

**JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE  
AGENDA**

**October 12, 2004**

**10:00 A.M., ROOM 643 LOB**

Senator Swindell, presiding

**Welcome and Introductions**

**Approval of Minutes**

**2004 Education Legislation Update** (Tab 4)  
Robin Johnson, Committee Counsel

**Review of Education Oversight Studies for 2005 Session** (Tab 5)  
Robin Johnson, Committee Counsel

**UNC Science & Math Graduates** (Tab 6)  
Dr. Bobby Kanoy, Associate Vice-President for Access and Outreach,  
The University of North Carolina

**New & Expanding Industry Training Program Expenditure Report** (Tab 7)  
Dr. Larry Keen, Vice President for Economic and Workforce Development,  
North Carolina Community College System

**Break**

**1:30 P.M.**

**Articulation Agreement Study** (Tab 8)  
Dr. Cyndi Balogh, Senior Associate, MGT of America, Inc.

**Responses**

Martin Lancaster, President, North Carolina Community College System  
Dr. Delores Parker, Vice President for Academic and Student Services,  
North Carolina Community College System

Dr. Bobby Kanoy, Associate Vice-President for Access and Outreach,  
The University of North Carolina



**JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE  
AGENDA**

**October 13, 2004**

**9:00 A.M., ROOM 643 LOB**

Senator Swindell, presiding

**Welcome**

**UNC Center for School Leadership Development Report on Professional Development** (Behind Tab 9)

Dr. Richard Thompson, Vice President for University-School Programs,  
The University of North Carolina

**ABCs/NCLB Update** (Behind Tabs 10, 11, 12)

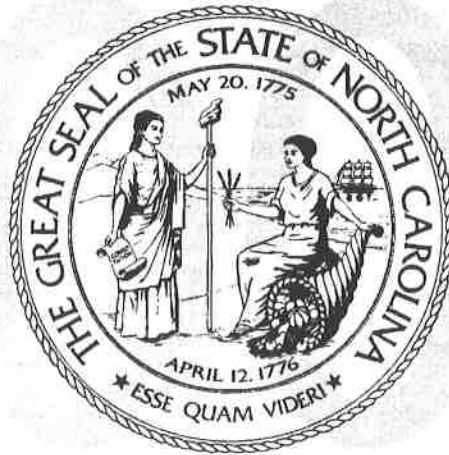
Lou Fabrizio, Director of Accountability Services, Department of Public Instruction  
Dr. Elsie Leak, Associate Superintendent, Curriculum and School Reform  
Services, Department of Public Instruction

**SCHOOL ACCOUNTABILITY AND LOCAL DECISION-MAKING** (Behind Tab 13)

Dr. Robert Landry, Principal, South Davie Middle School  
Sheila Tribble, Teacher, South Davie Middle School



# SUMMARIES



## ENACTED EDUCATION LEGISLATION

**2003 General Assembly  
2004 Regular Session**

*Summaries prepared primarily by the Education Team in the Research Division: Dee Atkinson, Drupti Chauhan, Shirley Iorio, Robin Johnson, and Sara Kamprath. Other contributors from the Research Division are Karen Cochrane-Brown, Brenda Carter, Tim Hovis, Theresa Matula, Giles Perry, and Barbara Riley.*



## *Public Schools*

### **State Board of Education to Study Use of At-Risk Funds**

S.L. 2004-73 (HB 1456) directs the State Board of Education (SBE) to recommend a specified percentage of the Alternative Schools/At-Risk Student allotment to be used to provide services for students who have been suspended from school for more than 10 days. The SBE must report by December 15, 2004 to the Joint Legislative Education Oversight Committee on its recommendation.

### **State Board of Education to Study Alternative Learning Program Funding**

S.L. 2004-76 (HB 1455) requires the State Board of Education to develop and recommend a formula for allotting funds to alternative learning programs and alternative schools based on the number of students who are (i) suspended from school for more than 10 days or expelled from school, and (ii) assigned to an alternative learning program or alternative school. The State Board should consider as a basis for this formula the existing funding formulas used for students with disabilities, academically or intellectually gifted students, and students with limited English proficiency. The State Board must recommend this formula to the Joint Legislative Education Oversight Committee by December 15, 2004.

### **Retirement Teacher Exchange Programs**

S.L. 2004-81 (HB 1478) amends the definitions of the terms "Teacher" and "Exchange Teacher" to clarify that these terms do not include nonimmigrant aliens employed in elementary and secondary public schools who are participating in an international cultural exchange visitor program designated by the U.S. Department of Homeland Security pursuant to 8 C.F.R. Part 214.2(q). This act clarifies that such persons are not eligible for retirement or tenure benefits. This act became effective July 1, 2004.

### **School Information/Meningitis and Influenza**

S.L. 2004-118 (SB 444), known as Garrett's Law, ensures that information concerning meningitis and influenza, and their vaccines, is available at the beginning of every school year for public schools, charter schools, and non-public schools, including home schools, to provide to parents and guardians.

The act became effective July 1, 2004, and applies beginning with the 2004-2005 school year.

### **K-2 Assessment**

S.L. 2004-124, Sec. 7.11 (HB 1414, Sec. 7.11) allows the State Board of Education to use standardized tests for first and second grades only when it is required as a condition of receiving a federal grant under the Reading First Program. Currently the State Board is prohibited from using standardized tests for first and second grade students. However, the State Board does provide to local school administrative units developmentally appropriate individualized assessment instruments for first and second grades, rather than standardized tests.

## **Evaluate Validity of ABC Accountability System**

S.L. 2004-124, Sec. 7.12 (HB 1456, Sec. 7.12) amends the law that directs the State Board of Education (SBE) to adopt annual performance goals as part of the School-Based Management and Accountability Program (also known as the ABCs program). The section directs the SBE, during the 2004-2005 school year, and at least every five years after that, to evaluate the ABCs program by reviewing, where available, historical trend data on student academic performance on State tests. If necessary, the SBE must modify the testing standards so they continue to reasonably reflect the level of performance needed to be successful at the next grade level or in more advanced studies. The SBE must complete its first evaluation and implement any needed testing modifications no later than the 2005-2006 school year.

## **Restore Vocational Education Funding**

S.L. 2004-124, Sec. 7.15 (HB 1414, Sec. 7.15) allows the funding for vocational and technical education to again be used for students in the seventh grade but priority must be given to provide vocational and technical education to students in 8<sup>th</sup> grade through 12<sup>th</sup> grade.

## **Healthful School Food Choices/Pilot Program**

S.L. 2004-124, Sec. 7.17 (HB 1414, Sec. 7.17) directs the State Board of Education (SBE) to develop and implement a pilot program to support the efforts of local school administrative units to provide only healthful and nutritious food choices to students. The SBE is to seek the advice and assistance of the North Carolina School Food Service Association and the Academy of Family Physicians in the development of the program. The SBE will select up to eight local school administrative units from different geographic locations throughout the State to participate in the pilot program and will set the standards for the food choices offered to students. Priority must be given to those local school administrative units that volunteer to be in the pilot program. The selected local school administrative units are directed to implement the program in elementary schools for the 2004-2005 school year. If the SBE finds at the end of the 2004-2005 school year that a pilot local school administrative unit experienced a decrease in food service revenues because students chose not to buy the healthful, nutritious food choices offered by the local school administrative unit's school food service, then the SBE must reimburse the local school administrative unit for that decrease in revenue.

## **State Board of Education Authority to Set Certification Standards for Teachers**

S.L. 2004-124, Sec. 7.19 (HB 1414, Sec. 7.19) removes the statutory requirement for a standard examination for all applicants for a North Carolina teaching license. The State Board of Education may require an applicant for a teaching license to take and achieve a prescribed minimum score on a standard examination appropriate and adequate for that purpose.

This section also makes a technical change to the law by adding the phrase "any required" in reference to a standard examination for certain individuals employed by a local board under a provisional certificate, and retains the September 1, 2006 expiration date for this provision.

## **Maintain 12-Month Vocational Agriculture Teacher Positions**

S.L. 2004-124, Sec. 7.20 (HB 1414, Sec. 7.20) prohibits local boards of education from reducing the term of employment for any vocational agriculture teacher who had a position that was 12 calendar months for the 2003-04 school year.

## **Accountability Assessment For Agricultural Education**

S.L. 2004-124, Sec. 7.20A (HB 1414, Sec. 7.20A) requires the State Board of Education (SBE) to submit an amended State Career-Technical Education Plan to the United States Department of Education. The State Career-Technical Education Plan will do the following:

- Allow the SBE to field test the North Carolina Agricultural Education Program Standards and collect data on these Standards for two years;
- Allow the use of data collected under the field test as an alternative to the end-of-course tests in the Vocational Education Competency Achievement Tracking System (VoCATS) and authorize the use of that data to satisfy the technical attainment requirement for continued Carl D. Perkins funding;
- Require the Department of Public Instruction and the Department of Agricultural Education at North Carolina State University to monitor the program to ensure compliance with all Standards; and
- Permit the SBE to determine whether to use the North Carolina Agricultural Education Program Standards on a statewide basis if the two years of field testing are successful.

The Department of Public Instruction and the Department of Agricultural Education at North Carolina State University must report on the field test to the Joint Legislative Education Oversight Committee by October 15, 2006.

## **Additional Teacher Positions for Third Grade**

S.L. 2004-124, Sec. 7.21 (HB 1414, Sec. 7.21) reduces the teacher to student allotment ratio for third grade from 1:22.23 to 1:18. Local school administrative units must use these additional teacher positions to reduce class size in third grade.

## **High School Workforce Development Program**

S.L. 2004-124, Sec. 7.22 (HB 1414, Sec. 7.22), as amended by S.L. 2004-199, Sec. 53 (SB 1225, Sec. 53), directs the Department of Public Instruction (DPI) to use designated appropriated funds for a high school workforce development program. The DPI is directed to use these funds to establish five pilot projects in which school systems, institutions of higher education, and local employers work together to meet the needs of the participating employers. The program is to identify students who do not plan, or who may not be prepared, to attend post-secondary programs and will provide them with assistance to earn an Associate Degree the year after their senior year of high school. The DPI is to work closely with the Education Cabinet and the New Schools Project in administering this program. Notwithstanding any other law or rule and effective August 17, 2004, a local school administrative unit and two- and four-year colleges and universities must agree upon the minimum age of the students who participate in the pilot projects.

S.L. 2004-124, Sec. 7.22 (HB 1414, Sec. 7.22) directs the State Board of Education (SBE) is also directed to evaluate this program annually. The evaluation must include an assessment of the program's overall impact on student achievement, retention, and employability, an accounting of the utilization of funds and resources and how this has impacted students, and recommendations for the program's continuation and improvement.

The SBE must report to the Office of State Budget and Management, the Joint Legislative Education Oversight Committee, and the Fiscal Research Division by September 15 of each year.

## **Implementation of Alternate Competency Tests**

S.L. 2004-124, Sec. 7.27 (HB 1414, Sec. 7.27) amends the effective date of S.L. 2003-275 so that the State Board of Education (SBE) must implement, no later than the 2004-05 school year, the law allowing students with disabilities who fail to pass the required competency test to take an alternate test. The (SBE) must adopt or develop alternate tests for the competency test no later than April 15, 2005 and shall implement the alternate tests starting with the 2005-06 school year.

## **Enhance Nutrition in School Food Program**

S.L. 2004-124, Sec. 7.29 (HB 1414, Sec. 7.29) provides that for nutritional reasons, the public schools are not allowed to use cooking oils that contain trans-fatty acids in their school food programs nor are they allowed to sell processed foods containing trans-fatty acids that were formed during the commercial processing of the foods.

## **Children's Trust Fund**

S.L. 2004-124, Sec. 7.33 (HB 1414, Sec. 7.33) directs the Department of Public Instruction to collaborate with the Division of Social Services, Department of Health and Human Services and with statewide child abuse and neglect prevention experts on the following while carrying out the State's Program on Prevention of Abuse and Neglect:

- Best practices in child abuse and neglect prevention programs and policies;
- Exploring additional sources of revenue; and
- Educational programs to ensure awareness of the purpose and mission of the Children's Trust Fund across the State.

The Department of Public Instruction must make an annual report to the Joint Legislative Commission on Governmental Operations on the revenues and expenditures of the Children's Trust Fund.

## **Education of Juveniles Committed to the Department of Juvenile Justice and Delinquency Prevention**

S.L. 2004-124, Sec. 16.8 (HB 1414, Sec. 16.8) directs the Department of Juvenile Justice and Delinquency Prevention, in consultation with the State Board of Education and the Community Colleges System Office, to report to the Chairs of the House and Senate Appropriations Committees and the Chairs of the House and Senate Appropriations Subcommittees on Justice and Public Safety on curricula, education plans, and alternative education programs for juveniles committed to the Department. The report must be submitted on or before March 1, 2005.

## **Retired Teachers Returning to Classroom Without Loss of Retirement Benefits/Option Extended**

S.L. 2004-124, Sec. 31.18A (HB 1414, Sec. 31.18A) extends the sunset of the provision that allows retired teachers to return to the classroom with no earnings restrictions until June 30, 2005. This provision removes any restrictions on the amount of post-retirement earnings for any

retiree of the Teachers' and State Employees' Retirement System who is employed to teach on a substitute, interim or permanent basis in a public school. To qualify, a teacher must have been retired for six months and not have been employed in any capacity with a public school, except as a substitute teacher or part-time tutor, for at least six months immediately preceding the return to teaching.

This section also directs the Retirement System Division to conduct an analysis of the postretirement reemployment issue, including a survey of other state systems, cost analyses, review of relevant federal regulations, and the administrative impact of various postretirement reemployment policies. The Retirement System Division shall develop findings and recommendations and report to the General Assembly by February 1, 2005.

This section became effective June 30, 2004.

## **Charter School Retirement Election**

S.L. 2004-164 (HB 1723) authorizes six charter schools that failed to make the election to become participating employers in the Teachers and State Employees' Retirement System and the Teachers' and State Employees' Comprehensive Major Medical Plan within the statutory time limit, to have a second opportunity to elect to participate in the Retirement System and the Health Plan. The schools are New Century High School in Saxapahaw, Lake Norman Charter School in Huntersville, Exploris Middle School in Raleigh, Magellan Charter School in Raleigh, American Renaissance Charter School in Statesville, and Healthy Start Academy in Durham. The election authorized by this act must be made no later than 30 days after the effective date of the act. The act does not amend the law to change the 30-day requirement or any other requirement currently contained in the law.

This act became effective August 2, 2004.

## **School Calendar Changes**

S.L. 2004-180 (HB 1464) makes changes to the school calendar by eliminating teacher workdays, requiring that schools open for students no earlier than August 25 and close no later than June 10 except in unusual circumstances or in year round schools, and changes the daily rate of pay. The act applies to school years beginning with the 2005-2006 school year and applies in all 100 counties and all local school administrative units.

**Teacher Workdays.** – The act reduces the number of days in the school calendar from 220 days to 215 days by eliminating 5 teacher workdays from the school calendar. Of the remaining 15 teacher workdays, 5 must be designated by the local boards of education as protected days for teachers to complete instructional and classroom administrative duties. Local school administrative units cannot impose any additional duties on these protected days. One of these days must be scheduled at the beginning of the school year and one at the end of each academic quarter. The local boards of education are to designate on which of these days teachers with accumulated vacation leave may take that leave.

The local boards of education, in consultation with each school's principal, will schedule the remaining nine to ten teacher workdays. Before the school principal consults with the local board of education, the principal must first work with the school improvement team to determine days to be scheduled and purposes for those days. The days may be scheduled for use as teacher workdays, additional instructional days, or other lawful purposes, including vacation days for teachers with accumulated vacation leave. In addition, the local boards of education may designate any of these remaining days as make-up days for days missed due to school closings for inclement weather.

**First and Last Instructional Day.** – The act further requires local boards of education to set the first instructional day of school no earlier than August 25 and the last day no later than June 10 for all schools except for year-round schools. A local board of education may ask the

State Board of Education for a waiver from this requirement if it can show good cause. Good cause exists if the schools in any local school administrative unit in a county have been closed for eight days per year during any four of the last ten years because of severe weather conditions, energy shortages, power failures, or other emergency situations. In addition, the State Board of Education may also grant waivers from the start and stop date requirements for an educational purpose. To request a waiver for educational purposes, a local school administrative unit must establish a need to adopt a different calendar based on one of the following reasons:

- To accommodate a special program at a school that is offered generally to the student body of that school;
- To serve a special population of students at a school; or
- To accommodate a defined program at a school.

In granting the waiver based on one of these three reasons, the State Board of Education must find that the educational purpose is reasonable, necessary, and not an attempt to circumvent the otherwise mandatory opening and closing dates. The waiver requests cannot be used to accommodate system-wide scheduling preferences.

The required opening and closing dates do not apply to any school that a local board of education designated as having a modified calendar for the 2003-2004 school year or to any school that was a part of a planned program in the 2003-2004 school year for a system of modified calendar schools so long as the school operates under a modified calendar.

**Rate of Pay, Pay Cycles.** – The act changes the daily rate of pay for teachers from 1/22 of the monthly rate of pay to a daily rate that is midway between 1/21 and 1/22 of the monthly rate of pay but does not reduce the yearly pay. The annual rate of pay for certified and non-certified employees cannot be reduced as a result of the act and nothing in the act is to be interpreted to change the pay cycle for non-certified employees. The State Board of Education is required to report annually to the Joint Legislative Education Oversight Committee on compliance with these prohibitions. The first pay date for teachers must be no later than August 31 except for those employed in year-round schools or who are paid in accordance with a year-round calendar. Subsequent pay dates must be spaced no more than one month apart and must include a full month's pay.

**Appropriation or Expenditure of Additional Funds.** – The act specifically states that nothing in the act requires the General Assembly to appropriate funds to implement the act or requires a local school administrative unit to spend additional funds to implement it.

## **Discharging Firearm on School Property**

S.L. 2004-198 (HB 1453) makes it a Class F felony to willfully discharge a firearm on educational property. "Educational property" includes any school building or bus, school campus, grounds, recreational area, athletic field, or other property owned, used, or operated by any board of education or school board of trustees, or directors for the administration of any public or private school, university, college or community college.

This act becomes effective December 1, 2004, and applies to offenses committed on or after that date.

## **Taking Indecent Liberties with a Student**

S.L. 2004-203, Sec. 19 (HB 281, Sec. 19) modifies the definition of the term "same school" for the purposes of G.S. 14-202.4. The criminal statute provides that a defendant who is a teacher, school administrator, student teacher, school safety officer, or coach of any age or is other school personnel at least four years older than the victim and takes indecent liberties with a victim who is a student while the defendant and victim were in the "same school". This section changes "same school" to mean a school at which the student is enrolled or is present for a

school-sponsored or school-related activity and the school personnel is employed, volunteers, or is present for a school-sponsored or school-related activity.

This section becomes effective December 1, 2004 and applies to offenses committed on or after that date.

## **Charter Schools Law Changes**

S.L. 2004-203, Sec. 45 (HB 281, Sec. 45) allows the State Board of Education (SBE) to grant the initial charter for a charter school for a period not to exceed ten years and allows the SBE to renew the charter upon the request of the chartering entity for subsequent periods not to exceed ten years. The SBE is directed to review the operations of each charter school at least once every five years in order to ensure that the school is meeting the expected academic, financial, and governance standards. This section applies to charters granted or renewed on or after the effective date of the act.

This section also adds the requirement that all charter school teachers in grades 6 through 12 must be college graduates if they teach in the core subject areas of mathematics, science, social studies, and language arts. This requirement applies to persons employed by charter schools for the 2004-2005 school year and subsequent school years.

This section became effective August 17, 2004.

## **Beverages Contracts**

S.L. 2004-199, Sec. 38 (SB 1225, Sec. 38) clarifies that contracts for the sale of juice or bottled water in public schools, community colleges, and universities shall be bid separately from each other and separately from any other contract. This section became effective August 17, 2004.

## **Higher Education**

### **The University of North Carolina & Community Colleges Tuition/Military Students**

S.L. 2004-130 (SB 1058) amends the laws governing tuition rates for individuals who are not residents of the State. The act provides that any active duty member (member) of the armed services qualifying for admission to a constituent institution of The University of North Carolina or to a community college, but not qualifying as a resident for tuition purposes, must be charged the in-State tuition rate and applicable fees while abiding in North Carolina incident to active military duty here. So long as the member continues to be enrolled in the same degree or other program after the member is reassigned out of the State, the member continues to be eligible for the in-State tuition rate.

The act provides that eligibility for the in-State tuition rate that has been available to a dependent relative (dependent) of a member who is abiding in the State will continue after the member is reassigned outside of North Carolina so long as the dependent is continuously enrolled in the degree or other program in which the dependent was enrolled when the member is reassigned.

The act also provides that any individual who is not a State resident, but who is a member of a North Carolina National Guard (Guard) unit in either a reserve or active duty status, is eligible for the in-State tuition rate. This individual must pay the full in-State tuition rate and applicable mandatory fees.

In addition, the act amends the law that prohibits employers and prospective employers from discriminating or taking retaliatory action against persons who serve in the Guard by extending that law's protections to members of the Guard who are called into active duty.

The act became effective August 1, 2004.

## **Beverages Contracts**

S.L. 2004-199, Sec. 38 (SB 1225, Sec. 38) clarifies that contracts for the sale of juice or bottled water in public schools, community colleges, and universities shall be bid separately from each other and separately from any other contract. This section became effective August 17, 2004.

## **Community Colleges**

### **Modify Reporting Requirement for New and Expanding Industry Training Program**

S.L. 2004-124, Sec. 8.4 (HB 1414, Sec. 8.4) modifies the reporting requirement for the New and Expanding Industry Training Program. The State Board of Community Colleges is required to report on September 1st of each year to the Joint Legislative Education Oversight Committee regarding the expenditures for the New and Expanding Industry Training Program.

### **Center for Applied Textile Technology/Modify Board Membership**

S.L. 2004-124, Sec. 8.6 (HB 1414, Sec. 8.6) removes the President of the North Carolina Community College System from the board of trustees of the North Carolina Center for Applied Textile Technology.

This section became effective July 1, 2004.

### **Report on the Adequacy of Multicampus and Off-Campus Center Funds**

S.L. 2004-124, Sec. 8.9 (HB 1414, Sec. 8.9) directs the multicampus colleges and colleges with off-campus centers to make an annual report to the Community Colleges System Office on all expenditures by line item that support the multicampuses and off-campus centers. This annual report begins September 1, 2005. The System Office shall make an annual report by October 1 on the expenditures to the House and Senate Education Subcommittees, the Office of State Budget and Management, and the Fiscal Research Division.

### **Statewide Military Business Center and Homeland Security Business Incubator**

S.L. 2004-124, Sec. 8.17 (HB 1414, Sec. 8.17), as amended by S.L. 2004-199, Sec. 55 (SB 1225, Sec. 55), requires that the funds appropriated to the Community College System Office for a military business center to provide for a statewide system of military procurement must be used as follows:

**Homeland Security Business Incubator.** – The North Carolina Electronics and Information Technologies Association, in conjunction with MCNC, must create a proposal for the

development and operation of a homeland security business incubator, and report on this proposal to the Joint Legislative Education Oversight Committee by February 28, 2005. There is \$200,000 available for this purpose.

**Military Business Center.** – Fayetteville Technical Community College must use the remaining funds to develop and operate a military business center to provide services to residents and businesses throughout the State. These funds must be used for:

- The development and operation of a statewide business assistance center to serve as a coordinator and facilitator for small- and medium-sized businesses throughout the State seeking to win and complete military contracts.
- The development and maintenance of an Internet-based system to match the knowledge, skills, and abilities of active-duty military personnel, veterans, and their families throughout the State with the needs of North Carolina businesses.
- The study of community resources and existing business capacity to meet the current and future needs of the military and the creation of proposals for further developing community resources and developing or recruiting new businesses to meet those needs.
- The marketing of the services provided by the military business center.
- The planning and implementation of the development of an industrial park to house military contractors.

This section provides that the Umstead Act, which makes it illegal for the State or its agencies to undertake activities that are in competition with private business, unless there is a specific exemption, shall not prohibit the operation of a military business center by a community college. The term "military business center" means a facility that serves to coordinate and facilitate interactions between the United States Armed Forces; military personnel, veterans, and their families; and private business. No request for proposals needs to be issued for any contract under a State military business center developed and operated by Fayetteville Technical Community College.

Fayetteville Technical Community College must report to the Joint Legislative Education Oversight Committee by September 1, 2005 on the expenditure of these funds. These funds do not revert at the end of the fiscal year.

Section 8.17 of S.L. 2004-124 became effective July 1, 2004. Section 55 of S.L. 2004-199, which addresses the need for request for proposals, became effective August 17, 2004.

## **Regional Partnerships Vision Plans**

S.L. 2004-124, Sec. 13.6 (HB 1414, Sec. 13.6) appropriates \$1,750,000 to the North Carolina Partnership for Economic Development Inc. to be equally allocated to seven regional economic development partnerships for development and implementation of strategic economic development plans. In developing and implementing these plans, the partnerships must:

- Perform a comprehensive study of the region's resources and existing businesses located in the region to determine what business clusters exist and the boundaries of those clusters, to develop ways to strengthen those clusters, and to determine in what areas the region has a competitive advantage that could lead to the development of future clusters.
- Ensure that the benefits of the economic development plan are widely dispersed and that the plan provides real opportunities in rural areas as well as in urban and suburban areas.
- Develop focused and targeted economic development initiatives related to the recruitment and development of new businesses and the retention of existing businesses.

- Provide a mechanism for continuous monitoring of the regional economy and competitiveness indicators and for updating the strategic economic development plan to take account of changing economic conditions.
- Recommend infrastructure investments to meet the region's current and anticipated future needs.
- Integrate the North Carolina Community College System and The University of North Carolina into economic development efforts and planning.
- Create leadership networks that span the public and private sectors and that facilitate communication within clusters, between members of complementary clusters, and between members of the public and private sectors.

The section also repeals S.L. 2002-126, Sec. 8.3 which directed the State Board of Community Colleges, the Board of Governors of The University of North Carolina, and the Department of Commerce, in conjunction with the North Carolina Board of Economic Development and the seven regional economic development commissions to adopt a joint policy that required the development of a five-year vision plan for each of the economic development regions in the State.

## **Education of Juveniles Committed to the Department of Juvenile Justice and Delinquency Prevention**

S.L. 2004-124, Sec. 16.8 (HB 1414, Sec. 16.8) directs the Department of Juvenile Justice and Delinquency Prevention, in consultation with the State Board of Education and the Community Colleges System Office, to report to the Chairs of the House and Senate Appropriations Committees and the Chairs of the House and Senate Appropriations Subcommittees on Justice and Public Safety on curricula, education plans, and alternative education programs for juveniles committed to the Department. The report must be submitted on or before March 1, 2005.

## **Local Government Employees/457 Plan**

S.L. 2004-137 (SB 1312) amends the statutes to allow an employee of any county, municipality, North Carolina Community College, and any political subdivision of the State to participate in any 457 Plan adopted by the State. The Board of Trustees of the North Carolina Public Employee Deferred Compensation Plan creates, establishes, implements, coordinates and administers a Deferred Compensation Plan. The Board and the proper governing authority of the county, municipality, community college or political subdivision must grant consent for participation.

The portion of the act that allows employees of any county or municipality, the North Carolina Community College System, and any political subdivision of the State to participate in any 457 adopted by the State, becomes effective January 1, 2005. The remainder of the act became effective July 1, 2004.

## **Universities**

### **William Friday Institute for Higher Education Leadership**

S.L. 2004-124, Sec. 6.28 (HB 1414, Sec. 6.28) directs the Board of Governors of The University of North Carolina to establish the William Friday Institute for Higher Education Leadership (Institute) along with an advisory board for the Institute. The purpose of the Institute is to provide students, faculty, and administrators on the campuses of The University of North Carolina the opportunity to learn more about careers in academic administration and gain skills,

insight, information, contacts, and experience through ongoing professional leadership development programs.

## **Fayetteville State University and North Carolina School of the Arts Retain Real Property Proceeds**

S.L. 2004-124, Sec. 9.5 (HB 1414, Sec. 9.5) allows Fayetteville State University and the North Carolina School of the Arts to retain the proceeds from the sale of their respective chancellor's residences. These institutions may use these proceeds and any other non-appropriated funds to construct or otherwise acquire new chancellor's residences.

## **UNC-Chapel Hill Continue to Operate Horace Williams Airport**

S.L. 2004-124, Sec. 9.7 (HB 1414, Sec. 9.7) requires the University of North Carolina at Chapel Hill (UNC-CH) to continue to operate the Horace Williams Airport and continue air transportation support for the Area Health Education Center and the public from the current location, until a replacement facility that is accessible to UNC-CH becomes operational. UNC-CH must report to the Joint Legislative Commission on Governmental Operations by July 1, 2006, and biannually thereafter, on the progress of locating a replacement facility. The Departments of

Administration and Transportation shall assist UNC-CH as needed to secure a replacement facility.

## **North Carolina School of the Arts Exempt from the Umstead Act**

S.L. 2004-124, Sec. 9.13 (HB 1414, Sec. 9.13) grants an exemption to the North Carolina School of the Arts from the Umstead Act. The Umstead Act makes it illegal for the State or its agencies to undertake activities that are in competition with private business, unless there is a specific exemption. Under this exemption, the North Carolina School of the Arts can make agreements for the use of their facilities, equipment, and services of students, faculty and staff for the creation of commercial materials and productions that may be unrelated to educational purposes so long as the proceeds from those agreements are used for the benefit of the educational mission of the North Carolina School of the Arts.

## **Report on Proposed Unified Leave Policy**

S.L. 2004-124, Sec. 31.16C (HB 1414, Sec. 31.16C) directs the State Personnel Commission and the Board of Governors of the University of North Carolina to develop and make recommendations to implement a unified leave policy for all State employees subject to the State Personnel Act or alternatively for employees of the University System subject to the Act. The recommendations must address the following issues:

- The rationale for adopting a unified leave policy separate from the current traditional leave policies;
- The potential financial impact on the Retirement System with respect to the amount of unused leave an employee can count towards retirement credit;
- The portability of employee leave balances;
- The potential implementation and costs for a unified leave system;
- A comparison of leave benefits between a unified leave program and the traditional leave programs and policies;
- A detailed implantation plan and how employees' leave will be converted under the new plan; and

- Any other relevant information and statutory changes that are needed.

The Commission and the Board must report their joint recommendations to the Appropriations Committees of each House of the General Assembly by February 15, 2005. This provision does not apply to the University of North Carolina Health Care System.

## **Clarifications Regarding Mediation**

S.L. 2004-154, Secs. 1 and 2 (SB 52, Secs. 1 and 2) make mediations regarding a personnel matter by The University of North Carolina or a constituent institution subject to the same rules as mediations in district or superior court matters. Evidence of the statements made or conduct occurring during the mediation would not be admissible as evidence in any proceeding on the same claim, except a claim to enforce a signed settlement agreement and the evidence would not be public record. A mediator, person training to become a mediator, or a mediation participant could not be required to testify regarding the mediation, except to attest to the signing of a settlement agreement. Finally, the drafting of a mediation summary would not be considered practicing law.

This section became effective August 2, 2004.

Sections 3 through 12 of this act concern open discovery in criminal cases.

## **Internal Auditors within The University of North Carolina and its Constituent Institutions**

S.L. 2004-203, Sec. 46 (HB 281, Sec. 46) adds a new section to the law governing higher education. This section provides that internal auditors within The University of North Carolina (The University) and its constituent institutions must supply independent reviews and analyses of various functions and programs within The University that will provide management information to promote accountability, integrity, and efficiency within The University.

An internal auditor:

- Must have access to any records, data, or other information of The University or the relevant constituent institution that the internal auditor considers necessary to carry out the internal auditor's duties; and
- Must maintain, for 10 years, a complete file of all audit reports and reports of other examinations, investigations, surveys, and reviews issued under the internal auditor's authority. Audit work papers and other evidence and related supportive material directly pertaining to the work of that auditor's office must be retained in accordance with the public records laws. Audit work papers related to issued audit reports must be, unless otherwise prohibited by law, made available for inspection by authorized representatives of the State and federal governments.

Except as otherwise provided in this subsection, or upon subpoena issued by a court, audit work papers must be kept confidential and must not be open to examination or inspection under public records law. Audit reports must be public records to the extent that they do not include information that, under State laws, is confidential and exempt from the public records laws or would compromise the security systems of The University.

This section became effective August 17, 2004.

## **Clarify Tuition Grants for Graduates of School of Science and Mathematics**

S.L. 2004-203, Sec. 47 (HB 281, Sec. 47) amends the statute that provides a full tuition grant for a State resident who graduates from the School of Science and Mathematics and who enrolls in a constituent institution of The University of North Carolina. This section clarifies that

the tuition grant is limited to the cost of tuition and must be reduced by other scholarships and grants that the student may receive for tuition. This section became effective August 17, 2004.

## **UNC Nonappropriated Capital Projects**

S.L. 2004-181 (HB 1699) authorizes the construction of numerous projects by The University of North Carolina. The projects will be financed through revenue bonds and special obligation bonds, not appropriations from the General Fund.

## **Studies**

### **Legislative Research Commission**

#### **Study Various Transportation Issues – Purchasing Alternative-Fuel or Low-Emission School Buses**

S.L. 2004-161, Sec. 2.1(2) (SB 1152, Sec. 2.1(2)) authorizes the Legislative Research Commission to study several issues, including: Purchasing alternative-fuel or low-emission school buses. The Commission may report its findings, together with any recommended legislation, to the 2005 General Assembly upon its convening.

#### **VoCATS Program**

S.L. 2004-161, Sec. 2.1(f) (SB 1152, Sec. 2.1(f)) authorizes the Legislative Research Commission to study the accountability system for vocational education courses. The Commission may report its findings, together with any recommended legislation, to the 2005 General Assembly.

#### **School Calendar**

S.L. 2004-161, Sec. 2.1(p) (SB 1152, Sec. 2.1(p)) authorizes the Legislative Research Commission to study whether the first instructional day of the school year should be later than the current practice. The Commission also may study the number of teacher workdays and the value and use of the teacher workdays now included in the school calendar. The Commission may report its findings, together with any recommended legislation, to the 2005 General Assembly.

## **New/Independent Studies/Commissions**

### **Local School Construction Financing Study Commission**

S.L. 2004-124, Sec. 7.32 (HB 1414, Sec. 7.32) establishes the Local School Construction Financing Study Commission to examine the present system of local financing for school facilities and to study alternative options for financing local school construction, renovation, repair, and maintenance. The Commission shall make an interim report to the 2005 General Assembly by January 31, 2005, and a final report to the 2006 General Assembly by March 31, 2006. The Commission shall terminate on March 31, 2006.

## UNC Board of Governor's Study Commission

S.L. 2004-161, Part XXII (SB 1152, Part XXII) establishes the UNC Board of Governors Study Commission to study the method of election or appointment of members of the Board of Governors, the length of members' terms, the number of terms a member may serve, and the size of the Board of Governors. The Commission shall report its findings and any recommendations to the 2005 General Assembly. The Commission shall terminate upon the filing of its final report.

## Referrals to Existing Commissions/Committees

### Joint Legislative Education Oversight Committee Studies

The Joint Legislative Education Oversight Committee (JLEOC) shall study the following issue and make recommendations to the 2005 General Assembly by January 15, 2005:

- Strategies for Facilitating Student Participation in Teacher Preparation Programs. S.L. 2004-124, Sec. 7.19A (HB 1414, Sec. 7.19A)

The JLEOC may study the following issues and report its findings to the 2005 General Assembly:

- The Efficacy of Providing for Staff Development Through Regional Education Service Alliances. S.L. 2004-124, Sec. 7.31 (HB 1414, Sec. 7.31)
- Teacher Assistant Salary Schedule. S.L. 2004-161, Sec. 13.2 (SB 1152, Sec. 13.2)
- Rural Schools. S.L. 2004-161, Sec. 13.3 (SB 1152, Sec. 13.3)
- Physical Restraints/Seclusion in Schools. S.L. 2004-161, Sec. 13.4 (SB 1152, Sec. 13.4)
- High School Graduation Rate Incentives. S.L. 2004-161, Sec. 13.5 (SB 1152, Sec. 13.5)
- At-Risk Students Single Funding Stream. S.L. 2004-161, Sec. 13.6 (SB 1152, Sec. 13.6)
- Close Achievement Gap. S.L. 2004-161, Sec. 13.7 (SB 1152, Sec. 13.7)
- E-textbooks for Students. S.L. 2004-161, Sec. 13.8 (SB 1152, Sec. 13.8)
- Attracting Teachers to Become Coaches. S.L. 2004-161, Sec. 13.9 (SB 1152, Sec. 13.9)
- Kindergarten Admission Requirements. S.L. 2004-161, Sec. 13.10 (SB 1152, Sec. 13.10)
- Update the Job Description for School Counselors. S.L. 2004-161, Sec. 13.11 (SB 1152, Sec. 13.11)
- Testing Reform. S.L. 2004-161, Sec. 13.12 (SB 1152, Sec. 13.12)
- Total Teacher Program. S.L. 2004-161, Sec. 13.13 (SB 1152, Sec. 13.13)
- School Construction. S.L. 2004-161, Sec. 13.14 (SB 1152, Sec. 13.14)
- Computer-based Math and Literacy Programs for Children Under Age Six. S.L. 2004-161, Sec. 13.15 (SB 1152, Sec. 13.15)
- Appropriate Education for Students on Long-Term Suspension. S.L. 2004-161, Sec. 13.16 (SB 1152, Sec. 13.16)
- School Nutrition/Physical Activity. S.L. 2004-161, Sec. 13.17 (SB 1152, Sec. 13.17)
- Adequacy of Low-Wealth School Funds. S.L. 2004-161, Sec. 13.18 (SB 1152, Sec. 13.18)

## **Referrals to Departments, Agencies, Etc.**

### **State Board of Education to Study Use of At-Risk Funds**

S.L. 2004-73 ([HB 1456](#)). See above summary of legislation.

### **State Board of Education to Study Alternative Learning Program Funding**

S.L. 2004-76 ([HB 1455](#)). See summary above of legislation.

### **Teacher Preparation Programs**

S.L. 2004-116 ([HB 1459](#)) directs the State Board of Education to study whether teacher preparation programs should require courses in diversity training, anger management, conflict resolution, and classroom management. The State Board of Education shall report its findings and recommendations to the Joint Legislative Education Oversight Committee by December 15, 2004.

### **Accountability Assessment for Agricultural Education**

S.L. 2004-124, Sec. 7.20A ([HB 1414](#), Sec. 7.20A). See summary above of legislation.

### **High School Workforce Development Program**

S.L. 2004-124, Sec. 7.22 ([HB 1414](#), Sec. 7.22), as amended by S.L. 2004-199, Sec. 53 ([SB 1225](#), Sec. 53). See summary above of legislation.

### **Children's Trust Fund**

S.L. 2004-124, Sec. 7.29 ([HB 1414](#), Sec. 7.29). See summary above of legislation.

### **Study of the North Carolina Center for Applied Textile Technology**

S.L. 2004-124, Sec. 8.6A ([HB 1414](#), Sec. 8.6A) directs the State Board of Community Colleges (Board) to study the North Carolina Center for Applied Textile Technology (Center) to determine whether the Center should (i) remain an independent institution under the Community College System, (ii) be administered by a community college, (iii) be dissolved, or (iv) be otherwise administered. The Board must consult with the Education Subcommittee of the Joint Legislative Commission on Governmental Operations and must make a written report by October 30, 2004, to the Office of State Budget and Management (OSBM), the chairs of the Joint Legislative Education Oversight Committee, and the chairs of the finance committees of the Senate and House of Representatives. The Board must, in consultation with OSBM, implement the results of this study by January 1, 2005.

## **Report on the Adequacy of Multi-Campus and Off-Campus Center Funds**

S.L. 2004-124, Sec. 8.9 (HB 1414, Sec. 8.9). See summary above of legislation.

## **Study of FTE Funding Formula**

S.L. 2004-124, Sec. 8.13 (HB 1414, Sec. 8.13) directs the State Board of Community Colleges (SBCC) to consider modifications to its funding formulas to ensure that the local community colleges have sufficient funds to adequately serve students when enrollments increase. In conducting the study, the SBCC must consider methods of accurately projecting enrollment for the upcoming academic year; using projected enrollment in its funding formulas; and modifications to its funding formulas to ensure adequate funding for high-cost programs. The results of the study must be reported to the Joint Legislative Education Oversight Committee and to the chair of the appropriations committees of the Senate and House of Representatives by January 15, 2005.

## **Evaluate Science & Math School Tuition Grants**

S.L. 2004-124, Sec. 9.6A (HB 1414, Sec. 9.6A) directs the North Carolina School of Science and Mathematics to collect data on the median family income of its students and report to the Joint Legislative Education Oversight Committee. The UNC Board of Governors must study the provision, enacted in 2003, which provided a four-year tuition grant to any North Carolina resident who graduated the school and enrolls as a full-time student in any constituent institution of The University of North Carolina. The Board must report its findings and recommendations to the Joint Legislative Education Oversight Committee and the Committee shall report its recommendations regarding the continuation of the tuition grant to the 2005 General Assembly.

## **Study of Various Ways to Promote Government Efficiency and Savings in State Spending**

S.L. 2004-161, Secs. 16.1 (2) and 16.2 (SB 1152, Secs. 16.1(2) and 16.2) direct the University of North Carolina, the Judicial Branch, the Executive Branch, the Legislative Branch, the Community College System, and the Department of Public Instruction to jointly study various ways to promote government efficiency and savings, including the establishment of a Statewide Benefits Committee to evaluate and provide a menu of portable supplemental benefits for all State employees. The Department of Administration is directed to report the results of the study to the Legislative Research Commission by January 15, 2005.

## **Forgiveness of Student Debt Program**

S.L. 2004-161, Part XXVII (SB 1152, Part XXVII) authorizes the Board of Governors of The University of North Carolina, in conjunction with the North Carolina Education Assistance Authority, to study the feasibility of a program that would forgive student indebtedness for teachers who have continuing certification in and are teaching in the disciplines of math, science, or special education. The Board must report the results of its study to the Joint Legislative Education Oversight Committee by January 15, 2005.

## **Teacher Retention Task Force**

S.L. 2004-161, Part XXVIII (SB 1152, Part XXVIII) directs the State Board of Education to form a Task Force to study issues related to effective recruitment and retention of North Carolina public school teachers. The State Board of Education must report its findings and recommendations to the Joint Legislative Education Oversight Committee prior to February 15, 2005.

## **Craven and Pamlico Technical High School Task Force Studies**

S.L. 2004-161, Sec. 43.1 (SB 1152, Sec. 43.1) authorizes the State Board of Community Colleges, the State Board of Education, Craven Community College, and the Craven County Schools to establish a task force to develop a plan to expand students' educational opportunities within the public school system by creating a technical high school. If the task force is established, the task force must report to the Joint Legislative Education Oversight Committee by January 15, 2005.

S.L. 2004-161, Sec. 43.2 (SB 1152, Sec. 43.2) authorizes the State Board of Community Colleges, the State Board of Education, Pamlico Community College, and the Pamlico County Schools to establish a task force to develop a plan to expand students' educational opportunities within the public school system by creating a technical high school. If the task force is established, the task force shall report to the Joint Legislative Education Oversight Committee by January 15, 2005.

## **North Carolina Central University Study**

S.L. 2004-161, Part XLVIII (SB 1152, Part XLVIII) authorizes North Carolina Central University, in conjunction with its Department of Sociology, to study whether there is an overrepresentation of minority youth in youth development centers. If the study is undertaken, the University must do the following:

- Compile and analyze data of youth development centers commitments for the years 1992 through 2002.
- Survey all programs that serve as prevention programs and alternatives to commitment.
- Assess the availability and accessibility of prevention programs and alternative programs in all 100 counties in the State, including the percentage of minority and at-risk youth placed in programs that serve as alternatives to commitment.
- Provide test data for variables contributing to minority youth overrepresentation in youth development centers, including data related to the court system's role in committing juveniles or placing them in alternative programs.

If the study is undertaken, the University must present its findings, including recommendations and legislative proposals to the Department of Juvenile Justice and Delinquency Prevention and the General Assembly on or before January 15, 2005.

## **Finance Vital Projects/Studies**

S.L. 2004-179, Part 6 (HB 1264, Part 6), as amended by S.L. 2004-199, Sec. 51 (SB 1225, Sec. 51), directs the Board of Governors of The University of North Carolina and the State Board of Community Colleges to contract with a consultant to study the mission and educational

programming needs for the University and Community College Systems and to analyze facility needs related to the identified program needs.

The Boards and their consultant are required to make a preliminary report to the Joint Legislative Education Oversight Committee and the General Assembly by April 15, 2005, and to make a final report by December 31, 2005. The Joint Legislative Education Oversight Committee may create a higher education programming subcommittee to monitor this study.

Parts 2-4 of this act concern parks renovation and acquisition, recreation, preservation of natural heritage, and clean water conservation. Parts 5 and 7 of this act concern the Debt Affordability Advisory Committee and the Innovative State Financing Study.

## **School Calendar Changes**

S.L. 2004-180 (HB 1464) directs the State Board of Education to study the scheduling of and purposes for noninstructional teacher workdays and report the findings to the Joint Legislative Education Oversight Committee by December 15, 2004.

## **Strengthen Domestic Violence Laws**

S.L. 2004-186, Part III (HB 1354, Part III) directs the Department of Public Instruction, in collaboration with the State Board of Education, to study the issue of antiviolenace programs in the schools; and training for school personnel dealing with students who are victims of physical violence and mental or verbal abuse. The Department must make a preliminary report to the House Select Committee on Domestic Violence and to the Joint Legislative Education Oversight Committee by November 15, 2004, and a final report to the Joint Legislative Education Oversight Committee and the General Assembly by January 15, 2005.

This part became effective August 12, 2004.

Additionally, S.L. 2004-186 makes various changes to strengthen the laws against domestic violence and to provide additional assistance to domestic violence victims. The act is divided into the Parts listed below.

- Part I: Domestic Violence Offender Treatment.
- Part II: Domestic Violence Training for Law Enforcement.
- Part III: Study of Anti-Violence Education in Schools and Training for School Personnel.
- Part IV: Legal Services for Victims of Domestic Violence.
- Part V: Domestic Violence Advocates on Child Fatality Task Force.
- Part VI: Study of Mental Health Services for Domestic Violence Victims.
- Part VII: Study of CLE Credit for Pro Bono Legal Representation.
- Part VIII: Domestic Relationship Aggravating Factor.
- Part IX: Create Strangulation Offense.
- Part X: Amend Habitual Misdemeanor Assault Statute.
- Part XI: Domestic Violence Offense Tracking.
- Part XII: Study of Misdemeanor Offense Classifications.
- Part XIII: Warrantless Arrest for Violation of Pretrial Release Conditions.
- Part XIV: Conform State Firearms Law to Federal Law.
- Part XV: Specifically Allow Cross Warrants.
- Part XVI: Clarify Nurse's Privilege.
- Part XVII: Temporary Child Custody in Domestic Violence Hearings.
- Part XVIII: Prohibit Employment Discrimination Against Domestic Violence Victims.
- Part XIX: Privacy for 50B Intake.
- Part XX: Training for Judges and Court Personnel.

*Unless otherwise noted, the effective dates are when the legislation was enacted or July 1, 2004.*

# **Ed Oversight Studies**

## **Studies by Ed Oversight**

### Shall study and report to the 2005 General Assembly

- Strategies for Facilitating Student Participation in Teacher Preparation Programs (S.L. 2004-124, Sec. 7.19A) [January 15, 2005]
- Continuation of the 4-Year Tuition Grant to Graduates of the North Carolina School of Science and Mathematics Attending A UNC Constituent Institution (S.L. 2004-124, Sec. 9.6A)

### May study and report to the 2005 General Assembly

- Efficacy of Providing Staff Development through Regional Education Service Alliances (S.L. 2004-124, Sec. 7.31)
- Teacher Assistant Salary Schedule (S.L. 2004-161, Sec. 13.2)
- Rural Schools (S.L. 2004-161, Sec. 13.3)
- Physical Restraints/Seclusion in Schools (S.L. 2004-161, Sec. 13.4)
- High School Graduation Rate Incentives (S.L. 2004-161, Sec. 13.5)
- At-Risk Single Funding Stream (S.L. 2004-161, Sec. 13.6)
- Close Achievement Gap (S.L. 2004-161, Sec. 13.7)
- E-Textbooks for Students (S.L. 2004-161, Sec. 13.8)
- Attracting Teachers to Become Coaches (S.L. 2004-161, Sec. 13.9)
- Kindergarten Admission Requirements (S.L. 2004-161, Sec. 13.10)
- Update the Job Description for School Counselors (S.L. 2004-161, Sec. 13.11)
- Testing Reform (S.L. 2004-161, Sec. 13.12)
- Total Teacher Program (S.L. 2004-161, Sec. 13.13)



- School Construction (S.L. 2004-161, Sec. 13.14)
- Computer-Based Math and Literacy Programs for Children Under Age 6 (S.L. 2004-161, Sec. 13.15)
- Appropriate Education for Students on Long-Term Suspension (S.L. 2004-161, Sec. 13.16)
- School Nutrition/Physical Activity (S.L. 2004-161, Sec. 13.17)
- Adequacy of Low-Wealth School Funding (S.L. 2004-161, Sec. 13.18)

#### Other

- Integration of Care for Children with Multiple System Service Needs (S.L. 2004-161 (SB 1152), Sec. 24.2)

If the Joint Legislative Oversight Committee on Mental Health, Developmental Disabilities, and Substance Abuse Services decides to undertake this study, then the cochairs of Ed Oversight will be members of the task force conducting the study.

- Ed Oversight may create a higher education programming subcommittee to hear the UNC Board of Governors and State Board of Community Colleges reports on their mission and program needs (S.L. 2004-179, Sec. 6.3)



## **Studies/Reports to Ed Oversight**

### **State Board of Education**

- Determine a Specified Percentage of At-Risk Funds for Services to Students Who are Suspended from School for More Than Ten Days (S.L. 2004-73) [December 15, 2004]
- Develop and recommend a funding formula for alternative learning programs and alternative schools (S.L. 2004-76) [December 15, 2004]
- Determine Whether Teacher Preparation Programs Should Require Courses In Diversity Training, Anger Management, Conflict Resolution, And Classroom Management (S.L. 2004-116) [December 15, 2004]
- High School Workforce Development Program (S.L. 2004-124, Sec. 7.22) [Annually on September 15]
- Effective Recruitment and Retention of Teachers (S.L. 2004-161, Part 28) [February 15, 2005]
- Pay cycle for noncertified employees (S.L. 2004-180, Sec. 3) [Annually but no date]
- Scheduling and Purposes of Noninstructional Teacher Workdays (S.L. 2004-180, Sec. 4) [December 15, 2004]
- Analysis of the Structure and Operation of the Department of Public Instruction (S.L. 2004-203, Sec. 67) [March 15, 2004]

### **Department of Public Instruction w/SBE**

- Antiviolence Programs in the Schools (S.L. 2004-186, Sec. 3.1) [November 15, 2004; January 15, 2005]
- Training for School Personnel Who Deal with Students who are Victims of Violence or Abuse (S.L. 2004-186, Sec. 3.2) [November 15, 2004; January 15, 2005]



**Department of Public Instruction and Department of Agricultural  
Education at NCSU**

- Accountability Assessments for Agricultural Education (S.L. 2004-124, Sec. 7.20A) [October 15, 2006]

**Community Colleges System Office**

- Use of Funds for the College Information System Project (S.L. 2004-124, Sec. 8.1) [Quarterly basis – no date]

**State Board of Community Colleges**

- Modify Reporting Requirement for New and Expanding Industry Training Program (S.L. 2004-124, Sec. 8.4) [Changes reporting date to September 1 annually]
- North Carolina Center for Applied Textile Technology (S.L. 2004-124, Sec. 8.6A) [October 30, 2004]
- Modifications to FTE Funding Formula (S.L. 2004-124, Sec. 8.13) [January 15, 2005]

**State Board of Community Colleges, State Board of Education,  
Craven Community College and Craven County Schools**

- Develop a Plan to Expand Students' Educational Opportunities within the Public School System by Creating a Technical High School (S.L. 2004-161, Sec. 43.1) [January 15, 2005]

**State Board of Community Colleges, State Board of Education, Pamlico  
Community College and Pamlico County Schools**

- Develop a Plan to Expand Students' Educational Opportunities within the Public School System by Creating a Technical High School (S.L. 2004-161, Sec. 43.2) [January 15, 2005]



### **North Carolina Electronics and Information Technologies Association**

- Development and Operation of a Homeland Security Business Incubator (S.L. 2004-124, Sec. 8.17) [February 28, 2005]

### **Fayetteville Technical Community College**

- Use of Funds to Develop and Operate a Military Business Center (S.L. 2004-124, Sec. 8.17) [September 1, 2005]

### **UNC Board of Governors**

- Evaluate the 4-Year Tuition Grant to Graduates of the North Carolina School of Science and Mathematics Attending A UNC Constituent Institution (S.L. 2004-124, Sec. 9.6A) [No date]
- Feasibility of Forgiving Student Indebtedness for Teachers with Continuing Certification in and who are Teaching Mathematics, Science or Special Education (S.L. 2004-161, Sec. 27.1) [January 15, 2005]

### **UNC Board of Governors and State Board of Community Colleges**

- Mission and Educational Program Needs for the UNC System and the Community College System (S.L. 2004-179, Secs. 6.1 – 6.3) [April 15, 2005; December 31, 2005]

### **Department of Health and Human Services, Department of Public Instruction and "More At Four" Pre-K Task Force**

- "More at Four" (S.L. 2004-124, Sec. 10.40(e)) [January 1, 2005; May 30, 2005]



# *2004-2005 Reports to Joint Legislative Education Oversight Committee*

## *March 2004*

<b>1</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>March 15, 2004</b> <b>State Board of Education</b> <b>Analysis of the Structure &amp; Operation of the DPI</b> <b>S.L. 2004-203, sec. 67</b>	
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## *June 2004*

<b>2</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>June 15, 2004</b> <b>State Board of Education and DPI</b> <b>State Board assistance to low-performing LEAs and to assist schools to meet AYP for each subgroup</b> <b>HB 797, S.L. 2003-419</b> <b>Elsie Leak, Bob Bellamy, Lou Fabrizio</b>	
<b>3</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>June 15, 2004 (biannually)</b> <b>State Board of Community Colleges</b> <b>Report on expenditures from the Board Reserve Fund to be used for feasibility studies, pilot projects, and start-up of new programs</b> <b>G.S. 115D-5(j)</b> <b>Kennon Briggs</b>	

## *July 2004*

<b>4</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>July 1, 2004</b> <b>State Board of Education</b> <b>Revisions made by SBE to curriculum requirements for lateral entry candidates</b> <b>S.L. 2003-284, Sec. 7.20(f); G.S. 115C-296(c)</b> <b>Zoe Locklear, Kathy Sullivan</b>	
<b>5</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>July 15, 2004 (Quarterly)</b> <b>State Board of Community Colleges</b> <b>Projects funded from community college general obligation bonds</b> <b>S.L. 2000-3, sec. 1.2</b> <b>Kennon Briggs</b>	

- Studies in italic are from the Excellent Schools Act of 1997.
- Studies/reports in bold are from the 2004 Session



# *2004-2005 Reports to Joint Legislative Education Oversight Committee*

## *September 2004*

6	<b>Due Date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>September 1, 2004 (annually)</b> <b>State Board of Community Colleges</b> <b>Expenditures for the New and Expanding Industry Program (Modified Reporting Req.)</b> <b>S.L. 1997-443, sec. 9.5, G.S. 115D-5(I), S.L. 2004-124, sec. 8.4</b> <b>Larry Keen</b>	
7	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>September 15, 2004 (annually)</b> <b>UNC Board of Governors</b> <b>Effectiveness of the programs for professional development offered by the Center for School Leadership Development</b> <b>S.L. 2001-424, sec. 31.4(b), G.S. 116-11(12a)</b>	

## *October 2004*

8	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>October 1, 2004 (annually)</b> <b>State Board of Education</b> <b>Schools of Education performance reports</b> <b>S.L. 2000-67, sec. 9.2(a)</b> <b>Zoe Locklear, Kathy Sullivan</b>	
9	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>October 1, 2004 (annually)</b> <b>State Education Assistance Authority</b> <b>Aid to students attending private colleges</b> <b>S.L. 2001-424, sec. 31.1(b), 2000-67, sec. 10.3, S.L. 1999-237, sec. 10; G.S. 116-19; S.L. 1998-212, s. 11</b> <b>Steve Brooks, Gretchen Bataille</b>	
10	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>October 1, 2004 (annually)</b> <b>UNC Board of Governors</b> <b>Report on the progress of private and State-operated medical schools and State-operated health professional schs to increase grads in primary care (1995) Ch. 507, sec. 23A.5(d)</b> <b>Tom Bacon</b>	
11	<b>Due Date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>October 3, 2004 (annually)</b> <b>State Board of Education</b> <b>Impact of mentor program on retention of teachers</b> <b>S.L. 2001-424, sec. 28.18(b)</b> <b>Zoe Locklear, Kathy Sullivan</b>	

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- Studies/reports in **bold** are from the 2004 Session



**2004-2005 Reports to  
Joint Legislative Education Oversight Committee**

**October 2004 (continued)**

<b>12</b>	<b>Due date:</b> October 15, 2004 <b>From:</b> State Board of Education <b>Description:</b> Characteristics of mentor programs most effective in retaining teachers based on results of pilot program <b>Chapter:</b> S.L. 2003-284, Sec. 7.30(d) <b>Contact(s):</b> Zoe Locklear, Kathy Sullivan	
<b>13</b>	<b>Due date:</b> October 15, 2004 (annually) <b>From:</b> State Board of Education <b>Description:</b> Continued implementation of the ABC's plan including composition and activity of assistance teams, schools that received incentive awards, schools identified as low-performing, etc. <b>Chapter:</b> S.L. 1997-18, sec. 15(a), G.S. 115C-12(25) <b>Contact(s):</b> Bob Bellamy	
<b>14</b>	<b>Due date:</b> <i>October 15, 2004 (annually)</i> <b>From:</b> <i>State Board of Education</i> <b>Description:</b> <i>Report on the implementation of the Teacher Competency Assurance provisions (general knowledge test for certified staff in low-performing schools and a plan to provide certified substitutes when teachers are absent for remediation)</i> <b>Chapter:</b> <i>S.L. 1997-221, sec. 3(f)</i> <b>Contact(s):</b> <i>Elsie Leak</i>	
<b>15</b>	<b>Due date:</b> October 15, 2004 (Quarterly) <b>From:</b> State Board of Community Colleges <b>Description:</b> Projects funded from community college general obligation bonds <b>Chapter:</b> S.L. 2000-3, sec. 1.2 <b>Contact(s):</b> Kennon Briggs	
<b>16</b>	<b>Due date:</b> <b>October 30, 2004 (To the chairs)</b> <b>From:</b> <b>State Board of Community Colleges</b> <b>Description:</b> <b>Study of the North Carolina Center for Applied Textile Technology</b> <b>Chapter:</b> <b>S.L. 2004-124, sec. 8.6A</b> <b>Contact(s):</b>	

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- Studies/reports in bold are from the 2004 Session



***2004-2005 Reports to  
Joint Legislative Education Oversight Committee***

***November 2004***

<b>17</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>November 1, 2004 (Quarterly)</b> <b>Community Colleges System Office</b> <b>Use of Funds for the College Info. System Project</b> <b>S.L. 2004-124, sec. 8.1</b> <b>Sandra Williams</b>	
<b>18</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>November 15, 2004 (Preliminary Report)</b> <b>DPI</b> <b>Antiviolence Programs in the Schools/Training for School Personnel</b> <b>S.L. 2004-186, secs. 3.1&amp; 3.2, HB 1354</b> <b>Marguerite Peebles</b>	
<b>19</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>November 15, 2004 (Annually)</b> <b>UNC Board of Governors</b> <b>Focused Growth Pilot Program</b> <b>S.L. 2002-126, sec. 9.9</b>	

***December 2004***

<b>20</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s)</b>	<b>December 1, 2004 (annually)</b> <b>NC Teaching Standards Commission</b> <b>Report on activities and recommendations for improving the teaching profession</b> <b>G.S. 115C-295.2(c)</b> <b>Eleanor Goettee, Jane Worsham</b>	
<b>21</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s)</b>	<b>December 1, 2004 (annually)</b> <b>DPI</b> <b>Results of county school system's receipts from sale of seized vehicles and costs for administering the DWI motor vehicle forfeiture law</b> <b>S.L. 1998-182, sec. 38</b> <b>Philip Price, Ben Matthews</b>	
<b>22</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>December 1, 2004 (annually)</b> <b>State Board of Education</b> <b>Evaluation of initiatives to assist high-priority schools</b> <b>S.L. 2001-424, sec. 29.6(d)</b> <b>Elsie Leak, Bob Bellamy, Lou Fabrizio</b>	

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***2004-2005 Reports to  
Joint Legislative Education Oversight Committee***

***December 2004 (continued)***

<b>23</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>December 15, 2004</b> <b>State Board of Education</b> <b>Study Use of At-Risk Funds</b> <b>S.L. 2004-73, HB 1456</b>	
<b>24</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>December 15, 2004</b> <b>State Board of Education</b> <b>Study Alternative Learning Program</b> <b>S.L. 2004-76, HB 1455</b>	
<b>25</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>December 15, 2004</b> <b>State Board of Education</b> <b>Teacher Preparation Programs</b> <b>S.L. 2004-116, HB 1459</b>	
<b>26</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>December 15, 2004</b> <b>State Board of Education</b> <b>Study Scheduling of and Purposes for Noninstructional Teacher Workdays</b> <b>S.L. 2004-180, HB 1464</b>	
<b>27</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>December 15, 2004</b> <b>State Board of Education</b> <b>Effectiveness of sample mentor programs</b> <b>S.L. 2003-284, Sec. 7.30</b> <b>Zoe Locklear, Kathy Sullivan</b>	
<b>28</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>December 15, 2004 (annually until 2005)</b> <b>UNC Board of Governors</b> <b>Enrollment planning</b> <b>S.L. 1999-237, sec. 10.8</b>	
<b>29</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>December 15, 2004 (annually through 2007)</b> <b>State Board of Education</b> <b>Recycling efforts of the public schools</b> <b>S.L. 2001-512, sec. 11</b> <b>Philip Price</b>	

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**2004-2005 Reports to  
Joint Legislative Education Oversight Committee**

***December 2004 (continued)***

<b>30</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	December 20, 2004 (annually) State Board of Community Colleges Regional program offerings in community colleges S.L. 2002-126, sec. 8.2 Delores Parker	
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***January 2005***

<b>31</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>January 2005 (annually)</b> <b>UNC Board of Governors</b> <b>Teacher education programs through distance education</b> <b>S.L. 2001-424, sec. 31.7(b)</b>	
<b>32</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>January 1, 2005</b> <b>DHHS/DPI/Task Force</b> <b>More At Four Program</b> <b>S.L. 2004-124, sec. 10.40(e)</b>	
<b>33</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	January 1, 2005 (biennially) Commission on School Technology Modifications to the State school technology plan S.L. 1997-443, s. 8.26(b), codified as G.S. 115C-102.6B Bob Bellamy	
<b>34</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	January 2, 2005 (annually) Business and Education Technology Alliance Education technology in the public schools S.L. 2002-126, sec. 7.27(f)(6) Bob Bellamy	
<b>35</b>	<b>Due Date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s)</b>	<b>January 15, 2005</b> <b>State Board of Community Colleges</b> <b>Study of FTE Funding Formula</b> <b>S.L. 2004-124, sec. 8.13</b>	

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**2004-2005 Reports to  
Joint Legislative Education Oversight Committee**

***January 2005 (continued)***

36	<b>Due Date:</b> <b>From:</b> <b>Description</b> <b>Chapter:</b> <b>Contact(s)</b>	<b>January 15, 2005</b> <b>UNC Board of Governors w/NC Education Assistance Authority</b> <b>Feasibility of Forgiveness of Student Debt Prog.</b> <b>S.L. 2004-161, sec. 27.1</b>	
37	<b>Due Date:</b> <b>From:</b> <b>Description</b> <b>Chapter:</b> <b>Contact(s)</b>	<b>January 15, 2005</b> <b>SBCC, SBE, Craven Community College, Craven County Schools (Task Force)</b> <b>Technical High School Task Force Studies</b> <b>S.L. 2004-161, sec. 43.1</b> <b>Delores Parker</b>	<b>Report if task force is established</b>
38	<b>Due Date:</b> <b>From:</b> <b>Description</b> <b>Chapter:</b> <b>Contact(s)</b>	<b>January 15, 2005</b> <b>SBCC, SBE, Pamlico Community College, Pamlico County Schools (Task Force)</b> <b>Technical High School Task Force Studies</b> <b>S.L. 2004-161, sec. 43.2</b> <b>Delores Parker</b>	<b>Report if task force is established</b>
39	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>January 15, 2005 (Final Report)</b> <b>DPI</b> <b>Antiviolence Programs in the Schools/Training for School Personnel</b> <b>S.L. 2004-186, secs. 3.1 &amp; 3.2, HB 1354</b> <b>Marguerite Peebles</b>	
40	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>January 15, 2005 (annually)</b> <b>State Board of Education</b> <b>State and local needs for professional development for public school employees/Professional Dev. provided by the CSLD</b> <b>S.L. 2001-424, sec. 31.4(a), G.S. 115C-12(26)</b> <b>Zoe Locklear, Kathy Sullivan</b>	
41	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>January 15, 2005 (annually)</b> <b>Education Cabinet</b> <b>Activities to create cooperative innovative education initiatives between secondary schools and higher education</b> <b>S.L. 2003-277, sec. 1, codified as G.S. 116C-4(c)</b> <b>Education Cabinet</b>	

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- Studies/reports in **bold** are from the 2004 Session



**2004-2005 Reports to  
Joint Legislative Education Oversight Committee**

***January 2005 (continued)***

<b>42</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	January 15, 2005 (Quarterly) State Board of Community Colleges Projects funded from community college general obligation bonds S.L. 2000-3, sec. 1.2 Kennon Briggs	
<b>43</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	January 15, 2005 (biannually) State Board of Community Colleges Report on expenditures from the Board Reserve Fund to be used for feasibility studies, pilot projects, and start-up of new programs G.S. 115D-5(j) Kennon Briggs	
<b>44</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	January 31, 2005 UNC Board of Governors Success of the Academic Common Market program S.L. 2001-424, sec. 31.2(c)	

***February 2005***

<b>45</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>February 1, 2005 (Quarterly)</b> <b>Community Colleges System Office</b> <b>Use of Funds for the College Information System Project</b> <b>S.L. 2004-124, sec. 8.1</b> <b>Sandra Williams</b>	
<b>46</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>February 15, 2005</b> <b>State Board of Education</b> <b>SBE Retention Task Force</b> <b>S.L. 2004-161, sec. 28</b>	
<b>47</b>	<b>Due Date:</b> <b>From:</b> <b>Description</b> <b>Chapter:</b> <b>Contact(s)</b>	<b>February 28, 2005</b> <b>NC Electronics and Information Technologies Association</b> <b>Statewide Military Business Center and Homeland Security Business Incubator</b> <b>S.L. 2004-124, sec. 8.17(a)</b>	

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***2004-2005 Reports to  
Joint Legislative Education Oversight Committee***

***March 2005***

<b>48</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	March 1, 2005 (annually) UNC Board of Governors Teacher Assistant Scholarship Fund S.L. 2001-424, sec. 31.5, G.S. 116-209.35	
<b>49</b>	<b>Due Date:</b> <b>From:</b> <b>Description</b> <b>Chapter:</b> <b>Contact(s)</b>	March 1, 2005 (annually) UNC Board of Governors Amount and use of overhead receipts for The University System S.L. 2001-424, sec. 31.14	
<b>50</b>	<b>Due Date:</b> <b>From:</b> <b>Description</b> <b>Chapter:</b> <b>Contact(s)</b>	March 1, 2005 (annually) UNC Board of Governors Strategic Initiatives Reserve Joint Conference Comm. Report on the Cont., Expansion and Capital Budgets – 9/19/01 Jeff Davies	
<b>51</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	March 1, 2005 (annually) UNC Board of Governors Supply and demand of school administrators G.S. 116-74.21 Gary Barnes	
<b>52</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	March 1, 2005 (annually) State Board of Community Colleges Implementation of performance budgeting S.L. 1999-237, sec. 9.2 Keith Brown	
<b>53</b>	<b>Due Date:</b> <b>From:</b> <b>Description</b> <b>Chapter:</b> <b>Contact(s)</b>	March 15, 2005 (annually) State Board of Education Dropout rates S.L. 2001-424, sec. 28.30(f) Elsie Leak	
<b>54</b>	<b>Due Date:</b> <b>From:</b> <b>Description</b> <b>Chapter:</b> <b>Contact(s)</b>	March 31, 2005 (annually) UNC Board of Governors Report on decisions and directives to the special responsibility constituent institutions G.S. 116-30.6 Davies	

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# **2004-2005 Reports to Joint Legislative Education Oversight Committee**

## ***April 2005***

<b>55</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>April 15, 2005 (Preliminary Report)</b> <b>UNC Board of Governors/SBCC</b> <b>Finance Vital Projects (Study Mission and Educational Programming Needs)</b> <b>S.L. 2004-179, Part VI, HB 1264</b>	
<b>56</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	April 1, 2005 (annually) Communities in Schools Operation and effectiveness of its program S.L. 2003-284, Sec. 15.3(c), <i>S.L. 2001-424, sec. 24.3(c)</i>	
<b>57</b>	<b>Due Date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s)</b>	April 15, 2005 (annually) State Board of Education Suspensions, expulsions, and alternative placements S.L. 2001-424, sec. 28.30(f) Elsie Leak	

## ***May 2005***

<b>58</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	May 1, 2005 (annually) State Board of Education Use of low-wealth funds for Level I or II students; whether counties supplanted S.L. 2003-284, Sec. 7.6(b), 7.6(i), <i>S.L. 2002-126, sec. 7.17(a), (Sec. 28.6(i) of S.L. 2001-424)</i> Philip Price	
<b>59</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	May 1, 2005 (annually) State Board of Education Use of small school funds for Level I or II students; whether counties supplanted S.L. 2003-284, Sec. 7.7(e), 7.7(f), <i>S.L. 2002-126, sec. 7.17(b), (Sec. 28.7(e) of S.L. 2001-424)</i> Philip Price	
<b>60</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	May 1, 2005 (annually) Community Colleges System Office & Employment Security Commission Actual expenditure of ESC training & employment funds S.L. 1999-237, sec. 9.11 (HB 275) Kennon Briggs	

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***2004-2005 Reports to  
Joint Legislative Education Oversight Committee***

***May 2005 (continued)***

<b>61</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>May 1, 2005 (Quarterly)</b> <b>Community Colleges System Office</b> <b>Use of Funds for the College Information System Project</b> <b>S.L. 2004-124, sec. 8.1</b> <b>Sandra Williams</b>	
<b>62</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>May 30, 2005</b> <b>DHHS/DPI/Task Force</b> <b>More At Four Program</b> <b>S.L. 2004-124, sec. 10.40(e)</b>	(Changed reporting requirement)

***June 2005***

<b>63</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>June 15, 2005 (biannually)</b> <b>State Board of Community Colleges</b> <b>Report on expenditures from the Board Reserve Fund to be used for feasibility studies, pilot projects, and start-up of new programs</b> <b>G.S. 115D-5(j)</b> <b>Kennon Briggs</b>	
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***July 2005***

<b>64</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>July 15, 2004 (Quarterly)</b> <b>State Board of Community Colleges</b> <b>Projects funded from community college general obligation bonds</b> <b>S.L. 2000-3, sec. 1.2</b> <b>Kennon Briggs</b>	
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***August 2005***

<b>65</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>August 1, 2005 (Quarterly)</b> <b>Community Colleges System Office</b> <b>Use of Funds for the College Information System Project</b> <b>S.L. 2004-124, sec. 8.1</b> <b>Sandra Williams</b>	
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***2004-2005 Reports to  
Joint Legislative Education Oversight Committee***

***September 2005***

<b>66</b>	<b>Due Date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>September 1, 2005</b> <b>Fayetteville Technical Community College</b> <b>Statewide Military Business Center and</b> <b>Homeland Security Business Incubator</b> <b>S.L. 2004-124, sec. 8.17(c)</b>	
<b>67</b>	<b>Due Date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>September 1, 2005 (annually)</b> <b>State Board of Community Colleges</b> <b>Expenditures for the New and Expanding</b> <b>Industry Program (Modified Reporting Req.)</b> <b>S.L. 1997-443, sec. 9.5, G.S. 115D-5(I), S.L. 2004-124, sec. 8.4</b> <b>Larry Keen</b>	
<b>68</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>September 15, 2005 (annually)</b> <b>State Board of Education</b> <b>High School Workforce Development Program</b> <b>S.L. 2004-124, sec. 7.22</b>	
<b>69</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>September 15, 2005 (annually)</b> <b>UNC Board of Governors</b> <b>Effectiveness of the programs for professional</b> <b>development offered by the Center for School</b> <b>Leadership Development</b> <b>S.L. 2001-424, sec. 31.4(b), G.S. 116-11(12a)</b>	

***October 2005***

<b>70</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>October 1, 2005 (annually)</b> <b>State Board of Education</b> <b>Schools of Education performance reports</b> <b>S.L. 2000-67, sec. 9.2(a)</b> <b>Zoe Locklear, Kathy Sullivan</b>	
<b>71</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>October 1, 2005 (annually)</b> <b>State Education Assistance Authority</b> <b>Aid to students attending private colleges</b> <b>S.L. 2001-424, sec. 31.1(b), 2000-67, sec. 10.3, S.L. 1999-237, sec. 10; G.S. 116-19; S.L. 1998-212, s. 11</b> <b>Steve Brooks, Gretchen Bataille</b>	

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**2004-2005 Reports to  
Joint Legislative Education Oversight Committee**

**October 2005 (continued)**

<b>72</b>	<b>Due date:</b> October 1, 2005 (annually) <b>From:</b> UNC Board of Governors <b>Description:</b> Report on the progress of private and State-operated medical schools and State-operated health professional schs to increase grads in primary care <b>Chapter:</b> (1995) Ch. 507, sec. 23A.5(d) <b>Contact(s):</b> Benson	
<b>73</b>	<b>Due Date:</b> October 3, 2005 (annually) <b>From:</b> State Board of Education <b>Description:</b> Impact of mentor program on retention of teachers S.L. 2001-424, sec. 28.18(b) <b>Chapter:</b> Zoe Locklear, Kathy Sullivan <b>Contact(s):</b>	
<b>74</b>	<b>Due date:</b> October 15, 2005 (annually) <b>From:</b> State Board of Education, State Board of Community Colleges <b>Description:</b> Evaluation of student success in cooperative innovative education programs <b>Chapter:</b> S.L. 2003-277, Sec. 2 (codified as G.S. 115C-238.55) <b>Contact(s):</b> Elsie Leak	
<b>75</b>	<b>Due date:</b> October 15, 2005 (annually) <b>From:</b> State Board of Education <b>Description:</b> Continued implementation of the ABC's plan including composition and activity of assistance teams, schools that received incentive awards, schools identified as low-performing, etc. <b>Chapter:</b> S.L. 1997-18, sec. 15(a), G.S. 115C-12(25) <b>Contact(s):</b> Bob Bellamy	
<b>76</b>	<b>Due date:</b> <i>October 15, 2005 (annually)</i> <b>From:</b> <i>State Board of Education</i> <b>Description:</b> <i>Report on the implementation of the Teacher Competency Assurance provisions (general knowledge test for certified staff in low-performing schools and a plan to provide certified substitutes when teachers are absent for remediation)</i> <b>Chapter:</b> <i>S.L. 1997-221, sec. 3(f)</i> <b>Contact(s):</b> <i>Elsie Leak</i>	

- Studies in italic are from the Excellent Schools Act of 1997.
- Studies/reports in bold are from the 2004 Session



***2004-2005 Reports to  
Joint Legislative Education Oversight Committee***

***October 2005 (continued)***

<b>77</b>	<b>Due date:</b> October 15, 2005 (Quarterly) <b>From:</b> State Board of Community Colleges <b>Description:</b> Projects funded from community college general obligation bonds <b>Chapter:</b> S.L. 2000-3, sec. 1.2 <b>Contact(s):</b> Kennon Briggs	
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***November 2005***

<b>78</b>	<b>Due date:</b> November 1, 2005 (Quarterly) <b>From:</b> Community Colleges System Office <b>Description:</b> Use of Funds for the College Information System Project <b>Chapter:</b> S.L. 2004-124, sec. 8.1 <b>Contact(s):</b> Sandra Williams	
<b>79</b>	<b>Due date:</b> November 15, 2005 (Annually) <b>From:</b> UNC Board of Governors <b>Description:</b> Focused Growth Pilot Program <b>Chapter:</b> S.L. 2002-126, sec. 9.9 <b>Contact(s):</b>	

***December 2005***

<b>80</b>	<b>Due date:</b> December 1, 2005 (annually) <b>From:</b> NC Teaching Standards Commission <b>Description:</b> Report on activities and recommendations for improving the teaching profession <b>Chapter:</b> G.S. 115C-295.2(c) <b>Contact(s):</b> Eleanor Goettee, Jane Worsham	
<b>81</b>	<b>Due date:</b> December 1, 2005 (annually) <b>From:</b> DPI <b>Description:</b> Results of county school system's receipts from sale of seized vehicles and costs for administering the DWI motor vehicle forfeiture law <b>Chapter:</b> S.L. 1998-182, sec. 38 <b>Contact(s):</b> Philip Price, Ben Matthews	

- Studies in italic are from the Excellent Schools Act of 1997.
- Studies/reports in bold are from the 2004 Session



***2004-2005 Reports to  
Joint Legislative Education Oversight Committee***

***December 2005 (continued)***

82	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	December 1, 2005 (annually) State Board of Education Evaluation of initiatives to assist high-priority schools S.L. 2001-424, sec. 29.6(d) Elsie Leak, Bob Bellamy, Lou Fabrizio	
83	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	December 15, 2005 State Board of Education Report on funds used to provide assistance to low-performing LEAs and to assist schools to meet AYP for each subgroup S.L. 2003-284, Sec. 7.17 Elsie Leak	
84	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	December 15, 2005 State Board of Education and DPI State Board assistance to low-performing LEAs and to assist schools to meet AYP for each subgroup HB 797, S.L. 2003-419 Elsie Leak, Bob Bellamy, Lou Fabrizio	
85	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	December 15, 2005 (final report) UNC Board of Governors Enrollment planning S.L. 1999-237, sec. 10.8	
86	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	December 15, 2005 (annually through 2007) State Board of Education Recycling efforts of the public schools S.L. 2001-512, sec. 11 Philip Price	
87	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	December 20, 2005 (annually) State Board of Community Colleges Regional program offerings in community colleges S.L. 2002-126, sec. 8.2 Delores Parker	
88	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>December 31, 2005 (Final Report)</b> <b>UNC Board of Governors/SBCC</b> <b>Finance Vital Projects (Study Mission and Educational Programming Needs)</b> <b>S.L. 2004-179, Part VI, HB 1264</b>	

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- Studies/reports in bold are from the 2004 Session



# *2004-2005 Reports to Joint Legislative Education Oversight Committee*

## *May 2006*

<b>89</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	May 1, 2006 (biennially) UNC Board of Governors Evaluation of distance education programs S.L. 1998-212, sec. 11.7	
<b>90</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	May 15, 2006 (every two years) UNC Board of Governors Primary care physicians & providers S.L. 95-507 Benson	

## **October 2006**

<b>91</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>October 15, 2006</b> <b>DPI/Dept. of Agricultural Education at NCSU</b> <b>Accountability Assessment for Agricultural Ed.</b> <b>S.L. 2004-124, sec. 7.20A</b>	
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## **December 2006**

<b>92</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	December 15, 2006 (annually through 2007) State Board of Education Recycling efforts of the public schools S.L. 2001-512, sec. 11 Philip Price	
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## **December 2007**

<b>93</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	December 15, 2007 (final report) State Board of Education Recycling efforts of the public schools S.L. 2001-512, sec. 11 Philip Price	Committee shall recommend legislation to 2008 session to continue the reporting requirement if significant progress has not been made by January 1, 2008.
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- Studies/reports in bold are from the 2004 Session



***2004-2005 Reports to  
Joint Legislative Education Oversight Committee***

***MISCELLANEOUS***

<b>94</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>Prior to 2005 Session</b> <b>President, NC School of Science and Math/UNC Board of Governors</b> <b>Evaluate Science and Math School Tuition Grants</b> <b>S.L. 2004-124, sec. 9.6A</b>	
<b>95</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>Annually on compliance</b> <b>State Board of Education</b> <b>School Calendar Changes (Rate of Pay, Pay Cycles)</b> <b>S.L. 2004-180, HB 1464</b>	
<b>96</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>Annually</b> <b>UNC Board of Governors</b> <b>UNC capital facilities maintenance, repairs &amp; renovations; funding formula for R &amp; R Account.</b> <b>S.L. 2000-3, secs. 1.1 &amp; 6</b>	
<b>97</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>No Date</b> <b>State Auditor</b> <b>ExplorNet Audit</b> <b>S.L. 2001-424, sec. 28.45</b>	
<b>98</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>No Date</b> <b>State Education Assistance Authority</b> <b>Number of full-time equivalent students enrolled at certain private institutions of higher education and Legislative Tuition Grants collected by students</b> <b>HB 150, S.L. 2003-429</b>	
<b>99</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	<b>No less than 30 days before effective date</b> <b>State Board of Community Colleges</b> <b>Changes in organizational structure of The Apprenticeship program</b> <b>S.L. 2001-424, sec. 30.10(b)</b>	

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- Studies/reports in bold are from the 2004 Session



***2004-2005 Reports to  
Joint Legislative Education Oversight Committee***

***MISCELLANEOUS (continued)***

<b>100</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	No Date UNC Board of Governors Feasibility of establishing a School of Dentistry at East Carolina University S.L. 2001-424, sec. 31.10(d)	
<b>101</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	30 days before the next regularly scheduled meeting of the Board of Governors UNC Boards of Trustees (New or revised) Management flexibility policies, procedures, and rules for special responsibility constituent institutions S.L. 2001-424, sec. 31.11(a), G.S. 116-40.23	
<b>102</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	Prior to awarding contract State Board of Education Study of the current certification programs S.L. 2002-126, sec. 7.18(d) Zoe Locklear, Kathy Sullivan	
<b>103</b>	<b>Due date:</b> <b>From:</b> <b>Description:</b> <b>Chapter:</b> <b>Contact(s):</b>	Prior to adopting revisions State Board of Education High School exit examination and other tests S.L. 2002-126, sec. 7.21 Bob Bellamy, Lou Fabrizio	

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- Studies/reports in bold are from the 2004 Session



**JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE**  
**2003-2004 SESSION**

October 12-13, 2004

**TABS**

- 1     Membership List
- 2     Authorizing Legislation; Issues to Study; Reports Due to Committee
- 3     Minutes
- 4     2004 Education Legislation Update
- 5     Review of Education Oversight Studies for 2005 Session
- 6     UNC Science and Math Graduates
- 7     New & Expanding Industry Training Program Expenditure Report
- 8     Articulation Agreement Study
- 9     UNC Center for School Leadership Development Report on Professional Development
- 10    ABCs/NCLB Update
- 11    National Assessment of Educational Progress (NAEP), End-of-Grade Test Results, SAT Scores
- 12    Models for Improving Student Achievement
- 13    School Accountability and Local Decision-Making



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## **JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE**

**Tuesday, October 12, 2004  
Legislative Office Building  
Room 643  
10:00 A.M.**

### **Session I**

**Update on the Tuition Grants to Graduates of the NC School of Science and Mathematics  
Attending UNC Constituent Institutions**

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#### **Presenters**

**Dr. Robert Kanoy: Associate Vice President for Access & Outreach, Office of the President, UNC**

#### **Background:**

Enacted during the 2003 Session, G.S. 116-238.1 provides tuition grants for NC residents who graduated from the NC School of Science and Mathematics and then enrolled full-time in a UNC constituent institution. During the 2004 Session, G.S. 116-238.1 was amended to provide that the amount of the tuition grant would be decreased by the amount of all other grants and scholarship aid covering the cost of tuition. The resulting sum shall not exceed the cost of tuition for the institution that the student is attending.

Also during the 2004 Session, the General Assembly directed the UNC Board of Governors to study the tuition grant program.

Dr. Kanoy will present a brief overview of the tuition grant program and an update on the progress of the study.

#### **General Considerations:**

- The members of the Committee know a great deal about education issues affecting the State. Some have been on local boards of education or boards of trustees. Some were educators before becoming state legislators. However, many come from different walks of life. Please target your remarks accordingly.
- Keep your formal remarks brief; 10 minutes is a good target; 20 minutes at a maximum. Legislators like to ask questions and enjoy the give and take of Q & A sessions.
- If you plan to use Power Point, please limit the number of slides and be sure everyone on the committee and in the room can read the slides. Legislators generally prefer Power Point or overheads when used to present graphs, charts, or lists.
- You should avoid using acronyms. If you find this is necessary, you may want to provide a handout that defines the terms.



- There are 25 members, and as many as 40-50 observers. You will need to provide 75 copies of any handouts.
- Attached is a list of issues and questions you may wish to address during your presentation. The Committee realizes you may not be able to address all of them and that you may wish to emphasize issues not listed. Committee members may have additional questions.

Driving Instructions to the Legislative Complex: <http://www.ncleg.net/help/directions.html>

**Session I**  
**Name of Topic**

**Presenters:**

**Name of presenter:**                      **Name of presenter's agency or organization**

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**Session I**

**Update on the Tuition Grants to Graduates of the NC School of Science and Mathematics  
Attending UNC Constituent Institutions**

1. What percentage/number of the graduates of the School of Science and Mathematics received the tuition grants? (i.e., 65%, 126 out of 195)
2. What are the eligibility requirements for receiving the tuition grant?
3. How is the amount of the tuition grant determined for each student?
4. How many of the tuition grant recipients are at each UNC constituent institution?
5. Has the tuition grant program had any effect on increasing the number of graduates from the School of Science and Mathematics who apply and are accepted at UNC constituent institutions?
6. What is the timetable for completion of the study and what kinds of information are you hoping to get from the study?



**North Carolina School of Science And Mathematics  
Tuition Grant  
for the  
University of North Carolina**

The 2003 North Carolina General Assembly passed legislation creating the School of Science and Mathematics Tuition Grant to provide encouragement and financial assistance to graduates of the North Carolina School of Science and Mathematics (NCSSM) through a program administered by the North Carolina State Education Assistance Authority (the Authority).

**Value:** The School of Science and Mathematics Tuition Grant ensures that graduates of NCSSM receive, at a minimum, a grant equal to the cost of **tuition** assistance for attendance at one of the 16 campuses of the University of North Carolina. The grant is intended to cover tuition only and will be reduced if a student receives scholarship or grant assistance from another source. However, grants and scholarships that are designated in writing by the donor (at the time of awarding the scholarship) for specific purposes, such as books or fees, do not affect the amount of the tuition grant. Undesignated awards are assumed to be intended for tuition and will reduce the tuition grant amount.

Examples of the calculation of tuition grant amounts:

- Student X's tuition is \$2,950 per year. He receives a \$500 scholarship from a local civic club. Student X will receive \$2,450 from the NCSSM Tuition Grant.
- Student Y will attend the same campus as student X with tuition expenses of \$2,950. However, student Y receives a scholarship from a local civic club for \$600, which the club designates is to be used for purchasing books. Student Y will receive a NCSSM Tuition Grant of \$2,950, equal to her tuition expenses.
- Student Z's tuition is \$2,400 per year. She receives a Pell Grant for \$850 and a \$2,000 academic scholarship. She will not receive a NCSSM Tuition Grant since her total grants and scholarships exceed the cost of tuition.

**Eligibility:**

- Graduate of NCSSM
- Resident of North Carolina for tuition purposes while enrolled in the university
- Enrolled full-time as an undergraduate in one of the 16 campuses of the University of North Carolina
- Eligible for **four consecutive academic years**, excluding summer sessions
- Must maintain "Satisfactory Academic Progress" as defined by the campus for renewal



**Application Procedure:** Students must submit a form to the Counseling Services Office at the School of Science and Mathematics authorizing NCSSM and the Authority to release information to the campus identified by the student. If a student decides to attend a different campus after NCSSM has sent the roster to the Authority, the student is responsible for notifying the university aid office of his or her eligibility.

In May, the Authority will send a roster of potential graduates to the financial aid office on each campus with an indication that the students on the roster plan to enroll. The financial aid office will coordinate each student's financial aid, adjusting the NCSSM tuition grant for other scholarships and grants already known.

If the aid office determines the student is not eligible for the NCSSM tuition grant due to other aid, the campus aid office will notify the student. Adjustments may be made later in the academic year if a student receives additional funding from other resources.

**Deferments:** To be eligible to receive the NCSSM tuition grant, students must enroll at one of the universities within 18 months of graduating from NCSSM. Students who do not enroll at one of the UNC campuses for the fall semester immediately following graduation from NCSSM bear the responsibility for notifying the financial aid office at the campus of their potential eligibility for the grant.

**Transfers:** A student may transfer among the 16 campuses of the University of North Carolina provided his/her enrollment is continuous from one semester to another, not including summer sessions. Students are responsible for notifying the aid offices at both institutions of the transfer. Students who initially enroll in colleges or universities other than one of the 16 UNC campuses will not be eligible for the grant if they subsequently transfer to a UNC campus.



**§ 116-238.1. Full tuition grant for graduates who attend a State university.**

(a) There is granted to each State resident who graduates from the North Carolina School of Science and Mathematics and who enrolls as a full-time student in a constituent institution of The University of North Carolina a sum to be determined by the General Assembly as a tuition grant. The tuition grant shall be for four consecutive academic years and shall cover the tuition cost at the constituent institution in which the student is enrolled. The tuition grant shall be distributed to the student as provided by this section.

(b) The tuition grants provided for in this section shall be administered by the State Education Assistance Authority pursuant to rules adopted by the State Education Assistance Authority not inconsistent with this section. The State Education Assistance Authority shall not approve any grant until it receives proper certification from the appropriate constituent institution that the student applying for the grant is an eligible student. Upon receipt of the certification, the State Education Assistance Authority shall remit at the times it prescribes the grant to the constituent institution on behalf, and to the credit, of the student.

(c) In the event a student on whose behalf a grant has been paid is not enrolled and carrying a minimum academic load as of the tenth classroom day following the beginning of the school term for which the grant was paid, the institution shall refund the full amount of the grant to the State Education Assistance Authority.

(d) In the event there are not sufficient funds to provide each eligible student with a full grant:

- (1) The Board of Governors of The University of North Carolina, with the approval of the Office of State Budget and Management, may transfer available funds to meet the needs of the programs provided by subsections (a) and (b) of this section; and
- (2) Each eligible student shall receive a pro rata share of funds then available for the remainder of the academic year within the fiscal period covered by the current appropriation.

(e) Any remaining funds shall revert to the General Fund. (2003-284, s. 9.4(a).)



SESSION LAW 2004-203  
HOUSE BILL 281

AN ACT TO MAKE TECHNICAL CORRECTIONS AND CONFORMING CHANGES TO THE GENERAL STATUTES AS RECOMMENDED BY THE GENERAL STATUTES COMMISSION, AND TO MAKE VARIOUS OTHER CHANGES TO THE GENERAL STATUTES AND SESSION LAWS.

The General Assembly of North Carolina enacts:

**SECTION 47.** G.S. 116-238.1 is amended by adding a new subsection to read:

"(f) Notwithstanding any other provision of this section, no tuition grant awarded to a student under this section shall exceed the cost of tuition of the constituent institution at which the student is enrolled. If a student, who is eligible for a tuition grant under this subsection, also receives a scholarship or other grant covering the cost of tuition at the constituent institution for which the tuition grant is awarded, then the amount of the tuition grant shall be reduced by an appropriate amount determined by the State Education Assistance Authority. The State Education Assistance Authority shall reduce the amount of the tuition grant so that the sum of all grants and scholarship aid covering the cost of tuition received by the student, including the tuition grant under this section, shall not exceed the cost of tuition for the constituent institution at which the student is enrolled."



SESSION LAW 2004-124  
HOUSE BILL 1414

AN ACT TO MODIFY THE CURRENT OPERATIONS AND CAPITAL  
APPROPRIATIONS ACT OF 2003 AND TO MAKE OTHER CHANGES IN  
THE BUDGET OPERATIONS OF THE STATE.

The General Assembly of North Carolina enacts:

**EVALUATE SCIENCE & MATH SCHOOL TUITION GRANTS**

**SECTION 9.6A.(a)** It is the intent of the General Assembly that the Board of Governors of The University of North Carolina review, evaluate, and study G.S. 116-238.1, which provides a four-year tuition grant to any North Carolina resident who graduates from the North Carolina School of Science and Mathematics and enrolls as a full-time student in a constituent institution of The University of North Carolina.

**SECTION 9.6A.(b)** The North Carolina School of Science and Mathematics shall collect data on the median family income of the students attending the school.

**SECTION 9.6A.(c)** The President of the North Carolina School of Science and Mathematics and the Board of Governors of The University of North Carolina shall report to the Joint Legislative Education Oversight Committee regarding the information collected in compliance with subsections (a) and (b) of this section and any findings and recommendations of the Board of Governors. The Joint Legislative Education Oversight Committee shall report to the 2005 General Assembly the information received from the President of the North Carolina School of Science and Mathematics and the Board of Governors and the findings and recommendations of the Board of Governors, along with the Committee's own findings and recommendations regarding the continuation of the tuition grant program.



## ***UNC Scholarship Program for NCSSM Graduates***

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*Joint Legislative Education  
Oversight Committee  
October 12, 2004*

The University of North Carolina Office of the President

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## ***Background***

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- **Legislative History**
  - **2003 Legislative Session**
  - **Purpose**
    - To attract more NCSSM graduates to remain in NC for college study
  - **First eligible class – 2004 Graduates**
  - **Award**
    - Tuition (only) to attend UNC campus
    - “Last dollar” scholarship after other scholarship support is removed



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## ***Scholarship Requirements***

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- **Graduate of NCSSM**
- **NC Resident**
- **Attend one of the 16 UNC constituent institutions**
- **Pays tuition for 4 years of college study**
- **Study must be in four consecutive years**



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## ***2004 Graduates***

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- **Graduates = 251**
- **Enrolled at UNC = 194 students**  
(at 10 different UNC institutions)
- **Eligible recipients = 126**
- **Average Award = \$2,868 (est.)**  
(total awards = \$361,264)



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## ***Next Steps***

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- **Data Collection:**
  - Trends of attendance at UNC institutions
  - Feedback from NCSSM faculty and staff
  - Data on median family income
- **Site visit to NCSSM**



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## ***Timeline (tentative)***

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- **October – December 2004**
  - Data collection
  - Site visit
- **January 2005**
  - Data analysis and draft recommendations
- **February 2005**
  - Report to Board of Governors
- **March 2005**
  - Report to Joint Legislative Education Oversight Committee



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## NCSSM Study – 2004 Session

### EVALUATE SCIENCE & MATH SCHOOL TUITION GRANTS SECTION

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## Recipients by Institution for 2004-05.xls

Campus	Fall tuition	Students Enrolled	Recipients	Percentage of recipients	Dollars	Average/recipients	
Appalachian	911	5	3	60%	2,620	873	
East Carolina	1,105	2	0	0%			
Elizabeth City	700	1	0	0%			
North Carolina Central	939	6	2	33%	1,878	939	
North Carolina State	1,603	59	38	64%	55,632	1,464	
UNC Asheville	949	7	7	100%	6,043	863	
UNC Chapel Hill	1,603	103	71	69%	110,438	1,555	
UNC Charlotte	1,065	2	1	50%	1,065	1,065	
UNC Greensboro	1,014	4	1	25%	564	564	
UNC Wilmington	964	5	3	60%	2,392	797	
		194	126	65%	\$ 180,632	\$ 1,434	
Projected annual tuition cost for 194 students			\$ 580,868				
Estimated annual tuition grant for 126 recipients for 04-05			\$ 361,264				
Estimated % of funds			62.19%				

Note: Per Technical Corrections Act (HB 281), ratified 8/17/2004, NCSSM Tuition Grant is reduced if student receives other scholarships and grants.



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## **JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE**

**Tuesday, October 12, 2004  
Legislative Office Building  
Room 643  
10:00 A.M.**

### **New and Expanding Industry Training Program Expenditure Report**

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**Presenter:**

Dr. Larry Keen, Vice President for Economic and Workforce Development,  
North Carolina Community College System

**Background:**

G.S. 115D-5(i) requires the State Board of Community Colleges to report on the expenditures for the New and Expanding Industry Training (NEIT) program. Dr. Keen will present the purpose of NEIT and the trends and statistics of the report.

**General Considerations:**

- The members of the Committee know a great deal about education issues affecting the State. Some have been on local boards of education or boards of trustees. Some were educators before becoming state legislators. However, many come from different walks of life. Please target your remarks accordingly.
- Keep your formal remarks brief; 10 minutes is a good target; 20 minutes at a maximum. Legislators like to ask questions and enjoy the give and take of Q & A sessions.
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## **New and Expanding Industry Training Program Expenditure Report**

### **Presenter:**

Dr. Larry Keen, Vice President for Economic and Workforce Development,  
North Carolina Community College System

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### **Issues/Questions**

#### **New and Expanding Industry Training Program Expenditure Report**

1. What is the purpose of the New and Expanding Industry Training (NEIT) Program?
2. Who is eligible to participate in the program?
3. Explain the process for accessing funds.
4. Summarize the data contained in the report – trends and statistics.
5. Does this program stimulate economic growth? How?
6. How will the proposed Customized Industrial Training program fit together with NEIT and the Focused Industrial Training (FIT) program?



**Session Law 2004-124**  
**HB 1414**

**MODIFY REPORTING REQUIREMENT FOR NEW AND EXPANDING  
INDUSTRY TRAINING PROGRAM**

**SECTION 8.4.** G.S.115D-5(i) reads as rewritten:

"(i) The State Board of Community Colleges shall report to the Joint Legislative Education Oversight Committee on ~~March 1 and October 1~~ September 1 of each year on expenditures for the New and Expanding Industry Program each fiscal year. The report shall include, for each company or individual that receives funds for New and Expanding Industry:

- (1) The total amount of funds received by the company or individual;
- (2) The amount of funds per trainee received by the company or individual;
- (3) The amount of funds received per trainee by the community college training the trainee;
- (4) The number of trainees trained by company and by community college; and
- (5) The number of years the companies or individuals have been funded."



# **New and Expanding Industry Training Program Expenditure Report**

**Submitted to the  
Joint Legislative Education Oversight Committee**

**September 1, 2004**



**North Carolina Community College System  
200 West Jones Street ~ Raleigh, North Carolina 27603  
(919) 807-7100**

**H. Martin Lancaster, President**





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## EXECUTIVE SUMMARY

Ratified HB 1414 Section 8.4 G.S. 115D-5(i) reads as rewritten:

*(i) The State Board of Community Colleges shall report to the Joint Legislative Education Oversight Committee on September 1 of each year on expenditures for the New and Expanding Industry Program each fiscal year. The report shall include, for each company or individual that receives funds for New and Expanding Industry:*

- (1) The total amount of funds received by the company or individual;*
- (2) The amount of funds per trainee received by the company or individual;*
- (3) The amount of funds received per trainee by the community college training the trainee;*
- (4) The number of trainees trained by company and by community college; and*
- (5) The number of years the companies or individuals have been funded.*

This report is submitted as the September 1, 2004 annual expenditure report for the New and Expanding Industry Training (NEIT) Program.

## HISTORY AND BACKGROUND OF THE NEIT PROGRAM

The New and Expanding Industry Training (NEIT) Program supports the economic development efforts of the State by providing education and training opportunities for new and expanding businesses. Started in 1958, it was the first state-sponsored customized training program and has since been copied by numerous other states around the nation.

The program was developed in recognition of the fact that one of the most important factors for a business or industry considering locating or expanding in North Carolina, is the ability of the State to ensure the presence of a well-trained workforce. The program is designed to respond quickly to the needs of businesses, and to respect the confidential nature of the proprietary processes and information within those businesses.

## PROGRAM GUIDELINES

The following New and Expanding Industry Training (NEIT) program guidelines were adopted by the State Board of Community Colleges on April 18, 1997, and amended March 19, 2004.

## PURPOSE

The purpose of the New and Expanding Industry Training (NEIT) Program is to provide customized training assistance in support of new, full-time production positions created in the State of North Carolina, thereby enhancing the growth potential of companies located in the state while simultaneously preparing North Carolina's workforce with the skills essential to successful employment in emerging industries.

## ELIGIBILITY

Companies creating 12 or more production jobs in excess of their previous 3-year maximum employment level are eligible for assistance through the New and Expanding Industry Training Program. Resources may support training assessment, program development, instructional costs, and training delivery for new front-line personnel involved in the direct production of goods and services and their first-line supervisors.

Companies which downsize positions in one area of the State and then transfer those positions to another area of the State are not eligible for training assistance for those transferred positions.

Employees of temporary or staffing agencies are not eligible for post-hire training support under the NEIT program.

## EXPENDITURE GUIDELINES

### *Salaries, Wages, and Related Expenses*

- ◆ The following priorities will be given to the recruitment and utilization of instructors for New and Expanding Industry Training projects: 1) community college permanent or part-time employees; 2) contractors of the community college; 3) company personnel or contractors. It shall be the responsibility of community college staff, with consultation from the client company, to determine the appropriate length and provision of training, and this shall be indicated in the Training Project Profile submitted for approval.
- ◆ Reimbursement for instructors will be made at a 6:1 or greater trainee to trainer ratio.
- ◆ In those cases when community college staff or contractors are used for instruction, they will be compensated directly in accordance with existing policies and guidelines. In addition to costs of instruction

including travel expenses and course preparation time, community college staff or contractors may be reimbursed for costs associated with job analysis, training needs assessment and program development. The payment of social security taxes and other employee benefits to community college employees will be made in accordance with the existing policies and procedures of the college.

- ◆ Employees or contractors of the client company may be used as instructors if community college staff or contractors with the appropriate expertise are not readily available. The community colleges have the responsibility, in such circumstances, to insure that all trainees are registered, and to monitor the instruction so as to assure that it is being delivered according to the Training Plan and Project Profile.

In such cases where company personnel or contractors are used as instructors, they will be reimbursed their normal rate of pay, not to exceed a maximum of \$26.50 per hour. In addition to actual hours of direct instruction, compensation for additional time devoted to training program preparation may be recommended by the Regional Customized Training and Development Director and authorized by the Vice President for Economic and Workforce Development for the North Carolina Community College System. This amount may not exceed 15 percent of the scheduled training hours or a maximum of 80 hours total. Wages may not be paid to prospective trainers while they themselves are training in production operations, and under no circumstances may funds be used to pay trainee wages or salaries.

- ◆ Colleges will receive 5 percent of the project costs as an administrative allowance, not to exceed \$60,000 per project during any one fiscal year. Temporary clerical and administrative personnel, and project coordination staff, may be employed by a community college expressly for direct services related to a specific project, if recommended by the Regional Customized Training and Development Director and the Vice President for Economic and Workforce Development.
- ◆ If recommended by the local community college and the Regional Customized Training and Development Director and approved by the Vice President for Economic and Workforce Development, NEIT funds may

also support training of community college instructors for skill acquisition of strategic technologies associated with a New and Expanding Industry Training project. The purpose of these expenditures will be to support specialized college instructor training for skills deemed important for future support of employers within the college's service area.

### *Travel Expenses*

- ◆ Community college instructors may be reimbursed for travel expenses in accordance with established travel policies and procedures.
- ◆ Out-of-state residents, employed or reimbursed directly by the company, may be temporarily assigned as training instructors and reimbursed for their expenses after having trained six or more North Carolina residents who are new company employees. The number of individuals per project supported for travel to the state is subject to negotiation and prior approval, and under such circumstances they will be limited to:
  - a) a maximum of twelve (12) weeks per diem at a daily rate of \$87.75.
  - b) one round-trip air fare (coach class, reimbursed at a 14-day prior purchase rate) or cost equivalent for each of the two complete or partial six-week periods of supported state residency.
  - c) local travel allowances as authorized by the Regional Customized Training and Development Director prior to departure.
- ◆ In-state residents, serving as instructors and employed by the company, may be reimbursed for previously authorized out-of-state travel, after having returned and trained six or more North Carolina residents who are new company employees in the knowledge or skills acquired as a result of the out-of-state travel. The intent of the out-of-state travel will be to acquire knowledge or skills necessary for NEIT project instruction. The number of individuals supported for out-of-state travel per project is subject to negotiation and prior approval, and under such circumstances they will be limited to:
  - a) a maximum of six weeks per diem at a daily rate of \$100.50. Per diem allowances for international

- travel may be adjusted for actual cost differences in different locations.
- b) one round-trip air fare (coach class, reimbursed at a 14-day prior purchase rate) or cost equivalent to location of the temporary assignment.
  - c) local travel allowances as authorized by the Regional Customized Training and Development Director prior to departure.

### *Training Facilities*

- ◆ Community colleges may be reimbursed for costs associated with providing dedicated training facilities for New and Expanding Industry projects. Reimbursement may be provided for the period required by the client company for dedicated temporary training space, not to exceed twelve months in duration.
- ◆ For training provided at existing college facilities, the college may be reimbursed a reasonable cost share of utilities (including electricity, gas, oil, water and sewer) for the space provided to the NEIT project. If suitable space is not available at a community college permanent facility, colleges may also be reimbursed for the costs of leasing space on a temporary basis. In such cases, colleges may be reimbursed the reasonable costs of leasing, utilities, maintenance, trash and garbage service, protective and security services, and insurance costs. Colleges may not lease temporary training space from New and Expanding Industry client companies or their subsidiaries.
- ◆ Colleges may be reimbursed for reasonable costs associated with necessary alterations to facilities to accommodate the training. Authorization for the provision of training facility reimbursements, including costs associated with alterations to facilities, must be approved by the Vice President for Economic and Workforce Development prior to initiation of the project.

Client companies may not be reimbursed for the leasing of training or other facilities through the New and Expanding Industry Training Program. They may, however, be reimbursed the reasonable costs of

transporting, installing, and removing training equipment to and from community college-provided training facilities.

### *Training Materials, Supplies, and Equipment*

- ◆ The State may provide necessary classroom and training-related supplies and materials in support of a specific training project.
- ◆ Media development services, including videos and print media, may be provided at State expense if recommended by the Regional Customized Training and Development Director and approved by the Vice President for Economic and Workforce Development. In addition, if authorized, the State may assist with offsetting a percentage of the expenses of developing and producing customized training manuals and computer-based training programs.
- ◆ The State may provide, install, and maintain at the training site, standard items of equipment normally associated with vocational-occupational training as available and typically used within the North Carolina Community College System.
- ◆ Considerations for non-salvageable material, consumed by company employees during formal training periods of instruction, may be reimbursed if approved in advance by the Vice President for Economic and Workforce Development. The eligible company may be reimbursed for 50% of the costs of the non-salvageable materials consumed during formal training, not to exceed \$100 per trainee participating in the training in which the materials were consumed. The cost and the amount of non-salvageable materials must be authenticated with appropriate company documentation.

## APPROVAL PROCEDURES

- ◆ Project Profile Form as well as Expenditure Authorization Forms must be signed by both a local college representative and the Regional Customized Training and Development Director and submitted for approval prior to project initiation. The Project Profile Forms must include total estimated project costs and a project time frame, not to exceed 36 months in duration after project approval. Time frames and project costs may be amended according to project training needs, with prior approval from the Vice President for Economic and Workforce Development.
- ◆ Approval for projects with estimated total expenditures less than \$75,000 may be made by the Vice President for Economic and Workforce Development. Projects in excess of \$75,000 must be approved by the Vice President for Economic and Workforce Development, and submitted by the Vice President for secondary approval to a Joint Community College/ Department of Commerce Review Panel consisting of a designate(s) of the President of the North Carolina Community College System and a designate(s) of the Secretary of Commerce.
- ◆ Project expenditures must be in accordance with the approved profile and may not exceed the amount indicated in the profile without prior amendment and approval.

## GUIDELINE EXCEPTIONS

- ◆ In unusual or extenuating circumstances, the Vice President for Economic and Workforce Development after consultation with the Review Panel consisting of both designated representatives from the North Carolina Community College System and the Department of Commerce, may authorize exceptions to these Guidelines. Exceptions will be documented and included with the Project Profile Form as a matter of public record.

## WORKER TRAINING TAX CREDIT PROVISIONS

- ◆ Provided that expenses claimed for the Worker Training Tax Credit are reasonable and directly related to support of the company's training plan, NEIT categorical reimbursement limitations (i.e., company instructor wages, instructor travel costs, and costs of non-salvageable training materials) will not apply in the administration of the Worker Training Tax Credit given that there is a tax credit limit per eligible employee.
- ◆ Any expenditures made through the New and Expanding Industry Training Program may not be claimed by the company for credit as an eligible expenditure under the Worker Training Tax Credit.

## DATA CATEGORY DEFINITIONS

<u>COLUMN</u>	<u>DEFINITION</u>
1 Community College	College to which funds have been allocated for the support of an NEIT project.
2 Company	New or expanding company supported by NEIT project funding.
3 Years Funded	Total number of years the NEIT project has been funded.
4 Company Training Reimbursement Expenditure	Funds provided directly to a company for instructional and other training-related expenditures allowable under the NEIT program.
5 Number Trained by Company Instructors	Number of trainees trained by instructors who are company employees/contractors; number trained by which the company has received NEIT funds to reimburse travel for train-the-trainer company instructors expense, and/or their wages for instruction and company instructors course development time.
6 Average Company Reimbursement Per Trainee	NEIT training-related company expenditures divided by the number of trainees trained by company instructors.

7 College Training Expenditures	Funds expended by a community college to support the training of employees and potential employees of a particular company under the NEIT program, including the five percent administrative allowance.
8 Number Trained by College Instructors	Number of trainees at a particular company trained by either full or part-time college employees or contracted community college instructors under an NEIT funded project.
9 Average College Cost Per Trainee	Total NEIT funds expended by a community college for support of an NEIT project, outside of funds provided directly to a company, divided by the total number of trainees trained by community college instructors.
10 Average College Cost Per Trainee	Total amount of NEIT funds expended to support a specific NEIT training project.
11 Total Trained by Company and College Instructors	Total number of employees trained under an NEIT funded project, including those trained by both company and community college instructors.
12 Average Total Cost Per Trainee	Total NEIT expenditures for a particular NEIT training project divided by the total number of trainees.



**NORTH CAROLINA COMMUNITY COLLEGE SYSTEM  
NEW AND EXPANDING INDUSTRY  
BUDGET AND EXPENDITURES  
REPORTING DATES: JULY 1, 2003 - JUNE 30, 2004**

Community College (1)	Company (2)	Years Funded (3)	Company Training Reimbursement Expenditures (4)	Number Trained by Company Instructors (5)	Average Company Reimbursement Per Trainee (6)	College Training Expenditures (7)	Number Trained by College Instructors (8)	Average College Cost Per Trainee (9)	Total Expenditures (10)	Total Trained by Company & College Instructors (11)	Average Total Cost Per Trainee (12)
<b>ALAMANCE</b>											
	Honda Power Equipment Manufacturing, Inc.	1	0.00	0	0.00	78,435.79	639	122.75	78,435.79	639	122.75
	LabCorp (1) (28)	3	0.00	0	0.00	150.71	11	13.70	150.71	11	13.70
<b>ASHEVILLE-BUNCOMBE</b>											
	American Datamed	2	12,481.50	62	201.31	8,526.04	7	1,218.01	21,007.54	62	338.83
	Borg Warner Turbo Systems (2 ) (28)	1	0.00	0	0.00	172.55	9	19.17	172.55	9	19.17
	Kendro Laboratory Products (3 ) (28)	1	0.00	0	0.00	761.70	0	N/A	761.70	0	N/A
	NCI (4) (28)	1	0.00	0	0.00	16,478.57	4	4,119.64	16,478.57	4	4,119.64
	NYPRO Asheville	3	0.00	0	0.00	1,268.41	14	90.60	1,268.41	14	90.60
	Plasti-Form	3	0.00	0	0.00	11,286.21	31	364.07	11,286.21	31	364.07
	Plasticard Locktech International	1	0.00	0	0.00	8,512.25	23	370.10	8,512.25	23	370.10
	ROTEC (5) (28)	2	0.00	0	0.00	3,253.41	2	1,626.71	3,253.41	2	1,626.71
	Shorewood Packaging Corporation	2	0.00	0	0.00	15,016.20	24	625.68	15,016.20	24	625.68
	Tyco Control Products	2	0.00	0	0.00	5,936.69	16	371.04	5,936.69	16	371.04
<b>BEAUFORT</b>											
	Camfil-Farr (6)	1	0.00	0	0.00	350.00	1	350.00	350.00	1	350.00
	Prett/Noma Systems	2	22,419.00	49	457.53	25,060.86	49	511.45	47,479.86	49	968.98
<b>BLADEN</b>											
	Axicor, Inc. (7) (28)	1	3,370.65	8	421.33	0.00	0	0.00	3,370.65	8	421.33
	Bladen Industries, Inc. (8)	3	699.04	0	N/A	3,485.00	18	193.61	4,184.04	18	232.45

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<b>BLUE RIDGE</b>											
	Porvair (9)	1	0.00	0	0.00	6,017.98	4	1,504.50	6,017.98	4	1,504.50
	Rafitac, Inc.	3	44,075.00	18	2,448.61	171,304.02	115	1,489.60	215,379.02	115	1,872.86
	Shorewood Packaging	2	23,437.29	28	837.05	19,129.38	40	478.23	42,566.67	40	1,064.17
<b>BRUNSWICK</b>											
	Rampage Sportfishing Yachts	2	0.00	0	0.00	3,478.51	112	31.06	3,478.51	112	31.06
<b>CALDWELL</b>											
	BEMIS	1	0.00	0	0.00	15,628.57	28	558.16	15,628.57	28	558.16
<b>CAPE FEAR</b>											
	DEL Laboratories	1	0.00	0	0.00	101,316.56	362	279.88	101,316.56	362	279.88
	Verizon Wireless (10)	1	0.00	0	0.00	121,240.01	0	N/A	121,240.01	0	N/A
<b>CATAWBA VALLEY</b>											
	Foamex International, Inc.	2	1,200.00	6	200.00	2,820.41	71	39.72	4,020.41	77	52.21
	Getrag USA (11)	1	3,840.00	7	548.57	192.00	0	0.00	4,032.00	7	576.00
<b>CENTRAL CAROLINA</b>											
	Caterpillar, Inc.	3	4,346.00	211	20.60	10,104.20	55	183.71	14,450.20	245	58.98
	Meikle EMS Automation (12)	1	0.00	6	0.00	3,540.00	14	252.86	3,540.00	17	208.24
	Moen, Inc.	3	3,223.20	191	16.88	30,874.87	79	390.82	34,098.07	216	157.86
	Wyeth-Lederle Vaccines (13)	3	0.00	11	0.00	127,837.78	90	1,420.42	127,837.78	90	1,420.42

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<b>Central Carolina cont'd</b>	3M	3	3,869.00	53	73.00	1,081.78	14	77.27	4,950.78	53	93.41
<b>CENTRAL PIEDMONT</b>											
	Boston Gear Corporation	2	6,360.00	12	530.00	4,634.48	20	231.72	10,994.48	31	354.66
	Carrier Corporation	1	0.00	0	0.00	5,979.76	69	86.66	5,979.76	69	86.66
	Celgard, Inc.	1	0.00	0	0.00	21,583.59	122	176.91	21,583.59	122	176.91
	Ferguson Box (14) (28)	2	0.00	0	0.00	1,616.00	6	269.33	1,616.00	6	269.33
	General Dynamics (15) (28)	1	0.00	0	0.00	2,525.63	11	229.60	2,525.63	11	229.60
	TIAA CREF	2	6,360.00	16	397.50	759.00	7	108.43	7,119.00	23	309.52
	Trammell Crow Company	2	1,380.00	36	38.33	21,055.53	25	842.22	22,435.53	42	534.18
	Vertis, Inc.	2	0.00	0	0.00	26,194.46	181	144.72	26,194.46	181	144.72
<b>CLEVELAND</b>											
	Sara Lee Intimate Apparel	3	4,500.00	32	140.63	5,379.32	15	358.62	9,879.32	47	210.20
	Specialty Textiles, Inc. (16)	1	9,600.00	28	342.86	480.00	0	N/A	10,080.00	28	360.00
	Wal-Mart Distribution Center (17)	2	122,000.00	375	325.33	22,543.95	0	N/A	144,543.95	375	385.45
<b>CRAVEN</b>											
	BSH Home Appliances	2	168,494.00	160	1,053.09	357,215.66	600	595.36	525,709.66	700	751.01
	Carolina Technical Plastics	1	10,720.00	24	446.67	4,878.55	36	135.52	15,598.55	36	433.29
<b>DURHAM</b>											
	AW North Carolina	2	0.00	0	0.00	429,665.90	540	795.68	429,665.90	540	795.68
	Eisai Pharmatechnology, Inc. (18)	3	0.00	0	0.00	840.00	0	N/A	840.00	0	N/A

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<b>FORSYTH</b>											
	Charter Medical, Ltd	1	4,674.95	40	116.87	7,201.00	70	102.87	11,875.95	70	169.66
<b>GASTON</b>											
	Aksys USA, Inc.	1	0.00	0	0.00	6,259.48	43	145.57	6,259.48	43	145.57
	Arrow Home Fashions	1	0.00	0	0.00	648.66	21	30.89	648.66	21	30.89
	Cataler North America Corporation	3	6,360.00	6	1,060.00	9,119.38	57	159.99	15,479.38	58	266.89
	Century Textiles, Inc. (19) (28)	1	0.00	0	0.00	236.25	7	33.75	236.25	7	33.75
	Dana Corporation	2	0.00	0	0.00	25,435.36	72	353.27	25,435.36	72	353.27
	LeeBoy	1	0.00	0	0.00	4,803.00	77	62.38	4,803.00	77	62.38
	Newworld Manufacturing Company	2	6,374.50	29	219.81	18,256.50	58	314.77	24,631.00	64	384.86
	Parkdale Mills, Inc. (20)	1	0.00	50	0.00	38,550.55	9	4,283.39	38,550.55	59	653.40
<b>GUILFORD</b>											
	Banner Pharmacaps, Inc. (21)	2	29,081.00	55	528.75	1,454.05	0	N/A	30,535.05	55	555.18
	Metaldyne	1	0.00	0	0.00	16,048.46	40	401.21	16,048.46	40	401.21
<b>HALIFAX</b>											
	Lowes Companies, Inc.	3	11,054.78	185	59.76	3,030.00	12	252.50	14,084.78	185	76.13
<b>HAYWOOD</b>											
	Associatated Packaging	2	0.00	0	0.00	5,158.20	25	206.33	5,158.20	25	206.33
	West One	1	0.00	0	0.00	15,579.79	30	519.33	15,579.79	30	519.33

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<b>ISOTHERMAL</b>											
	Arvin Meritor	3	12,269.50	85	144.35	3,918.71	155	25.28	16,188.21	155	104.44
	Mako	1	26,320.00	63	417.78	77,230.28	228	338.73	103,550.28	228	454.17
<b>JOHNSTON</b>											
	Bayer Pharmaceutical Division	3	0.00	0	0.00	53,939.82	559	96.49	53,939.82	559	96.49
	Novo Nordisk Pharmaceutical Industries	2	0.00	0	0.00	66,148.56	46	1,438.01	66,148.56	46	1,438.01
	PCX Corporation (22) (28)	1	0.00	0	0.00	496.44	5	99.29	496.44	5	99.29
	Thyssenkrupp Percision Forge	2	0.00	0	0.00	11,297.37	48	235.36	11,297.37	48	235.36
<b>LENOIR</b>											
	MasterBrand Cabinets, Inc.	1	6,911.50	301	22.96	7,805.56	122	63.98	14,717.06	301	48.89
	Tile Restoration, Inc.	1	618.36	28	22.08	467.63	28	16.70	1,085.99	28	38.79
<b>MARTIN</b>											
	Ann's House of Nuts	2	0.00	0	0.00	47,235.56	23	2,053.72	47,235.56	23	2,053.72
	McMurray Fabrics, Inc.	3	0.00	0	0.00	6,700.00	13	515.38	6,700.00	13	515.38
<b>MCDOWELL</b>											
	Coats America	1	51,304.80	103	498.10	17,952.53	101	177.75	69,257.33	103	672.40
	Perfect Air	1	21,648.10	70	309.26	13,357.02	61	218.97	35,005.12	70	500.07
<b>MITCHELL</b>											
	Advanced Tubing Technologies	2	11,040.00	18	613.33	1,120.00	11	101.82	12,160.00	26	467.69

**NORTH CAROLINA COMMUNITY COLLEGE SYSTEM  
NEW AND EXPANDING INDUSTRY  
BUDGET AND EXPENDITURES  
REPORTING DATES: JULY 1, 2003 - JUNE 30, 2004**

Community College (1)	Company (2)	Years Funded (3)	Company Training Reimbursement Expenditures (4)	Number Trained by Company Instructors (5)	Average Company Reimbursement Per Trainee (6)	College Training Expenditures (7)	Number Trained by College Instructors (8)	Average College Cost Per Trainee (9)	Total Expenditures (10)	Total Trained by Company & College Instructors (11)	Average Total Cost Per Trainee (12)
<b>MITCHELL cont'd</b>	BestSweet, Inc. (23)	1	0.00	0	0.00	473.00	0	N/A	473.00	0	N/A
	LesCare Kitchens, Inc.	1	0.00	0	0.00	34,797.07	129	269.74	34,797.07	129	269.74
	NGK Ceramics USA, Inc.	1	0.00	0	0.00	10,752.00	75	143.36	10,752.00	75	143.36
	Southeast Tubular Products, Inc.	1	0.00	0	0.00	5,691.00	29	196.24	5,691.00	29	196.24
	Trim Systems, LLC	2	0.00	0	0.00	1,673.00	27	61.96	1,673.00	27	61.96
<b>MONTGOMERY</b>											
	Longworth Industries, Inc.	1	8,568.00	24	357.00	0.00	0	0.00	8,568.00	24	357.00
<b>PIEDMONT</b>											
	Tietex Interiors	1	14,805.33	66	224.32	4,816.52	37	130.18	19,621.85	89	220.47
	Vector Tobacco (USA) Ltd.	3	0.00	0	0.00	13,279.78	37	358.91	13,279.78	37	358.91
<b>PITT</b>											
	Caldwell Design, LLC	2	4,062.24	12	338.52	1,445.04	10	144.50	5,507.28	14	393.38
	DSM High Performance Fibers	2	30,291.95	26	1,165.08	5,148.26	39	132.01	35,440.21	60	590.67
<b>RICHMOND</b>											
	FCC (North Carolina ), LLC	1	9,436.11	13	725.85	22,826.79	8	2,853.35	32,262.90	21	1,536.33
	QualPak (GOJO Industries, Inc.)	1	14,903.45	30	496.78	10,081.85	84	120.02	24,985.30	84	297.44
<b>ROBESON</b>											
	Graphic Packaging	1	11,353.60	32	354.80	29,824.54	122	244.46	41,178.14	136	302.78

**NORTH CAROLINA COMMUNITY COLLEGE SYSTEM  
NEW AND EXPANDING INDUSTRY  
BUDGET AND EXPENDITURES  
REPORTING DATES: JULY 1, 2003 - JUNE 30, 2004**

Community College (1)	Company (2)	Years Funded (3)	Company Training Reimbursement Expenditures (4)	Number Trained by Company Instructors (5)	Average Company Reimbursement Per Trainee (6)	College Training Expenditures (7)	Number Trained by College Instructors (8)	Average College Cost Per Trainee (9)	Total Expenditures (10)	Total Trained by Company & College Instructors (11)	Average Total Cost Per Trainee (12)
<b>ROCKINGHAM</b>											
	A.F.G. Wipes, Inc.	1	0.00	0	0.00	6,615.00	64	103.36	6,615.00	64	103.36
	Quality Associates	1	0.00	0	0.00	11,237.88	106	106.02	11,237.88	106	106.02
<b>ROWAN-CABARRUS</b>											
	Berenfield Containers (24) (28)	1	0.00	0	0.00	989.00	0	N/A	989.00	0	N/A
	Randall Metals Corporation	2	6,760.00	18	375.56	1,730.00	33	52.42	8,490.00	33	257.27
<b>SAMPSON</b>											
	Dodgers Industries	3	2,706.00	28	96.64	4,254.34	12	354.53	6,960.34	28	248.58
	Lundy's Premium Standard	1	4,014.00	24	167.25	0.00	0	0.00	4,014.00	24	167.25
	Sammia-SCI Enclosures	1	8,260.00	57	144.91	0.00	0	0.00	8,260.00	57	144.91
<b>SANDHILLS</b>											
	Holmes Building Systems, LLC (Dynamic Homes) (25)	1	61,440.00	48	1,280.00	3,057.00	0	N/A	64,497.00	48	1,343.69
<b>SOUTHEASTERN</b>											
	Kroy Building Products	1	7,200.00	14	514.29	447.96	42	10.67	7,647.96	50	152.96
<b>SOUTHWESTERN</b>											
	AFFCO (26) (28)	1	2,400.00	8	300.00	120.00	0	0.00	2,520.00	8	315.00
	Consolidated Metco	2	10,800.00	19	568.42	4,005.00	11	364.09	14,805.00	29	510.52
<b>STANLY</b>											
	Cope Industries, Inc.	2	0.00	0	0.00	6,671.39	25	266.86	6,671.39	25	266.86

**NORTH CAROLINA COMMUNITY COLLEGE SYSTEM  
NEW AND EXPANDING INDUSTRY  
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<b>SURRY</b>											
	ASMO Appalachian Corporation	1	0.00	0	0.00	1,950.00	42	46.43	1,950.00	42	46.43
<b>TRI-COUNTY</b>											
	IOI Enterprises	1	25,600.00	71	360.56	3,466.98	22	157.59	29,066.98	71	409.39
	Sioux Tools	3	7,599.00	19	399.95	43,529.52	65	669.68	51,128.52	84	608.67
<b>VANCE-GRANVILLE</b>											
	ACS State Health Care	1	4,092.80	35	116.94	7,102.51	43	165.17	11,195.31	65	172.24
	Elberta Crate & Box Company	1	8,160.00	35	233.14	2,256.00	52	43.38	10,416.00	53	196.53
	Revlon	1	0.00	0	0.00	95,915.59	307	312.43	95,915.59	307	312.43
	Wal-Mart Stores East, LP	3	48,252.40	266	181.40	3,789.38	97	39.07	52,041.78	266	195.65
<b>WAKE</b>											
	Biogen	3	0.00	0	0.00	34,579.46	132	261.97	34,579.46	132	261.97
	Catalyst Manufacturing Services	2	636.00	6	106.00	12,764.93	59	216.35	13,400.93	60	223.35
	John Deere Turf Care	2	212.00	27	7.85	14,109.59	252	55.99	14,321.59	277	51.70
	John Deere Worldwide C & CE Head	3	0.00	0	0.00	20,294.56	45	450.99	20,294.56	45	450.99
	Nomacorc, LLC	3	980.00	56	17.50	18,837.29	34	554.04	19,817.29	93	213.09
	Pergo	1	212.00	13	16.31	1,596.00	25	63.84	1,808.00	28	64.57
<b>WAYNE</b>											
	Hilex Poly Company (27) (28)	1	560.00	6	93.33	0.00	0	0.00	560.00	6	93.33

**NORTH CAROLINA COMMUNITY COLLEGE SYSTEM  
NEW AND EXPANDING INDUSTRY  
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<b>WESTERN PIEDMONT</b>											
	Viscotec Automotive	2	10,500.00	24	437.50	24,200.98	73	331.52	34,700.98	97	357.74
<b>WILKES</b>											
	D & D Display	1	11,150.53	25	446.02	1,061.53	3	353.84	12,212.06	28	436.15
	Gates Rubber	1	6,300.00	20	315.00	7,124.61	13	548.05	13,424.61	33	406.81
	Interflex Group-Carolina Division	3	28,800.00	36	800.00	4,345.48	57	76.24	33,145.48	64	517.90
	Maine Brand Manufacturing	1	0.00	0	0.00	21,672.23	22	985.10	21,672.23	22	985.10
	Martin Marietta Materials	1	47,907.00	67	715.03	19,785.30	105	188.43	67,692.30	105	644.69
	Unique Solutions	1	0.00	0	0.00	27,373.49	35	782.10	27,373.49	35	782.10
	US Chemical Storage	1	15,833.19	18	879.62	8,081.41	23	351.37	23,914.60	23	1,039.77
<b>WILSON</b>											
	Eon Pharma, Inc.	1	0.00	0	0.00	71,161.74	61	1,166.59	71,161.74	61	1,166.59
	Purdue Pharmaceuticals, Inc.	1	0.00	0	0.00	4,400.00	24	183.33	4,400.00	24	183.33
<b>TOTALS</b>			<b>\$1,053,827.77</b>	<b>3,509</b>	<b>\$300.32</b>	<b>\$2,787,397.45</b>	<b>7,866</b>	<b>\$354.36</b>	<b>\$3,841,225.22</b>	<b>10,117</b>	<b>\$379.68</b>



## **PROGRAM RELATED EXPENDITURES**

### **Media Development Office**

**Central Piedmont Community College     \$315,183.43**

As specified in the New and Expanding Industry Training Guidelines, “Media development services including videos and print media, may be provided at State expense if recommended by the Regional Customized Training and Development Director and approved by the Vice President for Economic and Workforce Development. In addition, if authorized, the State may assist with offsetting a percentage of the expenses of developing and producing customized training manuals and computer-based training programs.”

The NEIT program has traditionally supported a Media Development Office at a community college to provide comprehensive media development services for new and expanding industry projects. The office, currently located at Central Piedmont Community College, produces video, print and computer-based media (CBT) training programs for projects throughout the state. In addition, the Office helps coordinate assistance with job analysis programs as well as develops and maintains statewide marketing materials.

During the 2003-2004 program year, the Media Development Office produced a total of 214 finished minutes of video at an average cost of \$619.96 per minute, nearly 4 percent below last year’s cost. Other notable items included a Spanish translation of the boatbuilding CBT, nearly 20 hours of lightly-edited training documentation, and a rural economic development case study aired nationwide by Reuters and the National Association of Regional Councils. Numerous “special-request” print, photo, video and DVD jobs underscored a general feeling that production activity is on the upswing.

The recently revised NC Manufacturing Certification Program has been distributed on CD, and has met with widespread approval. The program, including core courses and electives, was copyrighted in March 2004. The Spanish translation of the program has been completed. The Plastics Operator training curriculum also has been distributed on CD.

## **ADDENDUM**

The report is footnoted to explain project expenditures that exceeded an average cost per trainee of \$2,500, or when there were no trainees reported for the reporting period. Projects reporting fewer than 12 trainees for the report period are ongoing projects that have provided or will provide training for 12 or more jobs over the project time frame (the minimum requirement for NEIT projects).

NOTE: For those projects where college expenditures were incurred and all instruction was carried out by company employees, the college expenditures in almost all cases occurred in one of four categories 1) instructional supplies and material costs, 2) travel costs, 3) provision of dedicated training facilities, and or 4) administrative allowance. As specified in the New and Expanding Industry Training Guideline, "Colleges may receive 5 percent of the project costs as an administrative allowance, not to exceed \$60,000 per project in any fiscal year." In those instances where trainees are reported by company trainers but no company training reimbursements are reported, trainees were registered under the New and Expanding Industry Training Project but no funds were reimbursed to the company during the reporting period.

### **1. Alamance Community College LabCorp**

One student withdrew during this reporting period, due to personal reasons. A total of 57 individuals were trained during the project period.

### **2. Asheville-Buncombe Technical Community College Borg Warner**

This project is ongoing and anticipates providing training for 12 or more trainees over the project period.

**3. Asheville-Buncombe Technical Community College  
Kendro Laboratory Products**

There were no trainees to report for this project. Expenditures were to support train-the-trainer activity for a college instructor, who is scheduled to teach new hires during Fiscal Year 2004–2005. This project continues through February 2006 for an estimated 65 new jobs.

**4. Asheville-Buncombe Technical Community College  
NCI**

This project is ongoing and anticipates providing training for an estimated 42 new jobs over the project period. The average cost per trainee of \$4,119.64 is elevated due to special approval to purchase two CNC Machining simulators for the project.

**5. Asheville-Buncombe Technical Community College  
ROTEC**

This project is ongoing and anticipates providing training for an estimated 20 new jobs over the project period.

**6. Beaufort County Community College  
Camfil-Farr**

The college expenditures were for one train-the-trainer course for one company employee. Originally, the company anticipated creating 12 new jobs; however, the project did not materialize as anticipated and is now closed.

**7. Bladen Community College  
Axicor, Inc.**

This project is ongoing and anticipates providing training for an estimated 25 new jobs over the project period.

**8. Bladen Community College**  
**Bladen Industries**

Company reimbursement was to provide travel expenses for two employees who served as internal trainers for the company.

**9. Blue Ridge Community College**  
**Porvair**

All funds were expended for preparation of training and college instructor development. The company's expansion plans did not materialize and the project was terminated.

**10. Cape Fear Community College**  
**Verizon**

The college expenditures were paid to Dell Computers as the first year lease cost for 250 desktop computers, which are installed at Cape Fear Community College. They were leased and installed to prepare for training Verizon employees starting in July 2004. This is a three-year project and the lease will be paid yearly to Dell.

**11. Catawba Valley Community College**  
**Getrag USA**

The college expenditures were for the 5 percent administrative allowance. Originally, a net growth of 30 positions was projected; however, the project did not materialize as expected and was terminated early with only seven total trainees.

**12. Central Carolina Community College**  
**Meikle EMS Automation**

Company training occurred during the 2003-2004 FY; however, invoices were not received prior to June 30 and therefore, company training reimbursement expenditures will be paid in 2004-2005.

**13. Central Carolina Community College  
Wyeth-Lederle Vaccines**

Company training occurred during the 2003-2004 FY; however, invoices were not received prior to June 30 and therefore, company training reimbursement expenditures will be paid in 2004-2005.

**14. Central Piedmont Community College  
Ferguson Box**

This annual report shows only six trainees; however, the total trained for the project period was 12.

**15. Central Piedmont Community College  
General Dynamics**

This project is ongoing and anticipates providing training for an estimated 200 new jobs over the project period.

**16. Cleveland Community College  
Specialty Textiles, Inc.**

The college expenditures represent the 5 percent administrative allowance.

**17. Cleveland Community College  
Wal-Mart Distribution Center**

The college expenditures represent the 5 percent administrative allowance and the salary for a part-time project coordinator.

**18. Durham Technical Community College  
Eisai**

The college expenditures were for services provided for a training needs analysis.

**19. Gaston College  
Century Textiles, Inc.**

This project is ongoing and anticipates providing training for an estimated 40 new jobs over the project period.

**20. Gaston College  
Parkdale Mills, Inc.**

Fifty (50) Parkdale Mills personnel were trained at the company using Computer Based Training (CBT) materials provided by the college.

**21. Guilford Technical Community College  
Banner Pharmacaps, Inc.**

The college expenditures were for the 5 percent administrative allowance.

**22. Johnston Community College  
PCX Corporation**

This project is ongoing and anticipates providing training for 12 or more trainees over the project period.

**23. Mitchell Community College  
BestSweet, Inc.**

The college expenditures represent funds for a college instructor to consult with the company on the development of an abbreviated BioWork course.

**24. Rowan-Cabarrus Community College  
Berenfield Container**

The college expenditures represent funds to support a safety audit. Training for this project is scheduled to occur in Fiscal Year 2004–2005 for an estimated 15 new jobs.

**25. Sandhills Community College  
Holmes Building**

The college expenditures were for the 5 percent administrative allowance.

**26. Southwestern Community College  
AFFCO**

The college expenditures represent the 5 percent administrative allowance. This project is ongoing and anticipates providing training for 20 additional trainees.

**27. Wayne Community College  
Hilex Poly**

This project is ongoing and anticipates providing training for 12 or more trainees over the project period.

**28. Projects reporting fewer than 12 trainees for the report period**

Unless otherwise noted, projects reporting fewer than 12 trainees for the report period are projects that have provided or will provide training for 12 or more jobs during the project period (the minimum requirement for NEIT projects).

## **New and Expanding Industry Training Program Project Completions**

### **Continuous Improvement Evaluation Instrument :**

The purpose of the Continuous Improvement Evaluation Instrument is to assess the companies' expectations, program impact and overall effectiveness of the customized training received by companies participating in the NEIT program. The responses are summarized and used for program assessments and improvement.

Program assessment is based on the following categories and rating scale.

**Expectations** - The extent to which the NEIT program met the company's expectations.

**Impact** - The overall impact of the NEIT program on the company's operations.

**Effectiveness** - The overall effectiveness of the NEIT program in preparing the company's employees for productivity.

#### **Rating Scale:**

5= Excellent, no improvement necessary, exceed highest expectations

4= Very Good, company needs were met at a highly acceptable level

3= Acceptable, needs met but some improvement indicated

2= Marginal, some needs unsatisfied, item needs substantial improvement

1= Unacceptable, needs generally not satisfied

NA= Not applicable

The following data represents summary information on project completions approved during July 1, 2003 through June 30, 2004.

## *Data Category Definitions*

#	Column	Definition
1	Community College	College to which funds have been allocated for the support of an NEIT project.
2	Company	New or expanding company supported by NEIT project funding.
3	Start Date	The initiation of a project that is signed by the local college representative and the Regional Training Director and, approved by the Vice President for Economic and Workforce Development.
4	End Date	The completion of a project that is signed by the local college representative and the Regional Training Director and, approved by the Vice President for Economic and Workforce Development.
5	Allocations	Total amount of NEIT funds allotted to support a specific NEIT project. This amount includes the total allocations for the project period.
6	Expenditures	Total amount of NEIT funds expended to support a specific NEIT project. This amount includes the total expenditures for the project period.
7	Positions Filled	Total number of positions filled by company as a result of project training.
8	Pre-Hire Training	Unduplicated headcount of individuals who participated in training on a pre-hire basis as part of the project.
9	Post-Hire Training	Unduplicated headcount of individuals who participated in training on a post-hire basis as part of the project.
10	Trained by Company Instructors	Total number of individuals who received training provided by the company instructors or contractors.
11	Trained by College Instructors	Total number of trainees at a particular company trained by either full- or part-time college employees or contracted community college instructors under an NEIT funded project.
12	Company's Expectations Met	Extent to which the NEIT program met the company's expectations.
13	Training Impact	Overall impact of the NEIT program on the company's operations.
14	Training Effectiveness	Overall effectiveness of the NEIT program in preparing the company's employees for productivity.

## Continuous Improvement Summary Evaluation ~ Projects Completed by July 1, 2003 - June 30, 2004

### Chart 1

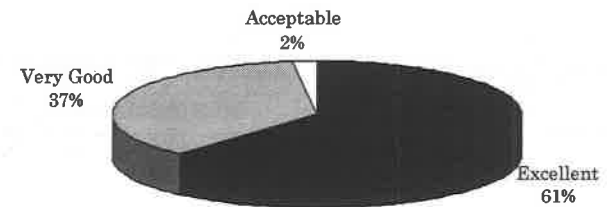
#### Expectations

Extent to which the New and Expanding Industry Training Program met the company's expectations.

**Average = 4.60**      **N = 52**

**2002-2003:**

**Average = 4.58**      **N = 65**



### Chart 2

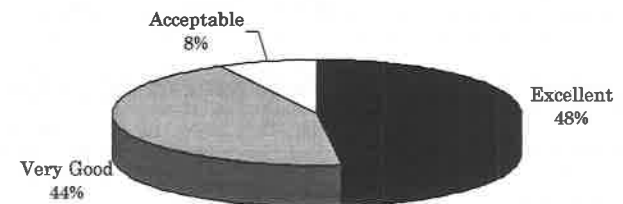
#### Impact

Overall impact of the New and Expanding Industry Training Program on the company's operations.

**Average = 4.40**      **N = 52**

**2002-2003:**

**Average = 4.51**      **N = 65**



### Chart 3

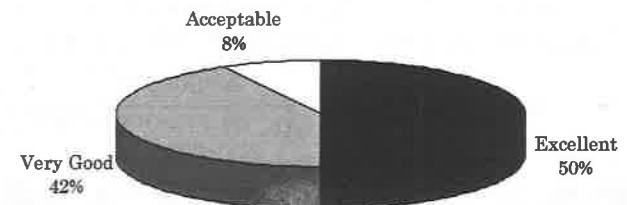
#### Effectiveness

Overall effectiveness of the New and Expanding Industry Training Program in preparing the company's employees for productivity.

**Average = 4.42**      **N = 52**

**2002-2003:**

**Average = 4.45**      **N = 65**



Percentages are based on the number of completed summary evaluations (52), rather than the number of completed projects (56).

North Carolina Community College System  
New and Expanding Industry Training  
**Project Completions**  
(Projects completed July 1, 2003 - June 30, 2004)

Community College (1)	Company (Completed Projects) (2)	Start Date (3)	End Date (4)	Total Allocations (5)	Total Expenditures (6)	Positions Filled (7)	Pre-Hire Training (8)	Post-Hire Training (9)	Trained by Company Instructors (10)	Trained by College Instructors (11)	Company's Expectations Met (Rating) (12)	Training Impact (Rating) (13)	Training Effectiveness (Rating) (14)
<b>ALAMANCE</b>													
	LabCorp	06/04/01	06/30/04	35,349	35,198	57	0	0	57	57	5	4	5
<b>ASHEVILLE-BUNCOMBE</b>													
	NYPRO Asheville	02/01/02	12/18/03	54,716	49,046	50	0	50	42	50	4	5	4
	Pechiney Plastic Packaging	11/15/01	12/15/03	42,442	6,680	30	0	39	8	39	4	3	3
	Plasti-Form	11/28/00	11/28/03	56,045	56,044	208	0	242	226	180	4	3	4
	Shorewood Packaging Corporation	08/23/02	06/30/04	47,669	41,174	31	0	31	31	31	5	5	5
<b>BEAUFORT</b>													
	Camfil-Farr (*)	07/01/03	05/10/04	368	350	1	0	1	0	1	N/A	N/A	N/A
<b>BLADEN</b>													
	Bladen Industries, Inc.	06/01/01	05/27/04	63,384	61,797	50	0	56	32	24	4	4	4
<b>BLUE RIDGE</b>													
	Borg Warner	02/07/02	02/28/04	77,091	47,924	48	0	46	46	33	5	4	4
	Porvair (*)	04/01/03	05/23/04	6,019	6,018	4	4	4	0	4	4	4	4
	Rafilatac, Inc.	01/01/01	06/30/04	652,939	578,700	286	0	338	338	338	5	5	5
<b>CATAWBA VALLEY</b>													
	Getrag USA (*)	07/07/03	04/12/04	4,032	4,032	7	0	7	7	0	5	5	5
	Gulf States Paper Corporation	09/03/02	12/11/03	18,791	18,791	20	0	34	12	24	4	3	3

North Carolina Community College System  
New and Expanding Industry Training  
**Project Completions**  
(Projects completed July 1, 2003 - June 30, 2004)

Community College (1)	Company (Completed Projects) (2)	Start Date (3)	End Date (4)	Total Allocations (5)	Total Expenditures (6)	Positions Filled (7)	Pre-Hire Training (8)	Post-Hire Training (9)	Trained by Company Instructors (10)	Trained by College Instructors (11)	Company's Expectations Met (Rating) (12)	Training Impact (Rating) (13)	Training Effectiveness (Rating) (14)
<b>CENTRAL CAROLINA</b>													
	3M	02/01/02	06/30/04	42,605	30,371	98	0	98	98	55	4	4	4
	Caterpillar, Inc.	03/01/02	06/30/04	67,576	26,144	112	0	245	55	211	5	5	5
	Saiden Technologies	02/01/02	06/30/04	16,374	7,873	19	0	19	0	19	5	4	4
	Wyeth-Lederle Vaccines	04/15/01	04/14/04	547,833	547,833	233	0	0	112	223	4	4	4
<b>CENTRAL PIEDMONT</b>													
	Ferguson Box	08/01/02	06/30/04	4,591	4,591	32	0	12	0	12	4	4	4
	Vertis, Inc.	08/01/02	06/28/04	38,345	38,344	140	0	225	27	206	4	4	3
<b>CLEVELAND</b>													
	Sara Lee Intimate Apparel	07/01/01	06/22/04	41,730	41,488	870	0	333	252	84	5	5	5
<b>DURHAM</b>													
	Eisai Pharmatechnology, Inc.	08/01/00	06/30/04	130,844	124,718	58	0	58	0	58	5	5	5
	Triumph Boats	03/01/02	06/30/04	57,482	20,137	30	0	30	0	30	5	4	4
<b>FORSYTH</b>													
	Charter Medical, Ltd	08/18/03	06/07/04	11,876	11,876	40	70	40	40	70	5	4	5
<b>GASTON</b>													
	Cataler North America Corporation	12/01/01	06/22/04	85,235	85,234	96	113	62	33	149	5	5	4
	Newworld Manufacturing Company	01/06/03	05/17/04	25,221	25,221	75	0	64	29	58	4	4	4
	Parkdale Mills, Inc.	06/09/03	05/17/04	38,551	38,551	60	0	59	50	9	4	4	4

North Carolina Community College System  
New and Expanding Industry Training  
**Project Completions**  
(Projects completed July 1, 2003 - June 30, 2004)

Community College (1)	Company (Completed Projects) (2)	Start Date (3)	End Date (4)	Total Allocations (5)	Total Expenditures (6)	Positions Filled (7)	Pre-Hire Training (8)	Post-Hire Training (9)	Trained by Company Instructors (10)	Trained by College Instructors (11)	Company's Expectations Met (Rating) (12)	Training Impact (Rating) (13)	Training Effectiveness (Rating) (14)
<b>GUILFORD</b>													
	Banner Pharmacaps, Inc.	01/06/03	06/30/04	52,692	41,129	55	0	55	55	0	5	4	5
<b>HALIFAX</b>													
	Reser's Fine Foods, Inc.	02/01/01	03/24/04	61,120	57,867	200	0	175	175	90	3	3	3
<b>ISOTHERMAL</b>													
	Parkdale Mills	07/01/02	09/15/03	47,355	17,941	163	0	163	163	12	5	5	5
<b>JOHNSTON</b>													
	Novo Nordisk Pharmaceutical	06/01/02	05/05/04	54,762	50,280	32	0	106	0	106	5	5	5
<b>MARTIN</b>													
	Ann's House of Nuts	05/06/02	06/30/04	54,505	49,063	152	0	23	0	23	4	5	4
	McMurray Fabrics, Inc.	11/12/01	12/15/03	68,091	68,091	250	0	88	28	65	NA	NA	NA
<b>MCDOWELL</b>													
	Baxter Health Care Systems	10/08/01	08/10/03	283,330	173,616	287	0	287	169	168	5	5	5
	Coats America	05/01/03	03/22/04	93,660	69,257	115	0	115	115	126	5	4	4
	Crane Resistoflex	06/26/02	07/31/03	64,607	55,964	65	60	42	35	60	5	5	5
<b>MITCHELL</b>													
	Advanced Tubing Technologies	02/12/03	02/20/04	29,518	29,518	55	0	44	36	11	4	4	4
	BestSweet, Inc.	03/01/03	06/24/04	19,771	19,771	68	0	22	0	22	4	4	4

North Carolina Community College System  
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Community College (1)	Company (Completed Projects) (2)	Start Date (3)	End Date (4)	Total Allocations (5)	Total Expenditures (6)	Positions Filled (7)	Pre-Hire Training (8)	Post-Hire Training (9)	Trained by Company Instructors (10)	Trained by College Instructors (11)	Company's Expectations Met (Rating) (12)	Training Impact (Rating) (13)	Training Effectiveness (Rating) (14)
Mitchell cont'd	Trim Systems, LLC	02/03/03	12/18/03	10,935	10,935	70	0	100	8	100	5	5	5
MONTGOMERY													
	Longworth Industries, Inc.	01/12/04	06/30/04	8,568	8,568	24	0	24	24	0	5	4	5
PIEDMONT													
	Tietex Interiors	04/01/03	06/30/04	50,301	19,622	75	0	89	66	37	NA	NA	NA
	Vector Tobacco (USA) Ltd.	07/26/01	12/23/03	99,800	99,483	160	0	82	29	65	5	5	5
PITT													
	Caldwell Design, LLC	05/20/02	01/24/04	16,920	16,490	31	0	26	23	26	5	5	5
RICHMOND													
	Manis Custom Builders	05/01/02	12/18/03	37,611	36,710	250	0	78	78	8	5	5	5
ROCKINGHAM													
	Gildan Activewear UStex	12/01/00	11/17/03	69,275	6,800	22	0	22	12	10	5	5	5
	Loparex	10/28/02	10/28/03	4,596	4,596	12	12	12	12	0	5	4	5
ROWAN-CABARRUS													
	Randall Metals Corporation	03/01/03	06/09/04	8,834	8,490	20	0	33	18	33	4	4	4
SAMPSON													
	Dodgers Industries	02/03/03	05/03/04	26,305	26,018	53	0	53	53	49	5	5	5
	Squires Hardwoods, Kennedy	02/08/02	04/29/04	45,910	44,487	30	0	30	24	12	5	5	5

North Carolina Community College System  
New and Expanding Industry Training  
**Project Completions**  
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Community College (1)	Company (Completed Projects) (2)	Start Date (3)	End Date (4)	Total Allocations (5)	Total Expenditures (6)	Positions Filled (7)	Pre-Hire Training (8)	Post-Hire Training (9)	Trained by Company Instructors (10)	Trained by College Instructors (11)	Company's Expectations Met (Rating) (12)	Training Impact (Rating) (13)	Training Effectiveness (Rating) (14)
<b>SOUTHEASTERN</b>													
	Kroy Building Products	11/15/00	12/30/03	8,722	1,522	64	0	64	51	64	4	4	4
<b>TRI-COUNTY</b>													
	Sioux Tools	11/20/99	10/30/03	222,618	212,797	265	0	265	154	265	5	5	5
<b>VANCE-GRANVILLE</b>													
	Revlon	02/01/01	01/31/04	733,499	671,825	1390	0	1763	922	1492	5	5	5
<b>WAKE</b>													
	Biogen	02/01/01	01/01/04	260,615	197,248	313	0	0	52	298	4	5	4
	John Deere Worldwide C & CE Head	09/07/01	03/07/04	51,408	49,926	210	0	0	0	235	5	5	5
	Nomacorc, LLC	02/01/02	06/30/04	77,493	70,132	85	0	0	98	196	4	4	4
<b>WILKES</b>													
	D & D Display	06/01/03	06/07/04	12,213	12,212	25	0	25	25	3	5	4	4
	Interflex Group-Carolina Division	05/30/01	06/30/04	62,580	62,130	64	171	64	64	171	5	5	5
<b>WILSON</b>													
	Purdue Pharmaceuticals, Inc.	10/06/03	04/19/04	4,620	4,400	24	0	24	0	24	NA	NA	NA
<b>TOTALS</b>	<b>56</b>			<b>4,809,342</b>	<b>4,105,023</b>	<b>7,284</b>	<b>430</b>	<b>5,967</b>	<b>3,984</b>	<b>5,736</b>	<b>4.60</b>	<b>4.40</b>	<b>4.42</b>

(\*) Due to the economic environment, the company did not grow to the projected employment level or the project did not materialize as expected. The project is closed.





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# **New and Expanding Industry Training (NEIT)**



## **Trends and Statistics**

**2003 - 2004**

**H. Martin Lancaster, President**  
**Dr. Larry Keen, Vice President for Economic and Workforce Development**  
**North Carolina Community College System**  
**(919) 807-7100**



## Continuous Improvement Summary Evaluation Projects Completed by July 1, 2003 - June 30, 2004

### Chart 1: Expectations

Extent to which the New and Expanding Industry Training (NEIT) Program met the company's expectations.

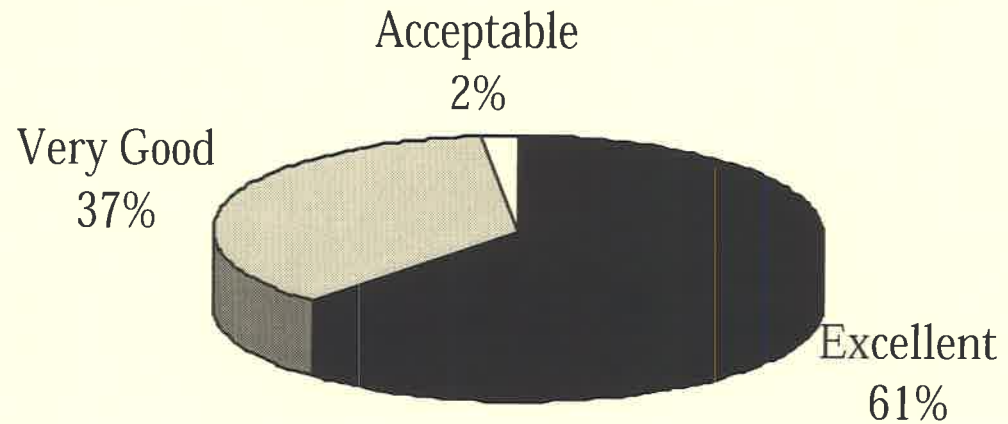
**Average = 4.60**

**N = 52**

**2002-2003:**

**Average = 4.58**

**N = 65**



*Percentages are based on the number of completed summary evaluations (52), rather than the number of completed projects (56).*



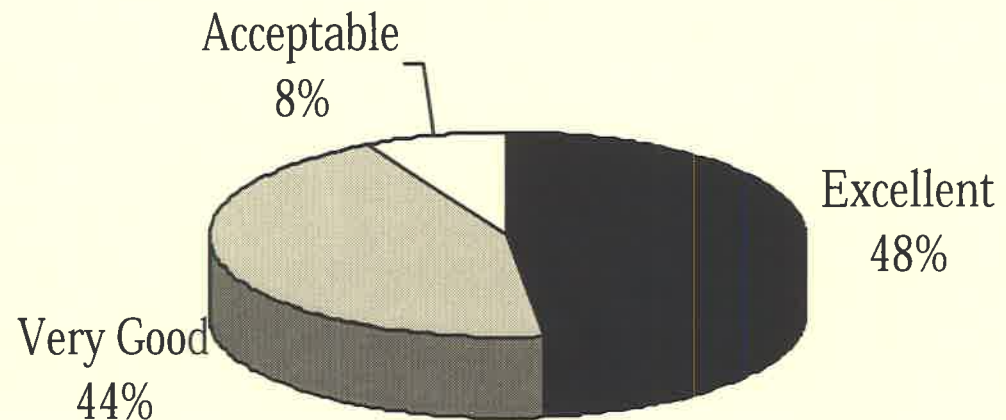
## Continuous Improvement Summary Evaluation Projects Completed by July 1, 2003 - June 30, 2004

### Chart 2: Impact

Overall impact of the  
New and Expanding  
Industry Training (NEIT)  
Program on the  
company's operations.

**Average = 4.40**  
**N = 52**

**2002-2003:**  
**Average = 4.51**  
**N = 65**



*Percentages are based on the number of completed summary evaluations (52), rather than the number of completed projects (56).*



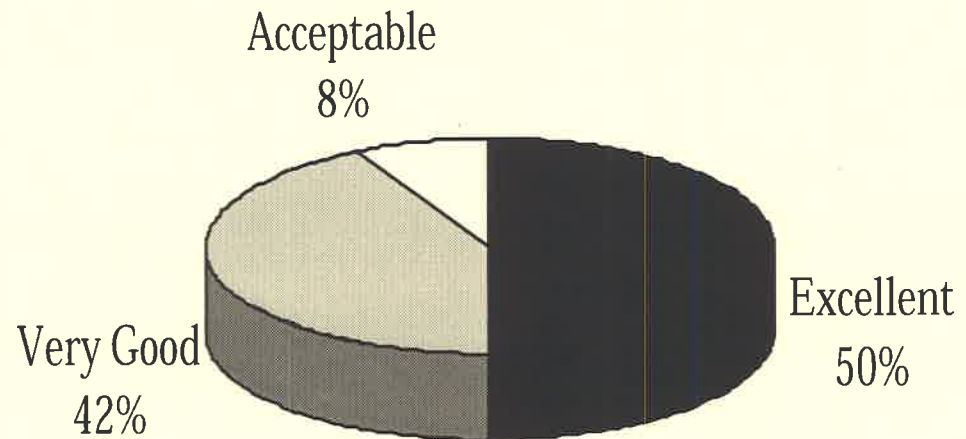
## Continuous Improvement Summary Evaluation Projects Completed by July 1, 2003 - June 30, 2004

### Chart 3: Effectiveness

Overall effectiveness of the New and Expanding Industry Training (NEIT) Program in preparing the company's employees for productivity.

**Average = 4.42**  
**N = 52**

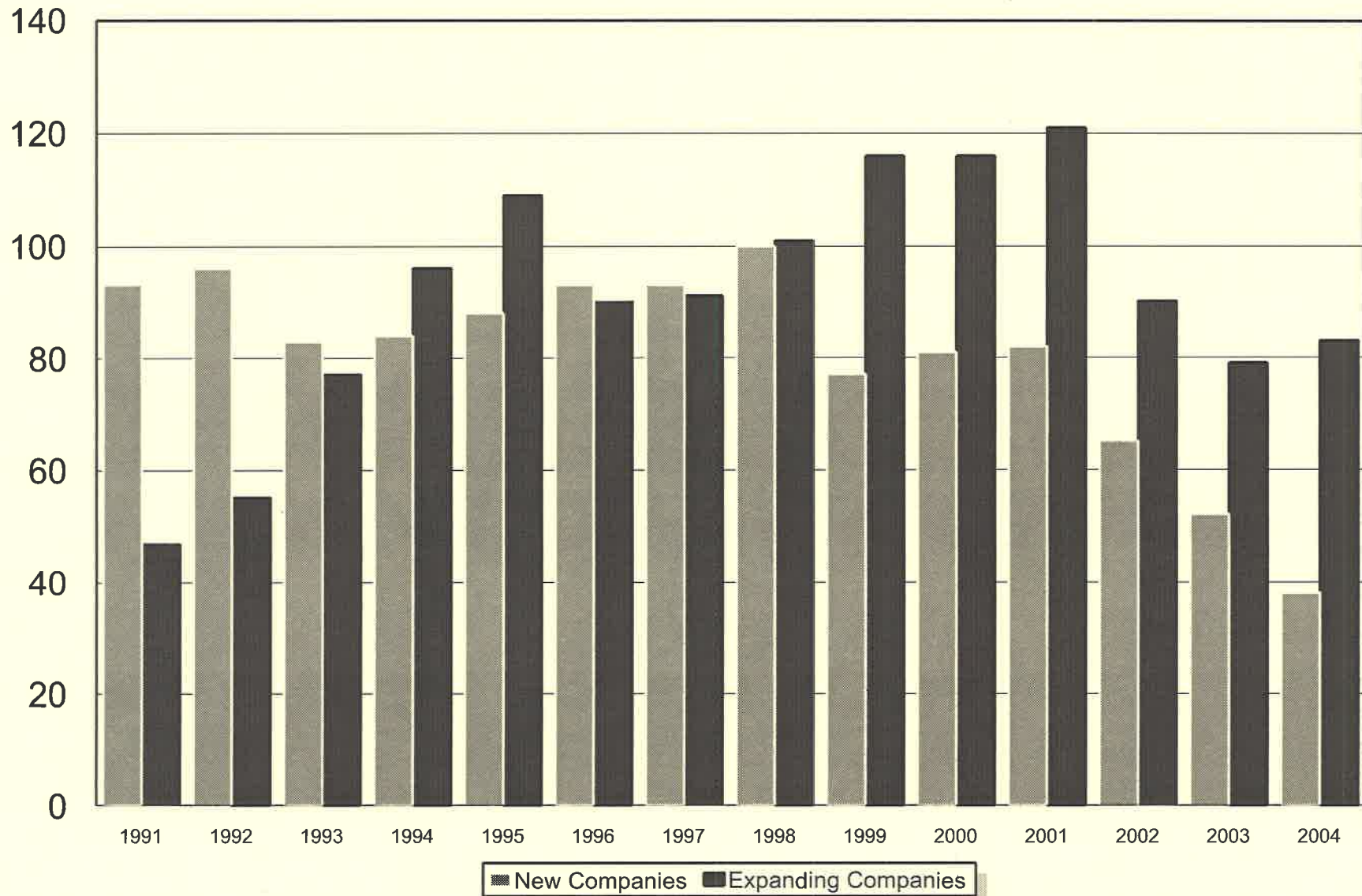
**2002-2003:**  
**Average = 4.45**  
**N = 65**



*Percentages are based on the number of completed summary evaluations (52), rather than the number of completed projects (56).*



## Number of New and Expanding Companies 1991 through 2004





# Rural and Urban Counties

## 2003 - 2004

Chart 1

Number of Projects = 121

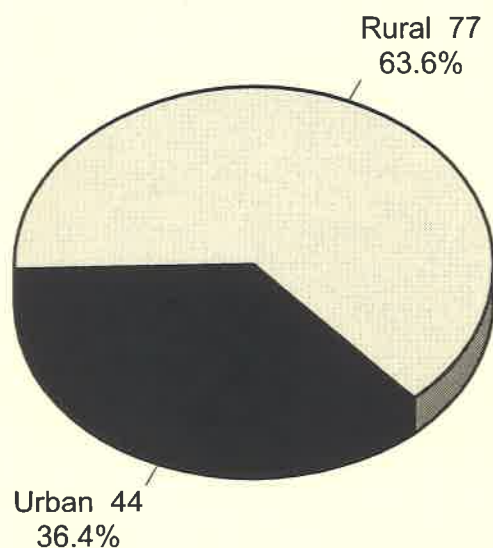


Chart 3

Number of Trainees = 10,117

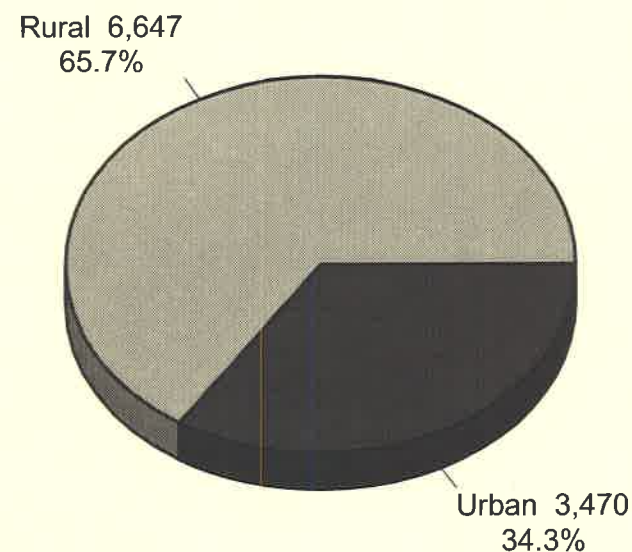
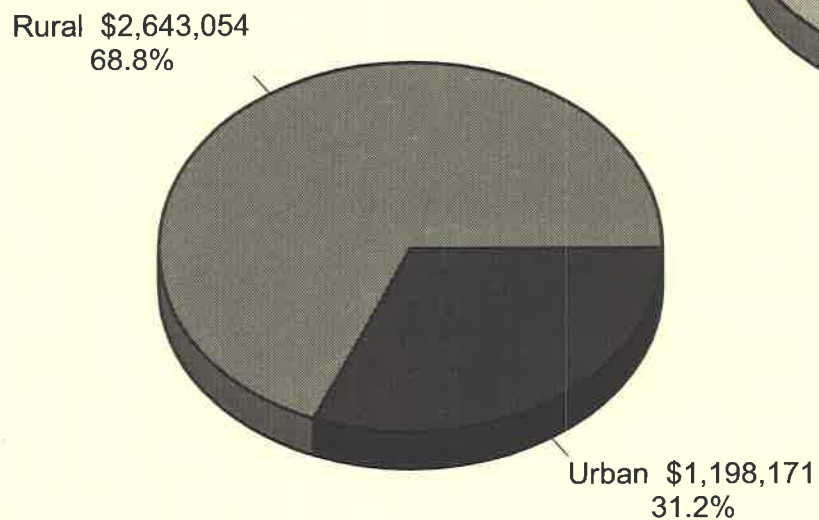


Chart 2

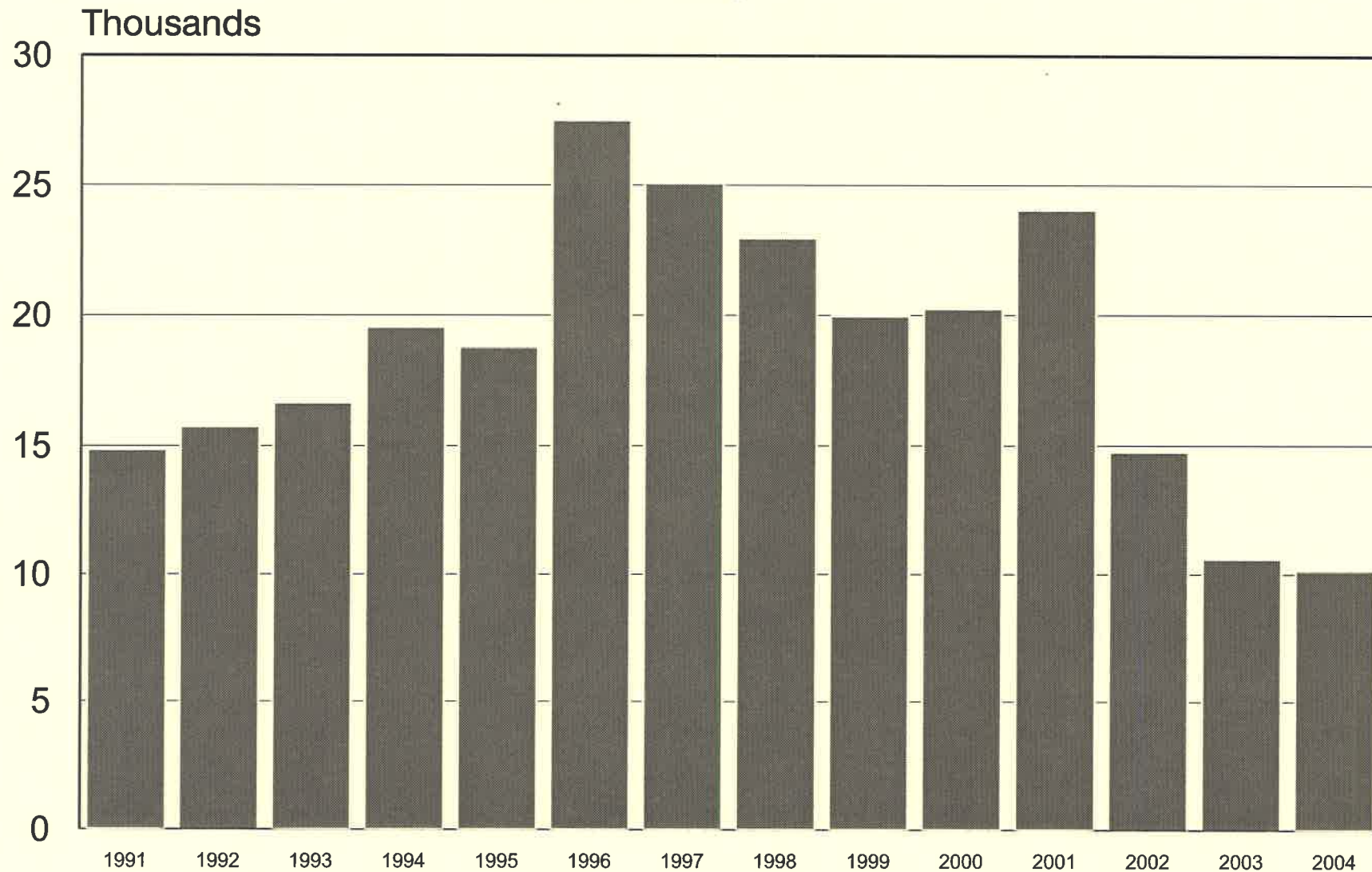
Expenditures = \$3,841,225.22





# Total Number of Trainees

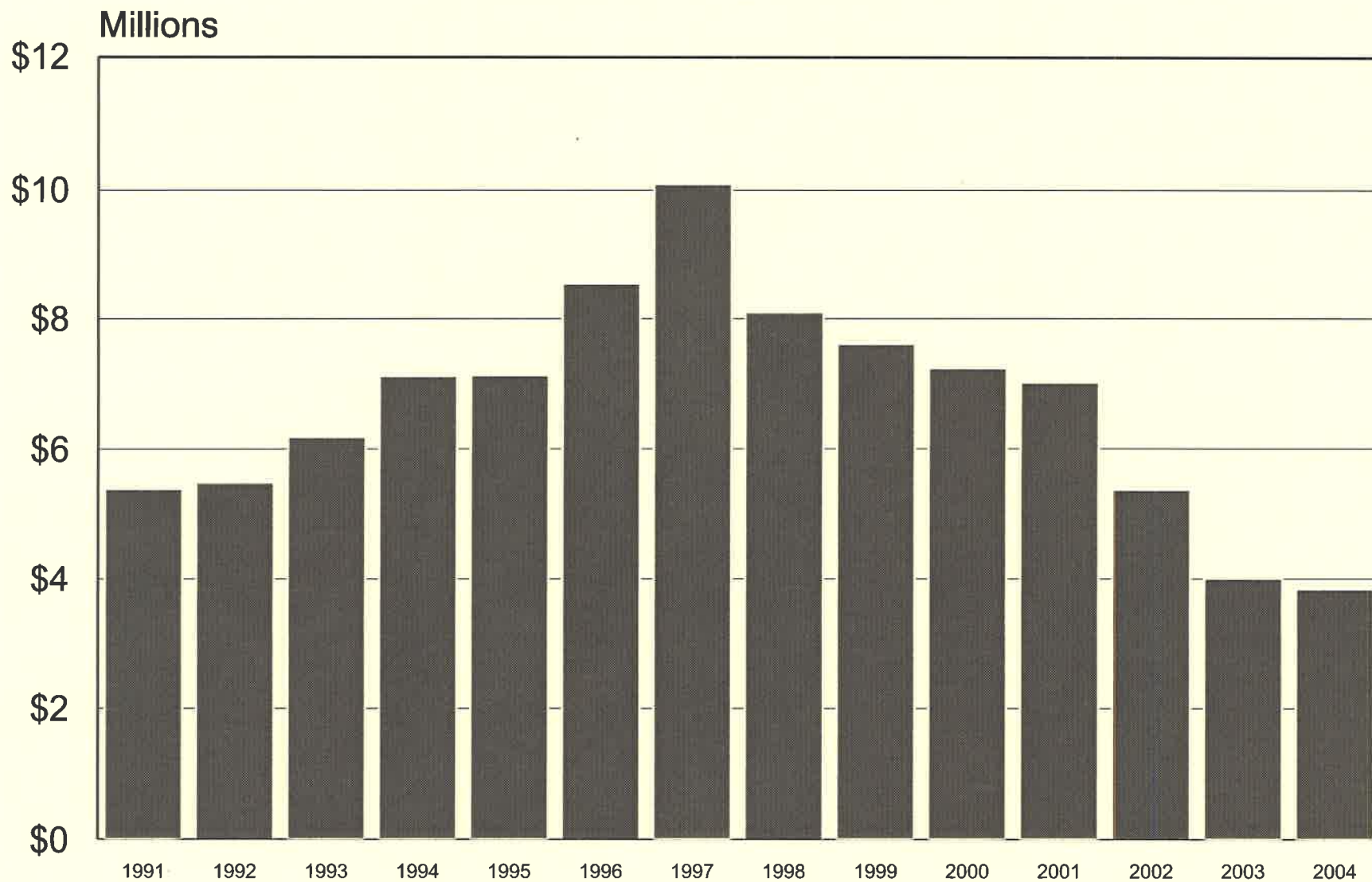
1991 through 2004





# Total Expenditures

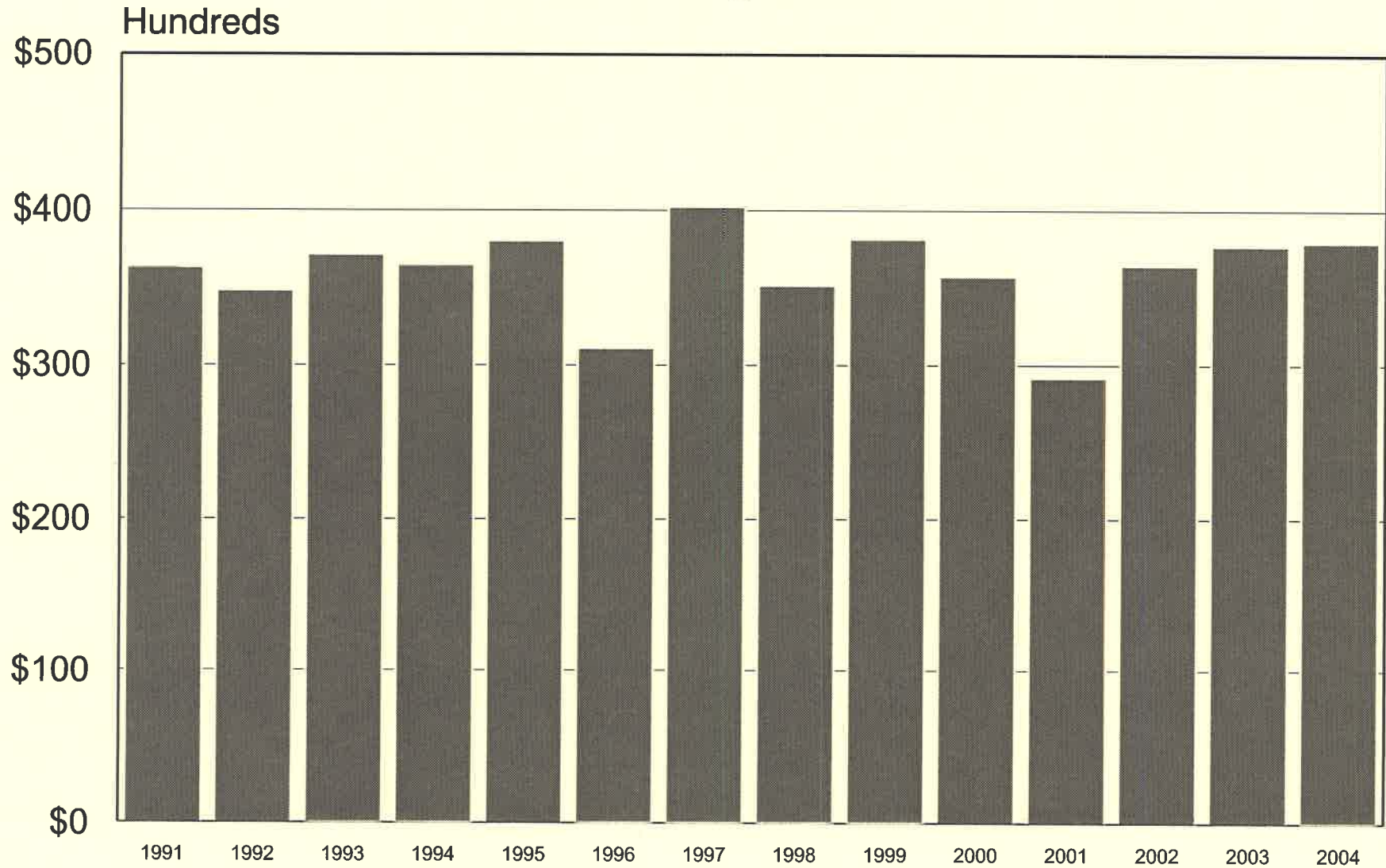
## 1991 through 2004





# Average Expenditure Per Trainee

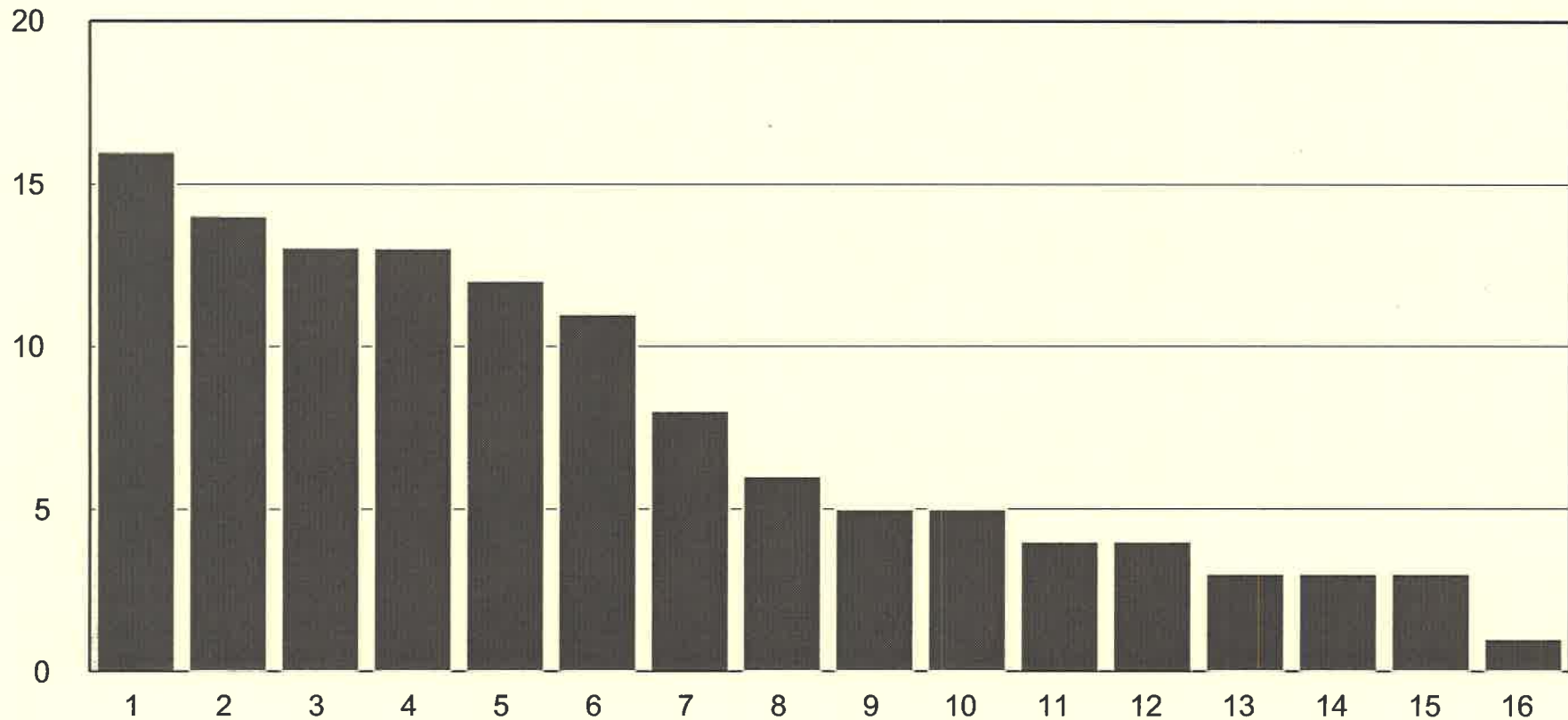
1991 through 2004





# Number of Projects by Industry

2003 - 2004



1 Textiles/Apparel  
2 Pharmaceutical/Medical  
3 Transportation  
4 Plastics/Rubber  
5 Wood/Paper/Printing  
6 Metals

7 Machinery/Equipment  
8 Furniture/Appliances  
9 Warehouse/Distribution  
10 Computers/Electronics/Electrical  
11 Food/Tobacco  
12 Chemical

13 Maritime  
14 Manufactured Housing/Bldg. Materials  
15 Customer Service  
16 Telecommunications/Fiber Optic