across the state,” referring to the movement to service delivery in a more inclusive setting and at earlier ages.

Finally, it must be noted that obstacles remain in the local community with providing services. Some areas of North Carolina continue to lack resources. “My county was unable to care for the needs of a blind student,” said a respondent to an online public survey. Overall, specialized services continue to be needed at residential schools as some communities still struggle with providing appropriate services, but it must be recognized that trends for more inclusive services are prevailing.

## **Transferring Oversight from the Department of Health and Human Services to the Department of Public Instruction**

The move from the Department of Health and Human Services to the Department of Public Instruction was initiated by the North Carolina General Assembly as a vehicle to improve academic achievement at those schools. In House Bill 200 in 2011 it was noted that “to improve educational outcomes” the transfer was necessary. Further, it was stated that moving the schools under the Department of Public Instruction was the “first step in ensuring academic achievement.” The document reviews support the results of interviews that this transfer was intended primarily to improve academic achievement of students. This had been noted as a problem previously in House Bill 200, Senate Bill 1005, and reports to the General Assembly. In summary, the transfer moved the residential schools from an agency focused on human services to an agency centered on education.

### **Political Stream**

The political stream explains how issues become important to government officials. Three methods for this stream are swings of national mood, the balance of organized political forces, and events within the government itself. In the political stream, advocacy groups, changing political parties, Department of Public Instruction, emotions, legislators, parents, students and alumni, special education law, and teachers and administrators were all noted as contributors to this stream. The themes for the political stream will be presented and discussed below.

## **Advocacy Groups**

An online public survey administered in 2011 provided ample opportunity for a variety of advocacy groups to submit responses. Interestingly, many of the responses were identical, which suggests an organized movement among advocacy groups to disseminate information so that survey responses convey similar comments. Some of the respondents directly responded to the questions on the survey. “Lions Clubs around the world are aware of this school and its importance,” wrote one respondent who identified himself as the President of a local Lions Club. On the other hand, some respondents failed to answer any of the questions and focused on the perceived unfairness of the closure. “Why is it always those who are needy always suffer cuts?” wrote one respondent. Alternatively, others questioned the validity of the survey itself.

In addition, some respondents to the survey took a negative approach to advocating on behalf of their preferred school. “Governor Morehead School is in a less than desirable location,” wrote one respondent. However, some took a neutral stance and advocated that none of the schools be closed. “The current residential schools are set up in the most efficient way,” wrote another respondent. Yet other respondents sought to find other alternatives and solutions to the closure problem. “Consolidate prisons and let inmates share facilities,” suggested a respondent. In general, the advocacy efforts from the general public revolved primarily around shifting attention away from the residential school closure issue, focusing attention for closure toward their non-preferred campus, or offering emotional appeals for their preferred campus. The strategy of emotional appeal will be discussed further below.

## **Changing Political Parties**

As noted during the interview phase, there was a shift in control of the General Assembly during the period of time of the directive to close one of the residential schools. This shift in political power resulted in a new agenda within the General Assembly. This was reflected in responses to a 2011 online public survey conducted by the Department of Public Instruction. “Reevaluate priorities” wrote one respondent to the survey. Further, “find somewhere else to cut!” was another submission by one respondent. These responses appear to indicate that the general public was aware of the political shift within the General Assembly. Finally, as noted previously, the problems and proposed solutions associated with this debate have been ongoing, but it was not until 2011 when this political shift evolved that closure or consolidation was legislatively acted upon. Overall, one respondent to the Department of Public Instruction online survey summed it up by saying the residents of North Carolina should exercise their right to vote and “change the tide in the next election.”

## **Department of Public Instruction**

The Department of Public Instruction had direct influence and participation in the process to determine which of the residential schools should be closed. Legislation enacted by the General Assembly in 2011 directed that the Department of Public Instruction study and determine which residential school to close. According to a 2011 report to the General Assembly, the Department of Public Instruction assembled a committee to study the residential schools, facilitated three public hearings, and utilized an online public survey to gather input. Additionally, the “School Support Division” within the Department of Public Instruction conducted onsite visits to assess facilities in 2010 at each of the residential

schools. Aside from their direct participation, “in consultation with DPI,” the Department of Health and Human Services maintained a working relationship with them prior to the transfer of oversight to support the residential schools. It should be noted that at the time of the directive from the General Assembly, the residential schools had only been under the oversight of the Department of Public Instruction for less than one year. Therefore, their input and participation was limited.

### **Emotions**

“I feel the closure of any of the schools is a mistake,” said one respondent. An online survey by the Department of Public Instruction revealed a variety of responses that portrayed emotional appeals to not closing any of the schools, keeping a preferred school open, or refocusing attention away from the intended issue of closure. “I was on my way of falling through the cracks,” recalled one respondent who went on to attend Governor Morehead School because his home county could not provide the necessary supports. Further, another respondent exclaimed that this survey is “bias.” Also, one respondent wrote that if individuals put themselves “in the shoes of these parents” and “really get to know them on a daily basis,” referring to students attending the residential schools, it should be clear they could not “function in the public schools.” Overall, a comment from one respondent summed it up by saying that whatever decision is made “is going to hurt a group of people.” Therefore, the emotional appeal put forth by individuals is a clear indication of the deep roots the residential schools play in the lives of many.

## **Legislators**

The General Assembly has been directly involved in identifying the problems and exploring the solutions associated with the residential schools. First, since 2008, the General Assembly received three reports outlining possible solutions to the perceived or actual problems identified earlier. As part of their work, the General Assembly has enacted House Bill 200 and Senate Bill 897 that identified “to improve education outcomes” and that they “no longer meet the needs of the population they serve in an efficient and effective manner” as reasons to explore solutions to the problems attached to the residential schools.

In 2010, the General Assembly enacted Senate Bill 897 that directed the school administration to undo two measures designed to reduce expenses. First, the General Assembly directed that “on-site summer school programming” be reinstated at the residential schools. Further, they directed that “residential and instructional schedules” be reinstated after they were altered to reduce expenses. This latter action seems to have been precipitated by intense advocacy to legislators. This appears to connect to previous solutions and suggestions that short- term placements and summer programs be utilized as part of service delivery. Finally, a review of transcripts from public hearings conducted by the Department of Public Instruction revealed that legislators and other politicians spoke on behalf of the residential schools within their districts. In summary, legislators had ongoing direct and indirect participation in the process by which one of the residential schools was identified for closure.

## **Parents**

Parents had a strong voice in the process by submitting responses to the public online survey and participating in public hearings. First, a transcript review from a public hearing in Raleigh, North Carolina in 2011 showed parents and grandparents speaking on behalf of the Governor Morehead School. Second, survey responses showed how parents valued the educational opportunities afforded their children at the Governor Morehead School campus in Raleigh. For instance, one parent stressed “the importance of independence and safety being learned in a community with public transportation,” which would not have been readily available in other communities under consideration for consolidation. It should be noted that the online survey did not collect demographic data and as a result only responses that identified the respondent as a parent were reviewed. Overall, it appears that parents participated throughout the process by making their concerns known verbally and in writing.

## **Students and Alumni**

Students and alumni had an opportunity to participate in the process by submitting responses to an online survey and attending public hearings. A review of the transcript from the Raleigh, North Carolina public hearing in 2011 showed that both current students and alumni spoke favorably on behalf of Governor Morehead School. The president of the Governor Morehead School Student Council spoke about his difficulty in the public schools and asking that he be allowed to attend Governor Morehead School.

Further, an alumnus spoke about his experience at Governor Morehead School preparing him for the transition to college life by living in a dormitory setting and building his confidence to interact socially with others. These statements were further supported by

survey responses by students and alumni as well. Students discussed their “ability to interact with classmates and participate in extracurricular activities,” which for many were not accessible to them in the traditional public schools for a variety of reasons. Students discussed difficulty in the public schools of not having “timely deliveries of large print textbooks and Braille texts.” Finally, one survey respondent shared his success as a successfully employed blind person for the past 23 years because of the education he received at Governor Morehead School. In summary, students and alumni made their voices heard by sharing their experiences through written feedback and speaking in favor of Governor Morehead School.

### **Special Education Law**

A review of discussions of the Individuals with Disabilities Education Act (IDEA) throughout the related documents revealed an emphasis on providing instruction in the “least restrictive environment.” Specifically, the documents imply that service delivery primarily through the public schools is the leading trend. It was noted that the purpose of the residential schools is to prepare students to “re-enter more inclusive schools.” Further, the documents emphasized the need for more collaboration and for teachers, parents, and administrators to work “in concert” to determine educational placements and services for students. This solution connects back to other solutions proposed that encourage a “revolving door” approach to service delivery and short term placements at the residential schools. Overall, the relevant documents mentioned compliance with federal special education laws, but the focus always shifted more toward financial and enrollment discussions. This seems to imply that compliance is a secondary concern. On the other

hand, one survey respondent refocused the issue on the legal mandate that students have access to the “full continuum” of educational placements, which includes residential schools.

### **Teachers and Administrators**

Unlike the results from the interviews, there appeared to be more participation from teachers and administrators in the online survey. The survey submissions were anonymous and this may have encouraged more participation. Additionally, a report to the General Assembly in 2008 included interviews with both teachers and administrators. Similar to previous results, it was noted by teachers and administrators that programs “to develop social and life skills are not sufficient.” Further, it was suggested that a school with “untrained staff and little resources is surely more restrictive.” This connects back to previous results that staffing difficulties were impacting student learning. Overall, it appears that teachers and administrators had minimal participation in contributing to discussions surrounding the future of the residential schools, but their input was sought and included as part of reports provided to the General Assembly.

### **Observation**

An observation of the Governor Morehead School campus was completed on Thursday, July 28, 2016 and Thursday, October 13, 2016 between the hours of 12:00pm and 8:00pm. These hours were selected because the Governor Morehead School is a residential school and the observer wished to experience both daytime and nighttime activities. It should be noted that the October 13, 2016 observation occurred five days following the landfall of Hurricane Matthew along the coast. This resulted in three days of school cancelation and some damage to the school campus. The results of the observations conducted suggest that

many of the problems discussed previously have been mitigated and improvements across campus continue to be underway.

### **Accountability**

During the site observations on Thursday, July 28 and Thursday, October 13, it was observed that systems and processes are in place to convey a shared accountability system. First, throughout many buildings signage conveys the school mission, vision, and beliefs. The presence of these signs serves as a reminder to all staff, students, and visitors of the role of Governor Morehead School. A “Most Improved K-8 School” banner is hung in the lobby of the school too. Further, signs throughout the buildings displayed the school wide Positive Behavior and Intervention Support system shared by all students and staff. This system focuses on responsibility and respect. Student can earn “Charger Bucks” as part of this system and redeem them at the school store. Finally, it was evident that staff had shared responsibilities for student supervision. During dismissal, staff escorted students from Lineberry Hall to their respective cottages and during dinner time residential life staff shared in supporting all students.

Finally, during the observation the observer was invited to interact with some students to help support social skills instruction. The teacher modeled and guided students with regard to introducing themselves to the observer, maintaining a conversation, and ending the interaction. This connects back to the Expanded Core Curriculum discussed previously. Overall, the site observation supported the results of the interviews and document reviews that there is a focus on life skills and the Expanded Core Curriculum. The skills that students learn from participating in the Positive Behavior and Intervention Support

system can be transferred to real world experience. Also, building a shared purpose among staff and encouraging shared responsibility for all students will strengthen the overall school program.

### **Budget Reductions**

During the site observation on Thursday, October 13, it was noted that a staffing reduction in residential life has resulted in limited independent living experiences for students. Specifically, the Sunshine House and Music House are independent living apartments on the campus designed to prepare students for the demands of living independently upon graduation. Due to limited staffing, only one of these independent living apartments is open per semester. In other words, four female students are given the opportunity to live in the Sunshine House one semester, while four male students are given the experience of living in the Music House the other semester. This observation connects back to interview and document review results that staffing challenges have an impact on student learning opportunities. Overall, generally, it was otherwise difficult to identify other budget reduction strategies simply by conducting a site visit.

### **Decreased Enrollment**

Decreased enrollment was obvious during the two site observations in that overall space on the campus is designed to accommodate a far greater number of students. During dinner on Thursday, October 13, the front portion of the dining hall was filled with Governor Morehead School students, while the larger back section of the dining hall was unused. Students attending the North Carolina Rehabilitation Center for the Blind on the campus partly filled the smaller dining area. Further, on Thursday, October 13 the number of

students attending dinner was even smaller, but this was attributed to Hurricane Matthew. Additionally, during both site observations, classrooms generally had fewer than five students in them. This was applicable for both the Governor Morehead School classroom and Rehabilitation Center for the Blind classrooms. On the other hand, during the site observation on Thursday, October 13, the use of the campus by the Wake Young Women's Leadership Academy brought in an influx of Wake County students. During lunch on this day, the back portion of the dining hall was almost full. In summary, it was not possible to compare numbers to determine an actual decrease in student enrollment during the site observations, but it was noted that the facilities are capable of holding more students. The school has made improvements in this domain by leasing space to the Wake County Public School System so that space is better utilized.

### **Federal Law**

There appears to be significant improvements throughout the campus as it relates to compliance with federal laws. It was difficult to assess programmatic compliance with federal law, but physical accessibility was observed. First, many buildings included directional signage indicating accessible paths of travel and accessible building entrance. Some buildings had wheelchairs lifts. Second, campus parking lots included accessible parking spaces. Many sidewalks included truncated domes at street crossings and curb cuts. It should be noted that accessibility concerns persist throughout the campus in terms of inaccessible paths of travel between some buildings. In some cases, accessible paths to buildings are complex and time consuming. Also, accessible entrances are sometimes

separated from entrances for the general public. In summary, the site observation supported problems noted in the document review regarding campus accessibility.

### **Increased Operating Costs**

During the site observations, it was difficult to measure the possible increases in operating costs, but consideration of all the services provided on the campus paint a realistic picture of the likelihood that costs would rise. First, the Simpson Building houses space for campus security, who utilize a golf cart to patrol the campus twenty-four hours a day seven days a week. Next, C-2 Cottage houses the Student Health Center, which provides onsite medical care to students twenty-four hours a day while students are on campus. Further, the Weathers-Hill Dining Hall serves students breakfast, lunch, and dinner while they are present. In addition, four dormitories are operational to house students throughout the week, each with staff members to provide supervision. Finally, campus maintenance and housekeeping staff is responsible for maintaining a nearly fifty-acre campus and twenty-eight buildings. In conclusion, while it is not possible to estimate how these services have increased overtime, it is realistic to note that these services go well beyond the scope of services provided at typical public schools and as a result would cost significantly more.

### **Maintenance**

During the site visit on Thursday, July 28, it was noted that the Weathers-Hill Dining Hall roof was covered in tarps. Also, while inside the gymnasium later that evening it was observed that part of the roof was leaking. This supports interview results that leaky roofs and aging facilities are a challenge. However, the roof of the Weathers-Hill Dining Hall had been replaced by the second site observation on October 13. Additionally, some parking lots

and sidewalks continue to be in poor condition. Potholes and cracks can be found in many places. Further, some signage throughout the campus appears to be old, faded, and in disrepair. Finally, on October 13 it was observed that two large trees had fallen on the campus as the result of Hurricane Matthew. It should be noted that unexpected maintenance challenges, such as inclement weather, are also a factor in ongoing maintenance efforts.

On the other hand, significant improvements were also noted during the site observations. First, new lighting has been installed on the exteriors of some campus buildings making nighttime travel and security better. Second, new signage has been added to the campus as well as new crosswalk markings painted. Specifically, new pedestrian crossing signs and directional signs have been placed strategically throughout the campus. New signage has also been added identifying campus security and providing contact information. Third, some of the campus parking lots have been resurfaced and some campus streets have been sealed to protect the pavement. Both of these improvements have resulted in revenue, which will be discussed later. Fourth, technology and interior furnishings appear new. Projectors were observed in some classrooms, Weathers-Hill Dining Hall, and Rick Coates' Auditorium. Also, new carpeting, stage curtains, and interior painting were present. Finally, the exteriors of many of the campus buildings have been painted and stair railings replaced. Overall, while maintenance continues to be a challenge, it is clear that significant strides have been made to improve the appearance of the campus.

### **Under-utilization**

The two site observations indicated two levels of utilization on the campus. The Thursday, July 28 site observation was during summer vacation for students who attend

Governor Morehead School. As a result, only students attending the Rehabilitation Center for the Blind were on campus. These students only occupied the small dining room within the Weathers-Hill Dining Hall. They also occupied the upper floor of the Crockett Peeler building in order to attend classes. Classrooms appeared to have fewer than five students in each, which was fewer than the classrooms were capable of holding.

Despite the vacation break, the school did make efforts to make better use of the facilities during this time. For example, during the week of this site observation, a nonprofit organization serving visually impaired students used some facilities. Additionally, an alumni association affiliated with the school was permitted to use some facilities. Finally, despite the fact that school was not in session, other buildings on the campus housing offices for Division of Services for the Blind were in use during this time. Overall, summer utilization of the campus appears to be limited and this could be an opportunity to serve more students and offer more programming.

The site observation on Thursday, October 13 yielded a different assessment of the utilization of the campus. This observation occurred during the school year while students were on campus. During lunchtime, the Weathers-Hill Dining Hall was nearly full of students from the Governor Morehead School, North Carolina Rehabilitation Center for the Blind, and the Wake Young Women's Leadership Academy. Further, several more campus buildings were in use, such as the gymnasium. Penland Building was also in use during this time as it houses the Governor Morehead School preschool class.

While there were more students on campus overall, it continued to appear that five or fewer students were in each classroom, which was still fewer than the capacity of the

classrooms. The campus had an overall appearance of more activity and movement. Furthermore, signage on the campus indicated that some parking areas are used on the weekends by Pullen Park for overflow parking. Finally, it was also observed that evening that a nonprofit organization offering adaptive sports and recreation for individuals with disabilities utilized the campus gymnasium providing instruction in the game of Goalball for both community members with visual impairments and Governor Morehead School students. In summary, improvements have been made in terms of encouraging more utilization of the campus, especially during the summer months and weekends when campus usage is lower. However, more improvements can be made and this could be yet another potential opportunity to serve more students and offer more programs.

### **A Compromise**

On Thursday, October 13, the compromise discussed previously during the interview and document review phases was clearly observed in a very positive manner. On this particular day, the Governor Morehead School hosted an assembly in celebration of White Cane Day, which raises awareness of individuals who are visually impaired that travel with white canes. This assembly was attended by both Governor Morehead School and Wake Young Women's Leadership Academy students. While the interview and document review phases indicated that this compromise was financially oriented, the site observation demonstrated the social importance of this compromise. The ability of students with visual impairments and nondisabled students to interact and learn from each other was evident during the assembly. Overall, the presence of a public school on a residential school campus appeared to be an asset for both entities.

## **Generating Revenue and the Local Economy**

During the site observations on Thursday, July 28 and Thursday, October 13, three main sources of revenue generation were noted. First, the presence of the Wake Young Women's Leadership Academy on the campus is a source of significant revenue. This supports the results of both interviews and document reviews in terms of leasing campus space being a priority to general revenue. Second, signage on the campus indicated that Pullen Park utilized some parking areas for overflow parking on the weekends. This also represents another source of revenue for the school. Finally, to a lesser extent, it was noted that the nonprofit organizations that utilize some facilities pay nominal fees to do so. While this might be insignificant in isolation, together these funds could become useful. Overall, the generation of revenue is evident on the campus and more importantly opens the campus to the broader community.

## **Maintaining the *Status Quo***

As noted previously in the results of the interviews and document reviews, closure of the Governor Morehead School ultimately did not happen. The site observation confirmed that the school is in fact operational and continuing to pursue its mission. During the site observations, the school mission of "high expectation in academic and Expanded Core Curriculum" was evident throughout the campus by the presence of a Positive Behavior and Intervention Support system, independent living apartments, an environment designed to enhance educational opportunities, and direct instruction in social skills. For example, The Martha Franck Fragrance Garden on the campus serves as an outdoor classroom. Students may utilize the garden to learn about various smells, textures, and plant life. Additionally,

some campus sidewalks have been adapted with specific tactile markings so that students can travel independently, orient themselves, and practice identifying various textures with their canes. Finally, the existence of Division of Services for the Blind on the campus supports students at Governor Morehead School as well by offering an onsite store to purchase adaptive equipment and summer transition programs for high school students. In summary, the Governor Morehead School is continuing its mission of educating students with visual impairments and utilizing its many resources to educate the whole child.

### **Specialized Services**

During the site observations on both Thursday, July 28 and Thursday, October 13, three specialized services were observed on campus. First, assistive technology in classrooms and instruction on how to use that technology was noted. Specifically, students with visual impairments use speech output software in order to access computers and other electronic documents. Some of these devices may include scanners, video magnifiers, and cell phones with specialized apps.

Second, instruction in orientation and mobility was observed within campus buildings, on the campus, and in the community. In particular, orientation and mobility teaches students with visual impairments how to safely cross streets, read maps, ride public transportation, be aware of their surroundings, and navigate from point A to point B. Finally, Braille instruction and use was evident throughout the campus. Braille signage can be found inside buildings and outdoors around the campus. A plaque in The Martha Franck Fragrance Garden honors Louis Braille, who invented the tactile language. In summary, the Governor Morehead School provides specialized instruction in a variety of skills important to students

with visual impairments and offers a rich and safe learning environment for those skills to be developed. However, as the school mission implies, the ultimate goal is for students with visual impairments to transfer those learned skills into the broader community.

### **Administrators, Advocacy Groups, Alumni, Parents, and Teachers**

During the site observation on Thursday, October 13, the Governor Morehead School Parent Teacher Association (GMS PTA) met. During this meeting, administrators, alumni, parents, and teachers came together. The GMS PTA discussed a variety of activities to support the school and its students. For instance, the GMS PTA worked to assist the Governor Morehead School Student Council with collection of canned foods for donation to the North Carolina Food Bank. This annual canned food drive was especially important this year as Hurricane Matthew devastated eastern North Carolina with significant flooding. Additionally, the GMS PTA developed plans to host general membership meetings in conjunction with school-wide assemblies. This practice will enable parents to both be involved with the GMS PTA and also attend school assemblies to support their children. Finally, the GMS PTA discussed fundraising efforts to provide support to the Governor Morehead School wrestling and cheerleading teams. In general, the GMS PTA functions as an advocacy group on behalf of the school and offers an avenue for alumni, administrators, parents, and teachers to come together. The GMS PTA appeared to be active and interested in the betterment of the Governor Morehead School and its students.

### **Summary**

In summary, this chapter presented the results of six interviews, twelve document reviews, and two site observations. Accountability, budget reductions, decreased enrollment,

federal laws, increased operating costs, maintenance, and under-utilization were common problems. A compromise, consolidation, generating revenue and the local economy, maintaining the status quo, specialized services, and transferring oversight from the Department of Health and Human Services to the Department of Public Instruction were proposed policy solutions to the aforementioned problems. Advocacy groups, changing political parties, Department of Public Instruction, emotions, legislators, parents, students and alumni, special education law, and teachers and administrators all influenced the problems and policy solutions. In the next chapter, the implications for practice, implications for future research, and implications for policy development will be discussed in relation to the results.

## **Chapter Five**

### **Discussion**

#### **Summary of Major Findings**

The topic of closure or consolidation of residential schools for the blind is not unique to North Carolina. As of 2016, thirteen states have combined schools for the blind and schools for the deaf (Cansler & Pearson, 2010). Further, as of 2016, three states do not have any residential school for the blind. Students in these three states attend schools for the blind in neighboring states. This topic has been under discussion in North Carolina since the 1970s, but came to the forefront for lawmakers in 2011. It was in that year that the North Carolina General Assembly directed that one of the three residential schools in North Carolina be closed and consolidated with the remaining two campuses. This study sought to explore the factors that led up to the decision to close Governor Morehead School in 2011 and what factors led to reversal of that decision in 2012. Additionally, this study sought to explore future policy implications and directions for the State of North Carolina in terms of the maintenance of specialized schools for students with visual impairments.

This study employed both purposeful participant interviews and relevant document reviews. Under Kingdon's Multiple Streams Model, focusing events, indicators, and feedback all help to bring problems to the forefront for policymakers. Indicators typically consist of data points collected in order to monitor particular events (Kingdon, 2011). Declining student enrollment and poor academic performance were indicators of existing problems. Focusing events generally call attention to the indicators and persuade policymakers to act. In 2011, the State of North Carolina was in the midst of a recession and

undergoing changes in political forces. As a result, the pressure to reduce operating costs at the residential schools, reduce state government expenditures, and improve the efficiency of state government came to the forefront. Finally, feedback from stakeholders and reports to the General Assembly indicated issues with under-utilization and maintenance as significant factors for lawmakers to act. Many of these reports offered campus consolidation as a solution to the issues outlined above.

Kingdon (2011) noted that researchers, lobbyists, civilian employees, advocates, and others serve as policy entrepreneurs. These individuals put forth ideas to solve problems. Solutions often sit idle until a problem comes to the forefront and the political climate is ripe for the solution to be presented. Prior to 2011, the problem, policy, and political streams aligned to allow for the transfer of oversight of the Governor Morehead School from the Department of Health and Human Services to the Department of Public Instruction. Further, in the years preceding 2011, reports to the North Carolina General Assembly called for the consolidation of the residential schools. Participant interviews and document reviews showed that attempts to do so were unsuccessful until 2011. Finally, in 2012, the three streams aligned yet again to allow for a compromise to be reached in which all three residential schools would remain open. This window of opportunity was preceded by the indicator of generating revenue and the focusing event of the Wake County Public School System leasing space on the Governor Morehead School campus. Additionally, interviewees and document reviews showed that significant feedback was funneled toward lawmakers regarding the desire to keep all residential schools open and operational.

The political stream is independent of the problem and policy streams and is often impacted by election results, public mood, and interest groups (Kingdon, 2011). Prior to 2011, the State of North Carolina experienced a shift in political forces when Republicans became the majority party in the North Carolina General Assembly. These lawmakers found themselves in the midst of a recession and generally under public scrutiny to reduce state government expenditures. At the same time, interest groups of alumni, parents, students, and teachers interjected their feedback on the specific issue of closing any of the residential schools. This led to an emotional appeal from both lawmakers and interest groups to maintain the *status quo* and allow all three residential schools to remain open. Specifically, in this instance, the movement to undo the directive to close one of the residential schools came from within the General Assembly itself, with support from interest groups.

Overall, the results of this study indicate that the issues of declining enrollment and accountability came to the forefront when a national recession persuaded lawmakers to reduce government expenditures. Previous reports to the General Assembly with concerns of under-utilization and maintenance along with recommendations for campus consolidations served as the basis for this proposed policy solution. In 2011, political forces within the state government were in transition and interest groups had significant influence within the General Assembly. Ultimately, the call to reverse the directive to close one of the residential schools came from within the state government itself after feedback from policy entrepreneurs and an innovative compromise of leasing space on the Governor Morehead School campus was realized. This suggests that Kingdon's Multiple Streams Model is applicable at the onset of the convergence on the three streams as well as throughout the

window of opportunity that is created. In this instance, the three streams converged in such a way that the decision to close one of the residential schools was moved forward, but during the decision-making process the streams converged yet again to compel a reversal of the closure directive.

### **Discussion**

Kingdon's Multiple Streams Model has showed promise as a method to explain how educational policy reaches the decision-making agenda (Shepley, Song, & Young, 2010). Chow (2014) and Shepley et al. (2010) explained that Kingdon's model has had limited application to educational policy at the state level to help explain how educational issues come to the forefront and when policy solutions are adopted. Therefore, this study adds to the existing body of literature on educational policy formation through the lens of Kingdon's Multiple Streams Model.

The results of this study support the findings of previous studies and align with the current trends in reorganization of schools for the blind. Dean (1981), Berry and West (2008), and Berry (2006) noted in their studies that the main purpose of school consolidation was rooted in economic and educational reform. For instance, they indicated that larger schools had the ability to offer more specialized classes and a uniform curriculum for all students. Additionally, larger schools provided more efficiency in terms of a centralized administration and facilities at a lower cost. Finally, the consolidation of schools allowed for more accountability, better monitoring, and direct involvement by the state government in education.

All of these reasons for school consolidation were repeatedly discussed during participant interviews and document reviews. Several reports to the General Assembly discussed increased operating costs and maintenance concerns at the residential schools. Further, participant interviews noted the need to research larger numbers of students with visual impairments and to provide unique opportunities not offered at local public schools. Additionally, legislation from the General Assembly included similar language around accountability and fiscal conservation. Overall, fiscal conservation and efficiency are dominant justifications for governments to pursue school consolidations.

Berry and West (2008) and Sargent and Handy (1974) noted in their studies that school consolidation can easily become an emotional issue and political in nature for community members and policymakers alike. This was clearly exemplified during participant interviews when it was noted that elected officials identified this topic as an emotional one and they sought ways to separate themselves from it. Further, it was also noted during participant interviews that lawmakers expressed an emotional desire to maintain the *status quo*. In addition, as Irwin and Seasons (2012) noted, public input during school consolidations is often simply a part of the process, rather than a true voice. This study supported this notion in that respondents to an online survey by the Department of Public Instruction expressed that their perception was that a decision had already been made or that the survey was not designed to obtain accurate public input. In summary, the issue of school consolidation is rooted in Kingdon's political stream because the stakeholders involved and the processes themselves are impacted by external factors, including emotions and public opinion.

Ajuwon and Oyinlade (2008), Bina (1999), and Corn and Phillips (2003) indicated that students with visual impairments often attend schools for the blind because of the nonacademic experiences provided at the schools. This may include social interaction, independent living, and extracurricular participation. In other words, students with visual impairments attend schools for the blind because their local public schools do not offer equivalent services. The results of this study support those findings. Participant interviews and document reviews both repeatedly discussed an increased focus on the Expanded Core Curriculum, which addresses nonacademic domains. Also, participant interviews suggested that Governor Morehead School needed to set itself apart from local public schools in terms of its offerings, which it has begun to do through the Expanded Core Curriculum. Overall, Governor Morehead School has shifted its focus toward nonacademic domains and this aligns with many of the primary reasons students with visual impairments opt to attend residential schools for the blind.

Corn and Phillips (2003) found during their study that students who are blind attend specialized schools because of the similar characteristics they shared with other students and the ease to which social interactions could be facilitated. About a quarter of the students interviewed stated that attending their local public school would lessen their social status because sighted peers would not understand them, they would be made fun of, and they would be excluded from school activities. On the other hand, a majority of the students noted that their specialized schools supplied services and instruction that would not have otherwise been available to them in a traditional public school (Corn & Phillips, 2003). Participant interviews and document reviews during this study support these findings.

Family members indicated that students with visual impairments in their local public schools are often isolated. Finally, survey respondents noted that the residential schools create communities within themselves and that students with visual impairments are connected to these networks to support one another.

Beadles (2007) and Caldwell et al. (2008) indicated that a national trend in the field of blindness is an emphasis on flexibility and fluidness in educational placements. Nationally, the number of students with visual impairments being served through outreach services from a school for the blind has doubled from 2,500 students in 2002 to over 5,000 students in 2005 (Beadles, 2007). As a result, the number of teachers of the visually impaired needed to support these programs has nearly tripled from about 40 to nearly 110 teachers. There has also been a notable increase nationwide in summer school and short-term placement enrollment (Beadles, 2007). Schools for the blind have sought to address these trends through development of regional centers and comprehensive outreach programs.

The results of this study suggest that Governor Morehead School has sought to align its program offerings with national trends and student needs. Participant interviews and documents support that Governor Morehead School has increased its summer school programs and short-term placements. This was also noted in pieces of legislation. These programmatic changes also correspond to data from participant interviews and documents that indicate a movement toward a revolving door placement or a system in which students attend Governor Morehead School for a period of time to receive specialized instruction and then return to their local public school. Bina (2008) and Smith and Wild (2006) echoed the

same when they suggested that rural school districts in particular are in need of additional supports to educate students with visual impairments.

McMahon (2014) noted that schools for the blind are expanding their scope to include offering professional development, assessment services, outreach programs, and short-term placements. Documents support the notion that these activities should be occurring at Governor Morehead School consistently, but participant interviews and site observations found little evidence of implementation. The lack of wraparound services could be rooted in previous organizational shifts at Governor Morehead School when it transitioned from the Department of Health and Human Services to the Department of Public Instruction. Legislation from the General Assembly suggests that outreach services and early intervention services for students with visual impairments have undergone significant organizational movements over the past few years, which could be a potential cause of the gap in wraparound services.

Additionally, participant interviews align with national concerns of hiring and retaining qualified staff. Interactions between Governor Morehead School and the Visual Impairment Training Program at North Carolina Central University have lessened over the past several years. This represents one domain in which Governor Morehead differs from national trends in terms of collaborating and partnering with institutions of higher learning for professional development and staff recruitment.

### **Implications for Policy**

The findings of this study have four major policy implications for school leaders and elected officials to consider. First, a more accurate system for calculating the cost per pupil

and overall operating costs of Governor Morehead School is necessary. Simply dividing the number of students by the overall operating costs does not give an accurate reflection of the true cost per pupil. Further, this equation also fails to take into consideration the costs associated with operating and maintaining a residential school as opposed to a traditional local public school that does not include residential components. The development of such a formula must also take into consideration the multiple entities that occupy the Governor Morehead School campus and their associated expenses and revenue. In developing this formula, policymakers must consider the costs associated with maintaining the state government entities that presently occupy parts of the Governor Morehead School campus. These associated costs could include rent, relocation expenses, utilities, travel, accessibility features to ensure access for those with disabilities, and other costs of conducting business on leased property. Also, the loss of current cost savings related to utilization of shared services on the Governor Morehead School campus must be incorporated into the formula. This might include food services, security, maintenance, and recreation facilities. Finally, the recorded number of students served by Governor Morehead School should be expanded to include all students served through short-term placements and summer school. The number of students enrolled at Governor Morehead School as fulltime students should not be the only factor in determining cost per pupil. This could include students who attend summer programs, short-term programs, or are provided consultative services at their local public school.

Second, school leaders and elected officials should consider enhanced educational opportunities and more efficient use of the Governor Morehead School campus facilities to

support learning for students with visual impairments. A greater emphasis should be placed on after school learning opportunities in the Expanded Core Curriculum. Under current programming, short-term placements are limited to two weeks in duration and summer school is limited to roughly one month. Short-term placements should become a standalone service and include students who require short-term placements ranging from one semester to one year. An increase in the duration of short-term placements is necessary so that students can fully benefit from instruction in nonacademic areas, while maintaining their academic skills. Students attending Governor Morehead School for short-term placements should be integrated into the broader school environment. This would require a systematic shift at Governor Morehead School so that the academic program aligns more closely with that of the local public schools. This shift is necessary so that students can transition to and from the school without gaps in academic skills or instruction. In addition, summer school should be expanded to include an additional month of instruction. This additional time will allow Governor Morehead School to serve a greater number of students and to create learning opportunities more specific to student needs. At present, school calendars vary across North Carolina and Governor Morehead School must capitalize on the traditional summer vacation time period to offer instruction to students who may not be able to attend during the traditional school year. Overall, it is recommended that year-round programming be implemented so that more students with visual impairments have access to resources at Governor Morehead School. Any such shifts in programming will require collaboration with other entities and Governor Morehead School should also focus on strengthening partnerships, which will be discussed in the next two recommendations.

Third, the Governor Morehead School should serve as a one-stop clearinghouse of supports and resources for those with visual impairments across North Carolina. This can be easily achieved by strengthening partnerships and developing a comprehensive entity designed to streamline resources and services. It is recommended that early intervention services for students with visual impairments, consultants for the visually impaired housed at the Department of Public Instruction and select transition staff from Division of Services for the Blind be assumed by the Governor Morehead School so that students from birth to age 21 can be seamlessly served by one educational entity.

Further, to support the enhanced short term and summer school offerings outlined earlier, a new outreach component of Governor Morehead School should be created. This component of the school would support local public schools by identifying resources for students with visual impairments and would serve as a liaison for short term and summer school programs. Finally, the outreach program would allocate resources to providing professional development to educators in the field of visual impairments across North Carolina. This role is essential to address concerns with attracting and retaining qualified professionals.

Lastly, Governor Morehead School should collaborate with the Visual Impairment Training Program at North Carolina Central University to facilitate professional development and to provide learning opportunities for students attending the university. Governor Morehead School should consider providing classroom space and housing on the campus for university students. This form of collaboration will provide pre-service educators of the visually impaired with experiences not available on a college campus and will improve

efficient use of the campus facilities. In addition, it is recommended that a stronger relationship with the North Carolina Library for the Blind and Physically Handicapped be facilitated so that students have access to reading materials and services that can follow them beyond high school.

Furthermore, a partnership with the City of Raleigh to enhance athletic and recreational opportunities for those with visual impairments in the community is needed. The close proximity of Governor Morehead School to existing and planned city-owned recreational facilities puts the school in a prime position to embrace and negotiate a partnership. Such a partnership could enhance opportunities for Governor Morehead School students, adults with visual impairments living locally, and greater community awareness of the school and its programs.

Additionally, a formal partnership with the Wake County Public School System to continue leasing of space on the Governor Morehead School campus is essential to ensuring financial stability. However, this partnership can be expanded to allow for students with visual impairments who attend the Wake County Public School System to benefit from the classes and services offered at Governor Morehead School or vice versa. Also, more opportunities for inclusive and shared events between Governor Morehead School and the Wake Young Women's Leadership Academy will break down barriers and eliminate stereotypes.

Finally, it is recommended that the North Carolina Library for the Blind and Physically Handicapped and all other agencies or organizations that serve the visually impaired be moved to the existing Governor Morehead School campus. This move would

strengthen and streamline services for those with visual impairments and make better use of unoccupied facilities on the school campus. Such a move would also improve wraparound services discussed earlier because the North Carolina Library for the Blind and Physically Handicapped serves individuals with blindness of all age groups. Considerations should also be given to utilization of space on the campus for the many nonprofit organizations that support students and adults with visual impairments. This would streamline and enhance transition support activities for those with visual impairments across North Carolina.

### **Implications for Research**

The findings of this study support the need for additional research in a variety of domains. First, this study supports the assertion of Shepley et al. (2010) that Kingdon's Multiple Streams Model shows promise as a method to explain how educational policy reaches the decision-making agenda. In this study, Kingdon's model helped to identify indicators and focusing events, explained how proposed policy solutions came to be, and how interest groups, emotions, and political forces influenced decision making. As a result, Kingdon's Multiple Streams Model should be considered as a framework for future studies related to the field of education.

Second, a detailed study of the academic and functional achievements of students with visual impairments at Governor Morehead School is necessary. This will help to guide instructional decisions and provide further guidance on how resources should be allocated to support student learning. It will also allow school leaders to identify areas of success and areas for improvement. Specifically, a study on postsecondary outcomes of Governor Morehead School graduates could strengthen the support services provided by identifying

areas of strength and areas for improvement. This cost-benefit analysis could closely examine the employment rates, types of employment, compensation or income earnings, and higher education attainment of the graduates. A cost-benefit analysis could be an important measure because long-term investments in education typically manifest themselves decades later in the form of civic participation, contributions to the tax base, and less dependence on government support programs. In addition, a comparison of academic and functional achievements and postsecondary outcomes for students with visual impairments attending local public schools and those attending Governor Morehead School will help strengthen accountability, facilitate a uniform curriculum, and improve monitoring by the Department of Public Instruction. Any such research should include learning opportunities during after school hours in the campus cottages at Governor Morehead School.

Third, a detailed study of current and future service delivery models for North Carolina is necessary. The study conducted in 2008 by the University of North Carolina School of Government lacked the time and detail to offer true guidance on future planning for service delivery. Such a study can provide information on how students can best be served in or near their local communities. This may include regional itinerant services, regional day programs, or residential schools. As noted earlier, upward trends in inclusive services and revolving door placements will propel the State of North Carolina to consider and expand service delivery offerings in the future.

Fourth, a study related to new concepts of shared campuses should be considered. It is likely that the topic of consolidation of the residential schools will resurface in the future, but instead of discussing the topic purely from a fiscal standpoint, it should be discussed

through the lens of a shared campus model. In this instance, a future study could take on the innovative idea of a local public school sharing the campus with a residential school. As noted previously, the sharing of the Governor Morehead School is the only known relationship of its kind in the United States. Aside from that perspective, a future study could also examine a shared campus model through the lens of two residential schools occupying one campus. There are many neighboring states to North Carolina that could serve as research sites. Such a study would take a broader look at consolidated administrative functions, operations, education, and shared facilities.

Lastly, a detailed study of the allocations of resources to educate students with exceptionalities and their post secondary outcomes would be critical to future planning for elected officials. Specifically, in North Carolina, a study exploring why consolidation of the residential schools for the deaf and blind is a recurring theme, while elected officials are discussing plans to expand residential school options for students who are academically gifted. Additionally, a comparison of the resources allocated for such purposes and the ultimate post secondary outcome may help elected officials focus allocations and be equitable in their decisions. Resource allocations could include funding, staffing, facilities, instructional materials, and related equipment.

### **Conclusion**

This study sought to explore the factors that led up to the decision to close Governor Morehead School in 2011 and what factors led to reversal of that decision only one year later. Additionally, this study sought to explore future policy implications and directions for the State of North Carolina in terms of the maintenance of specialized schools for students

with visual impairments. The topic of consolidation of the residential schools for the deaf and blind in North Carolina has been ongoing since the 1970s. Using Kingdon's Multiple Streams Model, the results of this study indicated that accountability, increased operating costs, and decreased student enrollment were all perceived or actual problems prompting elected officials to act. The proposed policy solution was to close one of the residential schools and consolidate it with the remaining two campuses. Pressure from interest groups, emotional appeals, and a plan to generate revenue ultimately persuaded elected officials to abandon their original proposal. Moving forward, establishing Governor Morehead School as a one-stop clearinghouse for resources for those with visual impairments is recommended. Specifically, expanding Governor Morehead School to include early childhood services, statewide outreach services, and year-round programming will enhance seamless service delivery from birth to age 21 and make more efficient use of campus facilities. Further, expanding student learning opportunities to include longer short-term placements and summer learning experiences is necessary to improve student access to services and provide more efficient use of state dollars as a greater number of students with visual impairments can be served. In summary, in 2011 and 2012, the problem, policy, and political streams of North Carolina, as embodied in the Kingdon's Multiple Streams Model aligned, perfectly to close and then prevent the closure of the Governor Morehead School for the Blind.

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## APPENDICES

## Appendix A

### Interview questions:

1. Prior to 2011, what, if any, knowledge did you have about The Governor Morehead School for the Blind?
2. In 2011, what problems, whether actual or perceived, were brought to your attention regarding The Governor Morehead School for the Blind? What solutions were proposed to address these problems, if anything?
3. In 2011, what political forces influenced either the problem(s) and/or solutions(s) discussed earlier?
4. What processes were followed and data collected in making the determination to close The Governor Morehead School for the Blind?
5. Based on your experience, how did the decision to close The Governor Morehead School for the Blind come to happen? Why did the Department of Public Instruction decide to only close the school in name, but allow the students to physically remain on its Raleigh campus?
6. In 2012, how did the decision to unclose The Governor Morehead School come to happen? What circumstances changed to result in this reversal?
7. Moving forward, what is your vision for The Governor Morehead School for the Blind? What potential problems do you foresee, if any? What possible solution(s) do you suggest to address these problem(s), if anything?

## Appendix B

### North Carolina State University RECRUITMENT LETTER for PARTICIPATION in RESEARCH

Title of Study: Educational Policy Formation: The Closing and Unclosing of The Governor Morehead School for the Blind

Principal Investigator: Alan Chase

Faculty Sponsor (if applicable): Dr. Lance Fusarelli

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To Whom It May Concern:

You are invited to participate in a research study. The purpose of this study is to explore the closing and unclosing of the Governor Morehead School for the Blind through a policy formation lens. You will be interviewed once during the summer or fall for no more than 60 minutes at a time and location which are convenient for you. You will be individually interviewed by Alan Chase. These interviews will be audio recorded for transcription purposes.

There is minimal anticipated risk to you, since your participation is limited to exchange of information through interviews. You will have the opportunity through participation in this study to share information that will explain how this topic came to the attention of lawmakers, the policy solutions set forth, and factors that lead to the closing and subsequent unclosing of Governor Morehead School for the Blind.

The information in the study records will be kept strictly confidential. No reference will be made in oral or written reports which could link you to the study. However, this study will include review of existing public documents as part of the data collection process. These documents will include legislation, reports to the General Assembly, and transcripts of public hearings. It is possible that you may be identified in those documents. You will be referred to by a pseudonym in order to protect your identity. The consent form that you will sign upon your agreement to participate which links you with your pseudonym will be stored in a locked file at Alan Chase's home office. At the conclusion of this study, the audiotapes, identifiable only by your pseudonym and the key that relates your name with your pseudonym will be destroyed.

Under this condition, you agree that any information obtained from this research may be used for publication or educational purposes of this researcher and the program only.

You will be offered a copy of the completed study in appreciation for your participation.

Your participation in the study is voluntary. You may withdraw from this study at any time. No compensation will be offered.

If you are interested in participating in this study or have any questions at any time about the study or the procedures, you may contact the researcher, Alan Chase at [aachase@ncsu.edu](mailto:aachase@ncsu.edu) or 9106122220.

Sincerely,  
Alan Chase

## Appendix C

### North Carolina State University INFORMED CONSENT FORM for RESEARCH

Title of Study: Educational Policy Formation: The Closing and Unclosing of The Governor Morehead School for the Blind

Principal Investigator: Alan Chase

Faculty Sponsor (if applicable): Dr. Lance Fusarelli

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#### **What are some general things you should know about research studies?**

You are being asked to take part in a research study. Your participation in this study is voluntary. You have the right to be a part of this study, to choose not to participate or to stop participating at any time without penalty. The purpose of research studies is to gain a better understanding of a certain topic or issue. You are not guaranteed any personal benefits from being in a study. Research studies also may pose risks to those that participate. In this consent form you will find specific details about the research in which you are being asked to participate. If you do not understand something in this form it is your right to ask the researcher for clarification or more information. A copy of this consent form will be provided to you. If at any time you have questions about your participation, do not hesitate to contact the researcher(s) named above.

#### **What is the purpose of this study?**

The purpose of this study is to explore the closing and unclosing of the Governor Morehead School for the Blind through a policy formation lens

#### **What will happen if you take part in the study?**

If you agree to participate in this study, you will be asked to participate in an individual interview with Alan Chase during the summer or fall of 2016. During this interview, questions will be asked to gather information that will explain how the aforementioned topic came to the attention of lawmakers, the policy solutions set forth, and factors that lead to the closing and subsequent unclosing of Governor Morehead School for the Blind. This interview will be audio recorded for transcription purposes and will last no more than 60 minutes. The location of the interview will be a mutually agreed upon location.

#### **Risks**

There are minimal risks of participating in this study. It is possible that your identity may become known as the result of your title or position. Further, this study will include the review of existing documents as part of data collection, which will include legislation, transcripts of public hearings, and reports to the North Carolina General Assembly. It is possible that identifying information will be contained within these documents.

#### **Benefits**

There is no direct benefit to you for participating in this study. Your participation will assist in the collection of knowledge on the topic outlined above. You will be offered a free copy of the completed study in appreciation for your participation.

#### **Confidentiality**

The information in the study records will be kept confidential to the full extent allowed by law. Data will be stored securely in the home office of Alan Chase on a password protected computer and within a password protected file. No reference will be made in oral or written reports which could link you to the study. Pseudonyms will be used to minimize the risk of your identification as a participant in this study. You will NOT be asked to write your name on any study materials so that no one can match your identity to the answers that you provide.

**Compensation**

For participating in this study you will receive a free copy of the completed study. If you withdraw from the study prior to its completion, you will receive nothing for your partial participation.

**What if you have questions about this study?**

If you have questions at any time about the study or the procedures, you may contact the researcher, Alan Chase, at 1217 Manassas Court Unit C Raleigh, NC 27606 or 9106122220.

**What if you have questions about your rights as a research participant?**

If you feel you have not been treated according to the descriptions in this form, or your rights as a participant in research have been violated during the course of this project, you may contact Deb Paxton, Regulatory Compliance Administrator at dapaxton@ncsu.edu or by phone at 1-919-515-4514.

**Consent To Participate**

“I have read and understand the above information. I have received a copy of this form. I agree to participate in this study with the understanding that I may choose not to participate or to stop participating at any time without penalty or loss of benefits to which I am otherwise entitled.”

**Subject's signature** \_\_\_\_\_ **Date** \_\_\_\_\_  
**Investigator's signature** \_\_\_\_\_ **Date** \_\_\_\_\_