

**JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE
AGENDA**

April 25, 2006

10:00 A.M., ROOM 544 Legislative Office Building
Senator Swindell and Representative Yongue, presiding

Welcome and Introductions

Approve Minutes

Communities In Schools

Linda Harrill, President and Chief Executive Officer

Michael Stephens, Executive Vice President and Chief Operating Officer

Report on Disadvantaged Student Supplemental Funding (DSSF)

Dr. Elsie Leak, Associate Superintendent of Curriculum and School Reform
Services, DPI

Philip Price, Associate Superintendent of Financial and Business Services, DPI

Report from Subcommittee on Retirees Return-to-Work Provision

Senator Dannelly and Representative Glazier, Cochairs

Proposed Report, Findings, and Recommendations to 2006 Session

Communities In Schools of North Carolina Helping Kids Stay in School and Prepare for Life

Quick Facts—2004-2005

			Compared to Previous Year
<u>Statistics About Our Youth</u>			
• Youth Receiving Services	80,918	↑	6%
• Case Managed Students	25,076	↑	30%
• Total Student Population at All CIS Sites	178,491	↑	1%
• Percent of Potential Dropouts Staying in School	98%	↑	2%
• Percent Promoted	95%	↑	3%
• Percent Graduated	96%	↑	4%
• Percent Improving Discipline	95%	↑	5%
• Percent Improving Achievement	85%	↑	1%
• Percent Improving Attendance	81%	↓	3%
<u>Statistics About Our Programs</u>			
• Local Programs	36	↑	8%
• Counties Served	57	↑	44%
• Sites Served	411	↑	1%
• Board Members	779	↑	5%
• Community Partners	2,795	↑	24%
• Volunteers	9,169	↓	33%
• Volunteer Hours	320,406	↑	23%
<u>Local Program Funding</u>			
• Grants and Contracts	\$8,741,300	↑	27%
• Cash	\$3,880,694	↑	24%
• In-Kind Donations	\$6,590,921	↑	84%
• Value of Volunteers	\$5,527,004	↑	24%
Total	\$24,739,919	↑	37%

Major Funding Sources (Cash and In-Kind) — Federal Grants, Public Schools, Local Governments, State Agencies, United Way

Value of cash, goods and services leveraged for every dollar invested by the NC General Assembly — \$22.57

Total Cost per Student Served — \$311.26

CISNC State Office Facts

• AmeriCorps Members (working in local program sites)	30	→	
• VISTA Members (working in local program sites)	33	↑	80%
• Annual Budget (FY 2004)	\$1,911,059	↓	7%
◊ Amount Received from NC Legislature (FY 2004)	\$1,167,588	↑	2%





Bottom Line: What are we Asking For?

Presentation to Joint Education Oversight Committee

April 25, 2006

Current Appropriations

▪ Recurring

- ***Department of Public Instruction*** ***\$607,500***
- DJJDP \$181,588
- Governor's Administrative Office \$200,000

Total \$989,088

▪ Non-Recurring

- ***Department of Public Instruction*** ***\$500,000***

Requested Appropriations

▪ Recurring

- ***Department of Public Instruction*** ***\$1,607,500***
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NORTH CAROLINA GENERAL ASSEMBLY
Legislative Services Office

George R. Hall, Legislative Services Officer

Research Division

300 N. Salisbury Street, Suite 545
Raleigh, NC 27603-5925
Tel. 919-733-2578 Fax 919-715-5460

Terrence D. Sullivan
Director

To: Joint Legislative Education Oversight Committee
Subcommittee on Retirees Returning to Work

Senator Dannelly, Co-chair
Representative Glazier, Co-chair

From: Shirley Iorio, Ph D
Legislative Analyst, Research Division

Date: April 24, 2006

Re: Bill Draft 2005-LL-219[v.11]

This proposed legislation makes several changes within the Teachers' and State Employees' Retirement System (TSERS) affecting retirees who return to work:

Section 1. Amends G.S. 135-1 by establishing a "normal retirement age" as follows:

- The age of 60 or older with 25 or more years of creditable service, **or**
- The age of 65 or older with 5 or more years of membership service.

Section 2. Amends G.S. 135-1(20) by rewriting the definition of "retirement" as follows:

- For a member who has reached normal retirement age, retirement means the start of a retirement allowance under the statutory provisions for TSERS.
- For a member who has not yet reached normal retirement age, retirement means the start of a retirement allowance under the statutory provisions for TSERS **and the following:**
 - A complete separation from active service, with no intent or agreement, express or implied, to return to service; **and**
 - A requirement that the member shall not render any service, on a part-time, temporary, substitute, or contractual basis at any time during the total of 25 working days immediately following the effective date of retirement **plus** the longer of the number of days during each of the previous two years that were not scheduled work days or holidays for that member.

Section 3. Amends, G.S. 135-3(8)c, the law that pertains to beneficiaries who retire on an early or service retirement allowance and return to work for an employer that participates in the Retirement System. Currently, a retiree may return to service during the 12-month period immediately following the effective date of retirement or in any calendar year on a part-time, interim, temporary or contractual basis and earn the greater of \$20,000 (adjusted each year for inflation) or 50% of the salary that the person earned during the 12 months of service prior to retirement. If the retiree exceeds this earnings cap, their retirement allowance is suspended as of the first day of the month following the month in which the reemployment earnings exceeded the cap. This proposed legislation adds the following conditions:

- If the beneficiary earns in any one month an amount that exceeds 60% of the average reported monthly compensation, excluding terminal payments, earned during the 12 months of service immediately preceding the effective date of retirement, then their retirement allowance is suspended.*

*Exception. When the beneficiary's employment is for a fixed term of no more than six months **and** is preceded by at least a six-month continuous separation from active service following their retirement.

There is an exemption that allows a beneficiary to be re-employed to teach after retirement and still collect full retirement benefits in addition to their salary. Currently, a beneficiary who is reemployed to teach must be retired at least six months and may not have been employed in any capacity with a public school for at least six months immediately preceding the effective date of reemployment. Also, to be exempt from the postretirement earnings cap, the beneficiary must be employed to teach in a permanent full-time or part-time capacity that exceeds 50% of the applicable workweek in a public school.

This proposed legislation reduces the break-in-service time from six months to the following:

- For a beneficiary who meets either definition of retirement in Section 2 above and who, before the effective date of reemployment, has not been employed in any capacity with a public school at any time during the total of 25 working days immediately following the effective date of retirement **plus** the number of days during the previous 12 months that were not scheduled work days or holidays for that member.

Section 4. Restores the UNC Phased Retirement Program by removing the reemployment restrictions for participants.

Section 5. Requires The University of North Carolina to establish a normal retirement age for the Optional Retirement Program of either 59 ½ or 60 years of age and limit the UNC Phased Retirement Program to persons who have reached that normal retirement age.

Section 6. Allows the North Carolina Community College System to establish for its faculty a phased retirement program similar to the UNC Program.

Section 7. Sets an effective date of July 1, 2006. However, Sections 1 through 3 do not apply to participants in the UNC Phased retirement Program or to members of the phased retirement program established for the faculty of the NC Community College System under Section 6.

GENERAL ASSEMBLY OF NORTH CAROLINA
SESSION 2005

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D

BILL DRAFT 2005-LL-219 [v.11] (4/12)

(THIS IS A DRAFT AND IS NOT READY FOR INTRODUCTION)
4/24/2006 6:22:42 PM

Short Title: Retirees Returning to Work.

(Public)

Sponsors: .

Referred to:

A BILL TO BE ENTITLED

AN ACT TO AMEND THE LAW AFFECTING RETIREES RETURNING TO
WORK.

The General Assembly of North Carolina enacts:

SECTION 1. G.S. 135-1 is amended by adding a new subdivision to read:

"(14a) "Normal retirement age" means the age of 60 or older with 25 or more
years of creditable service or the age of 65 or older with 5 or more
years of membership service."

SECTION 2. G.S. 135-1(20) reads as rewritten:

"(20) "Retirement" means the termination of employment and the complete
separation from active service with no intent or agreement, express or
implied, to return to service. A retirement allowance under the
provisions of this Chapter may only be granted upon retirement of a
member. In order for a member's retirement to become effective in any
month, the member must render no service, including part-time,
temporary, substitute, or contractor service, at any time during the six
months immediately following the effective date of retirement. means:

a. In the case of a member who has reached normal retirement age,
the commencement of a retirement allowance under the provisions
of this Article.

b. In the case of a member who has not yet reached normal retirement
age, the commencement of a retirement allowance under the
provisions of this Article and a complete separation from active
service, with no intent or agreement, express or implied, to return
to service, and subject to the requirement that the member shall not
render any service, whether part-time, temporary, substitute, or
contractor service, at any time during the total of twenty-five

1 working days immediately following the effective date of
2 retirement plus the longer of the number of days during each of the
3 previous two years that were not scheduled work days or holidays
4 for that member."

5 **SECTION 3.** G.S. 135-3(8)c. reads as rewritten:

6 "c. Should a beneficiary who retired on an early or service
7 retirement allowance under this Chapter be reemployed, or
8 otherwise engaged to perform services, by an employer
9 participating in the Retirement System on a part-time,
10 temporary, interim, or on a fee-for-service basis, whether
11 contractual or otherwise, and if such beneficiary earns an
12 amount during the 12-month period immediately following the
13 effective date of retirement or in any calendar year which
14 exceeds fifty percent (50%) of the reported compensation,
15 excluding terminal payments, during the 12 months of service
16 preceding the effective date of retirement, or twenty thousand
17 dollars (\$20,000), whichever is greater, as hereinafter indexed,
18 then the retirement allowance shall be suspended as of the first
19 day of the month following the month in which the
20 reemployment earnings exceed the amount above, for the
21 balance of the calendar year. The retirement allowance of such
22 a beneficiary shall also be suspended as provided in this sub-
23 subdivision if that beneficiary earns in any one month an
24 amount that exceeds sixty percent (60%) of the average
25 reported monthly compensation, excluding terminal payments,
26 earned during the twelve months of service immediately
27 preceding the effective date of retirement, unless the
28 beneficiary's employment resulting in that monthly amount is
29 for a fixed term of no more than six months and is preceded by
30 at least a six-month continuous separation from active service
31 following the beneficiary's retirement. The retirement allowance
32 of the beneficiary shall be reinstated as of January 1 of each
33 year following suspension. The amount that may be earned
34 before suspension shall be increased on January 1 of each year
35 by the ratio of the Consumer Price Index to the Index one year
36 earlier, calculated to the nearest tenth of a percent (1/10 of 1%).

37 The computation of postretirement earnings of a beneficiary
38 under this sub-subdivision, G.S. 135-3(8)c., ~~who has been~~
39 ~~retired at least six months~~ meets either definition of retirement
40 under G.S. 135-!(20) and who, before the effective date of
41 reemployment, has not been employed in any capacity with a
42 public school for at least six months immediately preceding the
43 effective date of reemployment, at any time during the total of
44 25 working days immediately following the effective date of

1 retirement plus the number of days during the previous 12
2 months that were not scheduled work days or holidays for that
3 member, shall not include earnings while the beneficiary is
4 employed to teach in a permanent full-time or part-time
5 capacity that exceeds fifty percent (50%) of the applicable
6 workweek in a public school. The Department of Public
7 Instruction shall certify to the Retirement System that a
8 beneficiary is employed to teach by a local school
9 administrative unit under the provisions of this sub-subdivision
10 and as a retired teacher as the term is defined under the
11 provisions of G.S. 115C-325(a)(5a).

12 Beneficiaries employed under this sub-subdivision are not
13 entitled to any benefits otherwise provided under this Chapter
14 as a result of this period of employment."

15 **SECTION 4.** Section 29.28(f) of S.L. 2005-276 reads as rewritten:

16 **"SECTION 29.28.(f)** Subsections (a) and (b) of this section become effective August
17 1, 2005. Subsection (e) of this section becomes effective November 1, 2005, but does
18 not apply to participants in The University of North Carolina Phased Retirement
19 ~~Program until June 30, 2007.~~ Program. The remainder of this section becomes effective
20 June 30, 2005."

21 **SECTION 5.** The University of North Carolina shall establish a normal
22 retirement age for the Optional Retirement Program of either 59½ or 60 years of age
23 and shall limit the UNC Phased Retirement Program to persons who have reached that
24 normal retirement age.

25 **SECTION 6.** The North Carolina Community College System may establish
26 a phased retirement program for its faculty that functions in a manner similar to The
27 University of North Carolina Phased Retirement Program.

28 **SECTION 7.** This act becomes effective July 1, 2006, but Sections 1 through
29 3 of this act do not apply to participants in The University of North Carolina Phased
30 Retirement Program or to members of the phased retirement program established for the
31 faculty of the North Carolina Community College System under Section 6 of this act.



NORTH CAROLINA GENERAL ASSEMBLY
AMENDMENT

Bill _____

AMENDMENT NO. _____
(to be filled in by
Principal Clerk)

_____ ARH-76 [v.1]

Page 1 of 1

Date _____, 2005

Comm. Sub. [NO]
Amends Title [NO]
2005-LL-219[v.11]

Representative Glazier

- 1 moves to amend the draft bill on page 2, lines 2-3, by rewriting the lines to read:
- 2 "retirement plus the longer of the number of weeks during each of the previous two
- 3 years in which there were no paid days of employment";
- 4
- 5 and on page 3, lines 1-3, by rewriting the lines to read:
- 6 "retirement plus the longer of the number of weeks during each of the previous two
- 7 years in which there were no paid days of employment for that member, shall not
- 8 include earnings while the beneficiary is".
- 9

SIGNED _____
Amendment Sponsor

SIGNED _____
Committee Chair if Senate Committee Amendment

ADOPTED _____ FAILED _____ TABLED _____

Executive Summary

The School-Based Management and Accountability Act of 1995 authorized the selection and training of State Assistance Team members to serve schools designated by the State Board of Education as low-performing. There was a realization that just labeling schools was not sufficient. Schools that were so labeled were provided the support and guidance necessary to improve student academic performance through the work of the teams. The State Assistance Team Program has worked very well for our schools over the past six years.

Even though the State Assistance Team Program has served us well, we now have an expanded need to develop a District Assistance Program. There are two major functions of the District Assistance Program: one is to help LEAs improve their performance composite scores and the other is to assist districts not meeting the No Child Left Behind (NCLB) requirements for Adequate Yearly Progress (AYP). The NCLB requirement that all schools and districts make Adequate Yearly Progress (AYP) has significantly increased the number of schools and districts requiring assistance. Since there are not enough resources for the State to assist an expanding number of schools, there now is a focus on building capacity at the district level. Enhancing and strengthening the capacity at the central office level will enable district staffs to better support their own struggling schools. District assistance is particularly beneficial to districts with limited resources.

The need for assistance to school and LEAs is likely to continue to increase as we move to a new growth model next school year and because of the increased demands brought about by the requirements of No Child Left Behind Act of 2001. The State currently does not have the capacity or resources to deliver the amount of assistance needed to adequately address the needs in the State.

During this school year (2005-06), assistance is being provided to the 16 Leandro districts that are receiving Disadvantaged Student Supplemental (DSS) Funding. There are 43 LEAs designated to be in District Improvement under NCLB. Five of the LEAs receiving DSS funds are also in District Improvement under NCLB and are receiving support through the LEAAP Program. This leaves 38 districts that are in District Improvement for NCLB that are not receiving adequate services. The districts receiving support and assistance are:

1. Edgecombe County Schools
2. Franklin County Schools
3. Halifax County Schools
4. Hertford County Schools
5. Hoke County Schools
6. Hyde County Schools
7. Lexington City Schools
8. Montgomery County Schools
9. Northampton County Schools
10. Elizabeth City-Pasquotank
11. Public Schools of Robeson County
12. Thomasville City Schools
13. Vance County Schools
14. Warren County Schools
15. Washington County Schools
16. Weldon City Schools

This report responds to the questions delineated in the enabling legislation. Information in this report is gleaned from the ongoing work with the designated LEAs.

Table of Contents

Executive Summary	1
Criteria for selecting LEAs and School to receive assistance	4
Measurable Goals and Objectives of LEAAP	5
An explanation of the assistance provided	5
Findings from the Assistance Program	10
Budget	11
Recommendations for the continuance of this program.....	13
Any other information the State Board deems necessary	13
Legislative Charge.....	14

LEA Assistance Program (LEAAP) 2005-06

LEAAP is designed to provide varying degrees of support, guidance and services to LEAs. The level of services is determined by their performance in the ABCs of Public Education and/or No Child Left Behind (NCLB). The primary aims are to improve student academic performance and to build internal capacity in the central office and school leadership for positive change and continual growth. Services and assistance provided to LEAs by DPI will be extended and reinforced by (a) encouraging and promoting the partnering of LEAs to share best practices, programs and strategies; (b) clustering LEAs located in close proximity that have similar needs and demographics; and (c) calling upon partners such as the Center for School Leadership Development. The number of districts served will depend on the availability of resources and will be offered in the order that requests are received. The state is required by federal guidance to provide assistance upon a district's request.

I. Criteria for selecting LEAs and schools to receive assistance

Federal Eligibility Criteria:

- | | |
|-----------------|--|
| First Priority | LEAs with the greatest percentage of schools in corrective action for which an LEA has not carried its statutory and regulatory responsibilities regarding corrective action or restructuring. |
| Second Priority | LEAs with the greatest percentage of schools identified as in need of improvement. |
| Third Priority | Title I LEAs that request additional support and assistance. |

State Eligibility Criteria:

A. Level I – Guided Assistance (Mandated)

- LEAs:
 - entering District Improvement under NCLB;
 - missing the greatest percentage of their AYP targets; and
 - having ABCs' composites in the lowest quintile when ranked according to all LEAs.

B. Level II – Collaborative Assistance (Voluntary)

- LEAs:
 - failing to make Adequately Yearly Progress (AYP) for one year; and
 - having ABCs' composites in the second lowest quintile when ranked according to all LEAs.

C. Level III – Consultative Assistance (Voluntary)

- LEAs:
 - failing to make Adequately Yearly Progress (AYP) and not meeting the criteria outlines in Levels I and II; and
 - having the internal capacity to develop, implement and monitor a plan to address their specific academic needs.

II. Measurable goals and objectives of LEAAP

- An increase in the number of NCLB targets met.
- An increase in the performance of each subgroup.
- A reduction in the number of students scoring at achievement Levels I and II.
- Other objectives:
 - Assist the central office to support schools more effectively, efficiently, and equitably so that all schools are on track to make state and federal accountability goals.
 - Assist the LEA in making data-driven decisions to improve student achievement.
 - Conduct a needs assessment and provide the support and guidance needed to complete a comprehensive plan with short- and long-range goals.
 - Increase the LEA's own capacity to achieve continual district-wide student academic growth over time for all student subgroups.
 - Monitor the progress of the LEA during the implementation of the assistance plan or other support activities.
- Sub objectives include, but are not limited to, developing:
 - Knowledge**
 - greater understanding of the significance of planning
 - greater knowledge of best practices
 - greater knowledge of leadership and the roles of central office staff and school leaders
 - greater knowledge of the tools/processes used in monitoring instruction
 - Skills**
 - increased ability to use data strategically to establish district instructional priorities
 - increased ability to align resources and other district activities to support the instructional priorities
 - increased ability to monitor instructional program
 - Product**
 - a strategic plan or action plan focusing on needs in one or more of the following categories: Instruction and Accountability, Finance, Human Resources and Technology.

III. An explanation of the assistance provided

The LEA Assistance Program (LEAAP) as developed to serve school districts in need of assistance was not implemented as written during the 2004-05 or the 2005-06 school year. The LEAAP program requires that a needs assessment be completed as an initial step in the assistance process. The districts receiving the Disadvantaged Student Supplemental Funding (DSSF) were provided the targets to be addressed as well as a menu of options from which to choose researched-based strategies. The primary areas of focus for these districts are teacher recruitment and retention and reduction in the number of students scoring below grade level. The districts participated for a partial year in 2004-05 and the entire year in 2005-06.

**Districts Served by LEA Assistance Program
During the 2005-06 School Year**

- | | |
|-------------------|----------------------|
| 1. Edgecombe | 9. Northampton |
| 2. Franklin | 10. Pasquotank |
| 3. Halifax | 11. Robeson |
| 4. Hertford | 12. Thomasville City |
| 5. Hyde | 13. Vance |
| 6. Hoke | 14. Warren |
| 7. Lexington City | 15. Washington |
| 8. Montgomery | 16. Weldon City |

LEAAP team members were assigned to work with the local teams. The resources available supported the hiring of twenty-nine (29) part-time contracted team members to work with the sixteen (16) districts for a period of two years, the length of the pilot program. This averages less than two persons per district. For the 2005-06 school year, a three-member Review Team was established to assist the associate superintendent in monitoring the work of the school districts and to work with the traditional high schools located in the district being served. To assist with implementation of the program, the superintendents of the designated districts were asked to set up a local team that included, but was not limited to, the following personnel: the superintendent, the assistant superintendent or director of instruction, the finance officer, human resources director, and the testing coordinator. The LEAAP and local teams have regularly scheduled quarterly meetings throughout the year to discuss progress and problem solve. These meetings also afford the superintendents the opportunity to share strategies that are working well in their districts and to hear about other programs that are providing benefits in other districts.

Some of the other responsibilities of the LEAAP team members included

- attending orientation/training;
- assisting with the preparation of action and budgets plans;
- monitoring the implementation of the action plan;
- reviewing and approving budget amendments before their submission;
- assisting with progress reports;
- providing support and guidance as needed by the assigned LEAs;
- attending quarterly sharing/training meetings;
- maintaining a log of activities;
- making recommendations when appropriate;
- working with LEAs on preparation of progress reports and submission of other information;
- informing DPI supervisor of any barriers or challenges that required additional support;
- making an onsite visit at least weekly;
- working to support and build capacity in the central office staff; and
- providing input into the evaluation process for these two pilot years of LEAs receiving additional funding.

**Chronology of Major Activities
2004-05**

Date	Activity
2004	General Assembly provided \$500,000 to contract with LEAAP Team Members. A recommendation was made to double this amount, but was not granted.
July 29, 2004	Governor Easley authorized the expenditure of \$12 million to pilot the Disadvantaged Student Supplemental Funding (DSSF) Program. The eleven LEAs funded included Edgecombe County, Halifax County, Hertford County, Hoke County, Lexington City, Northampton County, Thomasville City, Vance County, Warren County, Washington County and Weldon City.
July –August 2004	Contracted with 29 LEAAP Team Members.
August 19-20, 2004	LEAAP team member orientation/training session.
September 3, 2004	Orientation Meeting with LEAAP Districts and Team Members. LEAAP team members began their work with their assigned school districts.
October 4-5, 2004	Action and Budget Plans brought to the State Board of Education for review and approval.
September 2004	Governor authorizes the expenditure of an additional \$10 million to fund five LEAs which included Elizabeth City/Pasquotank, Franklin County, Hyde County, Montgomery County, and Robeson County.
November 2, 2005	Orientation session held with the five districts and the LEAAP team members. Robeson County did not attend.
November 23, 2005	Special orientation session held for Robeson County and its LEAAP Team members. LEAAP team members began their work with this school district.
December 1-2, 2004	Action and Budget Plans for four of the five districts brought to the State Board for review and approval.
January 5-6, 2005	Action and Budget Plans for Robeson County brought to the State Board for review and approval.
January 25, 2005	LEAAP team members sharing and networking session.
February 9, 2005	At the request of the LEAAP team leader, visited with Thomasville City Schools to see how the DSS funds were being expended and the positive collaboration that had been established between the local team and the LEAAP team.
March 2005	Progress Report submitted by the districts.
March 2005	Monthly LEAAP updates to the State Board began.
April 13, 2005	LEAAP team members meeting.
April 29, 2005	Visited Thomasville City to visit the remainder of the schools.
June 2, 2005	LEAAP team meeting.
June 14-15, 2005	Exit conferences with LEAAP team members.
June 2005	Exit survey sent to districts to complete.

**Chronology of Major Activities
July – March, 2005-06**

Date	Activity
July 2005	Established a Review Team to monitor the work of the LEAAP teams and progress of the districts.
August 3, 2005	LEAs prepared their action and budget plans for submission to the State Board of Education for approval. Action and Budget Plans for eleven of the sixteen Leandro districts taken to the State Board for approval on First Reading.
August 5, 2005	Information meeting with Local and LEAAP Team members.
August 10-12, 2005	LEAAP Team members – Professional Development.
September 2005	Action and Budget Plans for the remaining five Leandro district taken to the State Board for approval on First Reading.
October 4, 2005	Quarterly meeting with Local and LEAAP Team members.
October 13, 2005	Orientation meeting with high schools (high schools located in the Leandro districts that were on Judge Manning's and the Governor's list). Superintendents, central office staff, board members and high school administrators participated.
October 14, 2006	High School Assistance meeting (Associate, Review Team and other staff). Decided to focus on the core areas and school leadership.
December 8, 2005	LEAAP Team members meeting.
January 13, 2006	LEAAP and Local Team members quarterly meeting (morning). Judge Manning as special guest.
January 13, 2006	LEAAP Team members meeting (afternoon).
March 17, 2006	LEAAP and Local Team member quarterly Meeting (morning).
March 17, 2006	LEAAP Team members meeting (afternoon).

**Services Rendered to NC School Districts by LEAAP Review Team Members
2005-2006**

Date	Activity
October 2005	Met with 10 LEAAP Teams to discuss roles and responsibilities of the Review Team and procedures for monitoring districts' Action Plans.
November 2005	<p>Conducted four follow-up visits to monitor implementation of Action Plans, CORE area training, and leadership training. Provided specific recommendations and strategies for school improvement (Lexington City, Weldon City, Hertford County, Warren County).</p> <p>Attended leadership training sessions provided by the LEAAP Team members in Montgomery County.</p>
December 2005	Conducted four follow-up visits to monitor implementation of Action Plans, Core Area Training, and leadership training. Provide specific recommendations and strategies for school improvement (Plymouth High, Northampton, Lexington City, and Weldon City).
January 2006	Held seven meetings with superintendents, central office staffs and LEAAP team members to monitor the Action Plans and review revisions to those plans (Franklin, Hyde, Elizabeth City/Pasquotank, Robeson, Washington, Halifax, Vance, Edgecombe, Washington, Northampton).
February 2006	<p>Held four meetings with LEAAP team members and central office staffs to review the districts' Action Plans (Lexington, Thomasville, Vance, Halifax).</p> <p>Conducted eight monitoring visits, which included review of school-level Action Plan and classroom monitoring. Provided specific recommendations and strategies for school improvement (Plymouth, Northeastern, Weldon City (2), Warren County, Northampton West (2), and Hertford County).</p>
March 2006	<p>Met with central office staffs concerning instructional organization and budget (Warren).</p> <p>Participated in meeting with LEAAP team members and central office staff (Montgomery County).</p>

Since we only had twenty-nine part-time LEAAP team members to serve during 2004-05 and 2005-06, we are not able to provide adequate services to the forty (40) LEAs in improvement because of No Child Left Behind. This is one of our limitations; there are many more schools and LEAs requiring assistance than there are resources available to support the need. Additional resources are needed in order to set up a program that meets the needs of the LEAs and schools requiring assistance.

The assistance process is rewarding, but also difficult at times. Not all local personnel accept assistance or recommendations willingly. Sometimes attendance by LEAs at established meetings is not as consistent as it should be. In 2005-06, a LEAAP Review Team was established to conduct monitoring visits to improve effectiveness and bring more accountability.

IV. Findings based on implementation of the various aspects of the District Assistance Program

Effective Practices

- A formal evaluation is in process and should be completed December 2006.
- Practices that are identified through the evaluation process that prove to be effective in improving student achievement will be disseminated to all LEAs.
- Strategies that improve teacher recruitment and retention will also be shared.
- Sharing and distribution of these practices should occur at the conclusion of the evaluation process.

Funding/Resources

- Funds available (\$500,000) were adequate for 2004-05 because the team members did not serve an entire year, but is not sufficient to support this program for the entire 2005-06 school year. The funding amount should be increased because the number of schools and districts requiring assistance is increasing annually.
- The Agency does not have enough human resources to provide the service, technical assistance, coaching and other follow-up support required to implement an effective district assistance program statewide and meet the other demands for school assistance.
- Funding resources are also needed to train team members to serve and provide technical assistance effectively.
- By the end of February 2006, the LEAAP budget was in deficit. This year, ten high schools located in the Leandro districts are also receiving services. State Assistance Team funding is being used to subsidize the LEAAP budget.
- Supporting the deficit with Assistance Team funds may not be possible next year because of the anticipated increase in schools to be serviced under the new growth model for state accountability.

Training Selection/Preparation

- LEAAP Teams should include persons with expertise in curriculum, accountability, finance, human resource management, and who demonstrate excellent interpersonal skills.
- Teams serving districts can be of variable sizes (two – four members), depending on the expertise of the team members, on the size of the district, and the level and intensity of assistance required.
- Resources should be available to provide quality training for team members (two-four weeks).
- Geographic location is sometimes a barrier in selecting and hiring team members.
- Even though team members bring experiences and knowledge, training is critical to establishing a process for assistance, a common philosophy and knowledge base and delineation of expectations.

Local Team Needs

- Local Teams should be provided training that includes
 - roles and responsibilities of effective central office staff members;
 - data analysis;
 - making data-driven decisions;
 - monitoring school/classrooms; and
 - knowledge of researched-based best practices.

V. Budget

2005-2006 LEA Assistance Program (LEAAP) Projected Cost

Statutory Reference: Senate Bill 622, Section 7.24 authorizes the use of appropriated funds (\$500,000) to provide assistance to the State's low-performing LEAs and to assist schools in meeting adequate yearly progress in each subgroup identified in the NCLB Act of 2001.

REVENUES	Funds Available	Actual Expenditures	Projected Expenditures	TOTAL
Direct Appropriation Current Year (reflects agency-wide 1% reduction)	\$495,000			
Carryover Unspent Funds Previous Year	364,806			
Total Funding Available	\$859,806			
OBLIGATIONS				
Salaries for 27 Contracted Team Members: Contracted Members		\$ 501,005	\$ 292,733	\$ 793,738
Operating Support:				
Training		14,183	1,700	15,883
Non-Employee Transportation		98,577	50,895	149,472
Non-Employee Subsistence		25,409	10,341	35,750
Support Costs		2,157	212	2,369
Total Operating Support		140,325	63,148	203,473
Projected Cost of LEAAP Teams 2005-06		\$ 641,330	\$ 355,881	997,211
Deficit to be funded from Assistance Team				\$ (137,405)

2005-2006 Assistance Team Projected Cost

Statutory Reference: Senate Bill 622, Section 7.23 authorizes the State Board of Education to use funds appropriated to the State Public School Fund for Assistance Teams to low performing schools.

REVENUES	Funds Available	Actual Expenditures	Projected Expenditures	TOTAL
Assistance Teams Direct Appropriation	\$ 2,944,069			\$ 2,944,069
Staff Development	1,250,000			1,250,000
Instructional Support	1,922,688			1,922,688
TOTAL FUNDS AVAILABLE FOR BUDGET	\$ 6,116,757			\$ 6,116,757
OBLIGATIONS				
Salaries & Contract Cost of 51 Team Members:				
Salaries & Benefits		\$ 2,220,229	\$ 1,443,149	\$ 3,663,377
Contracted Members		319,109	140,528	459,637
Total Salaries		2,539,337	1,583,677	4,123,014
Operating Support:				
Academic/Wkshp Services		10,704	1,000	11,7
Misc. Contractual Services		150,751	5,248	155,9
Maintenance Agreement		5,523	-	5,523
Room Rental		66,187	800	66,987
Equipment Rental		11,059	500	11,559
Non-Employee Transportation		469,224	151,622	620,845
Non-Employee-Subsistence		347,103	119,765	466,868
Support Costs		45,469	4,250	49,719
Equipment and Other		5,348	15,237	20,585
Total Operating Support		1,111,367	298,422	1,409,789
Projected Cost of Assistance Teams 2005-06		\$ 3,650,704	\$ 1,882,098	5,532,802
Total Revenues Remaining After All Obligations				\$ 583,955

VI. Recommendations for the continuance of this program

1. Continue the LEA Assistance Program and expand it to
 - meet the No Child Left Behind requirement for states to provide assistance to districts in LEA improvement. Currently there are 43 in this category, and
 - provide support and assistance to systems having limited staff capacity and resources to assist their own schools.
2. Provide additional funds in the future to support the growing number of LEAs requiring assistance.
3. Establish legislation to support the district assistance process and procedures similar to that which supports the state assistance team process.
4. Increase the funding for this effort to an adequate level to handle contractors, training, travel, quarterly meeting expenses, professional development for local teams and other needs.

VII. Any other information the State Board deems necessary

LEAAP was developed to support and provide assistance to LEAs with the lowest performance composites as measured by the ABCs of Public Education and to meet AYP as required by No Child Left Behind. The program developed and presented below grew out of the work with Hoke County and Weldon City. Also, six years of work with the State Assistance teams provided excellent information and experiences to help shape the LEA Assistance Program. The Associate Superintendent for Curriculum and School Reform Services was charged with the responsibility of taking all of this work, the model she developed for the Title I program along with the model developed by Dr. Sammie Campbell Parrish and designed one model to serve as the LEA Assistance Program. As with the Assistance Team program, refinements and minor changes are made along the way as experiences with the model dictate for the continuous improvement of the program. Changes can also be made based on input provided by the State Board of Education as this agenda item is discussed.

The LEAAP Assistance model as written in its final form is fully described on the subsequent pages. It provides for three levels of service and assistance in order to recognize and accommodate the varying levels of resources and capacity available in the LEAs. Based on our experience with the Leandro districts, there may be some further refining of the model prior to implementation with districts in NCLB District Improvement. The LEAAP Team members will serve the DSSF districts until June 2006, after which they will begin serving the districts in NCLB LEA improvement. If additional funding is provided to the DSSF districts in the future, they will continue to receive guidance and support in the writing of their annual action and budget plans as well as continue to have the quarterly meetings to share and problem solve.

GENERAL ASSEMBLY OF NORTH CAROLINA

SESSION 2005

SESSION LAW 2005-276

SENATE BILL 622

AN ACT TO MAKE BASE BUDGET APPROPRIATIONS FOR CURRENT OPERATIONS OF STATE DEPARTMENTS, INSTITUTIONS, AND AGENCIES, AND FOR OTHER PURPOSES.

The General Assembly of North Carolina enacts:

PART I. INTRODUCTION AND TITLE OF ACT

LEA ASSISTANCE PROGRAM

SECTION 7.24. Of the funds appropriated to the State Public School Fund, the State Board of Education shall use five hundred thousand dollars (\$500,000) for the 2005-2006 fiscal year and five hundred thousand dollars (\$500,000) for the 2006-2007 fiscal year to provide assistance to the State's low-performing Local School Administrative Units (LEAs) and to assist schools in meeting adequate yearly progress in each subgroup identified in the No Child Left Behind Act of 2001. The State Board of Education shall report to the Office of State Budget and Management, the Fiscal Research Division, and the Joint Legislative Education Oversight Committee on the expenditure of these funds by May 15, 2006, and by December 15, 2007. The report shall contain: (i) the criteria for selecting LEAs and schools to receive assistance, (ii) measurable goals and objectives for the assistance program, (iii) an explanation of the assistance provided, (iv) findings from the assistance program, (v) actual expenditures by category, (vi) recommendations for the continuance of this program, and (vii) any other information the State Board deems necessary. These funds shall not revert at the end of each fiscal year but shall remain available until expended for this purpose.

EFFECTIVE DATE

SECTION 46.6. Except as otherwise provided, this act becomes effective July 1, 2005. In the General Assembly read three times and ratified this the 11th day of August, 2005.

s/ Beverly E. Perdue
President of the Senate

s/ James B. Black
Speaker of the House of Representatives

s/ Michael F. Easley
Governor

Approved 10:10 a.m. this 13th day of August, 2005



Public Schools of North Carolina
North Carolina Department of Public Instruction

Formula for Disadvantaged Children
Allotment Comparison

Line #	Region #	Region Name	LEA No.	LEA Name	\$ per Child	04-05 ADM	FY 04-05 Allotment	FY 05-06 ADM	FY 05-06 Estimated Allotment
1	5	Central	291	Lexington City	250.00	3,162	790,500	3,067	766,750
2	5	Central	292	Thomasville City	250.00	2,666	666,500	2,538	634,500
3	3	North Central	330	Edgecombe County	250.00	7,591	1,897,750	7,615	1,903,750
4	3	North Central	350	Franklin County	250.00	7,877	1,969,250	7,989	1,997,250
5	3	North Central	420	Halifax County	250.00	5,428	1,357,000	5,133	1,283,250
6	3	North Central	422	Weldon City	250.00	1,078	269,500	1,058	264,500
7	1	Northeast	460	Hertford County	250.00	3,606	901,500	3,534	883,500
8	4	South Central	470	Hoke County	250.00	6,593	1,648,250	6,977	1,744,250
9	1	Northeast	480	Hyde County	250.00	670	167,500	651	162,750
10	4	South Central	620	Montgomery County	250.00	4,502	1,119,500	4,513	1,128,250
11	3	North Central	660	Northampton County	250.00	3,254	813,500	3,175	793,750
12	1	Northeast	700	Elizabeth City/Pasquotank	250.00	5,902	1,475,000	5,976	1,494,000
13	4	South Central	780	Robeson County	250.00	24,134	6,033,000	24,427	6,106,750
14	3	North Central	910	Vance County	250.00	8,157	2,039,250	8,095	2,023,750
15	3	North Central	930	Warren County	250.00	3,110	777,500	3,084	771,000
16	1	Northeast	940	Washington County	250.00	2,155	538,750	2,121	530,250
Total						89,885	\$ 22,464,250	89,953	\$ 22,488,250

DRAFT

**JOINT LEGISLATIVE
EDUCATION OVERSIGHT COMMITTEE**



***REPORT TO THE
2006 GENERAL ASSEMBLY
OF NORTH CAROLINA***

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TABLE OF CONTENTS

LETTER OF TRANSMITTAL	i
COMMITTEE MEMBERSHIP	ii
COMMITTEE PROCEEDINGS	1
COMMITTEE RECOMMENDATIONS	6
ARTICLE 12H OF CHAPTER 120 OF GENERAL STATUTES.	10
LEGISLATIVE PROPOSAL I – A BILL TO BE ENTITLED AN ACT TO AMEND THE FUTURE TEACHERS OF NORTH CAROLINA SCHOLARSHIP LOAN FUND BY ADDING FIFTY SCHOLARSHIP LOANS FOR STUDENTS WHO AGREE TO BECOME CERTIFIED IN MATH OR SCIENCE, TEACH FULL-TIME IN THAT AREA IN A NORTH CAROLINA PUBLIC SCHOOL FOR THREE YEARS WITHIN FIVE YEARS AFTER GRADUATION, AND MEET CERTAIN OTHER REQUIREMENTS	12
LEGISLATIVE PROPOSAL II – A BILL TO BE ENTITLED AN ACT TO AMEND THE LAW AFFECTING RETIREES RETURNING TO WORK.....	15
LEGISLATIVE PROPOSAL III – A BILL TO BE ENTITLED AN ACT TO IMPLEMENT A RECOMMENDATION OF THE JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE TO ENCOURAGE THE CONSTITUENT INSTITUTIONS OF THE UNIVERSITY OF NORTH CAROLINA TO REDESIGN THEIR MATHEMATICS AND SCIENCE TEACHER PREPARATION PROGRAMS, AND TO MAKE AN APPROPRIATION	21
LEGISLATIVE PROPOSAL IV – A BILL TO BE ENTITLED AN ACT TO PROVIDE STATE CONTRACTUAL SCHOLARSHIP FUND GRANTS AND LEGISLATIVE TUITION GRANTS FOR STUDENTS WHO HAVE BACHELOR'S DEGREES BUT ARE PURSUING LICENSURE AS NURSES OR TEACHERS.....	24

STATE OF NORTH CAROLINA

JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE



April 25, 2006

TO THE MEMBERS OF THE 2006 GENERAL ASSEMBLY:

Attached for your consideration is the report to the 2006 General Assembly. This report was prepared by the Joint Legislative Education Oversight Committee pursuant to G.S. 120-70.81.

Respectfully submitted,

Senator A.B. Swindell
Cochair

Representative Doug Yongue
Cochair

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2005-2006

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Sara Kamprath
Drupti Chauhan
Dee Atkinson

Mo Hudson, Committee Assistant
Katie Stanley, Committee Assistant

COMMITTEE PROCEEDINGS

The Joint Legislative Education Oversight Committee held 11 meetings.

November 29, 2005

Budget/Authorizing Legislation/Studies

Robin Johnson, Committee Counsel

Spotlight on 2005 Education Legislation

Dr. Shirley Iorio, Committee Analyst

Teacher Shortage

Dr. Kathy Sullivan, Director, Human Resource Management/Quality Professionals
NC Department of Public Instruction

Teacher Working Conditions Survey

Eric Hirsch, Executive Director
Center for Teaching Quality
Dr. Larry Price, Superintendent
Wilson County Schools

Teacher Recruitment/Retention Proposals

Report and Recommendations from the State Board of Education Teacher
Retention Task Force
Dr. Jane Norwood, Vice Chairman, State Board of Education, and Chairman of Task Force

Governor's Office

Ann McArthur, Teacher Advisor
Dan Gerlach, Senior Policy Advisor for Fiscal Affairs

North Carolina Association of Educators
Eddie Davis, President

Professional Educators of North Carolina
Dr. Ellen Greaves, Executive Director

November 30, 2005

Proposal for Funding for Lateral Entry Teachers/Nurses

Dr. A. Hope Williams, President, N.C. Independent Colleges and Universities

Low-Wealth Funds

Lydia Prude, Section Chief, School Allotments, Financial and Business Services, Department of Public
Instruction
Alexis Schauss, Section Chief, Information Analysis and Reporting, Financial and Business Services,
Department of Public Instruction
Dr. Shirley B. Prince, Superintendent, Scotland County Schools
Dr. Norman W. Shearin, Jr., Superintendent, Vance County Schools

DPI Contract Positions

Philip Price, Associate Superintendent, Financial and Business Services, Department of Public Instruction

January 10, 2006

Erskine Bowles, President, University of North Carolina

Joint Distance Learning Initiatives Between the Community Colleges and Universities

Delores Parker, Vice-President for Academic and Student Services, NC Community College System

Alan Mabe, Vice-President for Academic Planning, UNC General Administration

Robyn Render, Vice-President for Information Resources and Chief Information Officer, UNC General Administration

Sandra Williams, Vice-President for Administration, NC Community College System

School Employees' Salary Structure

Alexis Schauss, Chief, Information Analysis and Reporting Section, DPI

NC Teaching Fellows Program

Jo Ann Norris, Associate Executive Director, NC Public School Forum

Recommendations from the Summit on National Board Certified Teachers

January 11, 2006

College Access and Financial Aid

Dr. Bobby Kanoy, Associate Vice President Academic Affairs, UNC General Administration

Brian Williams, Director of Technology and Internet Services, CFNC and

Susan McCracken, Resource and Partnership Development, GEAR UP NC

Tony Tyson, Senior at Green County High School

Dr. Steve Brooks, Executive Director, State Education Assistance Authority

Return to Work Following Retirement

Leslie Winner, UNC Vice President for Legal Affairs/General Counsel

Dr. Gordon Burns, President, NC Association of Community College Presidents, and President, Wilkes Community College

Dr. Ed Wilson, President, Wayne Community College

Katherine Joyce, Assistant Executive Director, Association of School Administrators

February 8, 2006

June Atkinson, Superintendent of Public Instruction

Global Education

Dr. Kenneth E. Peacock, Chancellor, Appalachian State University

Millie Ravenel, Executive Director, The Center for International Understanding

Robert Phay, Director, World View – An International Program for Educators – The University of North Carolina at Chapel Hill

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

Dr. Elsie Leak, Associate Superintendent, Curriculum and School Support Services, Department of Public Instruction

Science Education

Dr. Elsie Leak, Associate Superintendent, Curriculum & School Support Services, DPI

Christine Boytos, Associate Director for Community and Business Management, GlaxoSmithKline, Inc.

Brenda Evans, Director, North Carolina Infrastructure for Science Education (NC-ISE)

Dr. Sam Houston, Jr., President and Chief Executive Officer, North Carolina Science, Mathematics, and Technology Education Center

LEA Consolidation

Adam Levinson, Fiscal Analyst, Fiscal Research Division

The North Carolina New Schools Project

Dr. Tony Habit, Executive Director, New Schools Project

NC Wise Update

Philip Price, Associate Superintendent, Financial & Business Services, DPI

**March 8, 2006
Wilson and Nash Counties**

Wilson Technical Community College

Dr. Rusty Stephens, President, Wilson Technical Community College

Overview of Wilson Technical Community College and the transformation to a "green campus"

Mr. Hank Widmer, Director, Eastern North Carolina School for the Deaf

Overview and update on the Eastern North Carolina School for the Deaf

Wells Elementary School

Dr. Larry Price, Superintendent, Wilson County Schools

Impact Schools: The Integration of Technology into Instruction

The Honorable Beverly Perdue, Lieutenant Governor

Business Education Technology Alliance (BETA) Report

Nash Community College

Dr. Bill Carver, President, Nash Community College

Ms. Fay Agar, Principal, Nash-Rocky Mount Middle College High School

Overview of Nash-Rocky Mount Middle College High School

Ms. Sylvia Harriss, Director, Communities in Schools of the Rocky Mount Region

Red Oak Middle School

Dr. Rick McMahon, Superintendent, Nash-Rocky Mount Schools

School Uniforms and Discipline

March 20, 2006

Requests for Non-Budget Items

Erskine Bowles, President, The University of North Carolina

June Atkinson, Superintendent, Department of Public Instruction

Martin Lancaster, President, The North Carolina Community College System

Positive Behavior Supports Program

Mary Watson, Director, Exceptional Children's Division, Department of Public Instruction

March 21, 2006

Invitation to Legislators Retreat

Lisa Guckian, The James B. Hunt, Jr. Institute for Educational Leadership and Policy

Status Report on Retirees Subcommittee

Representative Glazier

School Construction Needs Assessment

Ben Matthews, Director, School Support Services, Department of Public Instruction
Don Steed, Superintendent, Hoke County Public Schools
Mike Burriss, Assistant Superintendent for Facilities, Wake County Public Schools

Effective Mentor Programs

Nancy Reid, Novice Teacher Coach, Asheville City Public Schools
Pat Hensley, Assistant Superintendent for Human Resources, Catawba County Public Schools
Rae Thompson, Director of Professional Learning, Catawba County Public Schools
Brenda Jones, Assistant Superintendent for Human Resources, Pitt County Public Schools

Teacher Assistants

Adam Levinson, Fiscal Analyst, Fiscal Research Division

Proprietary Schools

Jack Henderson, President, NC Association of Career Colleges and Schools
Bob Hodge, Miller-Motte
Mark Dreyfus, ECPI
Mike Fritz, NASCAR Institute

Committee Discussion

- **Committee Website**
Robin Johnson, Committee Counsel
- **Issues to Consider for Possible Recommendations to 2006 General Assembly**
Cochairs
- **Appointment of Subcommittees**
Cochairs

April 3, 2006

Scotland and Robeson Counties

Scotland County Schools Central Office

The Honorable Judge Howard E. Manning, Jr.

St. Andrews Presbyterian College

Dr. John Deegan, Jr., President, St. Andrews Presbyterian College
Overview and update on St. Andrews Presbyterian College

April 4, 2006

Scotland and Robeson Counties

Scotland High School

Dr. Shirley Prince, Superintendent, Scotland County Schools
Overview and update on Scotland County Schools: Initiatives, Successes and Challenges
Mr. Don Steed, Superintendent, Hoke County Schools
Mr. Hank Richards, Member, Hoke County Board of Education
Overview and update on Hoke County Schools: Initiatives, Successes and Challenges
Dr. Tony Habit, Executive Director, North Carolina New Schools Project
Conversion High Schools

UNC Pembroke

Dr. Allen Meadors, Chancellor, UNC Pembroke
Overview and update on UNC Pembroke

April 25, 2006

Communities In Schools

Linda Harrill, President and Chief Executive Officer

Michael Stephens, Executive Vice President and Chief Operating Officer

Report on Disadvantaged Student Supplemental Funding (DSSF)

Dr. Elsie Leak, Associate Superintendent of Curriculum and School Reform Services, DPI

Philip Price, Associate Superintendent of Financial and Business Services, DPI

Report from Subcommittee on Retirees Return-to-Work Provision

Senator Dannelly and Representative Glazier, Cochairs

Proposed Report, Findings, and Recommendations to 2006 Session

Committee Findings and Recommendations

The Joint Legislative Education Oversight Committee makes the following findings and recommendations to the 2006 Session of the General Assembly:

1. Teacher Retention and Recruitment

The Committee encourages the General Assembly to continue to support initiatives that address the State's teacher shortage, focus on recruiting math and science teachers, improve teacher preparation programs, maintain high standards for all teachers, and raise teacher salaries.

The Committee believes there is a growing shortage of competent teachers in North Carolina. This shortage is due to increasing student enrollment, class-size reduction initiatives, and teacher retirements. The teacher shortage is the most acute in rapidly growing school systems, in rural, low-wealth counties, and in schools with high numbers of at-risk students. In addition, many of the State's school systems are experiencing a shortage of certified teachers in math and science.

The Committee supports the initiatives proposed by Erskine Bowles, President of the University of North Carolina. These initiatives include improved collaboration by the deans of the schools of education in order to (i) improve teacher preparation programs and (ii) increase the numbers of students who choose teaching as a career. The Committee recommends that special emphasis be placed on recruiting math and science teachers. The Committee recommends enactment of legislation to fund 50 additional Future Teachers of North Carolina Scholarship Loans for students who agree to become certified in math or science. Scholarship Loan recipients must also agree to teach in that subject area in a North Carolina public school for three years within five years after graduation. See attached DRAFT LEGISLATION: 2005-RJz-2. The Committee also recommends special emphasis be placed on strengthening math and science teacher education programs. The Committee also encourages the General Assembly to consider initiatives to provide differentiated pay for math and science teachers as well as President Bowles' initiatives to provide higher salaries for math and science teachers willing to teach in low performing schools. In addition, the Committee supports the Governor's proposals to continue raising teachers' salaries.

The Committee believes that the North Carolina Teaching Fellows Program is an effective tool in recruiting outstanding high school students to choose teaching as a career. The program also benefits the teacher preparation programs the students attend. The Committee believes that the Teaching Fellows Program can provide more benefits to students if it allows fellows to enroll in a broader spectrum of colleges and universities that have teacher education programs. As a result, the Committee encourages the North Carolina Teaching Fellows Program to expand the number of colleges and universities in the State that can participate in the North Carolina Teaching Fellows Program. In order to accomplish this expansion in a manner that will allow the Program to be as beneficial and effective as it currently is, the Committee encourages the General Assembly to provide funds to allow for additional Fellows and to provide the administrative support that will be needed.

2. House Bill 706 – An Act to Amend the Teacher Certification Law to Facilitate the Hiring of Teachers – Status report

This is the bill that Governor Easley vetoed in September 2005, and that is currently in the House Rules Committee. Upon receiving a vetoed bill and its gubernatorial veto message, the receiving chamber must immediately proceed to reconsider the bill. A vetoed bill can be referred to committee for review and recommendation. Thus, the referral to committee constitutes the chamber's "immediate" consideration of the vetoed bill. The vetoed bill cannot be amended. No time limit is set for the committee to act or to make a recommendation on the vetoed bill. Therefore, the Rules Committee has until the end of the 2005 General Assembly to act (or not) on the bill. The end of the 2005 General Assembly will be when the Short Session that begins May 9, 2006, adjourns.

The Committee members are pleased to report that in April 2005, the State Board of Education adopted a policy that is similar to the provisions in House Bill 706. The Department of Public Instruction has been issuing licenses under that policy since its adoption.

3. Joint Legislative Education Oversight Subcommittee on Retirees Returning to Work

A subcommittee was appointed to determine whether it is possible to reach consensus on the easing of last year's changes to the law governing retirees who return to work. This subcommittee met three times and recommends enactment of legislation to amend the special provision in the 2005 Budget Bill that provides the conditions under which retired teachers and State employees may return to work after retirement. Representatives of the University system, the Community College system, the State Board of Education and other interested parties met and discussed their problems with implementing the current law. These education groups made recommendations that are included in the draft legislation. See attached DRAFT LEGISLATION: 2005-LL-219[v.10].

4. Mathematics and Science Teacher Preparation Programs.

There is increasing evidence that teacher preparation programs are not enabling individuals in these programs to acquire the in-depth content knowledge and well-honed skills needed to teach mathematics or science, or both, in the public schools, whether in elementary, middle or high school. In light of the rapidly changing global economy, colleges and universities must redesign their programs to prepare teachers who can challenge North Carolina's students with rigorous content standards so that when these students ultimately enter the workforce, they will have the skills and knowledge required in the future.

The Committee recommends enactment of legislation to encourage The University of North Carolina to begin the process to encourage the constituent institutions to redesign their mathematics and science teacher preparation programs. See attached DRAFT LEGISLATION: 2005-RHz-10.

5. Legislative Tuition Grants and State Contractual Scholarship Fund Grants

The Committee understands the critical shortage in teaching and nursing that the State is facing. The Committee believes that encouraging professionals that already hold undergraduate degrees in other areas to go back to college to pursue licensure in teaching or nursing is an excellent way

to increase the numbers of outstanding teachers and nurses in the State. The Committee recommends that the State Contractual Scholarship Fund Grants and the Legislative Tuition Grants be expanded to include part-time and full-time students who have bachelor's degrees but have returned to college to obtain licensure in teaching and nursing. See attached DRAFT LEGISLATION 2005-RQ-5 [v.5].

6. Improving School Leadership

There is a growing body of research that supports the idea that improving student achievement, particularly for low-income and minority students, is accomplished with the guidance of an effective leader at the building level. Therefore, it is imperative that principal preparation programs and professional development programs prepare and develop principals for the challenges of leading the schools of today and the future.

The Committee recommends that the Board of Governors of The University of North Carolina, in consultation with the State Board of Education, revise their school administrator programs and report to the Joint Legislative Education Oversight Committee by January 15, 2007, their recommendations for improving the preparation of new school principals and the professional development of current school principals. The revisions shall, at a minimum, focus on middle and high school principals, particularly those in schools where a large number of the students do not perform well, and the identification and inclusion of the skills a principal needs to be an effective instructional leader who is able to coach, teach and develop the teachers in their school. The report to the Joint Legislative Education Oversight Committee shall also include a plan for the implementation of the revised programs, any statutory changes needed, and a date by which these changes will be implemented.

7. Initiatives for Low-Wealth School Systems.

The Committee continues to fully support initiatives designed to assist schools in low-wealth counties. In particular, the Committee encourages the Governor to recommend and the General Assembly to provide increased funds for low-wealth counties so that this education funding category can finally be fully funded. The Committee also supports the continued annual report to this Committee on how these funds are used by the local education administrative units that receive these funds.

8. Disadvantaged Student Supplemental Fund

The Committee recognizes the importance of the Disadvantaged Student Supplemental Fund (Fund) and supports the continued funding and expansion of the Fund in order to improve academic achievement for all students. However, the Committee finds that accountability for the Fund must be a priority in order to document how the money has impacted student achievement. The Committee recommends that the General Assembly maintain oversight and require regular reports on how the monies in the Fund are used.

9. Accountability for Entities, Including Non-Profit Organizations, that Receive State Funds to Implement Education Programs.

In addition to State and local education agencies that receive State funds to provide a public education to the children of this State, numerous other entities also receive State funds to

implement programs to enhance or supplement the programs offered in the public schools. These programs should be held accountable to the General Assembly in order to continue to receive State funds.

The Committee encourages the General Assembly to improve its program and fiscal oversight of all of these entities by providing for audits that the General Assembly and its appropriations committees could use when determining whether State funds should be used to support or enhance these programs. One approach would be to authorize this Committee to contract with program and fiscal auditors for audits of specific programs.

10. Global Education

The Committee finds that public education must keep current with the changing world so that our students are prepared for the world of the future. In the past 30 years the world has changed dramatically. There have been more creations and inventions than ever in history. The demographics of the United States and this State have seen significant shifts that are expected to continue. There also are upcoming shifts in the global economy: none of the future largest cities will be in the northern hemisphere and the next one billion consumers will come from Brazil, India, China, and developing markets.

As part of the State's goal to be a leader in the global economy, the Committee strongly supports the continued expanding and upgrading of our school technology initiatives. These initiatives must be based on comprehensive plans that include measurable goals and objectives. At a minimum, the Committee encourages annual program and financial audits to assure credibility of these plans and to permit refinements as needed.

ARTICLE 12H.
Joint Legislative Education Oversight Committee.

§ 120-70.80. Creation and membership of Joint Legislative Education Oversight Committee.

The Joint Legislative Education Oversight Committee is established. The Committee consists of 22 members as follows:

- (1) Eleven members of the Senate appointed by the President Pro Tempore of the Senate, at least two of whom are members of the minority party; and
- (2) Eleven members of the House of Representatives appointed by the Speaker of the House of Representatives, at least three of whom are members of the minority party.

Terms on the Committee are for two years and begin on the convening of the General Assembly in each odd-numbered year. Members may complete a term of service on the Committee even if they do not seek reelection or are not reelected to the General Assembly, but resignation or removal from service in the General Assembly constitutes resignation or removal from service on the Committee.

A member continues to serve until his successor is appointed. A vacancy shall be filled within 30 days by the officer who made the original appointment.

§ 120-70.81. Purpose and powers of Committee.

(a) The Joint Legislative Education Oversight Committee shall examine, on a continuing basis, the several educational institutions in North Carolina, in order to make ongoing recommendations to the General Assembly on ways to improve public education from kindergarten through higher education. In this examination, the Committee shall:

- (1) Study the budgets, programs, and policies of the Department of Public Instruction, the State Board of Education, the Department of Community Colleges, the Board of Governors of The University of North Carolina, and the constituent institutions of The University of North Carolina to determine ways in which the General Assembly may encourage the improvement of all education provided to North Carolinians and may aid in the development of more integrated methods of institutional accountability;
- (2) Examine, in particular, the Basic Education Plan and the School Improvement and Accountability Act of 1989, to determine whether changes need to be built into the plans, whether implementation schedules need to be restructured, and how to manage the ongoing development of the policies underlying these legislative plans, including a determination of whether there is a need for the legislature to develop ongoing funding patterns for these plans;
- (3) Study other states' educational initiatives in public schools, community colleges, and public universities, in order to provide an ongoing commentary to the General Assembly on these initiatives and to make

recommendations for implementing similar initiatives in North Carolina;
and

- (4) Study any other educational matters that the Committee considers necessary to fulfill its mandate.

(b) The Committee may make interim reports to the General Assembly on matters for which it may report to a regular session of the General Assembly. A report to the General Assembly may contain any legislation needed to implement a recommendation of the Committee.

§ 120-70.82. Organization of Committee.

(a) The President Pro Tempore of the Senate and the Speaker of the House of Representatives shall each designate a cochair of the Joint Legislative Education Oversight Committee. The Committee shall meet at least once a quarter and may meet at other times upon the joint call of the cochairs.

(b) A quorum of the Committee is 10 members. No action may be taken except by a majority vote at a meeting at which a quorum is present. While in the discharge of its official duties, the Committee has the powers of a joint committee under G.S. 120-19 and G.S. 120-19.1 through G.S. 120-19.4.

(c) Members of the Committee receive subsistence and travel expenses as provided in G.S. 120-3.1. The Committee may contract for consultants or hire employees in accordance with G.S. 120-32.02. The Legislative Services Commission, through the Legislative Services Officer, shall assign professional staff to assist the Committee in its work. Upon the direction of the Legislative Services Commission, the Supervisors of Clerks of the Senate and of the House of Representatives shall assign clerical staff to the Committee. The expenses for clerical employees shall be borne by the Committee.

§ 120-70.83. Additional powers.

The Joint Legislative Education Oversight Committee, while in discharge of official duties, shall have access to any paper or document, and may compel the attendance of any State official or employee before the Committee or secure any evidence under G.S. 120.19. In addition, G.S. 120-19.1 through G.S. 120-19.4 shall apply to the proceedings of the Committee as if it were a joint committee of the General Assembly.

§§ 120-70.84 through 120-70.89: Reserved for future codification purposes.

**GENERAL ASSEMBLY OF NORTH CAROLINA
SESSION 2005**

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D

BILL DRAFT 2005-RJz-2 [v.4] (04/20)

(THIS IS A DRAFT AND IS NOT READY FOR INTRODUCTION)

4/21/2006 12:33:16 PM

Short Title: Amend Future Teachers Scholarship Loan .

(Public)

Sponsors: Unknown.

Referred to:

A BILL TO BE ENTITLED
AN ACT TO AMEND THE FUTURE TEACHERS OF NORTH CAROLINA SCHOLARSHIP LOAN FUND BY ADDING FIFTY SCHOLARSHIP LOANS FOR STUDENTS WHO AGREE TO BECOME CERTIFIED IN MATH OR SCIENCE, TEACH FULL-TIME IN THAT AREA IN A NORTH CAROLINA PUBLIC SCHOOL FOR THREE YEARS WITHIN FIVE YEARS AFTER GRADUATION, AND MEET CERTAIN OTHER REQUIREMENTS.

The General Assembly of North Carolina enacts:

SECTION 1. G.S. 116-209.38 reads as rewritten:

"§ 116-209.38. Future Teachers of North Carolina Scholarship Loan Fund.

(a) There is established the Future Teachers of North Carolina Scholarship Loan Fund. The purpose of the Fund is to provide a two-year scholarship loan of six thousand five hundred dollars (\$6,500) per year for any North Carolina student pursuing a college degree to teach in the public schools of the State. The scholarship loan shall be paid only for the student's junior and senior years. The scholarship loan is available if the student is enrolled in a State institution of higher education or a private institution of higher education located in this State that has an accredited teacher preparation program for students planning to become certified teachers in North Carolina. The State Education Assistance Authority shall administer the Fund and shall award ~~100-150~~ scholarship loans annually.

(b) The Board of Governors of The University of North Carolina, in consultation with the State Board of Education and the State Board of Community Colleges, shall develop the criteria for awarding the scholarship loans under this section and shall adopt very stringent standards for awarding these scholarship

loans to ensure that only the best students receive them. Additional criteria for awarding a scholarship loan under this section shall include all of the following:

- (1) ~~The student is one who either: (i) maintained a "B" or better average in college and is enrolled as a junior or senior in a teacher preparation program at any of the institutions described by subsection (a) of this section; or (ii) completed a college transfer curriculum at a community college in the State's Community Colleges System, maintained a "B" or better average in the community college courses, and is accepted and enrolled in a teacher preparation program at one of the institutions described by subsection (a) of this section.~~
- (2) ~~The student agrees to become certified in math, science, special education, or English as a Second Language and teach full-time in that subject area in a North Carolina public school for three years within five years after graduation.~~
- (3) ~~Any additional criteria that the Board of Governors of The University of North Carolina, in consultation with the State Board of Education and the State Board of Community Colleges, considers necessary to administer the Fund effectively.~~

(b1) Additional criteria for awarding the first 100 scholarship loans under this section shall include all of the following:

- (1) The student is one who either: (i) maintained a "B" or better average in college and is enrolled as a junior or senior in a teacher preparation program at any of the institutions described by subsection (a) of this section; or (ii) completed a college transfer curriculum at a community college in the State's Community Colleges System, maintained a "B" or better average in the community college courses, and is accepted and enrolled in a teacher preparation program at one of the institutions described by subsection (a) of this section.
- (2) The student agrees to become certified in math, science, special education, or English as a Second Language and teach full-time in that subject area in a North Carolina public school for three years within five years after graduation.
- (3) Any additional criteria that the Board of Governors of The University of North Carolina, in consultation with the State Board of Education and the State Board of Community Colleges, considers necessary to administer the Fund effectively.

(b2) Additional criteria for awarding the remaining 50 scholarship loans under this section shall include all of the following:

- (1) The student is one who either: (i) maintained a "B" or better average in college and is enrolled as a junior or senior in a

teacher preparation program at any of the institutions described by subsection (a) of this section; or (ii) completed a college transfer curriculum at a community college in the State's Community Colleges System, maintained a "B" or better average in the community college courses, and is accepted and enrolled in a teacher preparation program at one of the institutions described by subsection (a) of this section.

(2) The student agrees to become certified in math or science and teach full-time in that subject area in a North Carolina public school for three years within five years after graduation.

(3) Any additional criteria that the Board of Governors of The University of North Carolina, in consultation with the State Board of Education and the State Board of Community Colleges, considers necessary to administer the Fund effectively.

(c) If a student who is awarded a scholarship loan under this section fails to comply with the provisions of this section or the terms of the agreement awarding the scholarship loan, then the student shall repay the full amount of the scholarship loan provided to the student and the appropriate amount of interest as determined by the State Education Assistance Authority.

(d) The Board of Governors of The University of North Carolina, the State Board of Education, and the State Board of Community Colleges shall: (i) prepare a clear written explanation of the Future Teachers of North Carolina Scholarship Fund and the information regarding the availability and criteria for awarding the scholarship loans, and (ii) shall provide that information to the appropriate counselors in each local school system and the appropriate institutions of higher education and shall charge those counselors to inform students about the scholarship loans and to encourage them to apply for the scholarship loans.

(e) The Board of Governors of The University of North Carolina shall adopt rules to implement this section.

(f) The Board of Governors of The University of North Carolina shall report to the Joint Legislative Education Oversight Committee by March 1 each year regarding the Fund and scholarship loans awarded from the Fund. (2005-276, s. 9.11(a).)"

SECTION 2. Section 9.11(b) of S.L. 2005-276 reads as rewritten:

"SECTION 9.11.(b) Of the funds appropriated in this act to the State Education Assistance Authority the sum of six hundred fifty thousand dollars (\$650,000) for the 2005-2006 fiscal year and the sum of ~~one million three hundred thousand dollars (\$1,300,000)~~ one million six hundred twenty-five thousand dollars (\$1,625,000) for the 2006-2007 fiscal year shall be used to implement this act."

SECTION 3. This act becomes effective July 1, 2006.

GENERAL ASSEMBLY OF NORTH CAROLINA
SESSION 2005

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D

BILL DRAFT 2005-LL-219 [v.11] (4/12)

(THIS IS A DRAFT AND IS NOT READY FOR INTRODUCTION)
4/24/2006 6:22:42 PM

Short Title: Retirees Returning to Work.

(Public)

Sponsors:

Referred to:

A BILL TO BE ENTITLED
AN ACT TO AMEND THE LAW AFFECTING RETIREES RETURNING TO
WORK.

The General Assembly of North Carolina enacts:

SECTION 1. G.S. 135-1 is amended by adding a new subdivision to read:

"(14a) "Normal retirement age" means the age of 60 or older with 25 or more years of creditable service or the age of 65 or older with 5 or more years of membership service."

SECTION 2. G.S. 135-1(20) reads as rewritten:

"(20) "Retirement" means the termination of employment and the complete separation from active service with no intent or agreement, express or implied, to return to service. A retirement allowance under the provisions of this Chapter may only be granted upon retirement of a member. In order for a member's retirement to become effective in any month, the member must render no service, including part-time, temporary, substitute, or contractor service, at any time during the six months immediately following the effective date of retirement. means:

a. In the case of a member who has reached normal retirement age, the commencement of a retirement allowance under the provisions of this Article.

b. In the case of a member who has not yet reached normal retirement age, the commencement of a retirement allowance

under the provisions of this Article and a complete separation from active service, with no intent or agreement, express or implied, to return to service, and subject to the requirement that the member shall not render any service, whether part-time, temporary, substitute, or contractor service, at any time during the total of twenty-five working days immediately following the effective date of retirement plus the longer of the number of days during each of the previous two years that were not scheduled work days or holidays for that member."

SECTION 3. G.S. 135-3(8)c. reads as rewritten:

- "c. Should a beneficiary who retired on an early or service retirement allowance under this Chapter be reemployed, or otherwise engaged to perform services, by an employer participating in the Retirement System on a part-time, temporary, interim, or on a fee-for-service basis, whether contractual or otherwise, and if such beneficiary earns an amount during the 12-month period immediately following the effective date of retirement or in any calendar year which exceeds fifty percent (50%) of the reported compensation, excluding terminal payments, during the 12 months of service preceding the effective date of retirement, or twenty thousand dollars (\$20,000), whichever is greater, as hereinafter indexed, then the retirement allowance shall be suspended as of the first day of the month following the month in which the reemployment earnings exceed the amount above, for the balance of the calendar year. The retirement allowance of such a beneficiary shall also be suspended as provided in this sub-subdivision if that beneficiary earns in any one month an amount that exceeds sixty percent (60%) of the average reported monthly compensation, excluding terminal payments, earned during the twelve months of service immediately preceding the effective date of retirement, unless the beneficiary's employment resulting in that monthly amount is for a fixed term of no more than six months and is preceded by at least a six-month continuous separation from active service following the beneficiary's retirement. The retirement allowance of the beneficiary shall be reinstated as of January 1 of each year following suspension. The amount that may be earned before suspension shall be increased on January 1 of each year by the ratio of the Consumer Price Index to the Index

one year earlier, calculated to the nearest tenth of a percent (1/10 of 1%).

The computation of postretirement earnings of a beneficiary under this sub-subdivision, G.S. 135-3(8)c., who has been retired at least six months meets either definition of retirement under G.S. 135-1(20) and who, before the effective date of reemployment, has not been employed in any capacity with a public school for at least six months immediately preceding the effective date of reemployment, at any time during the total of 25 working days immediately following the effective date of retirement plus the number of days during the previous 12 months that were not scheduled work days or holidays for that member, shall not include earnings while the beneficiary is employed to teach in a permanent full-time or part-time capacity that exceeds fifty percent (50%) of the applicable workweek in a public school. The Department of Public Instruction shall certify to the Retirement System that a beneficiary is employed to teach by a local school administrative unit under the provisions of this sub-subdivision and as a retired teacher as the term is defined under the provisions of G.S. 115C-325(a)(5a).

Beneficiaries employed under this sub-subdivision are not entitled to any benefits otherwise provided under this Chapter as a result of this period of employment."

SECTION 4. Section 29.28(f) of S.L. 2005-276 reads as rewritten:

"SECTION 29.28.(f) Subsections (a) and (b) of this section become effective August 1, 2005. Subsection (e) of this section becomes effective November 1, 2005, but does not apply to participants in The University of North Carolina Phased Retirement Program until June 30, 2007. Program. The remainder of this section becomes effective June 30, 2005."

SECTION 5. The University of North Carolina shall establish a normal retirement age for the Optional Retirement Program of either 59½ or 60 years of age and shall limit the UNC Phased Retirement Program to persons who have reached that normal retirement age.

SECTION 6. The North Carolina Community College System may establish a phased retirement program for its faculty that functions in a manner similar to The University of North Carolina Phased Retirement Program.

SECTION 7. This act becomes effective July 1, 2006, but Sections 1 through 3 of this act do not apply to participants in The University of North Carolina Phased Retirement Program or to members of the phased retirement

program established for the faculty of the North Carolina Community College System under Section 6 of this act.



NORTH CAROLINA GENERAL ASSEMBLY
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Terrence D. Sullivan
Director

To: Joint Legislative Education Oversight Committee
Subcommittee on Retirees Returning to Work

Senator Dannelly, Co-chair
Representative Glazier, Co-chair

From: Shirley Iorio, Ph D
Legislative Analyst, Research Division

Date: April 24, 2006

Re: Bill Draft 2005-LL-219[v.11]

This proposed legislation makes several changes within the Teachers' and State Employees' Retirement System (TSERS) affecting retirees who return to work:

Section 1. Amends G.S. 135-1 by establishing a "normal retirement age" as follows:

The age of 60 or older with 25 or more years of creditable service, **or**

The age of 65 or older with 5 or more years of membership service.

Section 2. Amends G.S. 135-1(20) by rewriting the definition of "retirement" as follows:

For a member who has reached normal retirement age, retirement means the start of a retirement allowance under the statutory provisions for TSERS.

For a member who has not yet reached normal retirement age, retirement means the start of a retirement allowance under the statutory provisions for TSERS **and the following:**

A complete separation from active service, with no intent or agreement, express or implied, to return to service;
and

A requirement that the member shall not render any service, on a part-time, temporary, substitute, or contractual basis at any time during the total of 25 working days immediately following the effective date of retirement **plus** the longer of the number of days during each of the previous two years that were not scheduled work days or holidays for that member.

Section 3. Amends, G.S. 135-3(8)c, the law that pertains to beneficiaries who retire on an early or service retirement allowance and return to work for an employer that participates in the Retirement System. Currently, a retiree may return to service during the 12-month period immediately following the effective date of retirement or in any calendar year on a part-time, interim, temporary or contractual basis and earn the greater of \$20,000

(adjusted each year for inflation) or 50% of the salary that the person earned during the 12 months of service prior to retirement. If the retiree exceeds this earnings cap, their retirement allowance is suspended as of the first day of the month following the month in which the reemployment earnings exceeded the cap. This proposed legislation adds the following conditions:

If the beneficiary earns in any one month an amount that exceeds 60% of the average reported monthly compensation, excluding terminal payments, earned during the 12 months of service immediately preceding the effective date of retirement, then their retirement allowance is suspended.*

*Exception. When the beneficiary's employment is for a fixed term of no more than six months **and** is preceded by at least a six-month continuous separation from active service following their retirement.

There is an exemption that allows a beneficiary to be re-employed to teach after retirement and still collect full retirement benefits in addition to their salary. Currently, a beneficiary who is reemployed to teach must be retired at least six months and may not have been employed in any capacity with a public school for at least six months immediately preceding the effective date of reemployment. Also, to be exempt from the postretirement earnings cap, the beneficiary must be employed to teach in a permanent full-time or part-time capacity that exceeds 50% of the applicable workweek in a public school.

This proposed legislation reduces the break-in-service time from six months to the following:

For a beneficiary who meets either definition of retirement in Section 2 above and who, before the effective date of reemployment, has not been employed in any capacity with a public school at any time during the total of 25 working days immediately following the effective date of retirement **plus** the number of days during the previous 12 months that were not scheduled work days or holidays for that member.

Section 4. Restores the UNC Phased Retirement Program by removing the reemployment restrictions for participants.

Section 5. Requires The University of North Carolina to establish a normal retirement age for the Optional Retirement Program of either 59 ½ or 60 years of age and limit the UNC Phased Retirement Program to persons who have reached that normal retirement age.

Section 6. Allows the North Carolina Community College System to establish for its faculty a phased retirement program similar to the UNC Program.

Section 7. Sets an effective date of July 1, 2006. However, Sections 1 through 3 do not apply to participants in the UNC Phased retirement Program or to members of the phased retirement program established for the faculty of the NC Community College System under Section 6.

**GENERAL ASSEMBLY OF NORTH CAROLINA
SESSION 2005**

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D

BILL DRAFT 2005-RHz-10 [v.5] (04/18)

**(THIS IS A DRAFT AND IS NOT READY FOR INTRODUCTION)
4/21/2006 2:36:34 PM**

Short Title: Sci/Math Teacher Prep. Programs.

(Public)

Sponsors:

Referred to:

A BILL TO BE ENTITLED
AN ACT TO IMPLEMENT A RECOMMENDATION OF THE JOINT
LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE TO
ENCOURAGE THE CONSTITUENT INSTITUTIONS OF THE
UNIVERSITY OF NORTH CAROLINA TO REDESIGN THEIR
MATHEMATICS AND SCIENCE TEACHER PREPARATION
PROGRAMS, AND TO MAKE AN APPROPRIATION.

The General Assembly of North Carolina enacts:

SECTION 1. The purpose of this act is to encourage the constituent institutions of The University of North Carolina to redesign their teacher preparation programs so that they better prepare the individuals who must acquire in-depth content knowledge and well-honed skills to teach mathematics or science, or both, in the public schools, whether in elementary, middle or high school. In light of the rapidly changing global economy, these redesigned programs must prepare teachers who can challenge North Carolina's students with rigorous content standards so that when these students ultimately enter the workforce, they will have the skills and knowledge required in the future.

SECTION 2.(a) The Board of Governors of The University of North Carolina shall develop and implement a competitive proposal process and criteria for assessing proposals to establish rigorous, innovative, interdisciplinary, and collaborative teacher preparation programs for individuals who will teach mathematics or science, or both, whether in elementary, middle, or high school. To facilitate the development of the programs, program criteria, and the proposal process, the Board of Governors shall convene a task force of mathematicians,

scientists, and individuals with teacher preparation expertise to assist it in designing the proposal process and criteria for assessing the proposals. The Task Force shall consult with the State Board of Education, persons familiar with mathematics and science education in other countries, members of business and industry, and any other persons the Task Force considers appropriate.

SECTION 2.(b) The Task Force shall identify which departments, schools, or other programs within constituent institutions may submit a proposal under this act. The Task Force also shall determine whether proposals to develop a multi-campus, regional, distance, or joint program will be eligible for consideration. The Task Force shall develop criteria for assessing the proposals submitted under this act. Submitted proposals shall include the extent to which the proposed programs:

- (1) Reflect a vision for preparing teachers who have a strong foundation of the content knowledge and skills needed to teach mathematics or science, or both, whether in elementary, middle, or high school.
- (2) Are interdisciplinary in design and involve more than schools of education.
- (3) Reflect collaboration with local school administrative units, professional associations, mathematics and science organizations, and business and industry.
- (4) Meet content standards proposed by mathematicians or scientists, or both.
- (5) Demonstrate a significant commitment and sharing of campus resources.
- (6) Employ entrance standards and criteria that will attract outstanding applicants who reflect the racial and economic composition of the State.
- (7) Can serve as models for other mathematics and science teacher preparation programs in the State.
- (8) Include other elements that the Board of Governors and Task Force consider appropriate and necessary.

SECTION 2.(c) The Board of Governors shall develop a budget for the programs established under this section that reflects the resources necessary to establish and operate redesigned mathematics and science teacher preparation programs.

SECTION 3. The Board of Governors shall report to the Joint Legislative Education Oversight Committee on the budget developed under Section 2.(c) of this act and on the design for the programs and the proposal process created under Section 2 of this act by December 1, 2006.

SECTION 4. Requests for proposals shall be disseminated to the constituent institutions no later than January 15, 2007. Proposals shall be submitted

to the Board of Governors no later than June 1, 2007. The Board of Governors shall then reconvene the Task Force to screen the submitted proposals. After its screening, the Task Force shall make its recommendations to the Board of Governors by September 1, 2007. The Board of Governors shall choose the institutions that shall have the redesigned mathematics and science teacher preparation programs no later than November 1, 2007.

SECTION 5. Institutions chosen to have programs under Section 4 of this act shall plan for the implementation of the programs. Programs shall begin operating no later than September 1, 2008.

SECTION 6. There is appropriated from the General Fund to the Board of Governors of The University of North Carolina the sum of fifty thousand dollars (\$50,000) for the 2006-2007 fiscal year to implement Section 2 of this act.

SECTION 7. Section 5 of this act shall not become effective unless sufficient funds are appropriated for this purpose. Nothing in this act shall require the General Assembly to appropriate any funds to implement it.

SECTION 8. This act becomes effective July 1, 2006.

GENERAL ASSEMBLY OF NORTH CAROLINA
SESSION 2005

H

D

BILL DRAFT 2005-RQ-5 [v.5] (04/21)

(THIS IS A DRAFT AND IS NOT READY FOR INTRODUCTION)

Short Title: Tuit. & Contract. Grants for Teaching/Nursing.

(Public)

Sponsors: Representative Yongue.

Referred to:

A BILL TO BE ENTITLED

AN ACT TO PROVIDE STATE CONTRACTUAL SCHOLARSHIP FUND GRANTS
AND LEGISLATIVE TUITION GRANTS FOR STUDENTS WHO HAVE
BACHELOR'S DEGREES BUT ARE PURSUING LICENSURE AS NURSES OR
TEACHERS.

The General Assembly of North Carolina enacts:

SECTION 1. G.S. 116-19 reads as rewritten:

"§ 116-19. **Contracts with private institutions to aid North Carolina
students;students and licensure students; reporting requirement.**

(a) In order to encourage and assist private institutions to continue to educate
North Carolina ~~students;students and licensure students~~, the State Education Assistance
Authority may enter into contracts with the institutions under the terms of which an
institution receiving any funds that may be appropriated pursuant to this section would
agree that, during any fiscal year in which such funds were received, the institution
would provide and administer scholarship funds for needy North Carolina students and
licensure students in an amount at least equal to the amount paid to the institution,
pursuant to this section, during the fiscal year. Under the terms of the contracts the State
Education Assistance Authority would agree to pay to the institutions, subject to the
availability of funds, a fixed sum of money for each North Carolina student and
licensure student enrolled at the institutions for the regular academic year, said sum to
be determined by appropriations that might be made from time to time by the General
Assembly pursuant to this section. Funds appropriated pursuant to this section shall be
paid by the State Education Assistance Authority to an institution on certification of the
institution showing the number of North Carolina students and licensure students
enrolled at the institution as of October 1 of any year for which funds may be
appropriated. For purposes of this subsection, "needy North Carolina ~~students~~"students

1 and licensure students" are those eligible students and licensure students who have
2 financial need as determined by the institution under the institutional methodology or the
3 federal methodology as defined by the State Education Assistance Authority. For
4 purposes of this subsection, "institutional methodology" means a need-analysis formula,
5 developed by College Scholarship Service, that determines the student's ~~and~~ or licensure
6 student's and his or her family's capacity to pay for postsecondary education each year.

7 (b) The State Education Assistance Authority shall document the number of
8 full-time equivalent North Carolina undergraduate students and full-time and less than
9 full-time licensure students that are enrolled in off-campus programs and the State funds
10 collected by each institution pursuant to G.S. 116-19 for those students. The State
11 Education Assistance Authority shall also document the number of scholarships and the
12 amount of the scholarships that are awarded under G.S. 116-19 to students and licensure
13 students enrolled in off-campus programs. An "off-campus program" is any program
14 offered for degree credit away from the institution's main permanent campus.

15 The State Education Assistance Authority shall include in its annual report to the
16 Joint Legislative Education Oversight Committee the information it has compiled and its
17 findings regarding this program."

18 SECTION 2. G.S. 116-20 reads as rewritten:

19 "**§ 116-20. Scholarship and contract terms; base period.**

20 In order to encourage and assist private institutions to educate additional numbers of
21 North Carolinians, the Board of Governors of the University of North Carolina is hereby
22 authorized to enter into contracts within the institutions under the terms of which an
23 institution receiving any funds that may be appropriated pursuant to this section would
24 agree that, during any fiscal year in which such funds were received, the institution
25 would provide and administer scholarship funds for needy North Carolina students and
26 licensure students in an amount at least equal to the amount paid to the institution,
27 pursuant to this section, during the fiscal year. Under the terms of the contracts the
28 Board of Governors of the University of North Carolina would agree to pay to the
29 institutions, subject to the availability of funds, a fixed sum of money for each North
30 Carolina student and licensure student enrolled as of October 1 of any year for which
31 appropriated funds may be available, over and above the number of North Carolina
32 students enrolled in that institution as of October 1, 1997, which shall be the base date
33 for the purpose of this calculation. Funds appropriated pursuant to this section shall be
34 paid by the State Education Assistance Authority to an institution upon recommendation
35 of the Board of Governors of the University of North Carolina and on certification of the
36 institution showing the number of North Carolina students and licensure students
37 enrolled at the institution as of October 1 of any year for which funds may be
38 appropriated over the number enrolled on the base date. In the event funds are
39 appropriated for expenditure pursuant to this section and funds are also appropriated, for
40 the same fiscal year, for expenditure pursuant to G.S. 116-19, students and licensure
41 students who are enrolled at an institution in excess of the number enrolled on the base
42 date may be counted under this section for the purpose of calculating the amount to be
43 paid to the institution, but the same students and licensure students may also be counted

1 under G.S. 116-19, for the purpose of calculating payment to be made under that
2 section."

3 **SECTION 3.** G.S. 116-21.1 reads as rewritten:

4 "**§ 116-21.1. Financial aid for North Carolina students and licensure students**
5 **attending private institutions of higher education in North Carolina.**

6 (a) Funds shall be appropriated each fiscal year in the Current Operations
7 Appropriations Act to the Board of Governors of The University of North Carolina for
8 aid to institutions and shall be disbursed in accordance with the provisions of G.S.
9 116-19, 116-21, and 116-22.

10 (b) The funds appropriated in compliance with this section shall be placed in a
11 separate, identifiable account in each eligible institution's budget or chart of accounts.
12 All funds in the account shall be provided as scholarship funds for needy North Carolina
13 students and licensure students during the fiscal year. Each student and licensure student
14 awarded a scholarship from this account shall be notified of the source of the funds and
15 of the amount of the award. Funds not utilized under G.S. 116-19 shall be available for
16 the tuition grant program as defined in G.S. 116-21.2."

17 **SECTION 4.** G.S. 116-21.2 reads as rewritten:

18 "**§ 116-21.2. Legislative tuition grants to aid students and licensure students**
19 **attending private institutions of higher education.**

20 (a) In addition to any funds appropriated pursuant to G.S. 116-19 and in addition
21 to all other financial assistance made available to institutions, or to ~~students~~ persons
22 attending these institutions, there is granted to each full-time North Carolina
23 undergraduate student attending an approved institution as defined in G.S. 116-22, a
24 sum, to be determined by the General Assembly for each academic year which shall be
25 distributed to the full-time undergraduate student as provided by this subsection.

26 (a1) The legislative tuition grant provided by this section shall also be granted to
27 each full-time licensure student who is enrolled in a program intended to result in a
28 license in teaching or nursing at an approved institution. The legislative tuition grant
29 provided by this section shall be awarded on a pro-rata basis to any licensure student
30 who is enrolled less than full-time in a program intended to result in a license in
31 teaching or nursing at an approved institution. The legislative tuition grant and pro-
32 rated legislative tuition grant authorized under this subsection shall be paid for
33 undergraduate courses only.

34 (b) The tuition grants provided for in this section shall be administered by the
35 State Education Assistance Authority pursuant to rules adopted by the State Education
36 Assistance Authority not inconsistent with this section. The State Education Assistance
37 Authority shall not approve any grant until it receives proper certification from an
38 approved institution that the student or licensure student applying for the grant is an
39 ~~eligible student.~~ eligible. Upon receipt of the certification, the State Education Assistance
40 Authority shall remit at the times as it prescribes the grant to the approved institution on
41 behalf, and to the credit, of the ~~student.~~ student or licensure student.

42 (c) ~~In~~ Except as provided in subsection (a1) of this section, in the event a student
43 on whose behalf a grant has been paid is not enrolled and carrying a minimum academic

1 load as of the tenth classroom day following the beginning of the school term for which
2 the grant was paid, the institution shall refund the full amount of the grant to the State
3 Education Assistance Authority. If a licensure student on whose behalf a pro-rated grant
4 has been paid in accordance with subsection (a1) of this section is not enrolled in the
5 undergraduate class as of the tenth classroom day following the beginning of the school
6 term for which the grant was paid, the institution shall refund the full amount of the
7 grant to the State Education Assistance Authority. Each approved institution shall be
8 subject to examination by the State Auditor for the purpose of determining whether the
9 institution has properly certified eligibility and enrollment of students and licensure
10 students and credited grants paid on behalf of the students-them.

11 (d) In the event there are not sufficient funds to provide each eligible student or
12 licensure student with a full grant:grant as provided by subsection (a) of this section or a
13 full or a pro-rated grant as provided by subsection (a1) of this section:

14 (1) The Board of Governors of The University of North Carolina, with the
15 approval of the Office of State Budget and Management, may transfer
16 available funds to meet the needs of the programs provided by
17 subsections ~~(a)-(a)~~, (a1), and (b) of this section; and

18 (2) Each eligible student and licensure student shall receive a pro rata
19 share of funds then available for the remainder of the academic year
20 within the fiscal period covered by the current appropriation.

21 (e) Any remaining funds shall revert to the General Fund."

22 **SECTION 5.** G.S. 116-21.3 reads as rewritten:

23 **"§ 116-21.3. Legislative tuition grant limitations.**

24 (a) For purposes of this section, an "off-campus program" is any program offered
25 for degree credit away from the institution's main permanent campus.

26 (b) No legislative tuition grant funds shall be expended for a program at an
27 off-campus site of a private institution, as defined in G.S. 116-22(1), established after
28 May 15, 1987, unless (i) the private institution offering the program has previously
29 notified and secured agreement from other private institutions operating degree
30 programs in the county in which the off-campus program is located or operating in the
31 counties adjacent to that county or (ii) the degree program is neither available nor
32 planned in the county with the off-campus site or in the counties adjacent to that county.

33 (c) Any member of the armed services, as defined in G.S. 116-143.3(a), abiding
34 in this State incident to active military duty, who does not qualify as a resident for
35 tuition purposes, as defined under G.S. 116-143.1, is eligible for a legislative tuition
36 grant pursuant to this section if the member is enrolled as a full-time
37 student-undergraduate student or as a licensure student. The member's legislative tuition
38 grant shall not exceed the cost of tuition less any tuition assistance paid by the member's
39 employer.

40 (d) A legislative tuition grant authorized under ~~G.S. 116-21.2~~ G.S. 116-21.2(a)
41 shall be reduced by twenty-five percent (25%) for any individual student who has
42 completed 140 semester credit hours or the equivalent of 140 semester credit hours."

43 **SECTION 6.** G.S. 116-21.4(b) reads as rewritten:

1 "(b) Expenditures made pursuant to G.S. 116-19, 116-20, 116-21.1, or 116-21.2
2 shall not be used for any student or licensure student who:

- 3 (1) Is incarcerated in a State or federal correctional facility for committing
4 a Class A, B, B1, or B2 felony; or
5 (2) Is incarcerated in a State or federal correctional facility for committing
6 a Class C through I felony and is not eligible for parole or release
7 within 10 years."

8 **SECTION 7.** G.S. 116-22 is amended by adding a new subdivision to read:

9 "(1b) 'Licensure student' shall mean a person who:

- 10 (a) Has a bachelor's degree;
11 (b) Is enrolled either full-time or less than full-time in a program intended
12 to result in licensure in teaching or nursing;
13 (c) Attends an institution located in the State; and
14 (d) Qualifies as a resident of North Carolina in accordance with definitions
15 of residency that may from time to time be adopted by the Board of
16 Governors of the University of North Carolina and published in the
17 residency manual of the Board."

18 **SECTION 8.** This act becomes effective July 1, 2006.
19

Recommendations
Foreign Language Task Force Meeting
March 9, 2006

A group of K-16 foreign language educators, school administrators, and community advocates met in Raleigh on March 9, 2006 to develop recommendations to strengthen foreign language instruction in North Carolina. As a result of this discussion, the committee proposes the following recommendations and action steps:

High Student Performance

- 1. Encourage the State Board of Education to establish Global Preparedness as a 6th Priority. The task force believes that the priority will underscore the importance of learning languages and studying other cultures and will reinforce the efforts of local districts trying to establish strong second language instructional programs that lead to the development of proficiency.**

- 2. Work toward the establishment of a K-12 pipeline of articulated instruction in each LEA which will result in students who graduate with communicative proficiency at the advanced level in listening, speaking, reading, and writing in at least one language other than English.**
 - Provide incentive grants to LEAs to begin programs – perhaps 10 grants per year of \$75,000-\$100,000. Grants would be awarded on a competitive basis.
 - Create a public relations program in conjunction with the *Discover Languages* initiative of the American Council on the Teaching of Foreign Languages (ACTFL) that emphasizes the importance of second language study for all students. The program should be directed to school administrators (especially principals), parents, policy makers, and other members of the community.
 - Develop K-16 collaboratives in various regions of the state to support second language instruction, to apply for grants to strengthen K-12 language instruction and teacher preparation and, to explore ways in which university faculty can provide advanced level languages instruction for high school students
 - Designate a foreign language professional to serve as a district foreign language supervisor or lead teacher to coordinate foreign language instruction and professional development
 - Ask the State Board of Education to develop a foreign language concentration for high school students and a designation on the high school transcript of students who reach high levels of proficiency.
 - Encourage students to do graduation projects in languages other than English

- Award LEAs state recognition for graduating a certain percentage of students as language proficient or for showing significant improvement and progress toward achieving the goal.

3. Expand instruction in critical, non-traditional languages

- Appropriate funds to assist in the development of a Chinese distance-learning program
- Cooperate with the Governors Schools to develop offerings in critical languages such as Chinese, Arabic, and Russian
- Develop collaborative instructional programs between school districts and institutions of higher education to offer critical languages
- Ask the State Board of Education to develop a policy which would encourage heritage speakers to improve and maintain their home language including awarding credit for language instruction outside the public school setting
- Allow the use of “at risk funds” for the development of literacy skills in students’ first language (non-English language)

Quality Professionals

4. Increase the pool of qualified foreign language teachers

- Designate a percentage of Teaching Fellows specifically for foreign languages
- Establish scholarships to encourage heritage language speakers to become foreign language teachers, especially in critical languages
- Develop a public-private partnership to provide funding to assist foreign language teachers and future foreign language teachers to study in other countries in order to build language skills.

The majority of the recommendations do not require additional funds. However, the following is the budget for those that do:

RECOMMENDATION 2 —incentive grants to LEAS	\$750,000 per year—10 grants at \$75,000 per LEA
RECOMMENDATION 3 —funds to assist in the development and delivery of a Chinese distance learning program	\$1,000,000
RECOMMENDATION 4 —scholarships to encourage heritage language speakers to become foreign language teachers	\$50,000 per year-- \$2500 per year for 20 scholarships which could be renewed
RECOMMENDATION 4 —assist foreign language teachers and future teachers to study in other countries	\$50,000 per year--\$2500 for 20 teachers

NORTH CAROLINA GENERAL ASSEMBLY AMENDMENT

(Please type or use ballpoint pen)

EDITION No. _____

H. B. No. _____

DATE _____

S. B. No. _____

Amendment No. _____

(to be filled in by
Principal Clerk)

COMMITTEE SUBSTITUTE _____

Rep.)

Sen.)

1 moves to amend the ^{Report} bill on page 9, line _____

2 () WHICH CHANGES THE TITLE

3 by adding the following:

4 "11. Dropout Prevention / Communities in Schools

5 The Committee enthusiastically supports the
6 work of Communities in Schools. This organization
7 involves members of local communities
8 to provide tutors, mentors, scholarships,
9 and other ~~at~~ services ~~to~~ for students
10 who are at risk of dropping out of school.
11 Due to this organization's documented
12 success with these students, the Committee
13 encourages the General Assembly to continue
14 providing state funds for this organization
15 and, if funds are available, to provide
16 additional funds."

SIGNED Mark Nesbitt

ADOPTED _____ FAILED _____ TABLED _____

NORTH CAROLINA GENERAL ASSEMBLY AMENDMENT

(Please type or use ballpoint pen)

EDITION No. _____

H. B. No. _____

DATE 4/25/06

S. B. No. _____

Amendment No. _____

(to be filled in by
Principal Clerk)

COMMITTEE SUBSTITUTE _____

Rep.) Dorsett

Sen.)

report

1 moves to amend the ~~bill~~ on page 10, line _____

2 () WHICH CHANGES THE TITLE

3 by adding the following:

4 Teacher Retention and Recruitment

5 The Committee also recommends special

6 emphasis be placed on strengthening

7 math and science teacher education

8 programs and recruiting minorities

9 and males into teaching.

10 _____

11 _____

12 _____

13 _____

14 _____

15 _____

16 _____

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19 _____

SIGNED _____

ADOPTED _____ FAILED _____ TABLED _____

NORTH CAROLINA GENERAL ASSEMBLY AMENDMENT

(Please type or use ballpoint pen)

EDITION No. _____

H. B. No. _____

DATE _____

S. B. No. _____

Amendment No. _____

(to be filled in by
Principal Clerk)

COMMITTEE SUBSTITUTE _____

Rep.) Stevens
Ser.)

Report 8

1 moves to amend the bill on page _____, line _____

2 () WHICH CHANGES THE TITLE

3 by adding the following after "2005-RQ-5 (v. 5)":

4 "The Committee also supports expanding scholarships and
5 scholarship loan funds for students enrolled in
6 nursing programs at public institutions of higher
7 education."

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18 _____

19 _____

SIGNED Peter J. [Signature]

ADOPTED _____ FAILED _____ TABLED _____

NORTH CAROLINA GENERAL ASSEMBLY AMENDMENT

(Please type or use ballpoint pen)

EDITION No. 2005-RQ-5 [v. 5]

H. B. No. _____

DATE 4/25/00

S. B. No. _____

Amendment No. _____

(to be filled in by Principal Clerk)

COMMITTEE SUBSTITUTE _____

Rep.) Yongue
Sen.)

1 moves to amend the bill on page 5 (p. 28 of Report), lines 17-18

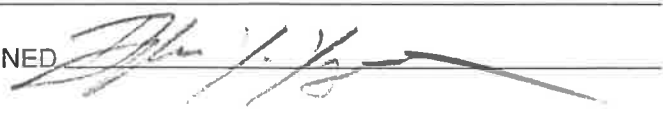
2 () WHICH CHANGES THE TITLE

3 by inserting between the lines the following:

4 "Section 8. There is appropriated from the General
5 Fund to the State Education Assistance ~~and~~ ^{Authority} the sum of
6 one million, five hundred thousand dollars (\$1,500,000) for the
7 2006-2007 fiscal year to implement this act."

8
9 and by renumbering the remaining sections accordingly.

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SIGNED 

Billfile

GENERAL ASSEMBLY OF NORTH CAROLINA
SESSION 2005

H/S

D

BILL DRAFT 2005-LE-245* [v.4] (4/10)

(THIS IS A DRAFT AND IS NOT READY FOR INTRODUCTION)
4/12/2006 11:43:29 AM

Short Title: Teach Chinese in Schools/Pilot Program. (Public)

Sponsors: Representative Glazier./Senator Hagan.

Referred to:

A BILL TO BE ENTITLED

AN ACT TO APPROPRIATE FUNDS TO DEVELOP AND IMPLEMENT A PILOT PROGRAM TO PROVIDE CLASSES IN CHINESE LANGUAGE, CULTURE, GEOGRAPHY, POLITICAL, LEGAL AND ECONOMIC SYSTEMS.

The General Assembly of North Carolina enacts:

SECTION 1. There is appropriated from the General Fund to the Department of Public Instruction the sum of one million dollars (\$1,000,000) for the 2006-2007 fiscal year to (i) establish and implement a pilot program in six local school administrative units to provide classes in Chinese language, culture, geography, political, legal and economic systems and (ii) make these classes available to other local school administrative units on the internet.

The State Board of Education, with the assistance of the Department of Public Instruction, shall select pilot local school administrative units that are distributed geographically throughout the State. Up to two high schools in each pilot unit shall implement the program. Classes shall begin in the second semester of the 2006-2007 school year.

The State Board of Education shall approve the curriculum for the pilot program and for the internet courses on an expedited basis.

SECTION 2. This act becomes effective July 1, 2006.

NORTH CAROLINA GENERAL ASSEMBLY AMENDMENT

(Please type or use ballpoint pen)

EDITION No. _____

H. B. No. _____

DATE _____

S. B. No. _____

Amendment No. _____

COMMITTEE SUBSTITUTE _____

(to be filled in by
Principal Clerk)

Rep.) _____

Sen.) _____

1 moves to amend the bill on page Report 7 line Item 4

2 () WHICH CHANGES THE TITLE
3 by adding the following paragraph at the end
4 of that section:

5 "The Committee also encourages the Board
6 of Governors and the State Board to evaluate
7 ~~in~~ and revise professional development programs
8 ~~to reflect~~ provide current teachers
9 in-depth content knowledge and well-honed
10 skills needed to teach science or mathematics.

11 The Boards shall report to this Committee
12 ~~on the~~ by December 1, 2006, on ~~the~~ changes
13 that are recommended or under consideration."

14 _____
15 _____
16 _____
17 _____
18 _____
19 _____

SIGNED K.B. [Signature]

ADOPTED _____ FAILED _____ TABLED _____

