

**JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE
AGENDA**

January 14, 2004, 10:00 A.M., ROOM 414 LOB

Rep. Robert Grady, presiding

10:00 Welcome and Introductions

10:15 Authorizing Legislation, Studies Authorized, Spotlight on 2003 Session

Dr. Shirley Iorio, Committee Policy Analyst

10:30 Measures Used in Decision Making for Incoming Freshmen for Admission and Placement at UNC Campuses

Authorizing Legislation

Ms. Sara Kamprath, Committee Policy Analyst

Report

Dr. Gretchen Bataille, Senior Vice President for Academic Affairs, UNC Office of the President

11:15 Should High School Students Receive Weighted Credit for College Courses?

Background

Ms. Robin Johnson, Committee Counsel

What is the problem?

Dr. Ken Boham, President, Caldwell Community College, & President, Community Colleges Presidents' Association

Status of DPI Study

Dr. June Atkinson, Director, Division of Instructional Services, DPI

Standardized Transcript and Use of Weighted Credit for University Admissions and Credit

Dr. Gretchen Bataille, Senior Vice President for Academic Affairs, UNC Office of the President

Dr. George Dixon, Vice Provost & Director of Admissions *emeritus*, NCSU

12:30 Lunch

1:30 Community Colleges Information System

Dr. Sandra Williams, Vice President for Administration, NCCCS

2:15 Center for Applied Textile Technology Issues

Mr. Kennon Briggs, Vice President for Business and Finance, NCCCS

**JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE
AGENDA**

January 15, 2004, 9:00 A.M., ROOM 414 LOB

Rep. Robert Grady, presiding

9:00 Welcome

9:10 Comprehensive Articulation Agreement

What is it? What works? What, if anything, needs to be improved?

Dr. Jim Owen, President, Piedmont Community College

Robert (Bobby) Kanoy, III, Associate Vice-President for Academic & Student Affairs, UNC Office of the President

A Review of the Request For Proposals to Study the Agreement

Ms. Drupti Chauhan, Committee Counsel

10:15 Effectiveness of Programs for Professional Development Offered by UNC Center for School Leadership Development

Authorizing Legislation

Dr. Shirley Iorio, Committee Policy Analyst

Report

Dr. Richard Thompson, Vice-President for University-School Programs, UNC

DPI's Response to the Report

Dr. Janice Davis, Deputy Superintendent, DPI

11:45 Schools of Education Performance Reports

Authorizing Legislation

Dr. Shirley Iorio, Committee Policy Analyst

Report

Dr. Kathy Sullivan, Director, Human Resource Management, DPI

12:45 Lunch

1:45 Report on UNC Enrollment Planning

Authorizing Legislation

Ms. Sara Kamprath, Committee Policy Analyst

Report

Dr. Gretchen Bataille, Senior Vice President for Academic Affairs, UNC Office of the President

2:45 Committee Priorities

A Review of the Committee's Major Past Issues

Ms. Robin Johnson, Committee Counsel

Committee Discussion as to Future Issues

Rep. Robert Grady, Cochair

Move to
next
meeting

X

**MINUTES
JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE**

2003-2004 SESSION

January 14 and 15, 2004

The Joint Legislative Education Oversight Committee met on Wednesday and Thursday, January 14 and 15, 2004 in Room 414 of the Legislative Office Building. Representative Robert Grady presided. Members present were Co-chairs Steve Metcalf and Doug Yongue; Senators Apodaca, Dannelly, Garwood, Malone, Rucho, Swindell, Thomas, Dorsett, Moore and Stevens; Representatives Bell, Gorman, Insko, Jeffus, Pate, Preston, Sauls, Tolson, and Warner.

Representative Grady, Co-chair, welcomed members, staff and visitors. He recognized Co-chair Senator Metcalf who said he looked forward to working with other members on the issues that will be studied before the beginning of the short session in May. Representative Grady recognized Representative Doug Yongue, House Co-chair, who noted that many issues are before the committee, including teacher retirement. He added that members may share and present additional items for discussion to the co-chairs and they will consider adding these suggestions to a future agenda.

Representative Grady said the co-chairs have agreed that presentations before the committee will be shorter in order to leave more time for questions from the membership. He said Research Staff plans to send summaries of presentations to members prior to the meeting, giving them time to review agenda items and allowing presentations to be concise. Specific questions can then be brought up during the committee meeting.

Representative Grady asked Dr. Shirley Iorio, Committee Policy Analyst, to review the legislation authorizing the work of the committee, the studies authorized and the compact disc presentation entitled, "Spotlight on Education Legislation". (See Attachment #1.) Dr. Iorio demonstrated how the information contained on the compact disc could be used and advised that members could obtain a second copy if needed.

SAT AND OTHER ADMISSIONS CRITERIA

Representative Grady asked Sara Kamprath, Committee Policy Analyst, to review the next item on the agenda, "Measures Used in Decision Making for Incoming Freshmen for Admission and Placement at UNC Campuses", as authorized by Session Law 2001-312 (House Bill 1246). (See Attachment #2.) The study was intended to identify and study the measures that are used by constituent institutions when they make decisions about admissions and placement for incoming applicants and to evaluate the validity of these measures in predicting academic performance. Further, Ms. Kamprath said the study was to determine whether there are other valid predictors of academic performance

that were not being used. One particular area of focus for the study was the emphasis that is being given to SAT in admissions decisions. The study was to compare the ability of SAT and high school end-of-course tests to predict academic performance.

Recommendations were then to be made as to whether the SAT or end-of-course tests should be used as one of the measures in admissions decisions or whether a combination of the SAT and end-of-course tests should be used. In conclusion, Ms. Kamprath said her presentation was intended to enhance understanding of the admissions process and the measures used for making admissions decisions. Secondly, she said this presentation should serve as a lead in for a following agenda item regarding weighted credit for college courses.

Representative Grady called on Dr. Gretchen Bataille, Senior Vice President for Academic Affairs, UNC Office of the President, to discuss the results of the study authorized by House Bill 1246. She recognized Dr. Bobby Kanoy, Associate Vice President for Access and Outreach, UNC Office of the President, and Dr. George Dixon, retired after thirty years as Vice Provost and Director of Admissions at the North Carolina State University and now a senior consultant for the National College Access Program, who accompanied her to this meeting and are available to answer questions of committee members. She said this final report (See Attachment #3.) includes an executive summary of the work of the study committee appointed by UNC President Molly Broad, N. C. Community Colleges President Martin Lancaster and Department of Public Instruction Superintendent Mike Ward. Dr. Bataille said the study group had two years of data on end-of-course tests available to them and they looked at admissions policies for placement and awarding of credit for SAT results, academically talented (AP) and International Baccalaureate (IB) courses used at all sixteen campuses. The results of the study found that overall the GPA for North Carolina students is the single best predictor and that the GPA combined with the SAT is a better predictor than the GPA alone. She added that end-of-course tests did not add significantly to the predictor because the GPA already incorporates the end-of-course exams. With this data-backed information, the study group visited all campuses and found that admissions personnel review each application and look closely at all information for each student applying. The study group looked at rigor of courses taken, minimum course requirements, availability of AP courses and IB courses, academic performance, the GPA and class range. They then look at other factors such as essays applicants write, their recommendations, leadership qualities and extra-curricular activities. She said it is important to keep in mind that the UNC admissions process is designed to determine how to get students in – not how to keep them out. Dr. Bataille said that, in fact, over 32,000 students in the 2002 high school graduating class applied to UNC campuses and 85% of them were accepted. Many students who are not admitted the first time they apply to UNC attend community colleges and after meeting expectations enter as transfer students.

Dr. Bataille said the other part of the legislative mandate was to look at course placement (particularly those in math, English and foreign languages) and when they did, they discovered that UNC did not have uniform policies and procedures across all 16 campuses. Each campus has used placement tools and processes that they determined work best for them, so efforts are underway to create a common math placement test for

12 of the campuses. The study group also looked at policies for awarding credit for AP and IB courses. It found that credit for these courses had been determined by faculty who reviewed course contents. This prompted a review of AP courses by academic vice chancellors, resulting in over half of the campuses re-evaluating how they awarded credit for the courses. Upon further review, Dr. Bataille said they found that admissions offices are careful to be sure that the admissions process is consistent with the mission of the institution. She said they believe that campuses should continue their current practices, including using multiple factors in making placement decisions, that they must be appropriate to the mission of the institution and that changes must enhance the opportunities for students to be accepted. She said they hoped to have a follow-up study after campuses have had experience with test enhancements. She said campuses will be directed to regularly review placement policies and practices to ensure that policies are dynamic and reflect changes going on in high schools. Dr. Bataille said this important study has made the university much more sensitive to the admission process so that North Carolinians will know what is expected for admission to campuses and will strive to meet those expectations. She concluded her presentation by responding to questions of committee members.

Senator Swindell asked how home-schooled children are treated in the admissions process and Dr. Bataille responded that they are treated in the same way as other applicants. Dr. Kanoy added that there seems to be no disadvantage at all to being home-schooled and these students do well while they are on campus. Representative Grady asked how a prospective student learns about the mission of a particular campus and Dr. Bataille said applicants have computer access to large amounts of descriptive information through the College Foundation of North Carolina (CFNC). Representative Grady asked whether schools with advanced placement classes give some applicants an unfair advantage and Dr. Bataille said admissions personnel take availability of these classes into consideration. She said SAT scores help even out students' chances. Rep. Pate asked about the services offered by CFNC and Dr. Bataille explained that, though CFNC may be best known for its financial assistance office, the components of CFNC have joined together to provide a website containing in-depth college/university information for prospective students and their parents. Representative Pate asked how guidance counselors fit into this service and Dr. Kanoy responded that school counselors work with and use CFNC to enhance other information sources. Senator Dannelly asked whether UNC can determine how schools with or without advanced placement courses can help students achieve success. Dr. Bataille said UNC provides feedback to high schools to help them offer more rigorous coursework.

WEIGHTED CREDIT FOR COLLEGE COURSES

Representative Grady called on Ms. Robin Johnson, Committee Counsel, to introduce the next subject for discussion: weighted course credit given in high schools. She said the central question before the committee is whether high school students should receive weighted credits for college courses taken in high school. She said that at least since 1983 kids in high school have been able to concurrently take courses offered in

community colleges. In 1992, the General Assembly enacted what is known as a standardized transcript (See Attachment #4, G.S. 116-11(d)). Part of what that did, she said, was direct the institutions of higher education to develop the method for calculating the GPA, which in turn calculates the class rank. In 1995-96, the General Assembly asked the university system and community colleges to work together to develop a plan for transferring credit between community colleges and between community colleges and universities. Ms. Johnson said that since the standardized transcript was adopted in 1992, a number of studies on that issue have resulted, especially the concept of weighted credit. In recent years, legislation has been enacted that encourages community colleges and high schools to create innovative programs to address the needs of students at risk for dropping out as well as those who need a more advanced curriculum.

Representative Grady introduced Dr. Ken Boham, President, Caldwell Community College and President, Community Colleges Presidents' Association, to discuss the topic of weighted credit from the perspective of a community college president. (See Attachment #5, Executive Summary.) He said having weighted credit would bring equality for community college courses and encourage students to take them. Senator Dorsett asked if community colleges are asking for weighted credit for everything or just college transfer courses and Dr. Boham responded that they are asking only for equity in the weighting process for the courses they offer. Representative Pate asked if some courses are being over-weighted to the point of discouraging students from taking courses they want that might open up new areas of interest. Dr. Boham said there is a segment, such as art departments, that say their courses deserve as much weight as others.

Representative Grady introduced Dr. June Atkinson, Director of the Division of Instructional Services for the N. C. Department of Public Instruction to discuss the status of the DPI study of the standardized transcript and the use of weighted credit for university admissions and credit. (See Attachment # 6.) She started her presentation by questioning the purpose of weighted quality points: should it be rigor, a predictor of success for students who continue their education, or should it be to add value to certain courses that would allow students to pursue their passion? She said this study would be a look at State Board of Education policy with regard to the system of weighted quality points, which was developed by the institutions of higher education.

Dr. Atkinson said the current policy allows two extra quality points for students who successfully complete advanced placement IB courses. In addition, if a school offers a standard of a course, the school may offer honors credit in that course. Using that policy, DPI has approximately three hundred courses in the curriculum for which weighted quality points can be given. The areas where DPI does not have courses eligible for weight quality points are in arts education and career technical education. Further, she said, DPI's current policy provides no weight as a general rule for community college courses and university courses offered at the freshmen and sophomore years of a university experience. Currently, the policy does allow weighted quality points for courses taken at the junior and senior level of a university.

Dr. Atkinson said only North Carolina and one other state – Hawaii – have a unified transcript. Consequently, there is no consistency among other states and local

school districts outside of North Carolina about how courses at community colleges or universities are treated as they relate to calculating the GPA. Neither is there consistency of treatment between honors courses and AP courses with regard to calculating GPA. Dr. Atkinson said the State Board of Education believes it is important to get general agreement among the institutions of higher education, including the community colleges, independent colleges, the public universities so that all are treated equitably as it relates to the calculations of GPA regardless of whether that student is at a small high school, a rural high school or a large high school.

Dr. Atkinson said another factor is how elective courses taken at a community college or university are treated on the standardized transcript today. Current statutes and community college policy indicate that students may take community college courses for elective credit. There are no uniform policies in this regard at the campuses of the university system. Consequently, she said, some school districts do not record community college courses on a high school transcript. Other local school districts include transcripts from a community college or a university to show that the student has taken such courses.

Dr. Atkinson then reviewed the options (See Page 4 of Attachment #6.) that the State Board of Education is considering with the hope that a recommendation can be made by March or April that reflects agreement among the institutions of higher education.

Representative Grady asked if high schools in North Carolina have the ability to connect with the AP classes offered online and Dr. Atkinson said most schools do have this connectivity. Representative Grady asked how many have the ability to retrieve these classes and Dr. Atkinson responded that in addition to online education courses, they have "Starnet" capability in low-wealth and small rural schools to access advanced placement classes. Representative Grady asked for lists of schools that offer advanced placement classes and Dr. Atkinson said she could provide that. Senator Dannelly asked what would constitute successful completion of an AP course and Dr. Atkinson responded that passing the course is sufficient. Representative Yongue asked if all the educators involved in these proposals would be in agreement when the recommendations are brought forth and Dr. Atkinson said she is optimistic that they will be.

Representative Grady called on Dr. Bataille to comment on UNC's position on the weighted credit issue. She said she agrees with Dr. Atkinson that it is complex, but believes all involved parties can find a way to resolve the issue. She said UNC's goal is to prepare high school students with the most rigorous curriculum possible. And she believes it is not in the best interest of anyone to supplant high school courses across the board because it could reduce the ability of high schools to have a strong curriculum. Dr. Bataille said the university, the community colleges and the State Board of Education reached agreement a few years ago about awarding two quality points for AP or IB courses. Further, they agreed that honors courses in high school should receive one quality point. Also, they agreed that community college or university courses that transfer as academic courses should receive one quality point. At that point, she said, the process stopped because the General Assembly convened and DPI was looking at requirements for honors courses. She concluded that the process can be re-energized and

agreement can be reached, adding that it is really important that folks know what the contents of courses are, and how students and admissions are affected. She said the consistent message from parents is "be sure my child gets the best possible education in high school."

Dr. Delores Parker of the Community College System said her understanding was that total agreement has not been reached on the issue of weighted credits. She said agreement was reached on what weighted credits would be assigned to courses, but not on timelines for implementation. Dr. Bataille said Dr. Parker's statement clarifies the status of this issue.

Dr. Bataille asked Dr. George Dixon to talk about the practical aspects of evaluating manuscripts. (See copies of transcripts, Attachment # 7.) Dr. Dixon said campuses look at applications individually and independently to make admissions decisions. Many applications are fairly easy to accept or deny – with the recommendation that the student look at ways to remedy their deficiencies and bring them up to the level to be successful and graduate. He said many students' applications fall in the middle range – make good grades, work very hard, are involved with outside activities and will successfully complete college work – but there's not enough room at the institution of choice for all in this group. At this point in the process, the assessment and evaluation of an application becomes individualized while admissions personnel try to make certain there is a good fit, especially with the more selective/popular institutions.

Dr. Dixon said having a standardized transcript (See Attachment # 7.) has been very helpful in achieving consistency in the evaluation of performance. College admissions personnel are mindful of courses offered in individual high schools. High schools provide a profile which details the honors courses, AP courses and IB courses, so admissions personnel know what is being offered in the schools. The profiles help assure that no student is disadvantaged in the admissions process because they attended a high school that did not offer the breadth of AP courses or IB courses that a larger school might offer. This is where the individual review takes place. Dr. Dixon said that the examples of transcripts (Attachment # 7) provided are from students who were admitted to N. C. State University this year and show the differences in weighted and un-weighted GPAs. He noted that all three are great students, but their differences were overcome by the individual review of the transcripts. He said that within several years high schools will have the ability to transfer transcripts automatically for students when they apply electronically to UNC campuses.

Senator Swindell asked if UNC campuses still do outreach with fairs held in local schools and Dr. Dixon said they do. He said they have "college nights" at high schools to make certain to supplement information that is available electronically and to continue to provide the human element, which is very important. From the student's perspective, however, college nights are less significant because they are comfortable with getting information by technical means.

COMMUNITY COLLEGES INFORMATION SYSTEM

Representative Grady asked Dr. Saundra Williams, Vice President for Administration at the North Carolina Community College System to present the next item on the agenda, "Community Colleges Information System". Dr. Williams referred to information provided to members (See Attachments # 8 and 9.) and noted that the College Information System (CIS) is to be comprehensive and fully integrated so it will support student-centered learning, management decisions and accountability to its external constituency and business operations for all community colleges. She added that this is the largest implementation of its kind in higher education today. She discussed the modules of the system – financial, human resources and student – and enhancements that are specific to the State of North Carolina. This information system, will give the Community College System the ability to integrate finance functions, human resources functions and student functions, making it consistent among all fifty-eight institutions. The implementation consisted of four phases: eight institutions in Phase 1, fifteen in Phase 2A, nineteen in Phase 2B and sixteen in Phase 2C. She described the issues and challenges they encountered that led to delays in implementation including training, accounts receivable cash reporting (ARCR) and problems associated with timing the implementation to coincide with college business and academic cycles. To resolve the need for training they decided to use community college personnel rather than an outside vendor. For the accounts receivable cash reporting function, several stakeholders – governmental agencies and others – have contributed to the solution. She noted that the contract extension to complete implementation of the CIS at all campuses by 2007 will cost \$26.4 million over three years. She emphasized the benefits of having all campuses using the same information system.

Rep. Yongue asked what the original cost estimate was for this information system and Dr. Williams responded that it was \$42 million over five years, adding that since the original estimate there have been several change requests because of issues regarding additional functionality of the software. The total cost at the present time is \$51 million and the \$26.4 mentioned earlier is for contract extension. The total projected cost is approximately \$77.4 million. Representative Grady asked where the extra \$35 million beyond the authorized \$42 million will come from and Dr. Williams referred the question to Mr. Kennon Briggs, Vice President for Business and Finance for the Community College System. Mr. Briggs said neither General Assembly staff nor Community College System knew the full scope of the project in terms of its cost from the beginning in 1998 and for that reason the intent was to appropriate \$15 million the first year and \$8 million per year recurring until the project is fully implemented. Representative Grady asked where the \$26.4 million would come from and Mr. Briggs said it could come from the \$8 million per year recurring appropriation. He said the project will have to stop if the recurring appropriation does not continue.

At Representative Grady's inquiry, Dr. Williams explained that she was hired in July, 2001; she said the project started around July, 1999. Senator Rucho said he was concerned, also, that a better cost estimate was not made in the beginning. He questioned paying \$26.4 million more for the project, asking why he should feel that the department

is competent to complete the project. Dr. Williams responded that problems and changes are always encountered in a project of this size and this kind of integrated project had not been done across a whole system of higher education. She said the Community College System specified what they thought their needs were and the vendor responded to that request. Since then, she said they have done internal operational audits to make sure their needs are still aligned with what was requested at the beginning. Senator Rucho said he is still not assured that the project will be completed for an additional \$26 million and asked if the problem was with the design of the request for proposal (RFP) or was it the fault of the vendor given the contract. Mr. Briggs replied that they have installed the financial module at community colleges and it is functioning well. He said the human resources module is working well where it is installed, with a group scheduled for installation in January, 2005 and the final group in January, 2006. At that time, the human resources function will be fully implemented. He said the most significant problem they have had has been with the student module, which is about 60% of the system. Dr. Williams has been assigned the responsibility to clearly define the scope of work involved during the remainder of the project. It is scheduled to be completed by July, 2007. Representative Grady asked why \$26 million more is needed if the system is so close to being completed and Dr. Williams responded that it should be remembered that the original contract was for the vendor to implement Phase 1. When they started Phase 2 – the remaining fifty-one institutions – she said they found that the original plan may have been too aggressive, so they went back and looked at the total project and decided they needed to project full implementation out another three years. Because implementation had to stop because of problems with ARCR (seven of the first eight institutions had problems), they could not move on with implementation until those problems were fixed. She said they now have processes in place for testing, for quality assurance, for every type of project management that goes into this type of system. She said they now have a plan for successful completion by 2007.

Senator Dannelly asked what the cost to maintain the system would be and Dr. Williams explained the ongoing needs for large amounts of quality assurance and support for maintenance and testing. Mr. Briggs said approximately \$10 million per year would be needed to maintain and operate the system, adding that it would have cost about \$540 million if it had been installed individually at each campus. The rationale for the system was that the General Assembly had struggled for many years to obtain information from the system of community colleges and it decided that an integrated system could best serve this need. Representative Grady asked if a contract with vendors for the additional three years has been signed and Dr. Williams responded that it had not. Representative Grady said he previously thought the project had been finished and commented that it is an example of a citizen's nightmare when the General Assembly tells them it will cost \$42 million and later tells them it's up to \$77 million with the implementation date extended out three years.

CENTER FOR APPLIED TEXTILE TECHNOLOGY ISSUES

Representative Grady called forth Mr. Briggs, to discuss issues involving the Center for Applied Textile Technology. Mr. Briggs said that on August 8, 2003 the chief operating officer of the System received a request from the General Assembly Fiscal Research Division seeking information about the operation and utilization of the Center for Applied Textile Technology in Belmont. At that time, he said, the chief operating officer determined it would be important to have a program audit (instruction, class attendance, etc.) from an independent contractor. The purpose was to see if there were problems from a programmatic or fiscal perspective. He said the fiscal audits for the Center have been clean – his division monitors the expenditures monthly of all fifty-eight community colleges and the Center for Applied Textile Technology. Mr. Briggs reminded members that community colleges are funded on a full-time enrollment (FTE) basis, which generates per capita appropriations for each of the colleges in the System. The Textile Technology Center is funded differently because it is not FTE-driven. It has a biennial review by the System and receives a recurring appropriation for operation of the center.

However, because of the legislative inquiry, the System's chief operating officer determined it would be appropriate to employ a contractor to go to the site. Mr. Briggs reported further that on October 1, 2003 the final program audit report was released and the findings were summarized (See Attachment # 10.). The findings were: (1) The Textile Center's workload had in the past consisted of 80% training and 20% support services. However, changes in the textile industry caused the focus to be somewhat reversed with a 20% focus on training and 80% on support services related to product testing. (2) There was some duplicative training going on at the Textile Center between Gaston College and the Textile Center and it was directed that those duplicative training activities cease. (3) It was suggested that the Textile Center meet with Gaston College to see if they could work out something cooperatively on sharing space and programs. (4) It was identified that the facility was not being fully utilized in terms of capacity and some of the space might be available to be used by Gaston College. Based on that information, President Martin Lancaster asked that the State Commission on Higher Education Facilities – a commission under UNC General Administration – conduct a space utilization study at the Center, looking at the inventory of space and the number and frequency of classes there. The director of the Center was notified on October 15, 2003 that this study should take place. President Lancaster requested, also, that the meeting dates of the Textile Center's Board be coordinated with meetings of the State Board of Community Colleges, so he would be better able to attend both meetings. On December 11, 2003 the System Office received a report from the Commission on Higher Education Facilities on the utilization of the Textile Center. Mr. Briggs said the study indicated there is excess capacity at the Center, which means the space can be used by Gaston College if appropriate.

Related to this issue, a Charlotte Observer news article raised questions about the use of the Textile Center's Foundation funds and Mr. Briggs pointed out that the State Board of Community Colleges has no control over the use of foundation funds at a local community college. So, he said, if the Center Foundation chooses to use funds at that institution to supplement the operations of the Textile Center that are consistent with law, the State Board has no authority over the use of those funds. He noted that another issue raised by the media concerned secondary employment, causing the State Board to take a look at its policy on this practice and promising action in the future. Mr. Briggs said it is clear from the program audit that the mission of the Center has changed, consistent with the change in the textile industry. He suggested that the General Assembly might want to consider looking at the changing mission of the Center and enable it to have the ability to do research and product testing for the textile industry, similar to that which occurs at the Hosiery Technology Center at Catawba Valley Community College.

Mr. Briggs commented that the textile industry is not gone from North Carolina and that there are still substantial jobs in that industry which need product testing and support services. While the need for training has diminished, he said, there is still a mission for the Center in that area and enabling legislation might help change the focus of its mission.

Senator Stevens commented that the UNC Board of Governors exercises control over private foundations at the university level and in fact prohibits the use of foundation funds for purposes similar to those described at the Textile Center. He asked why the State Board of Community Colleges cannot do the same. Mr. Briggs responded that there are salary caps for presidents in the Community College System based on their years of experience and size of their institution. He said general statutes encourage support for operations of institutions, but presidents can't earn more from all sources than the salary cap. Representative Grady asked if a foundation could give a community college president a private retirement account in addition to what he already has, a country club membership, trips, etc. Mr. Briggs said they could and those contributions would not be within the purview of the State Board.

Sen. Metcalf asked if there should be legislation that gives the State Board of Community Colleges authority and control over foundations set up to benefit community colleges and Mr. Briggs replied that he didn't think so because of changes in laws on financial reporting. He said those foundations are chartered by the Secretary of State's Office, receive independent determination letters of status from the IRS and should be at arms-length from the State Board. He said the reason for this distance is that the colleges themselves are like local education authorities. They stand alone. Sen. Metcalf asked if it would be appropriate to put in the general statutes specifically what the foundations can and can't do with regard to compensation. Mr. Briggs said they have reviewed presidents' salaries and they don't compare well with other southern states. Some of these supplemental funds, he said, are the only way a community college can be competitive on presidential salaries.

Rep. Grady said his understanding is that the 501(c)3 rule says if foundations collect over \$25,000 they have to file a report to show how they spent the money. He

asked if the State Board could collect the reports to see how the money is spent. Mr. Briggs said they could.

Sen. Metcalf asked if Mr. Briggs knows if this kind of issue has arisen among any other institutions and foundation boards. Mr. Briggs said more information will be coming forth because of changing accounting rules and they will have better access in the future. These rules say that depending on the assets of the foundation some will have to undergo "gap" audits. Reports on the "gap" audits have to be "bled" in with the financial statement of the college that is reviewed by the Office of State Controller and the Office of State Auditor. In addition, during the last session, the General Assembly changed the general statute about non-state entities receiving state funds, so the State Board requires that foundations receiving any state funding provide an accounting of its funds annually.

Sen. Apodaca asked who reviews "gap" audits and Mr. Briggs responded that the Office of State Controller looks at the financial statement and then it becomes a part of records at the Office of State Auditor.

Rep. Grady commented that the problems the committee is looking at are not symbolic of the rest of the community colleges and while there may have been questions about the foundation, the problem of a community college president working during the day at a university while also drawing a salary from a community college goes beyond that issue.

Representative Grady adjourned the meeting at 3:15 p.m. to reconvene at 9:00 a.m. on Thursday, January 15, 2004.

**MINUTES
JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE**

Thursday, January 15, 2004

Representative Grady called the meeting to order at 9:00 a.m. and welcomed members and visitors. The following members were present: Co-chair Representative Doug Yongue; Senators Dannelly, Rucho, Swindell, Dorsett, Moore, and Stevens; Representatives Bell, Gorman, Insko, Jeffus, Pate, Preston, Sauls, Tolson and Warner.

COMPREHENSIVE ARTICULATION AGREEMENT

Representative Grady called forth the first presenter, Dr. Jim Owen, President, Piedmont Community College, to discuss the Comprehensive Articulation Agreement (CAA) (See Attachment # 12.) Dr. Owen commended the chairman and members of the committee that developed the agreement about six years ago, calling it a milestone in the development of the relationship between community colleges and universities. He said he has chaired the System President's Legislative Committee and is a past president of the North Carolina Community Colleges Presidents' Association. He said he has been a part of the community colleges in North Carolina for about 25 years serving as President of Guilford Tech, Vice President in the System's Office and President of Piedmont Community College.

Dr. Owen said the CAA has been in effect since 1997, occurring almost simultaneously with the development of the System's transition from the quarter system to the semester system. This was historic because it brought into alignment the calendars of North Carolina's public schools, universities and community colleges and enhanced cooperation among these segments of the education process. The System established at that time a common course structure in which there was a number, a title, and a description for each course. This facilitated the development of the CAA and was a giant step for the people of North Carolina who are pursuing a baccalaureate degree. Dr. Owen recognized Dr. Dennis King, Vice President of Asheville/Buncombe Technical Community College, who serves as Co-chair of the Transfer Advisory Committee and Dr. Delores Parker who is Vice President in the North Carolina Community College System.

Dr. Owen said that, after six years of operation under the CAA, he feels it is appropriate to get an outside review. He said the Transfer Advisory Committee has worked on this topic and served an important role, but he believes a study by an outside group would be valuable at this point. He said a study would render a great service to the development of the need for further expansion of the agreement because community colleges are committed to preparing the workforce that is needed in our state. Community colleges, particularly in rural areas, are the area of entry that many people use to obtain a baccalaureate degree and help support the concepts of one North Carolina.

Dr. Owen said the CAA focuses on the Associate in Arts and the Associate in Sciences degrees, which are the college transfer degrees. The CAA sets up a 64-hour requirement for transfer to the universities with 44 hours of general education core course and 20 hours of elective courses. He said the completion of the associate degree, however, does not guarantee admission to a university within the North Carolina system. Students must successfully complete required coursework before they are admitted as juniors. Often times problems arise when students try to transfer to a state university without the completion of the 64 hours and the awarding of the associate degree. Other problems can arise with courses such as physical education and foreign languages, unless they are taken as electives.

Dr. Owen said there are several areas where the study might look at opportunities to expand or enhance the operation of the CAA. One area is the Associate of Applied Science degree. The problem with that degree is that it is not especially designed for college transfer and there are certain areas such as nursing, criminal justice, or education that might profit from the establishment of a template that might be applied across the community college system. He said there are some pre-major areas which are not working as well as they might. For example, UNC has recently addressed the Associate in Science leading to degrees in math, chemistry, biology, physics, engineering, computer science and have made adjustments in those areas. The State Board of Community Colleges is looking at making adjustments in the graduation requirements for that degree. This area is under development and probably will be addressed over the next few years.

Often times, Dr. Owen said, some university departments have some difficulty with courses that are offered to community college students at the freshman and sophomore level. Many times in a pre-major situation, he said, a baccalaureate program at a university will have three, six, nine or twelve hours in the sophomore year or freshman year of pre-major type of courses that community college students will not take at their institutions. The more these problems between community colleges and universities can be overcome the more important it will be for students and the state because it costs about twice as much to educate a student at a state university as it does at a community college.

Another area the study would work on is the pre-major in engineering. It has been addressed by the UNC Board of Governors and community colleges are presently working on adjusting the Associate in Science degree which will improve the transfer of credit between community colleges and universities in the area of engineering.

Dr. Owen said there are many examples where the CAA has worked very well and there are certain areas that need to be looked at. He said he believes this study should only consider those things that can be justified as educationally sound and that provide greater opportunities for students to complete their program of study in a timely manner. In conclusion, Dr. Owen said a number of the state universities have developed planning guides for students, which help counselors and students understand the relationship of programs between community colleges and universities. In addition, a brochure outlining the details of the CAA has been developed.

Rep. Grady said that having universities and community colleges work together is what they were trying to accomplish when this effort started some years ago. For example, he said UNC-Wilmington has a program that is already in force in Jacksonville

at Coastal Carolina Community College. Through that program, if students go to the community college in Jacksonville and earn two years of college credit they can walk onto the campus on UNC-W at the junior level. He said the idea is to make this happen all over North Carolina, but the problem is that some students at community colleges don't take the freshman and sophomore courses that will transfer as credit. Rep. Grady said it is a unique agreement between Coastal and UNC-W which basically says, if you notify us that you are in this program, we will follow you the whole time and if you have a sufficient grade point average in the courses we require, you can come on as a junior.

Rep. Tolson asked if it would be appropriate to have in the agreement that if a person enrolls in a community college program and has a 3.0 average they are assured of a place in the university and Dr. King said it would be difficult to assure anyone of a place in a specific university. He said it would be important to say that they would be admitted to a university. Rep. Grady said the problem seems not to be finding a place in a university, but rather that it's not guaranteed that every university will take all 64 transfer hours.

Senator Dorsett asked about the general impression that some course work requirements do not meet university standards in terms of quality of teaching, course content and rigor. She then asked if the study would address that question. Representative Grady replied that the committee's staff attorney could respond to her question when the Request for Proposal is reviewed later in the meeting. Senator Dannelly asked if independent colleges and universities experience the same situations with community college transfers and Dr. Owen responded that the nineteen colleges that participate in the CAA say the program works well.

Representative Grady called on Dr. Gretchen Bataille for a presentation of the University of North Carolina's views of the Comprehensive Articulation Agreement (CAA). Dr. Bobby Kanoy and Dr. George Dixon representing the University were also in attendance. She started by saying that all who were involved in the development of the agreement should be very proud of what they did. She said many of those involved, including Dr. Owen, have been invited to meetings of higher education groups in other states to explain what North Carolina is doing in this regard because they want to emulate what is being done here. She referred to Attachment # 13 in discussing the history and specifics of the agreement. She added that the University looks forward to the evaluation of the program. Last year, she said, the Transfer Advisory Committee decided it was time to do an evaluation because it had been five years since the process started. They sent out surveys and some of that information will be available to the vendor who is successful in getting the task of doing the evaluation. The Transfer Advisory Committee found that transfer students from community colleges on average took only two hours more than non-transfer students to finish their Bachelor's Degree, so a lot of the conversation we hear about how students lose credit, in fact, does not happen. So, community colleges are doing a good job of providing information about transfer requirements to their students.

Regarding the reference to engineering degrees mentioned earlier today, Dr. Bataille said the UNC Board of Governors approved changes to the CAA at their meeting last month to make it easier for students who want to study engineering to get courses for transfer at community colleges. She said this problem should be solved very soon. She

said they are also looking at providing more classes on-line. Dr. Bataille said she hopes the study about to be undertaken will include surveys of students, community college transfer coordinators and directors of admissions, UNC directors of admissions, in addition to admissions directors from independent colleges and universities. She said she hopes the study will look at the methodology used in the original agreement to see if it is correct to compare junior transfer students with native juniors to see how many courses are necessary for them to complete the bachelor's degrees. In addition, she wants the study to look at kinds of degrees, graduation, retention and effects on minority groups to see if students are being lost. Also, she believes the study should look at the total number of students transferring, the numbers who get full credit for transfer courses and those taking a few courses and then transferring and losing course credit. There are a lot of good questions being asked, she said, and so the study should ask the right questions.

Sen. Stevens asked, referring to the information provided on transfers in the Fall of 2002, how many actually applied for transfer, adding it would be interesting to know how many applied overall and how many applied at specific universities. Those numbers were not readily available, but Dr. Bataille said the study could probably look at that data.

Representative Grady called on Ms. Drupti Chauhan, Committee Counsel, to review the Request for Proposal (RFP). He reported that the study will be between community colleges and the universities and added that the faculty, staff and attorneys at the community colleges and universities have reviewed the proposal and are in agreement with its contents. Representative Grady said that General Assembly attorneys are in agreement with the proposal. He explained that the study is required by legislation and the funds to pay for it are in the budget. The timeline calls for completion by August 2, 2004. In fairness to whomever gets the contract, he said it was the hope of the General Assembly to get the proposal back quicker, but this committee was not up and running in time to get it out sooner. Representative Grady said the dates are not subject to discussion, whether or not to do it is not subject to discussion, and both sides have agreed to do it. Ms. Chauhan reviewed the RFP (See Attachment # 14.). Representative Grady asked for questions of members and, there being none, said a motion would be in order. Senator Dannelly moved to accept the proposal as presented and the motion passed unanimously.

Representative Grady announced a change to the agenda regarding the last item, "Committee Priorities". He asked that members contact Committee Counsel Robin Johnson for information they may desire on the committee's major past issues and send to staff or the co-chairs any suggestions for issues they want to discuss during future meetings of the committee.

PROGRAMS FOR PROFESSIONAL DEVELOPMENT

Representative Grady asked Dr. Shirley Iorio, Committee Policy Analyst to present the next item on the agenda, "Effectiveness of Programs for Professional Development Offered by UNC Center for School Leadership Development". Dr. Iorio

started by giving some background on the long history of Education Oversight interest and involvement in professional development and programs at the Center for School Leadership Development (CSLD). She said the Center is located in Chapel Hill and includes such groups as the Principals' Executive Program, NC Principal Fellows Program, the NC Teacher Academy, the Model Teacher Education Consortium, NC TEACH, and others. In 1995 the General Assembly directed the UNC Board of Governors (BOG) to study the operation, organization and governance of the programs that provide ongoing professional development and continuing education for school teachers and administrators. The BOG was further directed to consult with the State Board of Education and to develop a plan for the provision of professional development services including the location and governance of the various functions. In 1998, the Excellent Schools Act directed the BOG to implement, administer and revise programs for meaningful professional development based upon the required evaluations and recommendations made by the State Board of Education. Dr. Iorio said they were directed to align the programs with state education goals and direct them toward improving student academic achievement. The BOG was directed to report on a plan to coordinate the subject matter and consolidate components of the professional development program.

In 1998, the General Assembly directed the BOG to create a board of directors for the NC CSLD. (Dr. Iorio said members should be aware that the programs at the CSLD were all created at different times, separately and with different missions, and at a certain point in 1998 all were brought together under this one umbrella.) In addition, the BOG was directed to further study and recommend to Education Oversight any statutory or other organizational changes to assure oversight and coordination of the program components of the CSLD. There was concern among some of the other Education Oversight members about the amount of money that was appropriated for the CSLD and the members wanted to know how effective these programs were – whether students were benefiting. Then in 1999 the UNC Vice President for University School Programs and the Director for CSLD were asked to make a presentation to Education Oversight. They addressed specific questions from the committee. For example, they were asked to discuss (1) the structure and governance of the CSLD, (2) the alignment of the programs with the state priorities in teacher needs, and (3) how the programs assess the effectiveness of the programs in terms of their impact on raising student academic achievement and in terms of their implementation “back home”.

Dr. Iorio said that in 2000 all of the directors of the CSLD programs made presentations to an Education Oversight Subcommittee. They presented their evaluation data and their system for evaluating the effectiveness of their programs. At that time of limited resources, the co-chairs of Education Oversight were concerned about the return on the state's investment in professional development and the rationale for continuing to fund these programs. Committee members were not satisfied that programs were being evaluated in terms of their effectiveness for teachers and ultimately a benefit to students. Education Oversight concluded at that time that the N. C. Department of Public Instruction (DPI) was in the best position to identify the needs of schools and to recommend the best strategy to meet the needs. They determined that the CSLD programs should be working in collaboration with DPI to provide quality professional

development. So, the General Assembly passed legislation in 2001 to tighten up the language of The Excellent Schools Act.

Dr. Iorio referred to Attachment # 15 graphics to discuss the legislative direction to the State Board of Education to identify needs based on the state's education priorities for improving student achievement and to develop strategies to address those needs. The State Board then reports those needs and strategies to the General Assembly and to the Board of Governors. The first report was in 2002 and annual reviews and revision resubmissions were made by the State Board. The annual report is required to use data to evaluate the effectiveness of the programs and to clearly document how the programs have addressed the state's identified needs.

Dr. Iorio said that Dr. Richard Thompson, Vice President for University-School Programs at UNC and Dr. Janice Davis, Deputy Superintendent at the Department of Public Instruction would present the required 2003 report and the response to that report. Dr. Thompson came forth to present the Second Annual Report on the All Students Succeed through Excellent Teaching (ASSET) Project (See Attachment # 16.). He explained that ASSET is being tested by a small group of systems' high schools which volunteered for the project: Duplin County, Lexington City, Montgomery County and Swain County and their feeder schools. These counties were chosen for the test because the achievement gap had been widening in those schools for a period of years. Dr. Thompson called attention to the main lessons learned (see Page 3 of the Attachment) and discussed the more important ones: (1) development of significant achievement gaps during students' transition years; (2) large number of teachers not fully certified, especially in math and science; (3) large, complex high schools less able to meet academic needs; (4) lack of linking professional development lessons to achievement gap issues; (5) need for better support and mentoring for beginning and lateral-entry teachers; (6) need to stick with the NC Standard Course of Study; (7) high teacher turnover reducing the ability to meet needs of very diverse student populations. Dr. Thompson said their responses to these lessons learned were to offer as many professional development opportunities as possible, strengthen partnerships between CSLD and ASSET schools, establish communication networks with principals of ASSET schools, better analyze student achievement data, and secure assistance from other education providers when needed.

In conclusion, Dr. Thompson said that, generally, the elementary schools did well and, generally, high schools did not close the achievement gap. He asked if they can take credit for all the good work done at the elementary school level or the blame for many high schools not doing as well as folks would have liked and he said they cannot because of the many factors that can't be controlled such as high mobility of students in and out of some schools. He cited specific information on each of the schools under Appendix B. He recommended to the committee that (1) professional development, in general and strategically, be focused at the grade level transitions; (2) something be done to support high schools in developing more rigorous coursework; (3) consideration be given to working toward smaller high schools (4) needs of individual teachers in the classroom be better aligned to professional development; (5) better and more consistent mentor training be developed; (6) more focus is placed on working conditions of teachers and other personnel through better training for administrators; (7) better ways need to be found to

obtain data on staff development and how to evaluate it – there are a few educators in other states who are working on this aspect of professional development.

Dr. Thompson said it's important to know what is learned in professional development programs, what was done with what was learned, and how much support was there in the schools for efforts to implement what was learned. Did student achievement go up as a result?

Senator Swindell asked for clarification on what Dr. Thompson said about the NC Teacher Academy and Dr. Thompson explained that having teachers go to seminars in the summer is important, but can't be counted on to be enough; there needs to be follow-up with a support system working with teachers in the schools. Sen. Swindell asked if he sees the advantages of the Teacher Academy and what it does for teachers and Dr. Thompson said he does.

Representative Grady said there are multiple groups that offer professional development and he asked Adam Levinson, Fiscal Analyst, about the total amount of money appropriated to this effort. Mr. Levinson said the General Assembly has appropriated about \$13 million and that there is an additional \$18 million spent on professional development by DPI. Dr. Thompson said that, in addition to those amounts, there is about \$55 million in federal funds.

Representative Yongue asked if the process was a learning experience and is there some way more of this kind of thing can be done more efficiently. He asked if we've learned where the process can be streamlined so we can rely more on solving education needs at the grassroots level. Dr. Thompson said they did learn a lot, one thing being that a project is much easier to manage than taking a program to scale. He said many local districts are perfectly capable, not only of deciding what they need to do, but they can do it. He added that others have to have additional support. He said they learned the value of the principalship all over again and found that if the school doesn't have a good principal, the school's overall performance will not be good. He said probably the most important thing they learned is that we need to help the local schools understand what we've learned and then offer them the support they need. Dr. Yongue commented that it's critical to go out there and look at the individual school systems.

Senator Rucho said in the analysis of data there must have been certain criteria that he found he would want to instill in teachers in the future. He asked if there is an effort to provide this direction to teachers who are being trained in college now, so when they come out of college they'll be better prepared to achieve the level of success that this effort is trying to develop and take future development of learning to a higher level. Dr. Thompson said that has already begun. He said they have regular monthly meetings with directors of CSLD and deans of the schools of education, sharing with them what they are finding in the schools. Particularly, he said they are working on training of principals and how principals currently in the system can be helped. Sen. Rucho asked if colleges of education are enthusiastic about or interested in the findings provided by Dr. Thompson's work and he responded that the response varies. Dr. Thompson said the three larger teacher training institutions have embraced their findings and the others are coming along. He said President Broad of UNC has taken a very strong stand in favor of improved teacher training. He said they are working on a major report on improving the

quality and quantity of teacher preparation to the BOG. He said it will be released initially on February 11 and in its final form in late March. Senator Rucho said, since over the past couple of years, we may have found a formula to deliver improvement to the quality and numbers of teachers coming into the profession, will the General Assembly or this committee do anything to help them go in the direction of accepting the techniques Dr. Thompson says work?

Representative Grady asked staff to look into Senator Rucho's question and let the committee know what it finds.

Senator Dannelly asked for additional comments on the subject of mentoring. Dr. Thompson said mentoring is such a big part of improving teacher quality. An effective mentoring program at a school for beginning and lateral-entry teachers can be the difference in their success and is directly connected to teachers staying at a school. He mentioned the program called "Connecting" which focuses on beginning and lateral-entry teachers and they found, in Vance County, more than 20 new teachers were in the program, and they did not lose a single teacher, though one later transferred to another school. They gave mentoring the credit for the retention. Mentoring is a concentrated, on-site program that works with teachers while they are doing their work. He said North Carolina has a mentoring system where everyone is entitled to a mentor, but the way the program operates is vastly different across the state.

Representative Grady called on Dr. Janice Davis, Deputy Superintendent at the Department of Public Instruction for DPI's Response to the Report. She referred to "Study Professional Development Programs for Public School Professionals". (See Attachment # 17.) She said the State Board of Education appreciates the collaborative work that the CSLD has done over the last year on this project. She said a lot has been heard about "common sense" and it seems pretty clear that DPI marshals the valuable resources the CSLD holds, brings them together and aligns them with the work that is the goal – improving student performance in local school districts. Because of Dr. Thompson's thorough discussion she said her presentation would be briefer and she clarified why the focus – closing the achievement gap while raising achievement for all – was chosen. She said she knows that members are aware that the State Board of Education is committed to that effort. To that end, DPI created a whole special division for reaching out in response to needs in the local districts, as Rep. Yongue mentioned earlier. In addition, she said, it is very clear to the State Board that the resources in CSLD are a clear match for what needs to happen in terms of outreach and professional development in the LEAs. She said it is interesting that even though this was planned prior to all the new demands of No Child Left Behind, CSLD is perfectly aligned with those demands and provides the mechanism for the state to move forward.

The focus of closing the gap, ASSET, in addition, is a very valuable piece of the work that was done. Numerous instructional development modules have been developed. They are high quality, user-friendly and are being disseminated and made available to any district that wants them. (They are listed on Page 6 of Attachment #17.) The final thing that DPI had asked for in response to some legislation, was that all K-8 teachers receive training in reading. They have asked that there also be a focus in helping those

teachers in the local districts figure out the best way to meet the need to get training hours in staff development in the area of reading.

Dr. Davis said that, as they reviewed the project, the task of the State Board was to respond to the project as presented and set the stage for continuing to work together. In that light, she said the Board's response asks the CSLD to continue its effort. The recommendations provided reflect not only on things that the CSLD will do but provides interesting insight and a lot of affirmation of data received from other sources. She said she thinks they are on the right track. She said they have evolved to the point that they can take the data and look at it more comprehensively. There are a lot of ways to measure success – end of grade tests is one. She said they have a wonderful opportunity to expand data collection and analysis to help us move forward. She said the State Board is asking to focus on the issue of transition from one area to another and they are asking to reinforce the area of reading. The findings that show teachers wanting math, reading and writing assistance remain very clear and that is something that should be done.

Dr. Davis said the Board appreciates the work of the CSLD and looks forward to working together in the focus districts and looking for ways to expand to others.

SCHOOLS OF EDUCATION PERFORMANCE REPORTS

Representative Grady moved to the next agenda item, "Schools of Education Performance Reports" and asked Dr. Shirley Iorio, Committee Policy Analyst, to review the authorizing legislation from The Excellent Schools Act, which was adopted in 1997. (See Attachment # 18.) Dr. Iorio said it requires that there be performance reports for teacher preparation programs in North Carolina and common formats for the report from each of the schools, which include the particular items spelled out in the legislation. There also has to be the same kind of performance report for master's degree programs in education and school administration programs. Dr. Iorio said Dr. Kathy Sullivan, Director, Human Resource Management, DPI, would present the report.

Dr. Sullivan brought two handouts for use during her presentation. (See Attachment # 19 and Attachment # 20.) She started by referring to a publication of 2002-2003 performance reports (See Attachment # 21.), which contains separate information on the Undergraduate and Graduate Teacher Education Programs and School Administration Programs. She said each of the reports includes information that is a summary for the state as well as reports from and on each individual institution. The information in the report includes such things as number of students enrolled in programs, the number of students completing programs, the performance of students on Praxis tests, involvement of the institutions with public schools, efforts of the institutions to work with lateral-entry teachers, efforts of the institution to help students pass Praxis exams, efforts of the institutions to recruit individuals into teaching and surveys of program completers, their mentors and their employers.

Dr. Sullivan said the law specifies that on the basis of the report and other criteria identified by the State Board that institutions be rewarded and sanctioned, but that no institutions were rewarded or sanctioned during the first year that the report was issued. The first year was used instead for benchmarking to see what kind of points ought to be set as the criteria for designating an institution as exemplary or low-performing. She said

in the first four years the institutions were designated as exemplary or low-performing based upon the number of points they received in a variety of categories including the performance of students on Praxis tests, performance of students in the initial licensure program and survey results associated with their involvement with the public schools. In the second year, four institutions were designated as exemplary and five were designated as low-performing. In the third year, seven institutions were designated as exemplary and only one was designated as low-performing. In the fourth year, seven institutions were designated as exemplary and two as low-performing.

Dr. Sullivan said that for this year, based on feedback from institutions, DPI felt that the awarding of points was not as objective as it should have been even though DPI used readers from out-of-state. At this point, she said the State Board changed the way institutions were rewarded and sanctioned and adopted three broad categories: (1) service to the public schools not with individual points, but simply saying the institution does or does not meet the criteria; (2) criteria related to the performance of students on the Praxis 2 exam; (3) and criteria related to survey responses of people who had finished the program and their mentors and their principals. Based on the criteria adopted by the State Board there were no institutions in the Fall of 2003 designated as low-performing, and when DPI moved to that criteria, the institutions also agreed that they would give up the designation of exemplary because there was no basis on which to identify the top five or six top performing institutions. When an institution is identified as low-performing, it must submit a plan to DPI identifying what it intends to do to correct the deficiency. If the institution is designated as low-performing for two consecutive years, the department sends a team to the campus to meet with faculty and administrators to offer recommendations as to how the institution may improve its performance. Dr. Sullivan said only one institution has fallen into that category and it got itself out of the low-performing category in the third year. The Board has the option to actually close a low-performing program, but no institution is near the position of being closed.

Dr. Sullivan said that while the performance reports provide a snapshot of the institution – enrollment, number of people who have finished, percentage of completers licensed and employed – one of the real values of the report is that it allows DPI to look at data across years. She referred to Attachment # 20 which shows data trends across the five years that the performance reports have been issued. The number of institutions in the state that have teacher education programs has remained the same, even though one institution, Davidson College, closed down its program and another, Southeastern College at Wake Forest, is beginning to offer programs in the teacher education business.

Representative Yongue asked what percentage of lateral-entry teachers finish the process in the allotted time and Dr. Sullivan said roughly a third of teachers are coming through lateral-entry and while their retention rate is not as high as those coming through teacher education programs, it is increasing. She said she could get that information for members. Representative Grady commented that the number of student teachers graduating each year is about 3,000 and about 2,000 of those actually go into teaching. Dr. Sullivan said about 10,000 are needed.

Representative Grady thanked her for her presentation and recessed the meeting until the afternoon.

DRAFT

Representative Bell asked if information could be obtained on how many lateral-entry personnel go into – by category – elementary schools, middle schools and high schools. Representative Grady asked the staff to provide that information to Representative Bell.

Rep. Grady said the meeting has been concluded, since Dr. Bataille is not available for the next agenda item.

The meeting adjourned at 2:00 p.m.

Respectfully submitted,

Anne B. Wilson, Clerk

Representative Robert Grady,
Presiding Co-chair

Senator Steve Metcalf, Co-chair
Representative Doug Yongue, Co-chair

JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE
2003-2004 SESSION

January 14-15, 2004

TABS

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2003-2005

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Issues that the Joint Legislative Education Oversight Committee shall study

1. Whether to extend tuition waivers to certain persons enrolled in UNC constituent institutions and the community colleges (S.L. 2003-230, SB 424)

SECTION 4. The Joint Legislative Education Oversight Committee shall study whether to extend the tuition waivers under Chapter 115B of the General Statutes. In particular, the Committee shall consider whether the waivers should be made available (i) to law enforcement officers, firefighters, volunteer firefighters, or rescue squad workers who are permanently and totally disabled as a direct result of a traumatic injury sustained in the line of duty and (ii) to their children, regardless of the age of the children either at the time of the injury or enrollment. The Committee shall report to the General Assembly by April 15, 2004, on its findings and recommendations.

2. Issues related to rapid growth in student population (S.L. 2003-284, Sec. 7.29; HB 397, Sec. 7.29)

SECTION 7.29. The Joint Legislative Education Oversight Committee shall study the effects of rapid growth in student population on local school administrative units. In the course of the study, the Committee shall consider issues related to rapid growth and strategies for addressing these issues. The Committee shall report to the 2004 Regular Session of the 2003 General Assembly on its findings and recommendations.

3. Evaluation of the Comprehensive Articulation Agreement (S.L. 2003-284, Sec. 8.12(a)-(h); HB 397, Sec. 8.12(a)-(h))

SECTION 8.12.(a) The General Assembly finds that (i) there is a general sentiment expressed by students that the Comprehensive Articulation Agreement adopted by the Board of Governors of The University of North Carolina and the State Board of Community Colleges should be improved and (ii) over the past five years, there have been many suggestions for improving the Comprehensive Articulation Agreement as well as recommendations for new directions in which the Comprehensive Articulation Agreement should be developed.

SECTION 8.12.(b) The Joint Legislative Education Oversight Committee shall contract with a credible independent source, individual, or organization to study the Comprehensive Articulation Agreement. The contractor shall not be (i) a current employee of The University of North Carolina, Office of the President, the North Carolina Community College System, or any of the North Carolina independent schools/colleges participating in the Comprehensive Articulation Agreement or (ii) a current or past member of the Transfer Advisory Committee.

SECTION 8.12.(c) The study by the contractor shall:

- (1) Be consistent with the standards of the Southern Association of Colleges and Schools, Commission on Colleges, on educational quality and institutional effectiveness;
- (2) Be designed to provide an accurate and credible assessment of the effectiveness of the Comprehensive Articulation Agreement during its initial five years of existence relative to the intent of its authorizing legislation;
- (3) Be based on qualitative as well as quantitative information and data;
- (4) Take no more than four months from initiation to completion; and
- (5) Include input from college transfer students, counselors, faculty, and administration from both systems.

SECTION 8.12.(d) The contractor's report shall:

- (1) Adequately reflect the study's methodology, sources of information, purpose and scope, analyses, evaluative assessments, recommendations, and conclusions;
- (2) State any known deficiencies or limitations of the study;
- (3) Be presented in both a printed form and an electronic version; and
- (4) Provide recommendations for improving the Comprehensive Articulation Agreement.

SECTION 8.12.(e) The contractor shall submit a written progress report every four weeks to the Joint Legislative Education Oversight Committee, the

vice-president of academic affairs of The University of North Carolina, Office of the President, the vice-president of academic affairs of the North Carolina Community College System Office, and the cochairs of the Transfer Advisory Committee. The contractor shall complete the report within four months. At the completion of the study, the contractor shall submit a draft of the report document to the Joint Legislative Education Oversight Committee, the vice-president of academic affairs of The University of North Carolina, Office of the President, the vice-president of academic affairs of the North Carolina Community College System Office, and the cochairs of the Transfer Advisory Committee for review.

SECTION 8.12.(f) Within 30 days of completing the study, the contractor shall submit a final report to the Joint Legislative Education Oversight Committee, the vice-president of academic affairs of The University of North Carolina, Office of the President, the vice-president of academic affairs of the North Carolina Community College System Office, and the cochairs of the Transfer Advisory Committee. The Joint Legislative Education Oversight Committee, vice-president of academic affairs of The University of North Carolina, Office of the President, and the vice-president of academic affairs of the North Carolina Community College System Office may, in their discretion, schedule a formal presentation of the report when it is submitted.

SECTION 8.12.(g) The University of North Carolina, Office of the President, and the North Carolina Community College System shall provide the contractor with access to and use of information databases to the extent that such access and use is necessary for the study and does not violate legal and ethical codes or create disruptions of normal operations.

SECTION 8.12.(h) The University of North Carolina, Office of the President, and the North Carolina Community College System shall each transfer thirty-five thousand dollars (\$35,000) to the Joint Legislative Education Oversight Committee to carry out this study.

4. Review of Teacher Certification process (S.L. 2003-284, Sec. 7.39; HB 397, Sec. 7.39

Section 7.18 of S.L. 2002-126 reads as rewritten:

"SECTION 7.18.(e) The Joint Legislative Education Oversight Committee shall make recommendations to the General Assembly on any changes to law or policy affecting certification of teachers on or after August 1, 2004, after reviewing the findings and recommendations of the consultant and State Board of Education."

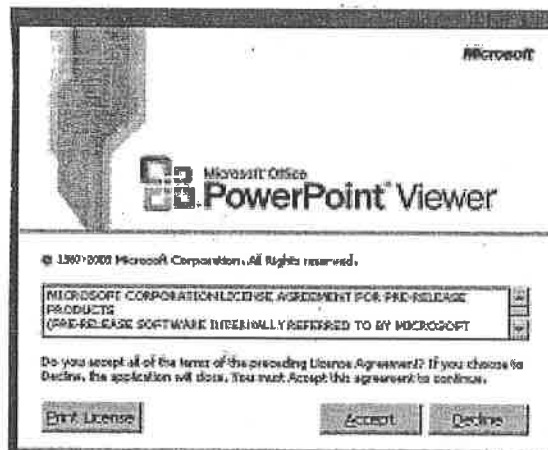
Reports/Studies Due to Education Oversight (From the 2003 Session)

Citation	Issue	Reporting Agency	Date Due
S.L. 2003-284 s. 7.6(b) & (i)	Supplemental Funding in Low-Wealth Counties	SBE	May 1, 2004
S.L. 2003-284 s. 7.7(e) & (f)	Small School System Supplemental Funding	SBE	May 1, 2004
S.L. 2003-284 s. 7.10(c)	Evaluation of Initiatives to Assist High-Priority Schools	SBE	December 1 of each year
S.L. 2003-284 s. 7.15(c)	Students With Limited English Proficiency	SBE	November 15, 2003
S.L. 2003-284 s. 7.16(c)	Funds to Implement the ABCs of Public Education	SBE	October 15, 2003
S.L. 2003-284 s. 7.17	LEA Assistance Program	SBE	May 15, 2004 and December 15, 2005
S.L. 2003-284 s. 7.20(d)	Recruitment and Retention Initiatives to Address Teacher Shortages	SBE	April 15, 2004
S.L. 2003-284 s. 7.20(f)	Recruitment and Retention Initiatives to Address Teacher Shortages	SBE	July 1, 2004
S.L. 2003-284 s. 7.25(c)	Replacement School Buses Funds/ Safety Rules for School Activity Buses	SBE	March 15, 2004
S.L. 2003-284 s. 7.30(d)	Mentor Teacher Funds May Be Used For Full-Time Mentors	SBE	October 15, 2004
S.L. 2003-284 s. 7.30(e)	Mentor Teacher Funds May Be Used For Full-Time Mentors	SBE	December 15, 2004
S.L. 2003-284 s. 7.31	Explornet Audit	State Auditor and OSBM	
S.L. 2003-284 s. 7.32	School Nurse Services	SBE	February 15, 2004
S.L. 2003-284 s. 7.35	Pilot Programs on Financial Literacy	SBE	January 1, 2004
S.L. 2003-284 s. 7.36	Credit for High School Students Taking Community College Courses	SBE	December 15, 2003
S.L. 2003-284 s. 7.39	Review of Teacher Certification Process	SBE	March 15, 2004
S.L. 2003-284 s. 10.40(e)	More At Four Program	DHHS, DPI, Task Force	January 1, 2004 and May 1, 2004
S.L. 2003-284 s. 15.3(c)	Reports on Certain Programs	Communities in Schools	April 1 (annually)
S.L. 2003-284 s. 29.7	Driver Education Privatization	SBE	November 30, 2003
S.L. 2003-277 s. 1	Innovative Education Initiatives Act	Education Cabinet	January 15, 2004 and annually
S.L. 2003-277 s. 2	Innovative Education Initiatives Act	SBE and SBCC	October 15, 2005 and annually
S.L. 2003-277 s. 3	Innovative Education Initiatives Act	SBE	April 15, 2004
HB 150	Establish State Education Grants	State Education Asst. Authority	
HB 797	Assistance to LEAs on Implementation of NCLB	SBE and DPI	June 15, 2004 and December 15, 2005

Spotlight on Education Legislation 2003 Installation Instructions

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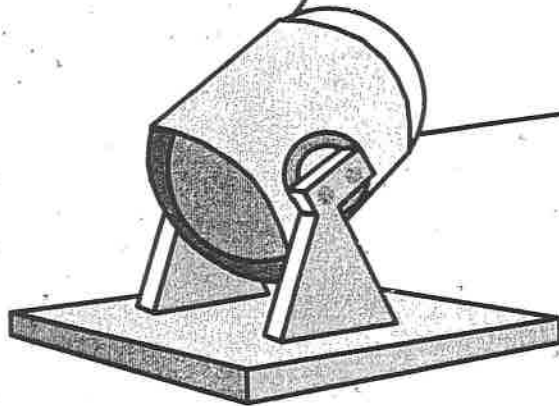
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then click Research Division
then click Spotlight on Education 2003

In the Spotlight

July, 2003

Education
Legislation



North Carolina General Assembly
2003 Session

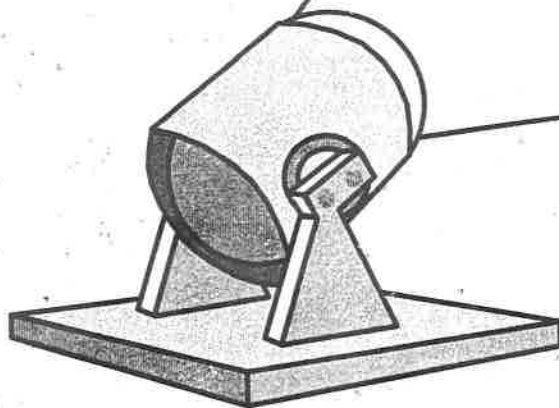
July 2003

Education Team - Research Div.

In the Spotlight

July, 2003

Education
Legislation



North Carolina General Assembly
2003 Session

July 2003

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North Carolina General Assembly

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Introduction

The North Carolina General Assembly convened on January 29, 2003, and adjourned July 20, 2003, ending the shortest "long" session since 1999.

This document summarizes highlights of ratified legislation pertaining to education.

The format was chosen so that information can be used as speaker's notes with supporting detail, or readily reproduced as a visual presentation.

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In the Spotlight



**K-12
Education**

July 2003

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Encourage Early College Attendance SL 2003-251 (HB 601)

- ⚡ Requires the State Board of Education, in cooperation with the Education Cabinet, to work with local school systems, the constituent institutions of The University of North Carolina, the local community colleges, and private colleges and universities to:
 - ⌘ encourage early entry of motivated students into college programs, and
 - ⌘ ensure that there are opportunities for academically talented high school students to take college coursework, either at nearby universities or through distance learning.

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Encourage Early College Attendance SL 2003-251 (HB 601)

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 - ▣ ensure that there are opportunities for academically talented high school students to take college coursework, either at nearby universities or through distance learning.

**Encourage Early College Attendance
(Cont'd)**

SL 2003-251 (HB 601)

* Requires the State Board of Education to adopt policies directing school guidance counselors to make ninth grade students aware of the potential to complete the high school courses required for college entry in a three-year period.

* Effective June 26, 2003.

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Encourage Early College Attendance (Cont'd)

SL 2003-251 (HB 601)

- # Requires the State Board of Education to adopt policies directing school guidance counselors to make ninth grade students aware of the potential to complete the high school courses required for college entry in a three-year period.
- # Effective June 26, 2003.

Alternatives to School Competency Test

SL 2003-275 (HB 801)

- * Gives high school students who do not pass the Competency Test the opportunity to take an alternative test.
- * Requires the State Board of Education to:
 - Adopt one or more nationally standardized tests or equivalent measures that evaluate competencies in verbal and quantitative areas,
 - or
 - Develop and validate alternate means to demonstrate minimum competence.

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Alternatives to School Competency Test

SL 2003-275 (HB 801)

- # Gives high school students who do not pass the Competency Test the opportunity to take an alternative test.
- # Requires the State Board of Education to:
 - † Adopt one or more nationally standardized tests or equivalent measures that evaluate competencies in verbal and quantitative areas, or
 - † Develop and validate alternate means to demonstrate minimum competence.

Alternatives to School Competency Test (Cont'd) SL 2003-275 (HB 801)

- * Requires that these tests or measures must be as difficult as the current required competency test.
- * Requires the State Board to adopt a policy to identify which students and under what circumstances students will be permitted to pass one of these alternate tests in lieu of the competency test.
- * Requires that students with disabilities who fail the current competency test after two attempts be given the opportunity to take and pass one of the alternate tests that the State Board adopts.
- * Effective July 1, 2003.

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Alternatives to School Competency Test (Cont'd)

SL 2003-275 (HB 801)

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- # Effective July 1, 2003.

Innovative Education Initiatives Act

SL 2003-277 (SB 656)

- ✦ Directs the Education Cabinet to set as a priority cooperative efforts between secondary schools and institutions of higher education;
- ✦ Authorizes boards of trustees of community colleges and local boards of education to jointly establish cooperative innovative programs in high schools and community colleges to serve high school students who are at risk of dropping out of school before attaining a high school diploma, or to serve high school students who would benefit from accelerated academic instruction;

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A joint application for such programs is submitted to the State Board of Education and the State Board of Community Colleges. Both Boards will appoint a joint advisory committee to review the applications and recommend those programs that meet the requirements of the act to the State Boards that would then approve the programs. An approved program will be accountable to the local board of education but will be exempt from the laws and rules applicable to a local board of education, a local school administrative unit, a community college, or a local board of trustees of a community college except as otherwise provided by this law and the program agreement. A program will operate under the terms of a signed written agreement for a term of no more than five school years.

Innovative Education Initiatives Act SL 2003-277 (SB 656)

- # Directs the Education Cabinet to set as a priority cooperative efforts between secondary schools and institutions of higher education;
- # Authorizes boards of trustees of community colleges and local boards of education to jointly establish cooperative innovative programs in high schools and community colleges to serve high school students who are at risk of dropping out of school before attaining a high school diploma, or to serve high school students who would benefit from accelerated academic instruction;

Innovative Education Initiatives Act (Cont'd) SL 2003-277 (SB 656)

- * Directs local boards and the State Board of Education to review and strengthen their policies that encourage students to remain in high school rather than drop out.
- * Effective June 27, 2003.



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Nothing in this legislation is to be construed to obligate the General Assembly to make appropriations to implement the law.

Innovative Education Initiatives Act (Cont'd) SL 2003-277 (SB 656)

- # Directs local boards and the State Board of Education to review and strengthen their policies that encourage students to remain in high school rather than drop out.
- # Effective June 27, 2003.



Budget Bill
SL 2003-284 (HB 397)

* Section 7.35 - Pilot Programs on Financial Literacy.

- Directs the State Board of Education to establish a pilot program that authorizes and assists up to 5 school systems to implement programs on teaching personal finance literacy.
- The purpose of the pilot program is to determine the best methods of teaching knowledge and skills for students to make decisions regarding their personal finances.
- Effective July 1, 2003.

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The State Board also must:

- Develop a curriculum, materials, and guidelines for local boards to use in implementing an instructional program on personal financial literacy before it selects the five participating school systems;
- Provide to local boards information on securing public and private funds and on using other assets to implement this instructional program; and
- Report by January 1, 2004, to the Joint Legislative Education Oversight Committee on the implementation of the pilot program.

Budget Bill

SL 2003-284 (HB 397)

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- † The purpose of the pilot program is to determine the best methods of teaching knowledge and skills for students to make decisions regarding their personal finances.
- † Effective July 1, 2003.

Budget Bill (Cont'd)
SL 2003-284 (HB 397)

*** Section 7.40 - Enhancement of Character and Civic Education Program.**

Encourages:

- High schools and middle schools to have elected student councils.
- All other schools to have student councils.
- Student discussions of current events in a wide range of classes, particularly social studies and language arts classes.
- High schools and middle schools to have at least 2 classes per grade level to offer interactive current events discussions at least every 4 weeks.

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Budget Bill (Cont'd)

SL 2003-284 (HB 397)

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- † High schools and middle schools to have at least 2 classes per grade level to offer interactive current events discussions at least every 4 weeks.

Budget Bill (Cont'd) SL 2003-284 (HB 397)

* Section 7.40 - Enhancement of Character and Civic Education Program (Cont'd.)

Encourages:

- Local boards of education to include, beginning with the 2004-2005 school year and as part of a character education program, instruction on the responsibility for school safety that includes a consistent and age-appropriate antiviolence message and a conflict resolution component for students in kindergarten through twelfth grade.
- All schools to provide opportunities for student involvement in community service or service-learning projects.

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Budget Bill (Cont'd)

SL 2003-284 (HB 397)

Section 7.40 - Enhancement of Character and Civic Education Program (Cont'd.).

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- † All schools to provide opportunities for student involvement in community service or service-learning projects.

Budget Bill (Cont'd)
SL 2003-284 (HB 397)

* Section 7.40 - Enhancement of Character
and Civic Education Program (Cont'd.).

- Directs the State Board of Education to consider incorporating into the ABCs Program a character and civic education component that may include a requirement for student councils.
- Effective July 1, 2003.

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Budget Bill (Cont'd)

SL 2003-284 (HB 397)

Section 7.40 - Enhancement of Character and Civic Education Program (Cont'd.).

- Directs the State Board of Education to consider incorporating into the ABCs Program a character and civic education component that may include a requirement for student councils.
- Effective July 1, 2003.

Veterans Day a Holiday for School Staff
SL 2003-131 (HB 421)

- * Requires local boards of education to make Veterans Day a holiday for staff.
- * Effective June 4, 2003 and applies to all school years beginning with the 2005-2006 school year.

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Currently, Veterans Day is a holiday for all students enrolled in public schools.

Beginning with the 2005-2006 school year, local boards of education must build a school calendar that makes Veterans Day a holiday for students and staff. It will not increase the number of holidays, but will be included in the calendar in place of another day designated as a holiday.

Veterans Day a Holiday for School Staff

SL 2003-131 (HB 421)

- # Requires local boards of education to make Veterans Day a holiday for staff.
- # Effective June 4, 2003 and applies to all school years beginning with the 2005-2006 school year.

**Budget Bill
SL 2003-284 (HB 397)**

*** Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages.**

⌞ Authorizes initial certification for a teacher from another state who has less than 3 years of full-time classroom teaching experience, is fully certified and highly qualified in that other state, and is employed as a teacher by an LEA in NC.

⌞ This certification is for one year or until the teacher has 3 years of full-time teaching experience, whichever is longer.

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The definition of Highly Qualified is an individual assessment for each teacher and varies depending on what grade level and subjects the teacher teaches:

- At the elementary level, teachers must be fully state licensed and pass the elementary Praxis II test(s) relevant to their teaching area.
- Teachers at the middle and high school level must be fully state licensed and demonstrate subject area knowledge by passing the required Praxis II test(s) in each academic subject in which they teach.
- As an alternative to the Praxis II test(s), a middle/high school teacher may complete one of the five following options for each academic subject he/she teaches:
 - An undergraduate major;
 - Coursework equivalent to an academic major;
 - A graduate degree;
 - A master's level licensure or above in the appropriate subject area; or
 - National Board Certification in the related subject area.
- An alternative to the Praxis II for existing teachers at all grade levels is to satisfactorily complete a High Objective Uniform Statewide Standard of Evaluation (HOUSSE). This evaluation measures an individual's subject matter competence.

Budget Bill

SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages.

- Authorizes initial certification for a teacher from another state who has less than 3 years of full-time classroom teaching experience, is fully certified and highly qualified in that other state, and is employed as a teacher by an LEA in NC.

- This certification is for one year or until the teacher has 3 years of full-time teaching experience, whichever is longer.

Budget Bill (Cont'd) SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

- ⌞ Unless the employing LEA recommends otherwise, a teacher receives continuing certification upon completion of 3 years of full-time teaching, including one full year in that LEA.
- ⌞ The teacher is then subject to the same continuing certification and certificate renewal requirements as other NC teachers.
- ⌞ The teacher is not required to take and pass Praxis.

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Budget Bill (Cont'd)

SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

- ▣ Unless the employing LEA recommends otherwise, a teacher receives continuing certification upon completion of 3 years of full-time teaching, including one full year in that LEA.
- ▣ The teacher is then subject to the same continuing certification and certificate renewal requirements as other NC teachers.
- ▣ The teacher is not required to take and pass Praxis.

Budget Bill (Cont'd)
SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

- h** Authorizes continuing certification for a teacher from another state who who has 3 or more years of full-time classroom teaching experience, is fully certified and highly qualified in that other state, and is employed as a teacher by an LEA in NC.

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Budget Bill (Cont'd)

SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

- ± Authorizes continuing certification for a teacher from another state who who has 3 or more years of full-time classroom teaching experience, is fully certified and highly qualified in that other state, and is employed as a teacher by an LEA in NC.

Budget Bill (Cont'd) SL 2003-284 (HB 397)

* Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

- " The teacher retains continuing certification if, at the end of one year of employment, the employing local board recommends to the State Board that the teacher's continuing certification be renewed.
- " The teacher is then subject to the same continuing certification and certificate renewal requirements as other NC teachers.
- " The teacher is not required to take and pass Praxis.

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Budget Bill (Cont'd)

SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

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- ▣ The teacher is not required to take and pass Praxis.

Budget Bill (Cont'd) SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

- Directs the State Board of Education to determine whether the minimum score needed on the Praxis exam, required for initial certification, is appropriate.

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Budget Bill (Cont'd)

SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

- † Directs the State Board of Education to determine whether the minimum score needed on the Praxis exam, required for initial certification, is appropriate.

Budget Bill (Cont'd)
SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

- Encourages the lateral entry into teaching by qualified individuals who have at least a bachelors degree, and directs the State Board to review and revise the curriculum requirements for lateral entry candidates to receive certification.

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Budget Bill (Cont'd)

SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

- † Encourages the lateral entry into teaching by qualified individuals who have at least a bachelors degree, and directs the State Board to review and revise the curriculum requirements for lateral entry candidates to receive certification.

Budget Bill (Cont'd)
SL 2003-284 (HB 397)

* Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

- Directs the State Board to issue provisional certificates for no more than three years to lateral entry teachers who are required by federal law to obtain a certificate by the fourth year of teaching.
- Allows other qualified lateral entry teachers to receive a provisional teaching certificate for five years.

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Budget Bill (Cont'd)

SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

- ▮ Directs the State Board to issue provisional certificates for no more than three years to lateral entry teachers who are required by federal law to obtain a certificate by the fourth year of teaching.
- ▮ Allows other qualified lateral entry teachers to receive a provisional teaching certificate for five years.

Budget Bill (Cont'd)
SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.).

- r. Directs the State Board to ensure that teacher preparation programs that provide training for lateral entry candidates provide that training in a uniform and consistent manner to enable lateral entry candidates to obtain certification as required by NCLB while working as full-time teachers.

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Budget Bill (Cont'd)

SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

- † Directs the State Board to ensure that teacher preparation programs that provide training for lateral entry candidates provide that training in a uniform and consistent manner to enable lateral entry candidates to obtain certification as required by NCLB while working as full-time teachers.

Budget Bill (Cont'd)
SL 2003-284 (HB 397)

* Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.).

- Effective July 1, 2003, and expires June 30, 2004. Provisions addressing teachers from other states apply to individuals initially employed as teachers in NC for the 2003-2004 school year.

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Budget Bill (Cont'd)

SL 2003-284 (HB 397)

Section 7.20(c)-(h) - Recruitment and Retention Initiatives to Address Teacher Shortages (cont'd.)

- † Effective July 1, 2003, and expires June 30, 2004. Provisions addressing teachers from other states apply to individuals initially employed as teachers in NC for the 2003-2004 school year.

Budget Bill (Cont'd) SL 2003-284 (HB 397)

* Section 7.39 - Review of Teacher Certification Process.

- Removes the requirement that the State Board of Education must contract with an outside consultant to conduct a study, authorized last year, of the teacher certification process, and directs the State Board to conduct the study.
- Eliminates portfolios from the issues to be considered as part of this study.
- Extends the date from January 1, 2004, to March 15, 2004, by which the Board must report its findings and recommendations to Joint Legislative Education Oversight Committee.
- Effective July 1, 2003.

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Budget Bill (Cont'd)

SL 2003-284 (HB 397)

Section 7.39 - Review of Teacher Certification Process.

- † Removes the requirement that the State Board of Education must contract with an outside consultant to conduct a study, authorized last year, of the teacher certification process, and directs the State Board to conduct the study.
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- † Extends the date from January 1, 2004, to March 15, 2004, by which the Board must report its findings and recommendations to Joint Legislative Education Oversight Committee.
- † Effective July 1, 2003.

Modify Law/Contracts for School Principals SL 2003-291 (SB 955)

- * Clarifies that only the initial contract between a local board of education and a school administrator may be for 2 to 4 years, ending on June 30 of the final 12 months of the contract.
- * Requires subsequent contracts between a local board of education and a principal or assistant principal to be for a term of four years.
- * Allows contracts to be renewed at any time after the first 12 months so long as the term of the new, renewed, or extended contract does not exceed four years.
- * Effective July 1, 2003.

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- # Effective July 1, 2003.

**Compensation/Public School
Employees/Active Duty
SL 2003-301 (SB 714)**

- # Requires the State Board of Education to adopt rules relating to leaves of absence for public school employees, without loss of pay or time, for periods of military training and for State or federal military duty or special emergency management service.
- # Effective on or after July 1, 2002.

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Requires the State Board rules to provide that the State will pay any salary differential to public school employees in State-funded positions, local boards will pay any salary differential in locally-funded positions, charter schools will pay any salary differential to public school employees in charter schools, and local boards will pay the local supplement.

Compensation/Public School Employees/Active Duty SL 2003-301 (SB 714)

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- # Effective on or after July 1, 2002.

Probationary Period Shortened/Career Teachers SL 2003-302 (HB 38)

- # Provides that career teachers will not have to serve another probationary period of more than one year following a return to the profession or a transfer to another school system.
- # Local boards can grant career status immediately or after the first year of employment.
- # Effective July 4, 2003 and applies to contracts of employment beginning with the 2004-2005 school year.

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Probationary Period Shortened/Career Teachers

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- # Local boards can grant career status immediately or after the first year of employment.
- # Effective July 4, 2003 and applies to contracts of employment beginning with the 2004-2005 school year.

School Volunteer Records Private SL 2003-353 (HB 1114)

- * Provides that all school records regarding volunteers are not open to public inspection under the Public Records Act.
- * Specifies who will be permitted to inspect the records.
- * Does not require school systems to maintain records related to volunteers.
- * Requires that volunteers be notified at the time they apply to volunteer that a file will be maintained on them and that the information in the file may be open to inspection under certain circumstances.

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This legislation amends Article 13 of Chapter 115C of the General Statutes (Community Schools Act) by adding a new G.S. 115C-209.1, "Nondisclosure of certain volunteer records".

Volunteers are defined as persons who provide services to the board without expectation of compensation and with the understanding that the board is not obligated to accept the services or pay for them.

The volunteers, superintendent, school supervisory personnel, members of the local board, the school board's attorney, the parent or guardian of any student with whom the volunteer has or had contact, and a party by authorization of a subpoena or court record, may inspect the records.

School Volunteer Records Private

SL 2003-353 (HB 1114)

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- # Does not require school systems to maintain records related to volunteers.
- # Requires that volunteers be notified at the time they apply to volunteer that a file will be maintained on them and that the information in the file may be open to inspection under certain circumstances.

**School Volunteer Records Private
(Cont'd)
SL 2003-353 (HB 1114)**

✱ Authorizes the release or inspection of these records when the board determined the release or inspection is essential to maintaining the integrity of the board OR to maintaining the level or quality of services provided by the board AND the board prepares a written memorandum with its reasons for release or inspection.

✱ Effective August 1, 2003.

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If the board prepares a written memorandum with its reasons for the release or inspection, the superintendent must keep the memorandum, which is a public record.

School Volunteer Records Private (Cont'd)

SL 2003-353 (HB 1114)

- # Authorizes the release or inspection of these records when the board determined the release or inspection is essential to maintaining the integrity of the board OR to maintaining the level or quality of services provided by the board AND the board prepares a written memorandum with its reasons for release or inspection.
- # Effective August 1, 2003.

Local Flexibility Regarding Job Sharing in Schools SL 2003-358 (SB 701)

- # Requires the State Board of Education to adopt rules to facilitate job sharing by school employees, including receiving on a pro rata basis the holidays and leave benefits that they would be entitled to receive if they were employed on a full-time basis.
- # Amends the creditable service section of the Teachers' and State Employees' Retirement System for a school employee in a job-sharing position.
- # Amends the eligibility criteria of the Comprehensive Major Medical Plan to allow coverage on a partially contributory basis.
- # Effective January 1, 2004.

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There is nothing in this legislation that requires local school administrative units to place part-time employees in job-sharing positions or to hire employees in job-sharing positions.

Local Flexibility Regarding Job Sharing in Schools

SL 2003-358 (SB 701)

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- # Amends the creditable service section of the Teachers' and State Employees' Retirement System for a school employee in a job-sharing position.
- # Amends the eligibility criteria of the Comprehensive Major Medical Plan to allow coverage on a partially contributory basis.
- # Effective January 1, 2004.

School Safety Officers-Students/Sex Offenses S.L. 2003-98 (SB 555)

- ✦ Adds school safety officers to the list of school personnel subject to criminal penalties for engaging in sexual acts with students and for taking indecent liberties with students.
- ✦ Defines "school safety officer" as a school resource officer or any other person regularly present in a school for the purpose of promoting and maintaining safety.
- ✦ Effective date - December 1, 2003.

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By listing school safety officers with teachers, school administrators, student teachers, and coaches, the result is that school safety officers would be charged with a felony for violating these statutes regardless of their age in relation to the student.

School Safety Officers-Students/Sex Offenses

S.L. 2003-98 (SB 555)

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- # Defines "school safety officer" as a school resource officer or any other person regularly present in a school for the purpose of promoting and maintaining safety.
- # Effective date - December 1, 2003.

An Act to Safeguard Children SL 2003-408 (SB 993)

- # Requires the State Board of Education (Board) to automatically revoke the certificate of a teacher or school administrator upon receiving proof that the person was convicted of certain serious felonies and misdemeanors.
- # Requires that the Board, before acting, receive a certified copy of the criminal record showing the conviction, and verification that the record applies to the teacher or school administrator.
- # Authorizes the Board to contract for any services necessary to comply with this act.
- # Effective August 13, 2003.

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The felonies and misdemeanors referenced include murder, rape, assault with a deadly weapon with intent to kill or inflict serious injury, kidnapping, abduction of children, crimes against nature, incest, sexual misconduct involving minors, sexual exploitation of a minor, indecent liberties with children and students, and child abuse.

The State Board must give written notice to the teacher or school administrator that revocation action is being considered, including notification that the person may challenge that the criminal record is for another person. If challenged, the Board may not revoke the certificate unless it can establish as a fact that the defendant and the teacher or school administrator are the same person.

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- # Requires that the Board, before acting, receive a certified copy of the criminal record showing the conviction, and verification that the record applies to the teacher or school administrator.
- # Authorizes the Board to contract for any services necessary to comply with this act.
- # Effective August 13, 2003.

Tobacco-Free Schools SL 2003-421 (SB 583)

- # Directs local boards of education to adopt and enforce written policies to enforce the federal prohibition on smoking in any school building used to provide routine or regular kindergarten, elementary, or secondary education or library services to children.
- # The local board policy shall prohibit the use of all tobacco products in enclosed school buildings during school hours.
- # Effective August 14, 2003.

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At a minimum, the policy shall include:

- Adequate notice for students and personnel about the policy;
- The posting of signs prohibiting the use of tobacco products; and
- Requirements that the school personnel shall enforce the policy.

The policy may allow tobacco products to be used in research or instructional activities so long as the tobacco product is not smoked, chewed or otherwise ingested.

Nothing in this legislation prohibits a local board from adopting and enforcing a more restrictive policy on tobacco use in school buildings and school facilities, on a school campus, at school related events, or on other school property.

Tobacco-Free Schools

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- # The local board policy shall prohibit the use of all tobacco products in enclosed school buildings during school hours.
- # Effective August 14, 2003.

**School Calendar Flexibility/Inclement
Weather
SL 2003-8 (HB 340)**

- ✧ Allows local boards of education to make up a maximum of 3 instructional days by adding instructional hours to previously scheduled instructional days if certain criteria were met.
- ✧ If a local board used this option, the LEA was deemed to have met the 180 days of instruction requirement.
- ✧ Effective April 4, 2003 and applied only to the 2002-2003 school year.

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A local board of education could make the decision to make up a maximum of three instructional days by adding instructional hours to previously scheduled instructional days only if certain criteria were met:

- The days to be made up were missed because schools were closed due to unusual and extraordinary inclement weather conditions;
- Making up days would cause undue hardship to parents, teachers, and students;
- The school calendar continued to have a minimum of 1000 instructional hours covering at least nine months; and
- The additional hours added on to the existing days equaled the regularly scheduled number of instructional hours at each school. For example, if the regular school day has six instructional hours, and the local board decided to use this option, the schools must add up to 18 hours (up to three days) to the existing days.

If a local board decided to use this option, the LEA was deemed to have a minimum of 180 days of instruction, teachers employed for a 10 month term were deemed to have been employed for the days being made up, and all other employees were to be compensated as if they had worked the days being made up.

School Calendar Flexibility/Inclement Weather

SL 2003-8 (HB 340)

- # Allows local boards of education to make up a maximum of 3 instructional days by adding instructional hours to previously scheduled instructional days if certain criteria were met.
- # If a local board used this option, the LEA was deemed to have met the 180 days of instruction requirement.
- # Effective April 4, 2003 and applied only to the 2002-2003 school year.

Purchasing Flexibility for Schools SL 2003-147 (SB 620)

- ✦ Allows LEAs to use the same competitive bidding methods used by other units of local government.
- ✦ Allows an LEA to be removed from the requirement to purchase under State contracts earlier than April 1, 2004, if the LEA is certified as E-procurement compliant by the Department of Public Instruction (DPI) and purchases a specified percentage of their materials, equipment, and supplies through the NC E-Procurement Service.

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This legislation removes the requirement that local school administrative units (LEAs) must purchase materials, equipment and supplies under contracts established or approved by the State Department of Administration (DOA), effective April 1, 2004 at the latest.

LEAs must report to the Department of Administration on what percentage of contract purchases were from minority-owned businesses, female-owned businesses, disabled-owned businesses, disabled business enterprises, and nonprofit work centers for the blind and the severely disabled.

This legislation acknowledges that the State wants to encourage LEAs to purchase goods through the NC E-Procurement Service (Service). Therefore, the State Board of Education, in consultation with the Office of Information Technology Services, the Division of Purchase and Contract, and the Service must establish standards for determining when a local school administrative unit's purchasing process is E-Procurement compliant. As of the date a LEA is certified as being E-Procurement compliant, it must expend at least 30% of its remaining unencumbered funds used to purchase supplies, equipment, materials, computer software, and other tangible personal property during the fiscal year in which it is certified through the NC E-Procurement Service. The LEA must purchase at least 35% of its goods through the Service during the fiscal year following certification and the State encourages the LEA to purchase at least 50% of its goods in this manner. During the second fiscal year following certification, the LEA must purchase at least 40% of its goods through the Service and the State encourages the LEA to purchase at least 70% of its goods in this manner.

Purchasing Flexibility for Schools

SL 2003-147 (SB 620)

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Purchasing Flexibility for Schools (Cont'd) SL 2003-147 (SB 620)

- * Requires the State Board of Education to adopt rules regarding equipment standards for supplies, equipment, and materials related to student transportation.
- * Provides that if the State Board of Education adopts safety guidelines for certain commodities, those guidelines must be at least as strict as ones adopted for state term contracts.

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