

MEMORANDUM

FROM: Jeffery Warren, Ph.D. Executive Director; Jeni Corn, Ph.D., Director of Research – Social Sciences

RE: Update on Progress for the Office of Learning Research (OLR) at NC Collaboratory

DATE: June 27, 2025

Legislative Mandate

S.L. 2024-57, SECTION 2A.8, the North Carolina Collaboratory will establish and operate the Office of Learning Research (OLR), beginning in the 2024-2025 fiscal year. The purpose of OLR is to identify and evaluate the efficacy and efficiency of programs, activities, initiatives, procedures, and any other factors related to elementary and secondary education in the State. Passed into state law December 11, 2024. (e) Report. – No later than July 1, 2025, the Collaboratory shall report to the Joint Legislative Education Oversight Committee on the progress made in establishing and operating OLR pursuant to this section. For each fiscal year OLR is in operation, the Collaboratory shall include in the annual report required by G.S. 116-256 information on the activities of OLR from the prior fiscal year.

Key takeaways:

- Two full-time staff to lead and manage OLR have been hired at the NC Collaboratory.
- OLR has actively engaged with key education leaders and officials in NC to build awareness of the new office at the NC Collaboratory.
- OLR is gathering input and building consensus around the most pressing policy issues in the K12 system.
- OLR is working directly with faculty at NC's institutes of higher education to fund research projects to accelerate innovation or inform education policy and practice.
- To date, the NCGA mandated \$525K OLR studies and the discretionary OLR studies subtotal \$775M; totaling \$1.3M in research grants already obligated.
- The 2025-27 NC Senate and House biennial budget proposals included \$11.25M in research funding to support six OLR research studies and codify OLR in the NC Collaboratory's existing Article 31A as GS 116-257.

PROGRESS TO DATE

The [NC Collaboratory](#) is a funding agency that was established by the NC General Assembly in 2016 to advance academic research that generates practical information for use by State and local governments and the communities they serve. The NC Collaboratory will establish and operate OLR to provide information and support needed by elementary and secondary public schools, university leaders, and elected officials to make evidence-based decisions; collaborate with constituent institutions of The University of North Carolina and other stakeholders to implement innovative policies and programs to accelerate learning for all students; work with external research resources and partners to evaluate local, State, and federal programs to establish metrics and assess return on investment; and support the operations of OLR. OLR will be part of a larger social sciences research office at the NC Collaboratory.

PRESSING K12 POLICY ISSUES IN NC

Engagements with critical education stakeholders have elevated the following as the most pressing policy priorities for NC’s elementary and secondary public schools:

1. Accountability for Opportunity Scholarships
2. Cell Phone Restriction Policies in Schools
3. Chronic Absenteeism
4. Early Literacy
5. Educator Recruitment and Retention
6. Effective Math Instruction
7. Family Engagement
8. Helene Recovery
9. Innovative Models for High School
10. Principal Working Conditions
11. Schools for the Deaf and Blind
12. School Funding Models
13. School Safety
14. Student Mental Health
15. Use of Artificial Intelligence in Schools

Table 1. OLR Funded Research Studies

Topic	Institution	Budget Estimate	Timeline	Legislation or State Agency	Report Due Date
Legislatively Mandated Studies					
Report on Opportunity Scholarship	NCSU	\$300K	2025-2026	S.L. 2024-57, SECTION 3J.23.(a)	December 31, 2025
Effects on Students of 2025 Summer Learning Program for Helene-Impacted PSUs	UNC App State	\$150K	2025-2027	S.L. 2025-2, SECTION 2G.1.(k)	January 15, 2027
Instructional Plan for Schools for the Deaf and Blind	TBD	\$75K	2025-2027	S.L. 2024-57, SECTION 3J.6.(h)	May 1, 2025, December 31, 2026
Collaboratory Discretionary Studies					
Impacts of Local Policies to Restrict Cell Phone Use in Schools	UNC	\$300K	2025-2027	S526, HB87v3	--
Pilot study for a new NC Principal Working Conditions Survey	NCSU	\$75K	2025-2026	NCDPI	--
Benefit Cost Analysis of a Large-Scale Student Mental Health Program [<i>Under Consideration</i>]	TBD	TBD	2025-2027	NCDPI, DHHS	--

Table 2. Legislatively Mandated Studies Proposed in the 2025-27 NC Senate and House Budget Biennium Proposals

Topic	Institution	Budget Estimate	Timeline	Legislation or State Agency	Report Due Date
AI Academic Support	TBD	\$300K	2025-2028	S619	April 1, 2028
Transforming the High School Experience	TBD	\$450K (NR)	2027-2030	S579	Annually March 15, 2027 - 2030
K-12 Math Pilot	TBD	\$10M (NR)	2025-2027	S257v5, SECTION 8.25.(a-f)	October 15, 2026, October 15, 2027
9-12 Literacy PD	TBD	\$500K (NR)	2025-2026	S257v5, SECTION 8.26	April 15, 2026

<i>Topic</i>	<i>Institution</i>	<i>Budget Estimate</i>	<i>Timeline</i>	<i>Legislation or State Agency</i>	<i>Report Due Date</i>
School Business System Modernization	TBD	TBD	2025-2026	S257v5 , SECTION 8.27	November 1, 2026
Classic Learning Test for Admissions to UNC System Schools	TBD	TBD	2025-2026	S257v5 , SECTION 8.30.(a-c)	December 15, 2025

DETAILS FOR OLR FUNDED STUDIES

Report on Opportunity Scholarship

Principal Investigators: Dr. Anna Egalite, Ph.D. (NCSU), Dr. Matthew Springer, Ph.D. (Basis Policy Research)

Total Award: \$282,782

Established in 2013 by the General Assembly, the North Carolina Opportunity Scholarship Program has grown into the largest universal school voucher program in the United States. This expansion has prompted increased interest in two main areas: (a) approaches for assessing and comparing student performance between traditional public school students and those utilizing Opportunity Scholarships, and (b) the program's effects on various non-academic outcomes, such as socio-emotional learning, educational trajectories, and broader social and economic impacts. This project aims to provide recommendations for effective strategies to measure student performance in 3rd and 8th grades, as mandated by the NC General Assembly, and to design a comprehensive evaluation of the program's effects on participating students.

Effects on Students of 2025 Summer Learning Program for Helene-Impacted PSUs

Principal Investigators: Dr. Sarah Crittenden Fuller, Ph.D., (UNC-CH), Dean Melba Spooner, Ph.D. (Appalachian State University)

Total Award: \$154,031

This study aims to evaluate the implementation and impact of School Extension Learning Recovery Programs (SLERPs) authorized by the NC General Assembly in response to Hurricane Helene. These SLERPs will serve students in grades 4-8 in 13 western NC counties in summer 2025. The study team will collect data on SLERP program plans, student enrollments and attendance, benchmark exam scores, EOG scores, attendance, and grades for program attendees. The researchers will also conduct observations of SELRPs; interview district and school staff in the programs; and survey students and staff to understand stakeholders' views of the programs. We will use a mixed methods approach to understand program implementation and impacts. Results from the study will provide evidence to education policymakers and practitioners on how the programs were designed and implemented; program impacts on student academic and school engagement outcomes; and the relationship between the program design and student outcomes. These data will be shared with policymakers directly and disseminated broadly to practitioners in the form of reports and policy briefs. This evidence will help state education systems understand how summer programs can best be used to support future hurricane recovery.

Instructional Plan for Schools for the Deaf and Blind

Principal Investigator and Total Award: TBD

Given the abbreviated timeline (December 11, 2024 - May 1, 2025) for completing this update to JLEOC, OLR worked with a team of graduate students from the Sanford Master of Public Policy Program at Duke University to develop a preliminary report. The graduate student team conducted a foundational landscape analysis to support the NC Collaboratory's efforts to engage highly qualified researchers to identify research-based best practices for educating Deaf and Blind students in the state's three specialty schools.

Subsequently, OLR at the NC Collaboratory will use the information from the preliminary report to design and fund a 18-month study (July 1, 2025 – December 31, 2026) that will provide recommended best practices for administrative structure, operations, and policies, including the cost and positions needed for

the support of the Schools and how to optimize operation of that School to maximize the educational outcomes for the Schools' students and ensure the Schools' success and independence. This study will include direct engagement with leaders and staff the Department of Public Instruction, Department of the Administration, Governor Morehead School for the Blind and Governor Morehead Preschool, Eastern North Carolina School for the Deaf, and North Carolina School for the Deaf. A report, non-technical policy brief, and presentation of research findings will be submitted to JLEOC by December 31, 2026.

Pilot study for a new NC Principal Working Conditions Survey

Principal Investigator: Dr. Timothy Drake, Ph.D. (NCSU)

Total Award: \$74,847

North Carolina public school leaders have voiced the need for a dedicated survey to assess their unique experiences and working conditions. Historically, principals and assistant principals participated in an abbreviated version of the NC Teacher Working Conditions (TWC) survey, but its application and impact remained unclear. In 2024, the North Carolina Department of Public Instruction (NCDPI) responded by partnering with Principal and Superintendent of the Year representatives to develop a new, administrator-focused survey. Through focus groups involving over 100 school and district leaders, NCDPI identified key issues and priorities to design a draft survey tailored to the needs of principals and assistant principals. The NC PWC aims to provide valuable insights into leadership challenges, promote effective support systems, and inform decision-making across the state. This pilot program will engage eight districts and charter schools to refine the survey and offer recommendations for a statewide rollout. The NC PWC reflects a commitment to empowering school leaders, ensuring their voices shape strategies for improving working conditions and, ultimately, the quality of education in North Carolina.

Impacts of Local Policies to Restrict Cell Phone Use in Schools

Principal Investigator: Dr. Mitch Prinstein, Ph.D. (UNC-CH)

Total Award: \$301,284

Youth engage in high levels of device usage during school hours, with many educators reporting that such usage is disruptive to the learning environment. The purpose of this project is to examine multiple forms of adolescent school device usage, including on both student-owned devices and school-issued devices, and to investigate how this type of usage relates to academic, behavioral/disciplinary, social, and psychological functioning. Teachers' perceptions of device usage and student functioning will also be assessed. An additional goal is to examine how these associations may vary depending on a school's device policy. Associations will be explored across three waves spanning three semesters, which will provide insights on how these relationships may change over time and how device usage and various domains of functioning may be bidirectionally linked. Eight middle schools across the state of North Carolina will participate. The insights gained in this study will inform recommendations that can be made about school-based digital device usage, and what environments may be best for student learning.

Benefit Cost Analysis of a Large-Scale Student Mental Health Program

Principal Investigator: TBD

Total Award: TBD

Despite promising data, funding for sustainability of existing programs and expansion into other districts is not guaranteed. A Benefit-Cost Analysis (BCA) study utilizing rigorous economic methods to calculate the true costs of implementing comprehensive, school-based Multi-Tiered Systems of Support (MTSS) programs and quantifying the benefits in real economic terms is needed. To date, no economic analyses have been conducted for any of the 90+ AWARE sites nationwide. Such a study would enhance NC policymakers' ability to assess the downstream cost savings and tangible value of making early investments in mental health screening and supports for all NC children. It would also position NC as a leader in utilizing BCA to inform policymaking for investment in children's mental health services and public health more broadly.

APPENDIX

Study overviews for the following research studies:

- Report on Opportunity Scholarship
- Effects on Students of 2025 Summer Learning Program for Helene-Impacted PSUs
- Impacts of Local Policies to Restrict Cell Phone Use in Schools
- Pilot study for a new NC Principal Working Conditions Survey
- Benefit Cost Analysis of a Large-Scale Student Mental Health Program

Reports on North Carolina's Opportunity Scholarship Testing

Overview

Established in 2013 by the General Assembly, the North Carolina Opportunity Scholarship Program (OS Program) has grown into the largest universal school voucher program in the United States. This expansion has prompted heightened interest in two main areas: (a) approaches for assessing and comparing student academic performance between public school units and those utilizing Opportunity Scholarships, and (b) the program's effects on various non-academic outcomes, such as durable skills, educational trajectories, and broader social and economic impacts. Consequently, this study, funded by the Office of Learning Research at the NC Collaboratory, aims to conduct a comprehensive review of testing practices and engage with educational organizations and other interested parties, ultimately providing recommendations for effective strategies to assess student performance in 3rd and 8th grades, as required by the NC General Assembly (see [S.L. 2024-57](#), SECTION 3J.23.(a-c) on the following page) and to design a comprehensive evaluation of the program's effects on participating students.

Research Objectives

- Evaluate various testing options for assessing and comparing student performance between public school students and those utilizing Opportunity Scholarships, and offer recommendations for the best strategies for measuring student performance in 3rd and 8th grades at scale.
- Produce an evaluation plan that delineates the study methods, data, timeline, cost, and statistical power needed to investigate the effects of the OS Program on durable skills, student performance, educational pathways, and social and economic outcomes, and identify areas for advancing the existing program.

Research Activities

- Facilitate input sessions with interested parties to ensure local contexts and perspectives from non-public school communities, as well as public school communities are considered.
- Conduct background research on national standardized assessments, evaluate the alignment of these national tests with the North Carolina Standard Course of Study, and assess the feasibility of implementing formative or through-grade assessments that can be administered multiple times throughout the year.
- Conduct descriptive and basic regression analyses of data from the 2023 and 2025 Opportunity Scholarship Parent Survey
- Obtain and organize secondary administrative data to facilitate a thorough evaluation of the OS Program.
- Engage nationally recognized school choice, psychometric, and research design and analysis experts to serve on the Technical Research Group to provide critical insight and comment on study deliverables and participate in designated meetings about project findings.

Research Deliverables

- Report for JLEOC - A report and presentation of research findings that highlight the advantages, disadvantages, and costs associated with the adoption of various nationally standardized tests for use in 3rd and 8th grades. Due: December 31, 2025.
- Interim policy briefs for the NC Collaboratory and/or members or staff from the NC General Assembly. Due: As requested.

Principal Investigators

- Anna J. Egalite, North Carolina State University and the Hoover Institution at Stanford University (anna_egalite@ncsu.edu)
- Matthew G. Springer, Basis Policy Research (mgspringer@basispolicyresearch.com)

Related Legislation: [S.L. 2024-57](#), SECTION 3J.23.(a-c)

REPORTS ON OPPORTUNITY SCHOLARSHIP TESTING

SECTION 3J.23.(a) Subsections (i) and (j) of Section 8A.6 of S.L. 2023-134 are repealed.

SECTION 3J.23.(b) The Office of Learning Research at The University of North Carolina, as established by Section 2A.8 of this act, shall study and report the following to the Joint Legislative Education Oversight Committee by December 31, 2025:

- (1) For the purpose of comparing student performance, recommendations for nationally standardized tests for use in third grade and eighth grade that would be appropriate for administering to (i) students in nonpublic schools who are receiving Opportunity Scholarships beginning with the 2026-2027 school year and (ii) students attending schools in public school units. To the extent practicable, the Office of Learning Research shall recommend only one test for use in third grade and one test for use in eighth grade.
- (2) Alignment between the nationally standardized tests selected pursuant to subdivision (1) of this subsection and the standard course of study for third grade and eighth grade, respectively, including a crosswalk between the standards assessed by the nationally standardized tests and the standard course of study.
- (3) Feasibility of developing a through-grade assessment for third and eighth grade that would meet the following criteria:
 - a. Assess mastery of the standard course of study.
 - b. Consist of multiple testing events throughout the year that are aggregated into a summative score.
 - c. Replace the current end-of-grade assessments for third and eighth grade.

d. Yield data that can be used with the Education Value-Added Assessment System (EVAAS).

e. Comply with federal law.

SECTION 3J.23.(c) The State Education Assistance Authority shall designate as the nationally standardized assessments to be administered by nonpublic schools, in accordance with G.S. 115C-562.5(a)(4), the tests recommended by the Office of Learning Research at The University of North Carolina for use in third grade and eighth grade in accordance with subsection (b) of this section.



Summer 2025 Programs

Research Project

Overview

The Reich College of Education at Appalachian State University and the Education Policy Initiative at Carolina (EPIC) at UNC Chapel Hill are partnering to study the implementation and impact of the School Extension Learning Recovery Programs authorized by the Disaster Recovery Act of 2025 – Part I (House Bill 47). The goals of this project are to understand how PSUs designed their summer programs, how they were implemented, and the impacts on students and families in order to provide evidence to support PSUs and state policymakers in designing and implementing high quality summer programs in future years.

Data Collection

To develop a comprehensive understanding of the variety of summer programs across PSUs, the research team will partner with PSUs to:

- Observe at school sites for 3-5 hours;
- Interview district leadership and summer program staff;
- Send feedback surveys to summer program staff, students, and parents; and
- Gather program schedules for each site.

The research team will also work with the NC Department of Public Instruction to gather information on student enrollment, attendance, and student outcome data.

Results of the Research

This research study will produce Summer Program Profiles for each participating PSU, a brief describing implementation of the programs (early 2026), and a brief describing the impact of the programs and highlighting successful programs (early 2027). These findings will be presented to the NC State Board of Education and the Joint Legislative Education Oversight Committee. In addition, all findings will be shared back with participating PSUs to support their learning and continued development of future summer programs.

For More Information

If you have any questions or want to learn more about the project, please reach out to:

Dr. Jennifer McGee, mcgeejr@appstate.edu

Dr. Sarah Crittenden Fuller, sarah.fuller@unc.edu



Study on New Restrictive Cell Phone Policies in NC Middle Schools

Overview

The [Winston Center on Technology and Brain Development at the University of North Carolina](#) is working with school districts to understand the impact of personal smart devices and/or school-issued technological devices on youths' academic, behavioral/disciplinary, social, and psychological functioning. In addition, this work can evaluate whether school policies regarding device use may be related to changes in youths' development.

The Winston Center research team has two decades of experience exploring the effects of digital technology use on youth development. Our team draws on our expertise spanning the disciplines of neuroscience as well as developmental, media, and clinical psychological science. A primary objective for our school-based work is to assess how device usage during school hours and/or during classroom instructional time may be associated with young people's classroom attention, academic performance, device-related disciplinary infractions, mental health (e.g., depressive symptoms, social anxiety), physical health (e.g., exercise, sleep), self-regulation, social relationships, and school experiences (academic aspirations, school belongingness), as well as teacher effectiveness/stress.

Our work is modified to meet the needs of each jurisdiction/district but can include the collection of data from students, teachers, parents, and objective school-based records. All data are kept confidential and only group-level results are shared, often without identifying the district or jurisdiction, if desired.

The Winston Center receives no funds from technology or social media companies and thus can offer an objective assessment of the associations between device usage and youth outcomes.

The NC Study

Public school students engage in high levels of cell phone usage during school hours, with many educators reporting that such usage is disruptive to the learning environment. In response, members of the NC General Assembly filed two bills ([S526](#), [H87v3](#)) during this legislative session with continuing discussions this week on the final bill that will likely become law.

In order to help guide and inform local-level policies and implementation of new restrictive cell phone policies, the Office of Learning Research at the [NC Collaboratory](#) funded researchers at The Winston Center to conduct a study in our public schools, in partnership with NCDPI. The NC Collaboratory is a funding agency that was created by the NC General Assembly in 2016 for the purpose of supporting research that generates practical information for State and local governments and the communities they serve, targeting a broad variety of pressing issues, from opioid remediation and K-12 education to water quality and natural disasters.



A primary objective for our school-based work is to assess how cell phone usage during school hours and/or during classroom instructional time may be associated with young people's classroom attention, academic performance, device-related disciplinary infractions, mental health (e.g., depressive symptoms, social anxiety), physical health (e.g., exercise, sleep), self-regulation, social relationships, and school experiences (academic aspirations, school belongingness), as well as teacher effectiveness/stress.

The main research question is: To what extent do school policies regarding restricting use of student personal cell phones impact youths' academic, behavioral/disciplinary, social, and psychological functioning?

What We Need from Partnering Schools

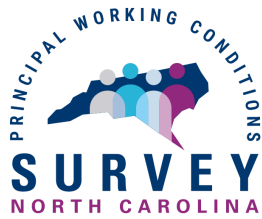
The study team is looking for one middle school in each of the eight [NC State Board of Education regions](#). The study involves student surveys over several time points, as well as brief teacher surveys, student administrative data (discipline, attendance, test data, etc.), and district cell phone use policies.

Our research uses an active consent procedure. Among consented students, all data may be collected within one hour at each of three data collection time points, ideally at least 4-6 months apart over a total span of 1-2 years. This approach allows us to understand both short- and longer-term effects of changes to device policies. To ensure the most reliable and valid data, ideally all students complete questionnaires in school with staff personnel serving as proctors. The Winston Center can provide all materials and training remotely or can attend the data collection sessions if needed.

Consenting can be challenging as it requires all parents to return a form either granting or denying consent to participate. This can be done electronically but often requires multiple contacts with parents to remind them to complete the form. The process works best when school administrators can use phone-, text-, and/or email-based systems to send reminders to parents. The Winston Center can also sometimes offer modest financial incentives to encourage parents to return these forms. Study conclusions typically are not representative of the entire community unless approximately 70% of families participate. We are happy to provide a copy of our consent form in advance to answer any questions and are open to revisions to the assessment protocol, so we are best able to capture data most meaningful and useful to each community.

Study Timeline

- Summer 2025: Recruiting
- Fall 2025: Consenting → Data Collection Wave 1, statistical analyses, report writing
- Spring 2026: Data Collection Wave 2, statistical analyses, report writing
- April 2026: Report Out for NC Legislature
- Fall 2026: Data Collection Wave 3, statistical analyses, report writing



Pilot Opportunity for 8 NC School Districts: North Carolina Principal Working Conditions (NCPWC) Survey

North Carolina's principals and assistant principals have expressed the need for a dedicated survey to assess their working conditions and leadership experiences. In response, a working group of North Carolina superintendents and principals of the year, the North Carolina Department of Public Instruction (NCDPI), and research faculty from UNC-system universities developed the NC Principal Working Conditions (NCPWC) Survey to provide a clearer understanding of school leadership conditions across the state.

Why This Matters

Currently, school administrators complete a modified version of the NC Teacher Working Conditions (TWC) survey, but how this data is used and interpreted is not always clear. The NC PWC Survey is designed to:

- Capture working conditions from the perspective of school leaders, including the social/educational environment, leadership standards, district leadership, professional development, policies and practices, leadership activities, and school facilities and resources.
- Support recruitment and retention efforts
- Provide districts with data to inform leadership support and development

Pilot Program: Call for Volunteer Districts

With support from new Office of Learning Research at the NC Collaboratory, we are launching a pilot study in the 2025-26 school year to refine and validate the survey before a potential statewide rollout. We are looking for eight districts (one from each region) to participate.

What Participation Involves

- Survey administration in Fall 2026 (October – November)
- Confidential & anonymous participation for principals & assistant principals
- Data analysis and feedback to refine survey content
- \$4,000 incentive per district to support leadership development

Project Leadership

This effort is led by a working group of NC superintendents and principals of the year, in partnership with NCDPI, the NC Principals and Assistant Principals Association (NC PAPA), and educational leadership faculty from NC State University. Findings from the pilot will inform recommendations to NCDPI, NC PAPA, NC State Board of Education, and NC General Assembly.

Questions

- Dr. Tim Drake, Associate Professor of Education Leadership and Policy, College of Education, NC State University, tadrake@ncsu.edu
- Dr. Jeni Corn, Office of Learning Research @ NC Collaboratory, UNC-CH, jeni_corn@unc.edu



North Carolina Project AWARE/ACTIVATE

Advancing Wellness and Resiliency in Education

Advancing Coordinated and Timely InterVentions, Awareness, Training, and Education

Overview/Background

The United States is in the midst of a youth mental health crisis. More youth than ever before need mental health care but there is a dire shortage of providers and community-based resources to meet the growing need. Suicide is a leading cause of death among adolescents in NC with especially high rates among the most vulnerable populations. North Carolina's Project AWARE/ACTIVATE is a collaboration between the NC Department of Public Instruction and the NC Department of Health and Human Services to develop a comprehensive plan of activities, services, and strategies for connecting youth and families to mental health services in six pilot school districts. The project addresses the three tiers of mental health: 1) promotion, 2) prevention, and 3) intervention through a continuum of education, universal screening, and appropriate services and supports for all students in response to varying levels of need. Recognizing the interrelatedness of **academic outcomes and mental health/well-being of students** Project AWARE/ACTIVATE seeks to provide an embedded approach within an existing system (schools) versus fragmented and reactive approaches. This approach provides screening and basic supports for all students but targets and prioritizes resources for students that need it most.

Funding and Context

The Substance Abuse and Mental Health Services Administration ([SAMHSA](#)) awards [Project AWARE](#) State Education Agency grants to US states/territories and tribal organizations for 5-year funding cohorts. NC was awarded a 2018-2023 and a 2021-2026 AWARE grant. The Project AWARE grant serves to build state and local education agencies' capacity to develop a comprehensive, coordinated, and integrated program to advance wellness and resilience in educational settings for school-aged youth. NC has chosen to locally brand this project as NC ACTIVATE.

Partner Local Education Agencies (LEAs)

Six school districts were selected as Project AWARE/ACTIVATE pilot sites to create transformation zones to serve as models to scale sustainable mental health services throughout the state. The racial, ethnic, and socio-economic status of students in the pilot project sites reflects the diversity of North Carolina's LEAs. In addition, these six pilot sites have a strong history of collaboration with the State Education Agency and local mental/behavioral health providers.

Cohort 1 (2018-2023)

Beaufort County Schools

Cleveland County Schools

Rockingham County Schools

Cohort 2 (2021- 2026)

Jackson County Schools

Nash County Schools

Sampson County Schools

Based on the success of these pilots, 2 additional counties (Swain and Graham) began implementation with a grant from the Great Smokies Health Foundation.

Pilot Program Outcomes

An external evaluation has tracked program implementation and outcomes for both Cohorts with promising findings. The completed evaluation of Cohort 1 included three districts comprised of 65 schools. The program provided 150 training events and included 31,000 individuals including school support and mental health professionals. More than 21,000 children were screened for social-emotional/mental health and just under 11,000 received mental health services resulting in an 88% access to services rate. Teachers reported a reduction in bullying and parents reported increased levels of engagement in their child's mental health treatment. Full evaluation reports can be found under the Related Content section of the Project AWARE/ACTIVATE NC DPI [website](#).

Next Steps/Cost Benefit Analysis:

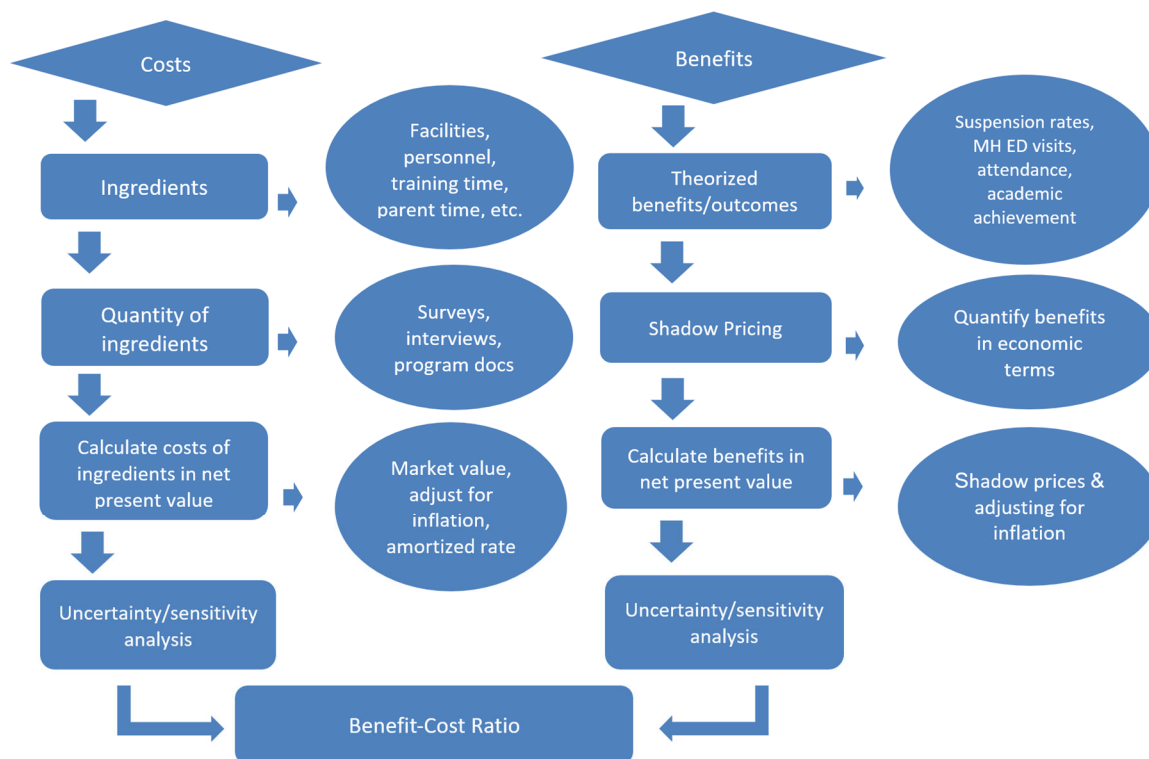
Despite promising data, funding for sustainability of existing programs and expansion into other districts is not guaranteed. A Benefit-Cost Analysis (BCA) study utilizing rigorous economic methods to calculate the true costs of implementing comprehensive, school-based Multi-Tiered Systems of Support (MTSS) programs and quantifying the benefits in real economic terms is needed. To date, no economic analyses have been conducted for any of the 90+ AWARE sites nationwide. Such a study would enhance NC policymakers' ability to assess the downstream cost savings and tangible value of making early investments in mental health screening and supports for all NC children. It would also position NC as a leader in utilizing BCA to inform policymaking for investment in children's mental health services and public health more broadly.

The key research questions to be answered are:

- **How does AWARE impact key outcomes (e.g., attendance, drop-out rate, disciplinary events, achievement, etc.) for participating districts as compared to similar districts not implementing this program?**
- **What are the economic benefits of the program and what are the costs? Do the economic benefits of the program exceed the costs?**

A BCA will determine whether the benefits are greater than the costs required to implement the program using a broader approach than methods such as Return on Investment (ROI). A BCA compares all benefits (not just financial) and all costs (even those typically not encompassed in a budget, such as time taken away from other activities). A detailed review/data collection process will be used in each of the Cohort 2 districts to calculate economic values and inform cost calculations. The study will utilize the ingredients method for determining costs and shadow pricing for calculating economic benefits to develop a benefit-cost ratio. This easily understood measure is a powerful tool in communicating the value of these important school mental health services to policymakers. Figure 1 highlights the planned methodological approach for the study.

Figure 1: Study Methods



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SAMHSA
Substance Abuse and Mental Health
Services Administration



Public Schools of North Carolina
State Board of Education
Department of Public Instruction



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**
Division of Child and Family Well-Being