

- B. **Common Core of Knowledge.** Describe the common core of knowledge and skills to be emphasized in the program. Show the extent to which this common core is grounded in problems of practice, such as societal and cultural influences on schooling, teaching and learning processes including those associated with children with special needs; current school improvement and reform, organizational theory, policy analysis, leadership, and management skills, including strategic planning.
- C. **Interdisciplinary/Interprofessional Content.** Describe the program features that are interdisciplinary in design and interprofessional in nature.
- D. **Instructional Procedures and Methodologies.** Describe the program's instructional procedures and methodologies. Show the extent to which these incorporate practice- and problem-based approaches, which might include case studies, problem-based instruction, simulations, and other related methods. Describe any involvement of practicing school personnel in the instructional program, and the role of university faculty in field experiences. Describe any attention to objective or self-administered appraisals or inventories used as instructional guides, as well as the candidate's engagement in preparation of "platforms," individual development programs, or the like.
- E. **Clinical Experiences.** Describe the program's clinical components. Show the extent to which these are integrated throughout the full sequence of the program. Describe in concrete terms the role and responsibility of university faculty and clinical staff, including mentors. Show the relationships between clinical experiences and the academic program. Note problems you can expect to encounter in making the clinical experiences effective and how your program will resolve them.
- F. **Internship.** Describe plans for an internship component, showing the extent to which it provides students with a significant, active, full-time internship experience that is an extension of earlier clinical experiences; is planned and supervised by a well-trained mentor; and extends over a minimum of one school year. Consider the provisions of SB 27, Section 85, Principal Fellows Program (1993) in your planning for this element.
- G. **Collaboration.** Describe the extent of collaboration with appropriate agencies, such as local school units, professional associations, industry and business, and community organizations; and show the interrelationship with program objectives and design.
- H. **Faculty Development.** Provide a plan for the continued professional development of the program faculty. Describe extent to which the plan is an integral element of the proposed program's educational objectives and/or of the faculty's overall teaching, research, and service mission.
- I. **Program Relationships.**
1. List degrees and certificates currently offered at your institution in educational administration at the master's, Ed.S., C.A.S., and Ed.D. levels.
 2. Show how the proposed program will relate to any Ed.D. program you are currently authorized to plan or offer.
 3. Describe how existing master's level programs in educational administration will be phased out if the proposed new program is approved.
 4. Describe the process for planning and implementing the proposed new program during the period from initial program approval to start-up. Indicate processes, schedule, and responsibilities for managing planning and implementation, faculty selection and development, curriculum development, making arrangements with collaborating institutions, candidate recruitment and selection, and other essential activity to ensure successful program initiation by September 1, 1995.

DRAFT

- J. **Additional Information.** [Reserved for additional information which may be requested based on future deliberations of the National School Administrator Review Panel.]

IV. BUDGET

The budget should demonstrate a significant commitment of campus resources, as compared to resources dedicated to comparable professional programs.

Provide estimates (using the attached form) of the additional costs required to implement the program and identify the proposed sources of the additional funds required. Prepare a budget schedule for each of the first three years of the program indicating the account number and name for all additional amounts required. Identify EPA and SPA positions immediately below the account listing. New SPA positions should be listed at the first step in the salary range using the SPA classification rates currently in effect. Identify any larger or specialized equipment and any unusual supplies requirements.

For the purposes of the second and third year estimates, project faculty and SPA position rates and fringe benefits rates at first year levels. Include the continuation of previous year (s) costs in second and third year estimates.

SUMMARY OF ESTIMATED ADDITIONAL COSTS FOR MASTER OF SCHOOL ADMINISTRATION (API# 0827)

INSTITUTION _____ DATE _____

Program Year 19__ - 19__

ADDITIONAL FUNDS REQUIRED - BY SOURCE

	Reallocation of Present Institutional Resources	Enrollment Increase Funds	Federal or Other (Identify)	New Allocations	Total
101 Regular Term Instruction					
1210 SPA Regular Salaries (Identify positions)	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____
1310 EPA Academic Salaries	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____
1810 Social Security	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
1820 State Retirement	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
1830 Medical Insurance	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
2000 Supplies and Materials (Identify)	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____
3000 Current Services (Identify)	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____
4000 Fixed Charges (Identify)	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____
5000 Capital Outlay (Equipment) (Identify)	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____	\$ _____ _____ _____
TOTAL - Regular Term Instruction	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
151 Libraries					
(Identify accounts)	\$ _____ _____ _____ _____	\$ _____ _____ _____ _____	\$ _____ _____ _____ _____	\$ _____ _____ _____ _____	\$ _____ _____ _____ _____
TOTAL - Libraries	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
TOTAL ADDITIONAL COSTS . . .	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

NOTE: Accounts may be added or deleted as required.

EXECUTIVE SUMMARY

Extended services programs are defined as "programs that expand students' opportunities for educational success through high quality, integrated access to instructional programming during nonschool hours." Students who are at risk of school failure or perform significantly below their age-level peers should be given priority for extended services. Examples of **calendar alternatives** include before and after school hours, evening classes, Saturdays, summer school, and year-round school. **Instructional programming** includes classroom instruction, tutoring, study skills, enrichment activities, and reinforcement projects.

This manual is intended to be used by school-based personnel as a resource guide in implementing extended services to at-risk students. It encourages school improvement teams to look closely at all existing resources and to make decisions on the most appropriate use of the funds in providing comprehensive programming to meet the needs of students. It also encourages schools to maintain quality program evaluation. Schools should also examine the need for alternative calendars and organizational structures. Schools may also consider flexible work schedules for teachers and staff. By setting nontraditional work hours for teachers and other staff, models of extended services may be implemented using existing resources.

The models presented in this document fall in three categories; (1) those that occur during nonschool hours, and (2) those that occur during school hours but provide a mechanism for implementing extended services beyond the school day. The third category includes those models that have components occurring during both nonschool hours and during the regular school day. Each of the models presented in this manual is summarized below. The manual also includes is a listing of some of the school systems that are implementing the model and the contact for each program in each school system.

Extended Services Offered During Nonschool Hours

Before and after school programs basically fall into three categories. One category is enrichment programs which offer structured classes and/or tutoring based on children's interests, needs, and abilities. Secondly, recreational programs offer a more complete schedule of supervised free choice time and structured activities for which staff plan and prepare. The third category, custodial programs, essentially offer adult supervision of minimally structured free play and/or required activities in which children must take part. Adults generally "sit and watch" to assure that problems do not get out of hand, manage a simple schedule through which they direct children, and occasionally interact socially with children.

Family Resource Centers serve children up to age twelve, and **Youth Resource Centers** serve children age twelve and above. One of the keys to the success of the centers is developing relationships and linkages among all agencies in the community that serve children, e. e., schools, social services, health department, employment services, mental health, juvenile justice, public transportation, and housing. These formal service providers also look at other resources in the community that may become part of the collaborative effort to solve problems. These may include

private industry/businesses, churches, volunteers, social/civic/professional organizations, non-profit organizations, and local government. The Kentucky model is based on the philosophy that children are better prepared to pursue academic studies in the classroom when their physical, mental, and social needs are addressed.

Parents As Teachers provides home visits by certified parent educators who are trained in child development. The parent educators go to the home of each family involved in the program. They help parents understand each stage of their children's development and offer practical tips on ways to encourage learning. Group meetings are provided for parents to find out they are not alone. Programs schedule times for parents to get together; to gain new insights; and to share their experiences, common concerns, and successes. Screenings are conducted periodically to assess overall development, language, hearing, and vision. The goal is to provide early detection of potential problems to prevent difficulties later in school. The referral network helps families link with special services, if needed. These services may be beyond the basic scope of the program.

Services During the School Day That Can Implement Programs During NonSchool Hours

The **Accelerated School Project** is a comprehensive approach to school change begun at Stanford University in 1986 to improve schooling for children caught in at-risk situations. To accomplish this, schools display high expectations on the part of teachers, students, and parents; deadlines by which students are expected to meet particular educational requirements are set; stimulating and relevant instructional programs are offered; and teachers, parents, and the community are involved in the design and implementation of programs. The Accelerated Schools Project is also expected to create a strong sense of self-worth and educational accomplishment for students who may now feel rejected by schools and frustrated by their own abilities. This model provides the mechanisms to determine the need for extended services and to plan for the implementation of such activities, if the school determines they are needed.

The **Comer School Development Program** links together people and programs to improve the school culture for parents, teachers, and students. The model is used to plan and manage all activities within a school in a way that promotes desirable staff and parent relationships and, in turn, desirable student learning and behavior. The Comer Program seeks to develop creative ways for solving problems using the collective good judgment of educators, parents, and the community and provides a mechanism for identifying the need for extended services and implementing such a program. The Comer model consists of three teams which works collaboratively to initiate programs to provide extended services to children. The three teams are the School Planning and Management Team, the Mental Health Team, and the Parent Committee.

A **Student Services Management Team (SSMT)** consists of student services personnel, selected classroom teachers in the school, and other service providers, as needed. The team meets routinely to discuss issues, plan services, and provide case management services for at-risk

students. Services planned by the team may occur either during the school day or during nonschool hours, depending upon the identified needs and resources of the school. The SSMT integrates and incorporates the function of the substance abuse student assistance program, the building-based staff support team, and any other assistance teams, with the possible exception of specific federal and/or state categorical program needs or requirements. Each identified at-risk student is provided with a personal adviser/case manager who serves as a friend, mentor, teacher, and counselor. The personal adviser also acts as a source of information and assistance as well as an advocate for the student so that each at-risk student may build on his/her strengths. In some schools, one SSMT may be sufficient to meet all functions. In larger schools, two components of SSMT may be critical to the performance of effective and efficient early level interventions.

Services Provided During Nonschool and Traditional School Hours

Alternative educational programs are based on the belief that there are many ways to become educated as well as many types of environments and structures within which education may occur. Some alternative educational programs may offer instructional services during nonschool hours as well as during the regular school day. Common types of alternative educational programs include continuation schools and schools within a school. Continuation schools provide an option for dropouts, potential dropouts, pregnant students, teenage parents, and other troubled and/or disruptive youth. They are designed to be less competitive and to provide a more individualized approach to learning. Programs vary, but usually include individualized learning plans that accommodate support services, personal responsibility for attendance and progress, nongraded or continuous progress, and personal/social experiences. Schools within a school represent an option developed to reduce the size and numbers of large schools into more manageable and humane units. They may represent large groups within one building such as in the middle school concept, or a small number of students who need individualized instruction and special support services. The program is designed to enhance student achievement, teach responsible classroom behaviors, and motivate regular school attendance.

The Comprehensive School Improvement Management Concept is a system of managing the organization of a school and focuses on positive school climate, individual attention, vocational/career awareness needs, and identification and prevention of problems that may lead to students being unsuccessful in school. The basic approach to serving students is examined by the School Improvement Team and reviews such factors as lengthening of the school day, reducing class size, developing a student services management team, implementing direct services to students at risk, and networking school and community resources more efficiently. The components of the Concept can be implemented in elementary, middle, and high schools. Its flexibility allows individual schools to adapt it to their own needs. There are basic components which, when implemented together, provide better services to and options for students. The Comprehensive School Management Concept is also a mechanism through which extended services can be planned and implemented.

Service learning is a method by which young people learn and develop through active

participation in thoughtfully-organized service experiences. It is an outside-of-the-class learning experience in which students become involved in experiences that require a spirit of giving of one's self in the area of public service. Service learning provides activities that meet community needs; are coordinated in collaboration with the school and community; are integrated into each young person's academic curriculum; provide structured time for a young person to think, talk, and write about what s/he did and saw during the actual service duty; provide young people with opportunities to use newly acquired academic skills and knowledge in real-life situations in their own communities; enhance what is taught in the school by extending student learning beyond the classroom; and helps to foster the development of a sense of caring for others and citizenship. Service learning can be implemented at any grade level and is not a job placement, on-the-job training, or paying students for work experience. It is course work which emphasizes practical, real-world problem solving; experiential, hands-on learning; and experiences in being socially responsible.

Teen parenting and pregnancy prevention programs provide academic and parenting education for pregnant students, serve as a resource of pregnancy prevention and personal health and classroom teachers, conduct staff development as appropriate, and staff serve as a liaison between school teachers, administrators, and adolescents. Staff working with the program may also foster community awareness and interest in adolescent health. Programs may be scheduled during nonschool hours and, in some cases, during the school day. Depending on program design and funding, some programs may assist in transporting patients to medical centers and helping to find baby equipment and clothes. School-based programs are frequently coordinated by school counselors or nurses.

Year-round education (YRE) is a reorganization of the school calendar into instructional blocks with vacations distributed across the calendar year so that learning is continuous throughout the year. The purposes of YRE are to more efficiently utilize available space in a manner which allows existing facilities to serve more students; to broaden the curricular offerings of the school; to intensify and lengthen instructional time for all students or a selected group of students; and to provide remedial instruction, accelerated instruction, and/or enrichment activities.

One additional model of extended services that is not included in the manual because it can encompass most of the other models is the **Cities in Schools (CIS)** program. The program is organized to promote and facilitate the coordinated delivery of existing health, social, educational, and other support services at school sites for the benefit of youths and their families to help youth stay in school. These services are delivered in a personable manner. The accountability process in Cities in Schools identifies the gaps in services to children and their families -- gaps that cause children to fall through the cracks. In addition to strong linkages with community agencies, the CIS program also forges partnerships with businesses and industries to provide volunteer tutors/mentors to provide one-to-one guidance and companionship to at-risk students and to serve as a role model for these students.

Financing extended services is an area of concern for all schools. Through the Performance Based Accountability Program (PBAP), schools have a great deal of flexibility in using state funds. In addition to having teachers and staff work flexible hours, schools may also use state funds such as dropout prevention, staff development, and summer school/remediation funds to provide extended services. Other possible funding sources include teacher positions, instructional support positions, equipment, supplies, and materials monies, textbook funds, state exceptional children's funds, and state grants provided through the Alcohol and Drug Defense fund. It is important to remember, however, that the program area must be included in the school's PBAP plan and to follow the process for securing waivers to move funds from one program area to another.

In addition to state funds, there are several federal funding sources which schools may want to consider for funding extended services. Some of the education funds are Chapter 1, Individuals with Disabilities, and Carl Perkins Vocational Educational funds. Health and social services agencies also have access to federal dollars which should be explored to finance extended services. This manual provides additional information on other funding sources.

Evaluation is a required, integral part of every successful program. The evaluative data provide information on whether or not a program is operating as you designed; how well your program is functioning; and the impact of the program on the achievement of students. Two types of evaluation are needed to document the successes and weaknesses of your program. The formative or process evaluation is designed to ascertain if the program is operating as it should and if the operations are efficient and timely. The summative or outcome evaluation determines how well your program's objectives are being met and what effect the program is having on student achievement. A five-step process is suggested to provide quality program evaluation.

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PROGRESS REPORT
ON THE IMPLEMENTATION OF
THE BASIC EDUCATION PROGRAM
TO THE
JOINT LEGISLATIVE EDUCATION
OVERSIGHT COMMITTEE

State Board of Education
Raleigh, North Carolina
January 1994

**Progress Report on the Implementation of the
Basic Education Program to the
Joint Legislative Education Oversight Committee**

EXECUTIVE SUMMARY

- A survey of LEAs was conducted to gather the most up-to-date data regarding implementation of the Basic Education Program. This report contains 1993-94 school year data from all 120 LEAs.
- In general, LEAs report a high degree of Standard Course of Study curriculum implementation (fully met) in the areas of social studies, communication skills, mathematics, science and vocational education.
- In general, LEAs report a low degree of Standard Course of Study curriculum implementation in the areas of the arts, media/technology programs and second languages.
- Instructional support/student services programs, scheduled for major emphasis during 1993-95 continue to be limited with regard to full access by all students. However, full implementation of comprehensive student services programs was achieved by an additional seven LEAs since 1992-93.
- LEAs report an increase in the availability of instructional equipment, textbooks, materials and supplies. Averaged over all curricular areas, the fully met level increased from 54% to 78% of the LEAs since 1992-93. The range is from 24% to 95% of LEAs at the fully met level.
- LEAs report that the primary inhibitors (50% or more of LEAs) to implementation of the Basic Education Program are delayed funding of BEP, inability to find qualified applicants for new positions, lack of adequate classroom space and lateness of state budget approval.

Progress Report on the Implementation of the Basic Education Program to the Joint Legislative Education Oversight Committee

INTRODUCTION

House Bill 83 of the 1991 General Assembly requires the State Board of Education to submit a progress report on the implementation of the Basic Education Program. Information for this report was collected through a survey instrument sent to all local school administrative units during November 1993. All data for the report are based on the 1993-94 school year and represent responses from all of the 120 LEAs. The actual survey with responses is shown in appendix A.

FINDINGS

The following provides an analysis of progress in implementing various aspects of the Basic Education Program.

General Standards of Instruction

Ninety-eight percent of the local education agencies (LEAs) provide an instructional day of at least 5.5 hours. Required time for courses in grades 9-12 is met by 94% of the LEAs. A number of LEAs grant a unit of course credit on the basis of competency acquisition under waivers approved by the State Board of Education.

Standard Course of Study

The BEP in the Standard Course of Study (SCS) outlines the educational program that should be available to every child regardless of where they live and go to school in North Carolina. The percent of LEAs which show a high degree of full curriculum implementation include social studies (96%), communication skills (95%), mathematics (95%), science (93%) and vocational education (93%). Eighty percent of the LEAs indicated that the healthful living curriculum is fully implemented. The percent of LEAs which show a low degree of full program implementation include the arts program (13%), media and technology programs (43%) and second languages (46%). Exceptional Children programs and services are in full compliance with the Division for Exceptional Children program review procedures and the State Board of Education *Procedures Governing Programs and Services for Children with Special Needs* in 79% of the LEAs. Comprehensive student services programs as called for in the BEP are fully implemented in only 24% of the LEAs. Dropout prevention programs and alcohol and drug prevention programs have been fully implemented respectively in 59% and 80% of LEAs.

Limited Implementation—The Arts

In the instance of arts education, depending on grade level cited, 92% to 99% of schools with grades K-5 provide instruction in visual arts and music. However, 34% to 40% of these schools offer theatre art and dance in addition to music and visual arts. The SCS calls for instruction in all four areas, grades K-5. Participation rates for students in all four arts areas for K-5 students range from 39% in grade K to 45% in grades 4 and 5.

The SCS for grades 6-8 calls for student participation in at least one of the four arts areas; however, schools are required to offer all four areas. Currently, visual arts and music are offered in 96 to 100% of the schools with grades 6-8 with theatre and dance offered in 29% to 41% of the schools with those grades. The number of students participating in at least one area of the arts in grades 6-8 varies from 93% in grade 8 to 100% in grade 6.

Certain arts courses grades 9-12 are quite limited in terms of availability, especially in the areas of technical theatre (41%) and dance (33%).

Limited Implementation—Second Languages

The second area of limited access is the second languages curriculum with 57% to 79% of schools with grades K-5 providing second language instruction, the grades where it is required of all students. The number of K-5 students currently participating in second language ranges from 46% in kindergarten to 81% in grade 4.

A second language is available in 62% to 67% of the schools with grades 6-8 where a second language must be available to students who elect to participate. Students participating in a second language in grades 6-8 range from 36% in grade 8 to 52% in grade 6.

Twenty-seven percent of the LEAs do not have available at least four years of one second language for all qualified students in grades 9-12.

Other Areas of Low Availability

Comprehensive student services programs (school counseling, school nursing, school psychology and school social work) should be available to all students. A comprehensive services program is fully implemented in only 24 or 28% of the LEAs. The availability of these services is essential to help each student achieve to his/her fullest.

A comprehensive media and technology program is fully implemented in 43% of the LEAs.

Instructional Materials, Supplies and Equipment

The availability of textbooks, instructional materials, supplies and equipment at the fully met level ranges from a low in arts education of 24% of the LEAs to a high in mathematics of 95% of the LEAs. These figures indicate that all areas of the curriculum need additional attention with regard to the availability of adequate instructional materials and equipment to provide the program outlined in the SCS.

Instructional Support Programs

The BEP calls for a comprehensive instructional support system which will enable students to learn to their fullest. In providing such a system, the BEP requires an adequate number of instructional support personnel by establishing staff ratios for the allotment of personnel to LEAs. Based on the responses of the 120 LEAs, the availability of instructional support personnel is as follows:

	<u>BEP Formula</u>	<u>Current Status</u>
Counselors	1: 400 ADM	1: 422 ADM
Psychologists	1: 2,000 ADM	1: 2,201 ADM
School Social Workers	1: 2,500 ADM	1: 3,676 ADM
School Nurses	1: 3,000 ADM	1: 4,376 ADM
Media Specialists/Librarians	1: 400 ADM	1: 550 ADM

The standards for instructional support personnel to provide the support services called for in the BEP are minimally met as indicated above by the current status ratios listed. An additional 2,145 positions are scheduled for funding. See Impact of BEP Funding 1985-95 State Summary.

Other Findings

A question was posed to the LEAs regarding their ability to implement the BEP. The eight inhibitors on the survey are those most frequently mentioned in informal feedback to the Department of Public Instruction. Of the eight inhibitors presented on the survey, the items which had a 50% or more response were: delayed funding of BEP (93%); inability to find qualified applicants (62%); lack of adequate classroom space (58%) and late state budget approval (53%).

Implementation Progress Since 1992-93 Report

The General Assembly provided \$10 million for instructional support positions for the 1993-94 school year. This added 330 positions for counselors, school psychologists, school nurses, social workers and media specialists. An additional \$4.5 million was appropriated for textbooks. These additional funds have resulted in an increase in the number of LEAs with fully implemented comprehensive student services programs from 21 to 28 LEAs or 33% increase in 1993-94. Decreases in instructional support staff ratios have decreased from 1:429 ADM to 1:422 for counselors. The school nurses ratio dropped from 1:4,749 ADM to 1:4,376 while school social workers decreased from a ratio of 1:4,119 to 1:3,676 ADM.

The 1993-94 school year has seen an increase in the participation of K-5 students in all four areas of the arts from 24% to 39% in grade K and from 34% to 45% in grade 5. Slight increases of 1-4% have occurred in arts participation in grades 6-8; availability of technical theatre and dance courses have increased by 2% in grades 9-12.

Second language participation in 1993-94 at K-5 grades has increased from 42% to 46% in kindergarten and from 75% to 81% in grade 4.

Availability of instructional materials, supplies and equipment at the fully met level increased from an average of 54% to 78% across all programs.

SUMMARY

The survey data from the 120 LEAs reflected in this report indicate varying degrees of implementation of the Standard Course of Study of the Basic Education Program. This results from the fact that the BEP is not yet fully funded and LEAs have flexibility to determine how and when to phase in the various components.

Areas of the curriculum in which there is a high level of full implementation (85% or above) are social studies, communication skills, mathematics, science and vocational education. Curricular areas which have a lower level of full implementation (50% or below) include the arts, media and technology and second languages.

Availability of adequate instructional equipment, textbooks, materials and supplies—the tools of education—at a fully met level increased from 54% to 78% of the LEAs when averaged across all curricular areas.

Factors that contribute to the slowed progress in fully implementing the BEP are: delayed funding of BEP, inability to find qualified candidates for new positions, lack of adequate classroom space and late state budget approval. These factors were cited by 50% or more of the LEAs.

IMPACT OF BEP FUNDING (1985-95)

Adjusted for Inflation (See Note 2)

STATE SUMMARY

Program Description	BEP Funding 1985 - 1994 (Note 1)		BEP To Be Funded 1994-95 (Note 2)		Total BEP Funding at Full Implementation	
	Positions	Amount	Positions	Amount	Positions	Amount
Teachers	8,778.5	\$290,476,288	2,558.5	\$89,317,235	11,337.0	\$379,793,523
Total Percent Instructional		49.2%		26.8%		41.1%
Assistant Principals (Note 3)	340.0	14,613,200	315.3	16,151,271	655.3	30,764,471
Athletic Trainer Supplement	0.0	65,000	0.0	7,000	0.0	72,000
Instr., Lab, Media, or Clerical Assistants	0.0	0	3,944.0	64,973,456	3,944.0	64,973,456
Support Personnel (Note 4)	1,545.5	58,234,440	2,145.0	80,823,600	3,690.5	139,058,040
Teacher Assistants	(266.0)	(4,382,084)	2,123.0	34,974,302	1,857.0	30,592,218
Total Percent Instructional Support		11.6%		59.0%		28.8%
Community Schools	0.0	(689,577)	0.0	689,577	0.0	0
Dropout Prevention (Note 5)	344.0	29,544,107	0.0	0	344.0	29,544,107
Exceptional Children	0.0	35,693,606	0.0	0	0.0	35,693,606
Staff Development (Note 5)	0.0	3,511,334	0.0	0	0.0	3,511,334
Summer School (Note 5)	0.0	26,372,299	0.0	0	0.0	26,372,299
Vocational Education	0.0	56,303,148	0.0	0	0.0	56,303,148
Total Percent Categorical		25.6%		0.2%		16.4%
Consolidated Allotment						
(Instructional Equipment and Instructional Supplies)	0.0	15,743,013	0.0	3,667,591	0.0	19,410,604
Textbooks	0.0	17,634,419	0.0	11,632,790	0.0	29,267,209
Total Percent Consolidated and Textbooks		5.7%		4.6%		5.3%
School Administrators (Note 6)	(63.0)	(3,885,702)	340.0	22,144,817	277.0	18,259,115
Clerical Assistants	2,007.5	45,974,189	402.0	9,210,222	2,409.5	55,184,411
Finance Officers	100.0	4,389,599	0.0	0	100.0	4,389,599
Total Percent Administration		7.9%		9.4%		8.4%
TOTAL	12,786.5	\$589,597,279	11,827.8	\$333,591,861	24,614.3	\$923,189,140
	63.9%		of Total	36.1%	of Total	100.0%

Note 1: Reflects the total impact of the BEP when compared to the allocation formulas used in 1984-85. Dollars are based on 1993-94 allotted salaries including benefits.

Note 2: Remaining funding is based on 1993-94 ADM. Dollars are based on 1993-94 allotted salaries including benefits. Consolidated Allotment and Textbooks have been adjusted for inflation.

Note 3: Assistant Principals 1985-94 funding is based on a 10 month position; 1994-95 is based on a 12 month position.

Note 4: Instructional Support - Certified personnel include Library/Media Specialists, Guidance Counselors, Psychologists, etc.

Note 5: Includes 1991-92 funding reductions of \$16,749,527.

Note 6: Includes funding for Associate/Assistant Superintendents and Directors/Supervisors/Coordinators.

Department of Public Instruction
Division of School Business Services
School Budgets Section
November 9, 1993 (BEPINFL)

THE RECOMMENDATIONS OF THE JOINT COMMITTEE FOR A SCHOOL LEADERSHIP ACADEMY

The report that follows contains the Committee's recommendations for the establishment of a School Leadership Academy to serve the needs of school administrators and other school leaders throughout the State for continuing professional development. The legislation refers to both a School Leadership Academy and an Educational Leadership Academy; throughout this report the title "School Leadership Academy" has been used except when quoting from the legislation. The report is presented to the Joint Legislative Education Oversight Committee of the General Assembly in April 1994.

The report is organized around the eight (8) topics listed for consideration in the legislation. The items from the legislation are presented in italics followed by Committee findings and recommendations. The term "school administrators" as used herein includes superintendents, associate and assistant superintendents, principals and assistant principals. Others who may receive training are persons who participate in school governance activities such as teachers, parents, and school board members.

In its planning the Joint Committee has considered:

- (1) *The recommendations of the report submitted to the 1993 General Assembly by the Educational Leadership Task Force.*
- (2) *How to incorporate all or part of the Principal's Executive Program into the Educational Leadership Academy.*

In its deliberations, the Joint Committee has thoroughly studied the report and recommendations of the Task Force on Educational Leadership. It appreciates and endorses the beliefs of the Task Force regarding continuing professional development for school leaders. The Joint Committee believes that the continuing professional development for school administrators is an essential element in developing and maintaining a highly qualified cadre of school leaders. Pre-service programs at the master's and doctoral levels are only the foundation for competence in school administration. After licensed candidates become employed as administrators, they need professional development opportunities suited to their new roles. The State must provide training that assists practicing school administrators to reflect on and solve real-life challenges under the direction of accomplished mentors and also to stay knowledgeable and skilled in new practices in the fields of leadership and management. The recommendations of the Joint Committee presented herein reflect this vision of the need for and the nature of continuing professional development for school administrators.

The Joint Committee has studied the programs currently offered for school administrators. It found that universities offer a wide range of programs on leadership issues, many in collaboration with public schools and the State Department of Public Instruction (SDPI). A few school districts offer programs for the enhancement of leadership among their own faculty and administrators. The SDPI offers leadership academies in three geographically dispersed locations; the Assessment Center and its allied development services; and the Business and Industry Liaison Program which sends educators to training opportunities offered by the business community. The Principals' Executive Program (PEP) provides five-week professional-level management courses for public school principals, and comparable programs for superintendents and assistant principals.

Although there are some excellent programs among those available today, there is no coordination among them. There is no guarantee that an administrator will have access on a regular basis to what he or she needs in development opportunities. The Joint Committee agrees with the report of the Educational Leadership Task Force, *Leaders for Tomorrow's Schools*, that there should be established a School Leadership Academy with the capacity to serve the ongoing development needs of all school administrators. The programs of the Academy must be of the highest quality and rigor as measured by independent evaluators. The menu of program offerings must be planned to address needs expressed by administrators themselves, as well as training needs related to State educational initiatives (for example, site-based management, outcomes-based education, special education, etc.).

The Joint Committee envisions an Academy that would offer two kinds of professional development programs. There should be required initial professional development programs for superintendents, principals, and assistant principals to be taken within the first five years of employment. In addition, the Academy should provide a variety of other programs for superintendents, assistant and associate superintendents, principals, assistant principals, and other school leaders to be taken throughout their careers so that North Carolina administrators would have ongoing professional development opportunities to meet the challenges of school leadership.

The required initial program for principals should be offered by the current staff of the Principals' Executive Program under the auspices of the School Leadership Academy Board of Trustees. The program should be delivered at the proposed Academy facility to ensure the residential retreat environment which the Committee considers necessary for cohort building among participants and for engagement with rigorous subject matter. The program would be similar in scope and design to the basic program now offered by PEP. The required program for assistant principals also would be offered by PEP, at the proposed Academy facility as well as at locations across the State that provide appropriate geographical access for the assistant principals.

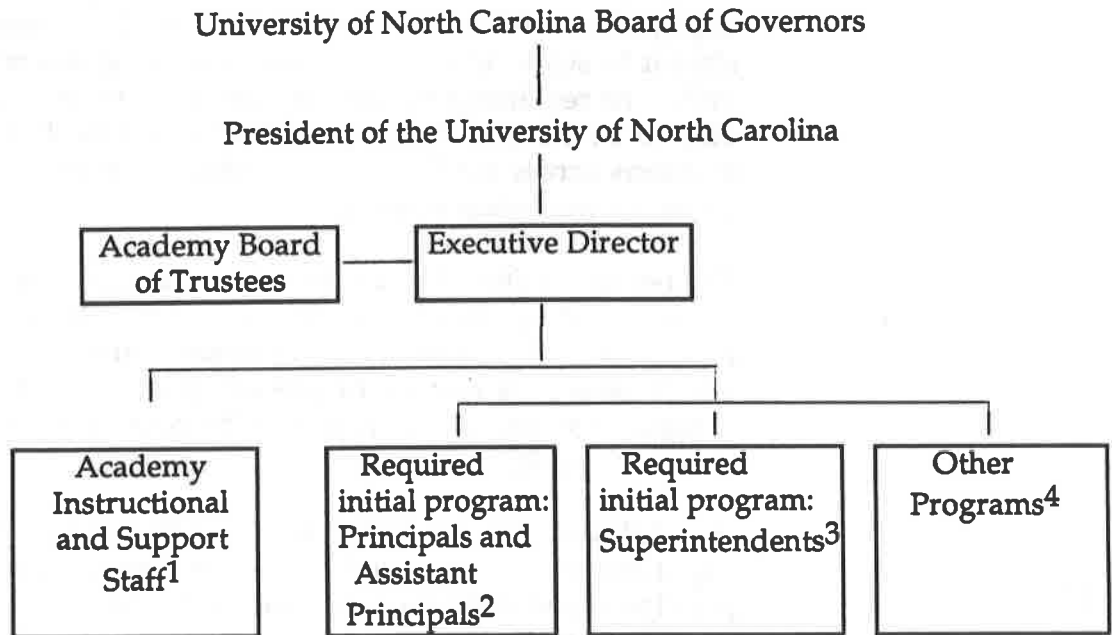
The required initial program for superintendents should be offered on a contractual basis by an entity selected by the Academy Board of Trustees. PEP, universities, private training institutions, and others would be eligible to present proposals. Like the initial program for principals, it would be offered at the Academy's proposed facility.

In addition, the Academy would offer other programs for superintendents, associate and assistant superintendents, principals, and assistant principals, and other school leaders such as parents, teachers, and school board members. These programs would be designed to address current school problems, advances in the leadership and management practice, and further professional development for all school leaders. These programs would be offered on a contractual basis in geographically dispersed locations across the state by entities selected by the Academy Board of Trustees.

The table of organization (Table 1) illustrates the structure of the Academy. The School Leadership Academy staff should consist of an executive director, a program associate, and adequate instructional and support staff to include the program director and all current instructional and support staff positions of the PEP program. Other staff will be contracted as needed.

Table 1:

**School Leadership Academy
Table of Organization**



- ¹ The School Leadership Academy initial staff should consist of an executive director, a program associate, and adequate instructional and support staff, to include the program director and all current instructional and support staff positions of the PEP program. Other staff will be contracted as needed.
- ² The Principals' Executive Program, as incorporated into the School Leadership Academy, will offer the required initial program for principals and assistant principals. The required program for principals shall be offered at the proposed Academy facility.
- ³ The required initial program for superintendents will be offered by an entity selected by the Academy Board of Trustees.
- ⁴ Other instructional and/or follow-up programs to serve superintendents and associate and assistant superintendents, and principals and assistant principals, as well as others who serve in school governance roles will be offered at geographically dispersed sites across the State, by entities selected by the Academy Board of Trustees.

- (3) *A design for a governing board for the Educational Leadership Academy composed of persons who have demonstrated a commitment to improving educational leadership in the State including practicing school administrators and professors of schools of education.*

The governing board of the School Leadership Academy shall be called the "Board of Trustees of the School Leadership Academy," and shall be responsible to the University of North Carolina Board of Governors.

The membership of the Board of Trustees shall include persons who have demonstrated a commitment to improving educational leadership in the State and shall be constituted as follows:

- Chair of the Board of Governors (or a designee who shall be a member of the Board of Governors) shall serve as a co-chair
- Chair of the State Board of Education (or a designee who shall be a member of the State Board of Education) shall serve as a co-chair
- Superintendent of Public Instruction, or a designee
- 1 dean of a School of Education that offers initial preparation programs for school administrators
- 1 professor of educational administration
- 1 representative of independent colleges and universities
- 1 superintendent/assistant or associate superintendent
- 2 school principals/assistant principals
- 1 teacher
- 5 at-large members.

The chair of the Board of Governors or his/her designee, the chair of the State Board of Education or his/her designee, and the Superintendent of Public Instruction or his/her designee shall serve as *ex officio* voting members. The remaining appointments shall be the responsibility of the Board of Governors of the University of North Carolina in collaboration with the North Carolina State Board of Education. Initial appointments shall be for one, two, and three year terms. Succeeding terms shall be for three years each. No appointed member may serve more than two consecutive three-year terms. Appointments to the board shall be representative of the geographic, race and gender, and urban and rural make-up of the State.

The membership shall not exceed fifteen (15) members. The Board of Trustees shall appoint committees/sub-committees as necessary to complete tasks. These committees shall be chaired by a member of the Board.

- (4) *A charge to the governing board that ensures coordination between the Educational Leadership Academy and the initial preparation programs.*

In order to ensure and promote coordination between the Leadership Academy and initial preparation programs, the School Leadership Academy shall sponsor an annual professional development conference on school leadership. Participants will include those entities offering programs through the School Leadership Academy and faculty of education administration in initial preparation programs.

The Board of Trustees shall initiate a joint committee among the School Leadership Academy, the institutions of higher education offering initial preparation programs, the Principal Fellows Commission, the School Administrators Standards Board, and the State Department of Public Instruction for the purpose of ensuring high quality coordinated programs.

- (5) *How the State Board of Education shall ensure that all school administrators be required to complete at least five of their 15 continuing education units for continued practice in the profession in Educational Leadership Academy programs or in programs endorsed by the Educational Leadership Academy's governing board.*

The State Board of Education shall mandate that all school administrators be required to complete in Leadership Academy programs or programs endorsed by the Leadership Academy a minimum of five (5) of the fifteen (15) certificate renewal credits (CRCs) that are required every five (5) years for license renewal. The Board of Trustees of the Academy shall determine how many CRCs will be granted for each activity.

- (6) *How to ensure that coordinated and geographically dispersed professional development opportunities exist for school administrators.*

The responsibility of ensuring that professional development opportunities will be coordinated and will be offered at geographically dispersed locations shall lie with the Academy Board of Trustees.

- (7) *What facilities and staff are needed for the Academy: the Joint Committee shall recommend whether a building is needed, and, if so, whether there is an existing building that can be used to meet the needs of the Academy, or if a new building is needed.*

There should be a new facility in a central location for the School Leadership Academy which shall include state-of-the-art instructional, office, and residential space, and provide the latest instructional and communications technology. Related educational programs would be able to use the facility at the discretion of the School Leadership Academy Board of Trustees, with School Leadership Academy programs having priority.

As described above in section (2), the School Leadership Academy staff shall consist of an executive director, and adequate instructional and support staff. Other staff will be contracted as needed.

- (8) *The cost of its recommendations which shall be included in its report to the Joint Legislative Education Oversight Committee.*

The cost estimates included in Table 2 are preliminary because there has been no opportunity to consult with the Fiscal Research Division due to the timing of the special legislative session on crime. If further refinement is determined to be necessary by the Education Oversight Committee, the staff of the Joint Committee for a School Leadership Academy will be available for consultation. Support documents for the cost estimates appear in Appendix C. The facility cost estimate is based on a PEP facility request, which is currently included as a part of the UNC-Chapel Hill capital budget request. It is the understanding of the Joint Committee that if a facility for the School Leadership Academy is funded, PEP would no longer need a separate facility.

Table 2: Cost Estimates

CONTINUING PROGRAM COSTS*

New Programs

Development, delivery, program evaluation (average 6 days of training for 5000 participants for \$160/day per participant) (C-2)	\$ 4,800,000
Annual Conference for 100 people (C-3)	\$ 15,975
Board	
Meetings (\$125/person/day for per diem, subsistence, and travel; 15 members at 6 meetings per year)	\$ 11,250
Consultants	\$ 5,000
Staff	
Executive director	\$ 108,000
Program Associate	\$ 50,000
3 Secretaries IV @ 19,500 each	\$ 58,500
3 instructional staff @ 50,000 each	\$ 150,000
Staff benefits	\$ 77,760
Printing/publications	\$ 45,000
Travel	\$ 15,000
Telephone	\$ 8,000
Postage	\$ 10,000
Building maintenance and operating costs (C-4)	\$ 425,000
<i>Sub-Total/New Programs</i>	<i>\$ 5,779,485</i>

Current Programs

PEP annual budget	\$ 1,200,000
<i>Sub-Total/Continuing Program Costs</i>	<i>\$6,979,485</i>

ONE-TIME CAPITAL OUTLAY

Building (C-5 - C-8)	\$10,000,000
Equipment for instruction, communication, and student workstations (e.g., computers, fax, podiums, N.C. Information Highway connection, video equipment, a fully equipped master classroom, and two computer classrooms). (C-9)	\$ 560,000
<i>Sub-Total/One-time Capital Outlay</i>	<i>\$10,560,000</i>
TOTAL	\$17,539,485

* An amount for maintenance, replacement, and upgrading of equipment must be added in future budget cycles.

Note: Numbers and letter in parentheses following budget items refer to page numbers of Appendix C.

Projections of the Supply of, and Demand for, Educational Administrators in North Carolina, 1993-94 through 2002-03

House Bill 257, 1993 Session Laws, directs the Board of Governors to:

study the issue of supply and demand of school administrators to determine the number of school administrators to be trained in the programs in each year of each biennium. The Board of Governors shall report the results of this study to the Joint Legislative Education Oversight Committee no later than March 1, 1994, and annually thereafter.

This requirement is part of the Act to Implement the Recommendations of the Education Leadership Task Force and the Joint Legislative Education Oversight Committee Concerning School Administrator Programs at the Constituent University of North Carolina Institutions. For this study, educational administrators are defined to include principals, assistant principals, superintendents, associate superintendents and assistant superintendents. This report is the first of the mandated annual reports on this topic.

Analytical Approach

The annual demand for newly trained educational administrators is closely related to the annual number of new hires caused by the annual growth in staffing levels and the annual replacement of those who have left their North Carolina positions due to retirement, resignation, discharge or death during the previous year. Table 1 presents past and projected data on the number of full-time principals and assistant principals in North Carolina public schools, total Average Daily Membership (i.e., public school enrollment-ADM) and the number of public schools in North Carolina. From these data, the ratio of assistant principals to principals and the number of public schools per 1000 ADM are calculated.

Under the assumption that the number of public schools per 1000 ADM will return to its 1980s level of 1.83, the number of public schools is projected to increase to 2,524 by the 2002-03 school year in order to accommodate a projected enrollment growth of 265,651 pupils. This is a growth of 23.9 percent over 1993-94 and stands in stark contrast to the stable enrollments of the 1980s. It accounts fully for the projected growth in the number of principals and assistant principals during this period. The assumptions underlying these projections are stated at the bottom of Table 1.

Table 2 presents similar data for full-time superintendents and their associates and assistants. Just as the number of principals is equal to the number of public schools (minus a handful that either lack a full-time principal or share one with another school), the number of superintendents is equal to the number of school districts, which are projected to decline by four per year until each county has only one. The number of assistants and associates per superintendent is projected to stabilize at 2.46 over the next decade.

Table 3 summarizes the projected annual growth in staffing levels for these educational administrators over the coming decade. It also projects the number of new hires needed to replace those lost to turnover each year. The turnover rate of 7.87 percent for principals and assistant principals is based on the most recent five years of data. It has shown little variation over these years. The turnover rate of 11.35 percent for superintendents, associates and assistant is also an average over the past five years. However, it has varied between 6.9 and 15.0 percent over this period. It should be noted that educational administrators who left their position for another position in the same category (i.e., principal or assistant principal, or superintendent, associate or assistant) in any other public school or school district in North Carolina were not counted in the turnover rate.

The data in Table 3 summarize the projections of demand for educational administrators in North Carolina's public schools and school districts over the coming nine years. Persons to fill these positions may be drawn from any one of three sources:

1. Currently certified persons who received their education and training from out-of-state institutions and then moved to North Carolina, but are not yet employed as educational administrators.
2. Currently certified persons who received their education and training from a North Carolina institution sometime other than the last year—but are not yet employed as educational administrators, and
3. Newly trained and certified completers of training programs offered by North Carolina institutions.

To the extent that the projected new hires are drawn from either of the first two sources, new production by colleges and universities in North Carolina is not needed except to fill vacancies at private schools, out-of-state schools or in related positions. The number of persons in this pool who may actively seek an educational administrator position in any given year is unknown, but the data in Table 4 give some information on the size of this Reserve Pool. They show that in the fall of 1993, there were 12,565 and 3,597 persons with active certificates to be employed, respectively, as principals and superintendents. Those who are already employed in a North Carolina public school, but at a level below that of their certificate, are 2,957 and 1,935 (see boxed entries), respectively, at the principal and superintendent levels. Members of both groups would seem to be viable candidates for positions at the level of their certificates.

Similarly, those who have active certificates but are not employed by a public school or school district would also seem to be viable candidates. However, if one considers whether persons in these groups have worked at the level of their certificate in the past five years, or if they are 55 or younger, their numbers drop significantly (see second set of boxed entries).

The availability of persons from the Reserve Pool to fill future vacancies at the principal and superintendent levels is a function of the relative attractiveness of those positions. Factors such as salary levels, loss of tenure for principals, in-service training opportunities and certificate renewal requirements will all exert their separate influence on those in the pool.

Some insight into the number of persons that will need to be drawn from this pool may be gleaned from the data in Table 5. These data show the number of persons trained by North Carolina colleges and universities in educational administration over the past five years, and the number of these who have become certified and then employed by a North Carolina public school or school district at the level of their certificate. The data in the first column show that North Carolina institutions have trained about 300 principal-level candidates and 150 superintendent-level candidates, on average, during each of the past five years. The data in the next two columns show that between 75 and 80 percent of these program completers were certified as of the fall of 1993.

The data in the last two columns show that the employment rates of program completers have been 41.5 percent for principal-level completers and 8.7 percent for superintendent-level completers. These employment rates are an important reminder that not all program completers find administrative positions in the public schools. Many fail to get certified, either because they fail the NTE/PRAXIS exam or because their employment goal may not require it (e.g., they are working in a private school or out-of-state). Others obtain certification in order to have an employment option that they are not yet ready to exercise. Some are simply unable to find suitable employment in their school or school district even though vacancies may exist in others.

The data in Tables 4 and 5 underscore the uncertainty associated with converting the projection of new hires shown in Table 3 to a projection of the number of program completers needed from North Carolina colleges and universities over the next decade. The data in Table 6 address this uncertainty by calculating three estimates—low, moderate and high—of the number of program completers that will be required. The first column in Table 6 reproduces the projection of principals that will be hired between 1994-95 and 2002-03, as shown in Table 3.

The second column estimates the number of these new hires that will be drawn from persons trained out-of-state by assuming that 20 percent—the average over the past four years—will continue to come from this source over the next nine years. The third column presents the number of new hires to be drawn from old and new graduates of North Carolina institutions. In each of the projections shown in the last three columns of Table 6, it is assumed that 10 percent of future program completers will fail the licensure exam (a rate comparable to that found in law and nursing), and an additional 20 percent of those passing will not seek employment in a North Carolina public school. The differences in the three projections reflect differences in assumptions about the relative proportions of new hires shown in the third column that will be drawn from the Reserve Pool and from the pool of new program completers each year. The moderate projection of program completers needed assumes that the Reserve Pool will be partially depleted over time so that, on average, only 25 percent will be drawn from this source.

Summary

Enrollment growth, which is projected to exceed 23 percent in North Carolina public schools over the next ten years, will increase the demand for principals and assistant principals as new schools are built or acquired to accommodate this growth. Because the number of school districts will continue to fall until it reaches one-per-county and because superintendent level positions are relatively insensitive to enrollment levels, the demand for superintendents and personnel will change little over the next ten years.

The projected number of persons that will be needed to complete programs in educational administration at North Carolina institutions in order meet the growing demand for principals and assistant principals is not the same as the projected number of new hires because many vacancies are filled by persons trained out-of-state or by persons trained in-state in earlier years. Furthermore, not all newly trained persons in North Carolina find public school positions at the principal level either because they fail the licensure exam or simply cannot be matched with existing vacancies. These factors are all considered in the projections reported in Table 6 and three alternative assumptions lead to the low, moderate and high projections that are presented.

The moderate and high projections both suggest that the number of program completers at North Carolina colleges and universities will need to increase in the next nine years over the average level of 300 per year attained over the past five years. The increase needed will be at least 17 percent year according to these projections.

The major source of uncertainty in these projections is the assumed number of new hires to be drawn each year from the Reserve Pool, i.e. those previously trained and currently certified—but not yet employed—in a public school principal-level position. The availability of persons in this pool will be strongly influenced by changes in certification renewal requirements now under discussion. The annual update of these projections will consider the impact of these changes as they are adopted.

Table 1.
Full-Time Principals and Assistant Principals Employed in NC Public Schools, Past and Projected

Year	Principals	Assistant Principals	Total	Ratio Asst. to Princ.	Number of NC Public Schools	Final ADM	Schools per 1000 ADM
1983-84	1,986	1,290	3,276	0.65	1,996	1,084,728	1.84
1984-85	1,969	1,379	3,348	0.70	1,972	1,078,700	1.83
1985-86	1,957	1,455	3,412	0.74	1,968	1,075,289	1.83
1986-87	1,957	1,538	3,495	0.79	1,963	1,073,524	1.83
1987-88	1,941	1,702	3,643	0.88	1,952	1,072,934	1.82
1988-89	1,940	1,793	3,733	0.92	1,948	1,068,800	1.83
1989-90	1,942	1,851	3,793	0.95	1,951	1,065,399	1.83
1990-91	1,949	1,882	3,831	0.97	1,959	1,070,297	1.83
1991-92	1,937	1,821	3,758	0.94	1,946	1,080,223	1.80
1992-93	1,944	1,895	3,839	0.97	1,948	1,093,683	1.78
1993-94	1,951	1,892	3,843	0.97	1,956	1,113,338	1.76
1994-95	2,012	1,952	3,964	0.97	2,017	1,139,541	1.77
1995-96	2,070	2,008	4,078	0.97	2,075	1,165,464	1.78
1996-97	2,125	2,061	4,186	0.97	2,130	1,190,025	1.79
1997-98	2,179	2,114	4,293	0.97	2,184	1,213,594	1.80
1998-99	2,238	2,171	4,409	0.97	2,243	1,239,471	1.81
1999-00	2,304	2,235	4,539	0.97	2,309	1,268,642	1.82
2000-01	2,377	2,306	4,683	0.97	2,382	1,301,494	1.83
2001-02	2,446	2,373	4,819	0.97	2,451	1,339,335	1.83
2002-03	2,519	2,443	4,962	0.97	2,524	1,378,989	1.83

UNC-GA Planning/Misc.AT001C/2-17-94

Assumptions:

- 1) Number of principals = number of public schools -5.
- 2) Number of schools per 1000 ADM will stabilize at 1.83.
- 3) Ratio of assistant principals to principals will stabilize at .97.

Table 2.
Full-Time Superintendents, Associate and Assistant Superintendents
Employed in NC Public Schools, Past and Projected

Year	Superintendents (= No. of School Districts)	Associate/ Assistant Superintendents	Total	Ratio of Associate and Assistant to Superintendents
1983-84	142	248	390	1.75
1984-85	142	282	424	1.99
1985-86	141	272	413	1.93
1986-87	140	282	422	2.01
1987-88	140	285	425	2.04
1988-89	140	312	452	2.23
1989-90	134	328	462	2.45
1990-91	134	329	463	2.46
1991-92	133	304	437	2.29
1992-93	129	285	414	2.21
1993-94	120	295	415	2.46
1994-95	116	285	401	2.46
1995-96	112	276	388	2.46
1996-97	108	266	374	2.46
1997-98	104	256	360	2.46
1998-99	100	246	346	2.46
1999-00	100	246	346	2.46
2000-01	100	246	346	2.46
2001-02	100	246	346	2.46
2002-03	100	246	346	2.46

UNC-GA Planning/Misc.AT001D/2-17-94

Assumptions:

- 1) Number of superintendents = number of school districts, which will decrease by four per year until there is only one per county.
- 2) Ratio of associate and assistant superintendents to superintendents will stabilize at 2.46 per school district.

Table 3.
Projected New Hires of Public School Administrators in North Carolina

Year	Principal & Asst. Principal			Supt., Assoc. Supt., and Asst. Supt.			Total		
	Staffing Level Change	Re- place- ment	Total	Staffing Level Change	Re- place- ment	Total	Staffing Level Change	Re- place- ment	Total
1994-95	121	302	423	-14	47	33	107	349	456
1995-96	114	312	426	-13	46	33	101	358	459
1996-97	108	321	429	-14	44	30	94	365	459
1997-98	107	329	436	-14	42	28	93	371	464
1998-99	116	338	454	-14	41	27	102	379	481
1999-00	130	347	477	0	39	39	130	386	516
2000-01	144	357	501	0	39	39	144	396	540
2001-02	136	369	505	0	39	39	136	408	544
2002-03	143	379	522	0	39	39	143	418	561

UNC-GA Planning/Misc.AT001B/2-17-94

Assumptions: 1) Turnover rate of principals and assistant principals will average 7.87 percent per year.

2) Turnover rate of superintendents, associate and assistant superintendents will average 11.35 percent per year.

Table 4.
Reserve Pool Calculation for Educational Administrators, Fall 1993

Variable	Number
A. Principals and Assistant Principals	
1. Persons with active certificates	12,565
a. Employed as principal or assistant	4,101
b. Employed as sup't, assoc., asst., or curriculum specialist	1,213
c. Employed in other public school position	2,957
Total employed (in a NC public school in 1992-93)	8,271
2. Unemployed persons with active certificates	4,294
a. Have worked as a principal or assistant principal in a NC public school in the last five years	967
b. Persons in group a. above who are 55 or younger	378
B. Superintendents, Associates, and Assistants	
1. Persons with active certificates	3,597
a. Employed as sup't, assoc., asst., or curriculum specialist	385
b. Employed in other public school position	1,935
Total employed (in a NC public school system in 1992-93)	2,320
2. Unemployed persons with active certificates	1,277
a. Have worked as a superintendent, assoc. or asst. sup't in a NC public school system in the last five years	231
b. Persons in group a. above who are 55 or younger	87

Table 5.
Rates of Certification and Employment by NC Public Schools for Persons
Completing Academic Programs in Educational Administration at a
NC College or University in the Period 1987-88 through 1991-92

Program	Number Completed Program	Certified as of Fall 1993		Employed in a NC Public School or System	
		Number	Percent	Number	Percent
Principals/Assistants					
Master's in Ed.Admin.	974	704	72.3%	399	41.0%
Certification Only	522	417	79.9%	222	42.5%
Total	1,496	1,121	74.9%	621	41.5%
Superintendents/Associates/Assistants					
Ed.S./CAS	565	469	83.0%	31	5.5%
Doctorate	226	168	74.3%	38	16.8%
Total	791	637	80.5%	69	8.7%

UNC-GA Planning/Misc.AT003/2-17-94

Source: SDPI Certification File and CPC File and UNC-General Administration Student Data File

Table 6.
Projected Number of New Master's Degrees and Certification Only Completers
Needed in Educational Administration

Year	New Hires of Principals & Assistants			Completers Needed from NC Institutions		
	Total	Out-of-State Graduates	NC Graduates	Low	Moderate	High
1994-95	423	85	338	235	352	469
1995-96	426	85	341	237	355	474
1996-97	429	86	343	238	357	476
1997-98	436	87	349	242	364	485
1998-99	454	91	363	252	378	504
1999-00	477	95	382	265	398	531
2000-01	501	100	401	278	418	557
2001-02	505	101	404	281	421	561
2002-03	522	104	418	290	435	581
10-Yr. Total	4,173	834	3,339	2,318	3,478	4,638

UNC-GA Planning/Misc.AT004/2-17-94

- Assumptions:
- 1) Twenty (20) percent of new hires will continue to come from out-of-state institutions.
 - 2) All three projections of program completers needed assume that 90 percent will pass the licensure exam and 20 percent of these will not seek employment in a NC public school position in educational administration.
 - 3) The low, moderate, and high projections assume that half, one fourth, and none, respectively, of new hires from NC institutions will be drawn from the Reserve Pool.

EXECUTIVE SUMMARY

The Teacher Training Task Force has studied the various issues required by the legislation (Chapter 971, House Bill 1357). As a result of our deliberations, the task force makes nineteen recommendations grouped under the headings: Continuing Professional Development, Teaching Fellows Program, Cultural Diversity, Special Education, and Implementation of the Objectives of the 1987 Task Force Report. In the body of the report, background and rationale leading to the development of each recommendation are presented. In the executive summary, only the recommendations are listed.

The Teacher Training Task Force recommends that:

Continuing Professional Development

- 1. for the year 1994-95, five days of work be funded and required for teachers exclusively for professional development, with an additional five days funded each biennium until the goal of twenty is achieved. The Task Force strongly recommends that professional development occur outside the 180 days allotted for student instruction.
- 2. the direct state allotment to school districts for continuing professional development be doubled from approximately \$9 million in 1993-1994 to \$18 million, and that the amount be increased annually for five (5) years until the allocation equals 1.5% of the state education budget.
- 3. the Initial Certification Program (ICP) that supports and assesses teachers in the first two years of teaching be funded at a minimum of \$5.9 million dollars annually; that the guidelines of the current Initial Certification Program be reviewed and amended as necessary to reflect state initiatives; and that the program be implemented consistently in every school district.
- 4. the State support and expand existing programs of continuing professional development as follows:
 - a. that three regional professional development school programs be funded. Funding should be provided for a maximum of five years with continued funding dependent on evidence of successful progress after the first three years. Local take-over of costs should occur after year five. Grants should be awarded on a competitive basis to local school districts and institutions of higher education that have formed a collaborative agreement.

- b. that the North Carolina Center for the Advancement of Teaching be funded to serve more teachers by enhanced recruitment, and offering seminars and alumni services in various locations in the State.
- c. that the Mathematics and Science Education Network receive funding to enable the program to extend its benefits to all science and mathematics teachers in need of services.
- d. that the Model Clinical Teaching Network be strengthened at existing campuses and expanded to include additional campuses to improve its effectiveness to develop and demonstrate new methods of preparing classroom teachers. Additional funds for the Network and each of the school-college partnerships operating within the Network are required for this purpose.
- 5. the Joint Committee on Teacher Education further examine the Allied Health Education Center model and make recommendations to the University of North Carolina Board of Governors and the State Board of Education on a professional development delivery model which would ensure grassroots involvement in the design and implementation of professional development activities. Recommendations should also focus on redesigning existing structures within the State to include a focus on the coordination of all existing and new professional development efforts.

Teaching Fellows Program

- 6. pre-service teacher training programs consider the incorporation of the following elements of the Teaching Fellows Program as far as budgetary allocations allow:
 - a. Experiences that encourage peer support and recognition of teaching as an authentic profession;
 - b. Extended experiences beyond the academic curriculum including field trips, speakers, leadership/service components;
 - c. Continued support through the degree program by faculty mentors;
 - d. Multicultural exposure;
 - e. Early exposure to the school and classroom by way of observations, tutoring, mentoring, etc.;
 - f. Recruitment of minorities into teaching.
- 7. an independent evaluation of the Teaching Fellows program be conducted to study attrition and performance levels.

Cultural Diversity

- 8. the funding of scholarship loans, administered by the State Board of Education, for minorities who enter programs leading to teacher licensure, at the level of up to \$5,000 per individual each year for a total appropriation of \$2 million dollars annually.
- 9. special seminars should be created for teacher educators to deal effectively with cultural diversity in the education of prospective teachers, and that funds for university course development be available to teacher educators who have participated in the special seminars on cultural diversity.

Special Education

- 10. the State Board of Education ensure that there shall be no loss of needed services for any student as the State moves toward a policy of increased inclusionary practices.
- 11. classroom teachers receive appropriate assistance as increased inclusionary practices are implemented. The assistance should include continuing professional development, trained specialist assistants, lowered class size, and time to confer with specially trained colleagues.
- 12. all prospective teachers receive training to prepare them to work with students with exceptionalities within regular classes.
- 13. support and assessment procedures in the Initial Certification (licensure) Program (ICP) establish competence in special education teaching and require a performance-based assessment for initially certified (licensed) teachers before the award of permanent licensure.
- 14. the State Board of Education establish a statewide continuing education program to provide access to licensure for special education teachers who are teaching out of field. An essential component of this program should be a performance-based evaluation system to ensure that all teachers demonstrate the competencies needed to teach students with exceptionalities.
- 15. the Department of Public Instruction complete a study of the five-year projected supply and demand of special educators.
- 16. there be state-funded scholarship/loan incentives for prospective and employed teachers to complete degrees in areas of need in special education if need is demonstrated by a supply/demand study.

- 17. the State Board of Education review the special and regular education licensure categories and levels to ensure that the categories and associated competencies are appropriate for the personnel who work in the current system or in any future system based on increased inclusionary practices.
- 18. the State Board of Education ensure that the latest, most reliable assessments available are used to determine which children should be included in the general special education category, and once that determination is made, similar care should be used to place children within the specific categories within special education.

**Implementation of the objectives of the 1987 task force report,
*The Education of North Carolina's Teachers***

- 19. the Joint Committee on Teacher Education of the State Board of Education and the Board of Governors, with representation from the independent colleges, continue to monitor selected recommendations of the 1987 task force report and also to monitor the implementation of the recommendations of the Teacher Training Task Force contained in this report.

SPECIAL CONSIDERATIONS

The National Board for Professional Teaching Standards

The National Board for Professional Teaching Standards (NBPTS) is providing high standards, nationally, for what teachers need to know and to be able to do. The program is now beginning to offer advanced certification, analogous to board certification in medicine, for experienced teachers who successfully complete a series of demanding teaching-related tasks. The State Board of Education is considering actions which will blend this new program with other ongoing procedures in the area of licensure, salary and professional development. The Task Force recognizes the importance of the NBPTS and urges appropriate action on the part of the State Board of Education and higher education to strengthen the National Board of Professional Teaching Standards presence in North Carolina.

Independent Licensing Board

There is pending legislation in North Carolina which would transfer the teacher licensing function from the State Board of Education and the Department of Public Instruction to an independent licensing board. While the Task Force has not taken a position in either support or opposition to this bill, the Task Force does urge efforts to directly involve teachers in the process of decision-making regarding licensure.

Standards and Inclusion

In the course of its work, the Task Force observed that two major educational policy forces are at work. The first is the aspiration and drive for higher standards of performance for all children. The second is the renewed effort to include, mainstream, or incorporate larger numbers and percentages of children with special needs into the regular classrooms of the public schools. The Task Force cautions that great care must be taken to avoid depriving exceptional children of needed special educational services in this situation. Expectations for the performance of disabled children should be realistically set and intervention and prevention services should be rigorously applied.

NORTH CAROLINA EDUCATION STANDARDS AND ACCOUNTABILITY COMMISSION

Legislation creating the North Carolina Education Standards and Accountability Commission, was ratified by the North Carolina General Assembly on July 16, 1993. The twenty-five member Commission includes a broad representation of business, political, civic, and educational leaders from all regions of North Carolina.

"The purpose of the Commission, is to develop high and clearly defined education standards for the public schools of North Carolina." In addition, the Commission is charged with developing "fair and valid assessments to assure that high school graduates in North Carolina meet these standards."

The Commission has begun its work by focusing on what students should know and be able to do in order to be successful workers and citizens in the 21st Century. The Commission has retained the on-going services of two internationally acclaimed consultants, Dr. Willard Daggett, Director, International Center for Leadership in Education and Dr. Grant Wiggins, Director, Center on Learning, Assessment, and School Structures. While seeking a broad-based consensus from business, civic, and educational leaders through a series of Citizens Forums, the Commission has divided its membership into two subcommittees -- Standards and Assessment. The two subcommittees will work on their respective tasks simultaneously.

In addition, the Commission will define a system of benchmarks at appropriate levels, review and recommend a system of benchmark measures, recommend ways to assure that each student is challenged, consider how the standards can serve the needs of exceptional children, recommend refinements to the Standard Course of Study and the testing program, recommend the best methods of comparing North Carolina students' performance to that of students in other states, and recommend any necessary statutory changes to implement the recommendations.

WORK OF THE COMMISSION

The Commission has worked diligently at its task and membership participation has been outstanding and meaningful. Many meetings have had nearly 100% participation by members of the Commission and involvement in decision-making has been representative of the merging of various opinions.

The Commission has devoted hours of study to assure that they are up-to-date with all that is happening in the education arena in North Carolina and in other States as they deliberate the many decisions and recommendations that will flow from the Commission's work. Few stones have been left unturned in this process of self-enlightenment. Numerous books and volumes of articles have been required reading. Clearly, the discussion indicates that all members have done their homework.

MEETING SCHEDULE

September 22, 1993	First Meeting and Swearing to The Oath of Office Speaker: Dr. William Purkey
October 20-21, 1993	Commission Meeting

	Speakers: Dr. Bill Daggett and Dr. Emmett Floyd
November 15, 1993	Standards Sub-Committee
November 16, 1993	Assessment Sub-Committee
December 10, 1993	Commission Meeting Speakers: Dr. Doug Walker - Vermont Dr. Joyce Reinke - Oregon Dr. Mel Levine and Dr. Ken Jones - UNC Medical School
December 19, 1993	Citizens Forum - Winston-Salem, NC
January 11, 1994	Citizens Forum - Greenville, NC
January 25, 1994	Citizens Forum - Charlotte, NC
January 27, 1994	Commission Meeting NC Education Cabinet
February 8, 1994	Citizens Forum, Raleigh, NC
February 14, 1994	Commission Meeting Speaker: Dr. Asa Hilliard
February 15, 1994	Citizens Forum, Wilmington, NC
February 17-18, 1994	Challenge to America Conference- NC Responds
March 1, 1994	Citizens Forum, Asheville, NC
March 7, 1994	Commission Meeting Speaker: Dr. Bill Daggett Sandy Babb
March 18-19, 1994	Commission Retreat - Northern Telecom
April 13, 1994	Commission Meeting
May 2, 1994	Commission Meeting

PROGRESS TO DATE

By plan, the work of the Commission has been paced to facilitate the accomplishment of "first things first." This desire to move deliberately and carefully relates to the magnitude of the task being addressed by the Commission. The Commission believes the development of its recommendations will have a far reaching impact on the future of the North Carolina Schools and its graduates as we approach the 21st Century. Consequently, all members recognize the importance of making the correct decisions.

From our research, citizen forums, and the experience vested in the background of the Commission we have developed the first working draft of a model that will describe the

end product of public schooling. Our efforts have been guided by the legislation that created the Commission.

The Commission believes that the graduate of public schooling in North Carolina will need certain essential enabling skills to enter the workforce or to enter post secondary study. Evidence indicates that the set of skills needed will not differ for either group of graduates. Keeping this in mind the following essential enabling skills have been agreed upon. They are:

- (1) **Reading**
- (2) **Writing**
- (3) **Speaking**
- (4) **Listening**
- (5) **Viewing**
- (6) **Using Numbers**
- (7) **Problem Solving**
- (8) **Creative Thinking**
- (9) **Critical Thinking**
- (10) **Teaming**

These skills are all measurable and are essential for an individual to continue functioning in society as the knowledge and skills needed in society change overtime. All of the above skills are based on one's ability to use systems (technology) and provide an individual the opportunity to be a lifelong learner, an essential characteristic of a citizen and worker in today's society.

We are now in the process of defining those descriptors that represent the abilities needed to function in a changing society as a worker and a citizen.

We will then define the skills needed in each area for each of the ten essential enabling skills which are at the core of our model.

Benchmarks will be set and performance assessments will be recommended to determine if children can demonstrate their application of knowledge in each arena. (worker-citizen)
The intent is to design models for assessment that require the application of knowledge and skills in real world adult role situations.

NEXT STEPS

The following are next steps that the Commission will be involved in as a continuation of our work. These items listed below, in most cases, will be carried out simultaneously.

A. Benchmarking of the Performance Levels

The Commission will develop benchmarks of performance expectations at approximate points that all children are to meet. There is some chance that it could be anticipated that performance expectations will be set for children after approximately 4, 8, 10, 12 years in school.

B. Development of Performance Assessments to Validate Benchmarks

This will be our first effort directed at the generic design of a set of performance assessments written in a fashion that requires the application of knowledge to real world situations.

C. Identification of Field Test Models

We have not yet agreed upon the process for this portion of our task. This process will be determined by early summer and invitations given to those selected to participate.

D. Training and Development

A full year will be devoted to training and development of those using the new assessment procedure and to the refinement of that process. Dr. Bill Daggett and Dr. Grant Wiggins will be integral to this process.

E. Development of Linkages

It is imperative that all of the Commissions/Task Forces dealing with the public school develop appropriate linkages. Therefore, the Standards Commission will partner with the workforce groups to assure compatible and well articulated relationships which eliminates duplication of recommendations or direction.

F. Timeline and Implementation

To be ready to award diplomas based on the year 2000 deadline, a precise plan of implementation must be finalized. This timeline will have a distinct relationship to staff training and the progression of the class of 2000 through the educational process. The class of 2000 is in the sixth grade this year.

Executive Summary

Report on Section 141, Chapter 321 (Senate Bill 27)

Purpose: Chapter 321 (Senate Bill 27) Section 141, a Task Force on Teacher Staff Development "to develop a Teacher Academy Plan" was approved by the General Assembly in 1993. The bill requires that the Task Force report the Plan to the Joint Legislative Education Oversight Committee by March 1, 1994.

Task Force Members: State Superintendent Bob Etheridge, Chair; Eddie Davis, Teacher, Durham County Schools, State Board of Education; Dr. J. Earl Danieley, Board of Governors; Dr. Richard Thompson, North Carolina Center for the Advancement of Teaching; Dr. Charles Coble, Dean, School of Education, East Carolina University; Dr. Mary Johnson, Dean, Weems Graduate School, Meredith College, Teacher Training Task Force; Dr. Don Stedman, Dean, School of Education, University of North Carolina at Chapel Hill; Dr. Teresa Stern, Chair, Department of Education, Mars Hill College; Dr. Betsey Stallings, Superintendent, Tyrrell County Schools; Mr. Richard Jordan, Principal, Pinewood Elementary, Gaston County Schools; Dr. Martha Zollicoffer, Principal, Stovall-Shaw Elementary, Granville County Schools; Mr. Sid Baker, Teacher, Rockingham County Schools; Ms. Joyce Elliott, Teacher, Buncombe County Schools; Ms. Carrie Sue Florence, Teacher, Orange County Schools; Mr. Terry Greenlund, Teacher, Chapel Hill-Carrboro Schools; Ms. Helen Heavner, Teacher, Lincoln County Schools; Ms. Carolyn Mann, Teacher, Wake County Schools; Ms. Ann McArthur, Teacher, Dare County Schools; Ms. Geraldine McGlohon, Teacher, Nash-Rocky Mount Schools; Ms. Carolyn McKinney, Teacher, Forsyth County Schools; Ms. Susan Phipps, Teacher, Watauga County Schools.

Requirements: The bill requires that the Teacher Academy Plan "establish a statewide network of high quality, integrated, comprehensive, collaborative, and sustained professional development for teachers in school committee leadership and the core content areas." According to the bill, the Teacher Academy should "address the professional needs of teachers in site-based decision making, core content areas, instruction, and use of modern technology" based on a "comprehensive needs assessment" of teachers. The Plan should also consider "training schedules and opportunities that

minimize the time teachers are away from classroom instruction" in their "proposal for training an initial cadre of teacher trainers and implementation of the first phase of training in the summer of 1994." The bill further encourages "the effective use of the North Carolina Center for the Advancement of Teaching facility and staff" as well as "effective use of the facilities and staff of the University of North Carolina campuses."

Results:

- There will be four one-week sessions in 1994 at ten sites - June 19-24, July 10-15, July 17-22, and July 31-August 5. All four-year colleges and universities in North Carolina were invited to apply to host the Academy. The following ten sites were selected based on criteria determined by the Task Force: Appalachian State University, Chowan College, East Carolina University, Fayetteville State University, Greensboro College, Lenoir-Rhyne College, Meredith College, Saint Augustine's College, University of North Carolina at Wilmington, and Western Carolina University.
- An in depth assessment of teachers' professional development needs was conducted to determine characteristics of quality staff development and content needs in the areas of leadership skills for site-based decision making, instruction, core content, and use of technology. This assessment will be used in developing the content of the Teacher Academy sessions.
- Teacher trainers, identified through an application process by March 31, 1994, will receive training in April, May and June to become trainers in the summer Academy. With a pool of one thousand five hundred applicants from which to choose, the Task Force will be able to select a cadre of trainers that is balanced geographically by race and gender.
- Seventy-five teachers will participate in each of the four sessions at each of the ten sites for a total of 3,000 participants. Teachers may attend individually or as part of a school team. School teams should include the principal. Selections of participants will be equally distributed by region and grade level on a first-come, first-serve basis. The make-up of the participants will be reflective of the racial composition of our state.

Issues Under Consideration: The Task Force is gathering information regarding current federal, state, and local expenditures for staff development in order to develop a statewide plan that ensures quality programs and accessibility based on need.

I.

Recommendations of the Board of Governors Regarding the UNC Fiscal Accountability/Flexibility Legislation

The UNC Fiscal Accountability/Flexibility legislation (Exhibit I-A-1) sunsets on June 30, 1994 unless extended or made a permanent part of the State's General Statutes by the 1994 Session of the 1993 General Assembly.

The Board of Governors' recommendations, with respect to the legislation, are as follows:

1. The Board respectfully requests that the UNC Fiscal Accountability/Flexibility legislation be made a permanent part of the State's General Statutes.

As demonstrated throughout this Report, the flexibility legislation has benefited the students enrolled in The University, the institutions, and the citizens of North Carolina; and it should be made a permanent part of the State's statutes. This legislation, which gives the Chancellor of each institution the ultimate authority for decisions regarding the expenditures of General Fund monies made available to his institution, consistent with the directives and policies of the Board of Governors, has the wholehearted endorsement of each of the Chancellors.

2. The Board further recommends that the current legislation be modified in the following respects:
 - a. A uniform reversion rate should be established for all operating budget codes under budget flexibility, except the rate for the Area Health Education Centers Program at The University of North Carolina at Chapel Hill. The recommended reversion rate for all operating budget codes, except Area Health Education Centers, is 2.0% and the recommended reversion rate for the Area Health Education Centers Program is 1.0%. It is further recommended that, subject to the relative

condition of the General Fund. Legislative consideration be given to a staged reduction in the required reversion rate with the ultimate goal of phasing it out entirely.

Presently, the required 1993-94 reversion rates (excluding AHEC), which are based on the historic five-year average and determined by the Director of the Budget, range from 3.73% at Pembroke State University to 2.06% at The University of North Carolina at Asheville. The reversion rates for 1991-92, 1992-93, and 1993-94 are shown in Exhibit I-A-2. Since budget flexibility represents a marked departure from past budgeting practices, historical reversion patterns should not continue to be applied to flexibility. No institution should be placed in a comparative disadvantage because of its higher historical reversions. The uniform rate of 2.0% is suggested since it approximates the lowest required reversion rate.

Since the largest component of the Area Health Education Centers budget consists of grants for primary care residencies and the operations of the outlying centers, reversion rates have historically been very low in comparison with those of the academic budgets. It is recommended that the rate be established at 1.0% for the Area Health Education Centers budget.

Overall, it is projected that the University-wide weighted average reversion rate, which is currently 2.58%, will decrease to 2.46% when 1994-95 rates are calculated. At current appropriation levels, approval of the recommended rates would result in \$5.4 million less in reversions to the General Fund in the 1994-95 fiscal year.

The suggested phased reduction in the required reversion would provide additional resources for The University to carry out its programs. For example, if a uniform reversion rate of 2.0% was established for the 1994-95 fiscal year and reduced by .5% each succeeding fiscal year, the reversion requirement would be phased out entirely by the second year of the 1997-99 biennium. At current

appropriation levels, required reversions would be reduced by approximately \$5.4 million each fiscal year during this period until the reversion requirement reached zero in 1998-99.

- b. The authority granted to each special responsibility constituent institution to spend the General Fund monies appropriated to it in a manner deemed by the Chancellor to maintain and advance the programs and services of the institution, subject to directives and policies of the Board of Governors, should be extended to those receipts realized in excess of budgeted levels at the designated institutions, up to a maximum of 10% above budgeted levels.

The present flexibility legislation does not include provisions related to budgeted receipts. Under budget flexibility granted in 1990, receipts within The University of North Carolina realized in excess of budgeted levels are available up to a maximum of 10% above budgeted levels, for each budget code, in addition to appropriations, to support the operations generating such receipts, as approved by the Director of the Budget. A logical expansion of budget flexibility would be to allow the special responsibility constituent institutions to budget these institutional resources up to the 10% limitation without prior approval of the Office of State Budget and Management. Any increases in budgeted receipts under this procedure would be reported immediately to the Office of State Budget and Management.

- c. The present on-campus purchasing benchmark of \$25,000 should be increased to \$50,000 on all purchases.

The 1990 flexibility legislation raised the on-campus purchasing benchmark, the threshold requiring a formal bid procedure through the Division of Purchase and Contract, from \$5,000 to \$10,000. The 1991 flexibility legislation increased the benchmark further to \$25,000. During the 1992-93 fiscal year, 1,851 purchases totaling \$28.8 million were made on campus between the previous benchmark of

\$10,000 and the new benchmark of \$25,000. Previously these purchases would have required processing through the Division of Purchase and Contract. Processing time for purchases made by the campuses is less than the time required for similar purchase awards through the Purchase and Contract Division. The resulting decrease in processing time has substantially increased the efficiency of the institutions' procurement function by putting equipment and supplies in the hands of users in a much more timely fashion without sacrificing competitive pricing or quality. Increasing the benchmark from \$25,000 to \$50,000 would increase the number of on-campus purchases by an estimated 460 at a total value of \$17 million.

- d. The reporting requirements of results under the UNC Fiscal Accountability/Flexibility legislation should be modified and consolidated with other established reporting schedules where applicable.

During the pilot phase of flexibility, extensive reporting of implementation and results has been very appropriate. It is also recognized that accountability is an integral part of the General Assembly's consideration in enacting the flexibility legislation. However, if the legislation is extended or made a permanent part of the General Statutes as recommended by the Board, it is suggested that reporting requirements be annual or biennial and that, where possible, the results should be incorporated with other reports submitted on a scheduled basis. For example, the impact of the legislation on undergraduate education and student development as measured by separate assessment measures could be reported annually when other such assessment measures are reported to the Joint Legislative Education Oversight Committee.

It is suggested that UNC-General Administration staff work with the staff of the Joint Legislative Education Oversight Committee and other Legislative

Committees, as appropriate, to meet fully the information needs in an orderly and expeditious manner.

- e. The North Carolina School of Science and Mathematics should be made eligible to participate in the benefits available under the flexibility legislation.

Presently the North Carolina School of Science and Mathematics is not covered by the flexibility legislation. The administration of the School desires to participate and has forwarded a proposal to the School's Board of Trustees to this effect. (The proposal is scheduled to be considered at the Trustees meeting on March 4, 1994). The School would certainly benefit from the same opportunities as those afforded the constituent institutions under the legislation. Under flexibility, the School could spend the General Fund monies appropriated to it in the manner deemed by the Executive Director to maintain and advance the programs and services of the School, consistent with the directives and policies of the School's Board of Trustees.

PROPOSED GUIDELINES TO COMPLY WITH SECTION 89 (a & b) OF SENATE BILL 27,
1993 SESSION LAWS

a. Fifteen Hour Requirement

- Applies to average courseload attempted by full-time undergraduates in the fall and spring semesters.
- Each constituent institution must meet the 15-hour average by December 1997.
- Board of Governors must report annually to the legislature and identify additional steps to be taken by institutions failing to make timely progress.
- Monitoring will be based on all degree-creditable and remedial course hours taken by degree-seeking undergraduates on the last date to add a course. First annual report to the legislature is due on April 1, 1994.

b. Tuition Surcharge Requirement

- Applies to all undergraduates seeking a baccalaureate degree at your institution with a matriculation date of fall 1994 or later.
- Credit hours to be *included* in the total:
 1. All regular session degree-creditable courses taken at your institution including repeated courses, failed courses and those dropped after the last date to add a course.
 2. All transfer credit hours accepted by your institution except those taken at another UNC institution through summer school or through degree-credit extension.
- Credit hours to be *excluded* are those earned through: 1) The College Board's AP and CLEP programs or alternative programs; 2) institutional advanced placement, course validation, or any similar procedures for awarding course credit; and 3) a summer session or degree-credit extension division on your campus.
- The credit hour threshold for imposing the surcharge depends upon the number of hours required to earn the degree. For students earning a first baccalaureate degree in a program that requires no more than 128 credit hours, the surcharge is applied to all credit hours in excess of 140. For students earning a first baccalaureate degree in a Board-approved program that requires more than 128 credit hours, the surcharge is applied to all credit hours that exceed 110 percent of the credit hours required for the degree. Examples of such programs include those that have been officially designated by the Board of Governors as five year programs, programs involving double majors and combined bachelor's/master's degree programs. For students earning a baccalaureate degree other than their first, the surcharge shall be applied to all credit hours that exceed 110 percent of the minimum additional credit hours needed to earn the additional baccalaureate degree.

AVERAGE CREDIT HOURS TAKEN BY FULL-TIME UNDERGRADUATES BY INSTITUTION, 1982-1993

YEAR		1982		1983		1984		1985		1986		1987		1988		1989		1990		1991		1992		1993	
CAMPUS	ASU	NUMBER		16.61		16.61		16.61		16.61		16.61		16.61		16.61		16.61		16.61		16.61		16.61	
		AVERAGE		16.61		16.61		16.61		16.61		16.61		16.61		16.61		16.61		16.61		16.61		16.61	
ECU	ECU	NUMBER		10,251		10,251		10,251		10,251		10,251		10,251		10,251		10,251		10,251		10,251		10,251	
		AVERAGE		15.61		15.61		15.61		15.61		15.61		15.61		15.61		15.61		15.61		15.61		15.61	
PSU	PSU	NUMBER		1,451		1,451		1,451		1,451		1,451		1,451		1,451		1,451		1,451		1,451		1,451	
		AVERAGE		15.11		15.11		15.11		15.11		15.11		15.11		15.11		15.11		15.11		15.11		15.11	
HCAAT	HCAAT	NUMBER		4,044		4,044		4,044		4,044		4,044		4,044		4,044		4,044		4,044		4,044		4,044	
		AVERAGE		15.41		15.41		15.41		15.41		15.41		15.41		15.41		15.41		15.41		15.41		15.41	
NCU	NCU	NUMBER		3,440		3,440		3,440		3,440		3,440		3,440		3,440		3,440		3,440		3,440		3,440	
		AVERAGE		15.71		15.71		15.71		15.71		15.71		15.71		15.71		15.71		15.71		15.71		15.71	
HCSU-R	HCSU-R	NUMBER		14,463		14,463		14,463		14,463		14,463		14,463		14,463		14,463		14,463		14,463		14,463	
		AVERAGE		15.61		15.61		15.61		15.61		15.61		15.61		15.61		15.61		15.61		15.61		15.61	
PSU	PSU	NUMBER		1,565		1,565		1,565		1,565		1,565		1,565		1,565		1,565		1,565		1,565		1,565	
		AVERAGE		15.31		15.31		15.31		15.31		15.31		15.31		15.31		15.31		15.31		15.31		15.31	
UNC-A	UNC-A	NUMBER		1,288		1,288		1,288		1,288		1,288		1,288		1,288		1,288		1,288		1,288		1,288	
		AVERAGE		14.61		14.61		14.61		14.61		14.61		14.61		14.61		14.61		14.61		14.61		14.61	
UNC-CH	UNC-CH	NUMBER		14,019		14,019		14,019		14,019		14,019		14,019		14,019		14,019		14,019		14,019		14,019	
		AVERAGE		14.61		14.61		14.61		14.61		14.61		14.61		14.61		14.61		14.61		14.61		14.61	
UNC-C	UNC-C	NUMBER		6,660		6,660		6,660		6,660		6,660		6,660		6,660		6,660		6,660		6,660		6,660	
		AVERAGE		15.11		15.11		15.11		15.11		15.11		15.11		15.11		15.11		15.11		15.11		15.11	
UNC-G	UNC-G	NUMBER		5,999		5,999		5,999		5,999		5,999		5,999		5,999		5,999		5,999		5,999		5,999	
		AVERAGE		14.91		14.91		14.91		14.91		14.91		14.91		14.91		14.91		14.91		14.91		14.91	
UNC-W	UNC-W	NUMBER		4,100		4,100		4,100		4,100		4,100		4,100		4,100		4,100		4,100		4,100		4,100	
		AVERAGE		15.81		15.81		15.81		15.81		15.81		15.81		15.81		15.81		15.81		15.81		15.81	
WCU	WCU	NUMBER		4,532		4,532		4,532		4,532		4,532		4,532		4,532		4,532		4,532		4,532		4,532	
		AVERAGE		15.61		15.61		15.61		15.61		15.61		15.61		15.61		15.61		15.61		15.61		15.61	
WVSU	WVSU	NUMBER		1,046		1,046		1,046		1,046		1,046		1,046		1,046		1,046		1,046		1,046		1,046	
		AVERAGE		15.21		15.21		15.21		15.21		15.21		15.21		15.21		15.21		15.21		15.21		15.21	
UNC-TOTAL	UNC-TOTAL	NUMBER		63,472		63,472		63,472		63,472		63,472		63,472		63,472		63,472		63,472		63,472		63,472	
		AVERAGE		15.21		15.21		15.21		15.21		15.21		15.21		15.21		15.21		15.21		15.21		15.21	

WCU IS OMITTED. BELOW BACHELORS STUDENTS ARE OMITTED

UNC-GA PLANNING/SDF.F1001/10NOV93

**Progress Report of the School Technology Commission
April 11, 1994**

The N.C. School Technology Commission was created by legislation G.S. 115C-102.51. The appointments to the commission were completed by December 1993. The first meeting was held on January 19, 1994.

January 19, 1994

Eleven commission members convened on January 19, 1994 to review the legislation and establish timelines. Senator Winner explained the legislation that created the Commission and the requirements for the Commission to complete a thorough analysis study of public education (K-12) technology needs. Once this has been accomplished, the legislation charges the Commission to propose a plan for improving student performance in public schools through the use of learning and instructional management technologies. This plan would include recommendations on technology, staff development, maintenance, and a cost analysis.

The Commission heard reports from Ms. Elsie Brumback on state and national technology mandates, and on the Council of Chief State School Officers technology recommendations. The Commission then heard from Mr. Alan Blatecky, Vice President of MCNC on Executive Order 136 and NC 2000 and Mr. Bob Van Kirk from the NC Public School Forum on their report entitled "Technology in the Schoolhouse".

Mr. Jim Johnson led a discussion on the RFP requirements. A sub committee was appointed to develop the RFP timelines and to report RFP specifications to the full commission meeting scheduled for February 4.

February 4, 1994

The Commission met on February 4 to continue their update on technology initiatives. Reports were given by Mr. Frank Yeager on the Instructional Technology Task Force, Ms. Linda De Grand on NC Distance Learning Networks, Ms. Margaret Bingham on microcomputer statistical data survey, Ms. June Atkinson on the vocational education equipment study, and Ms. Jane Patterson on the NC Information Highway.

Discussions were held on the requirements analysis for the RFP and the Commission decided on RFP timelines and strategies. The next Commission meeting was scheduled for March 14.

March 14, 1994

The Commission met on March 14, 1994. The Commission reviewed specific curriculum technology needs and questions from the RFP/bidder's conference held on March 8 in Raleigh. Ms. Karen Garr reported on the National Board for Professional Standards and the technology needs for NC Board certified teachers. Mr. Bob Etheridge presented the State Department's technology plan and Mr. Jake Brown and Mr. Bill Spooner presented science and math technology requirements.

Mr. Bob Stoltz, from the Southern Regional Education Board, presented an overview of technology in the Southeastern States and made recommendations on the issues relating to state technology planning. He strongly recommended training, maintenance, and support as integral parts of a state's plan. Mr. Mike Smith, a National Technology Teacher-of-the-Year, described his classroom that has an impressive technology infrastructure.

RFP bidders conference and timelines were discussed. Commission meetings were scheduled for April 25 and May 10.

The RFP contract was awarded by Purchase and Contract on April 7 to the Center for Educational Leadership and Technology (CELT). Representatives from CELT are scheduled to meet with a Commission subcommittee on April 11 prior to beginning five weeks of intensive surveys, personal interviews, focus groups, and other fact-finding work across the state.



Report to Education Oversight Committee

Department of Public Instruction Staffing



**NORTH CAROLINA
DEPARTMENT OF
PUBLIC INSTRUCTION**

State Superintendent Bob Etheridge
May 10, 1994

Report to Education Oversight Committee

The Department of Public Instruction has undergone a dramatic reorganization over the last five years, a reorganization that continues today. The reorganization has been and is designed to change the agency's mission from one of regulation to one of service and to take agency services directly to the schools. DPI and its staff members are currently engaged in a strategic planning exercise designed to make even more changes to assure that the agency can meet the challenges of the future.

DPI's authorized strength was 1,014 staff members when the original reorganization was announced on June 15, 1989. That reorganization cut the top administrative staff from 70 to 24, and the divisions within the agency were cut from 49 to 17. Top management was vested in five assistant state superintendents reporting to a Deputy Superintendent. The number of assistant superintendents has since been reduced to four.

In 1990, the agency underwent the second phase of the reorganization when the eight regional offices were replaced with five Technical Assistance Centers, plus a center operating from the DPI Raleigh office. The philosophy behind the creation of the TACs was to foster a climate of change and refocus DPI as a deliverer of services directly to schools rather than as a regulator of state policy. A further reorganization was announced in the spring of 1993, to be accomplished by June 30 of this fiscal year.

In five years, the agency's authorized staff strength has declined from 1,014 on January 1, 1989, to 802.5 on May 9, 1994. Of those positions, 569.9 are state positions, 191.6 are federal positions, and 41 positions are receipt supported. Since 1989, the number of state positions has declined by 172.77 positions. When June 30 arrives, the number of state positions will have declined by 17 additional staff members, for a total decline of 189.7 positions. Meanwhile, several new programs such as the Task Force on Site Based Management and the Task Force on Teacher Academy, as well as several federal programs, such as Service Learning, have been added.

Last spring's three-phase reorganization focused on the Instructional Services area. The Technical Assistance Centers were moved under the assistant superintendent for this area in order to assure that curriculum and service delivery were completely coordinated. In addition, in response to the changed focus of DPI's services to schools, the Instructional Services area was organized into interdisciplinary teams of Early Childhood/Elementary, Middle Schools, and High Schools. The philosophy behind this change is that DPI does not have the staff to be effective on a statewide basis in helping individual teachers in individual curriculum areas, but could be effective in examining and enhancing the total curriculum of schools and whole systems of schools. While the delivery of DPI services is concentrated in the Technical Assistance Centers, a team concept is being developed throughout the Instructional Services area and throughout the agency. In particular, the Instructional Services and Accountability Services areas are working closely to assure that the Standard Course of Study and the statewide testing program are aligned. More staff members have been moved into the Technical Assistance Centers to assist local schools.

Further changes in DPI will be aimed at improving the delivery of services to individual schools as the site-based management philosophy becomes fully operational.

The Size of State Agencies in North Carolina

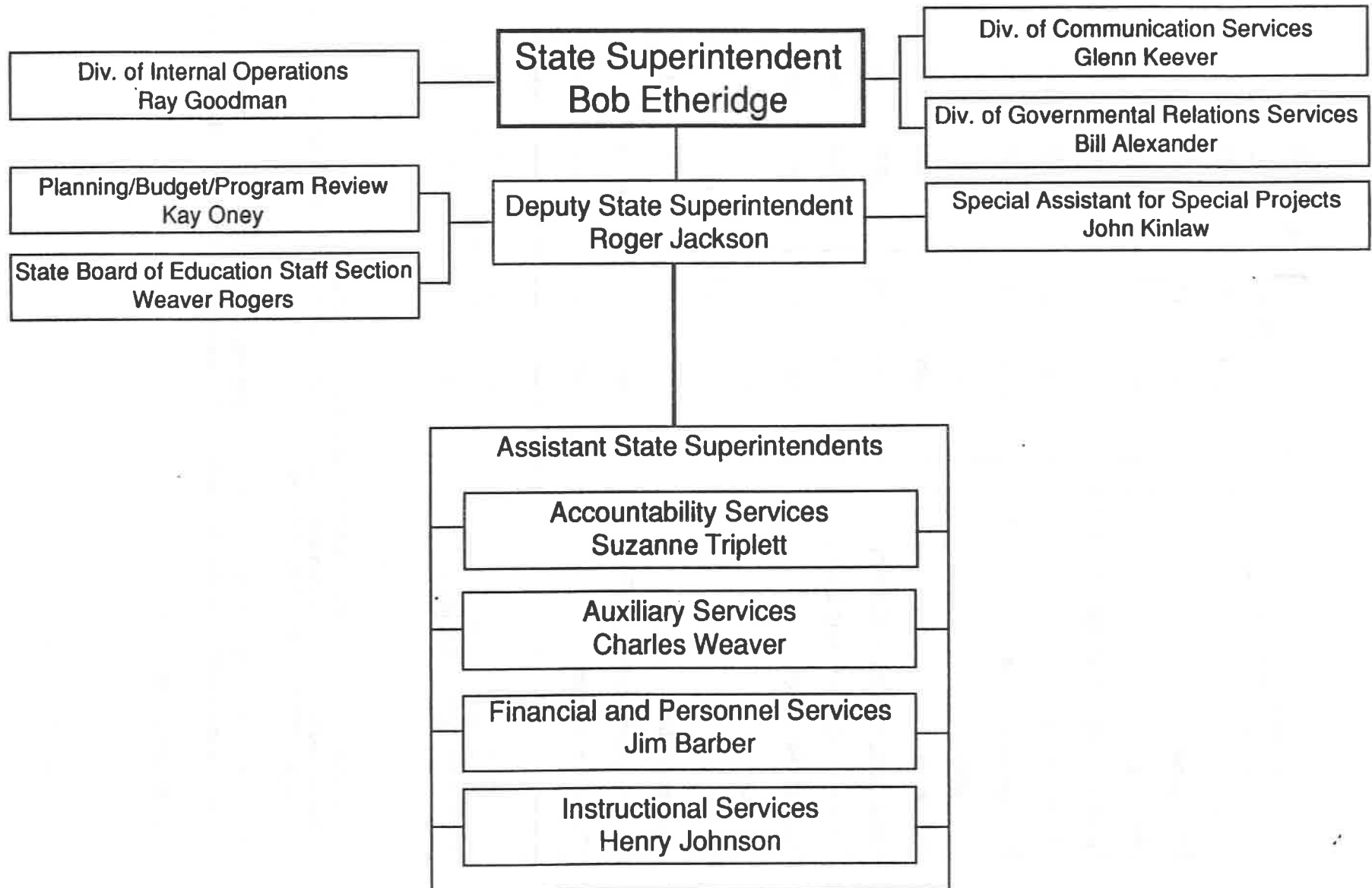
Department	January 1, 1989		March 31, 1994		Percent Change	
		Rank		Rank		Rank
DPI	1,014	10	802	11	-20.91%	1
Personnel	140	17	121	17	-13.57%	2
Agriculture	1,400	7	1,399	7	-0.07%	3
Administration/State Controller *	1,194	8	1,195	8	0.08%	4
State Auditor	155	16	157	16	1.29%	5
Human Resources **	16,609	1	17,378	1	4.63%	6
Insurance	341	13	358	14	4.99%	7
Treasurer	229	15	243	15	6.11%	8
Econ. and Commun. Develop.	2,414	5	2,579	5	6.84%	9
Crime Control & Public Safety	2,142	6	2,323	6	8.45%	10
Cultural Resources	658	12	717	12	8.97%	11
Justice	968	11	1,071	10	10.64%	12
Revenue	1,068	9	1,186	9	11.05%	13
Transportation	12,571	2	14,515	2	15.46%	14
Environment, Health & NR **	3,851	4	4,773	4	23.94%	15
Secretary of State	86	18	114	18	32.56%	16
Labor	301	14	430	13	42.86%	17
Corrections	9,286	3	14,263	3	53.60%	18
Total (Universities not Included)	54,427		63,624		16.90%	

* The State Controller's Personnel Office was established after January 1, 1989. The majority of personnel were transferred from Administration and some were transferred from the State Auditor. Currently 341 employees are a part of the State Controller's Office.

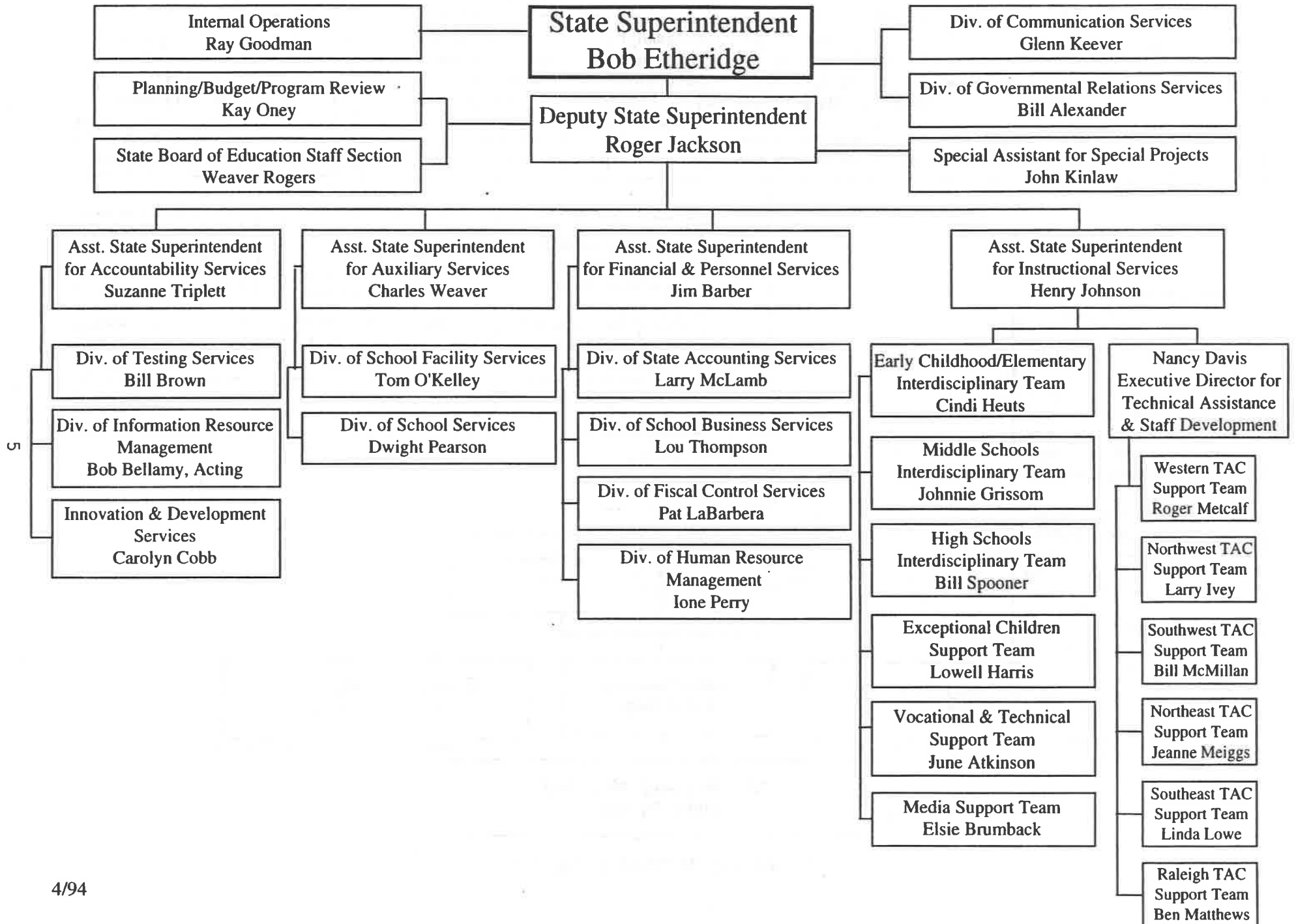
** In July of 1989, 1,251 employees were moved from Human Resources to the Department of Environment, Health and Natural Resources. For this report, the adjustment was reflected in the January 1, 1989 numbers.

Source: State Personnel.

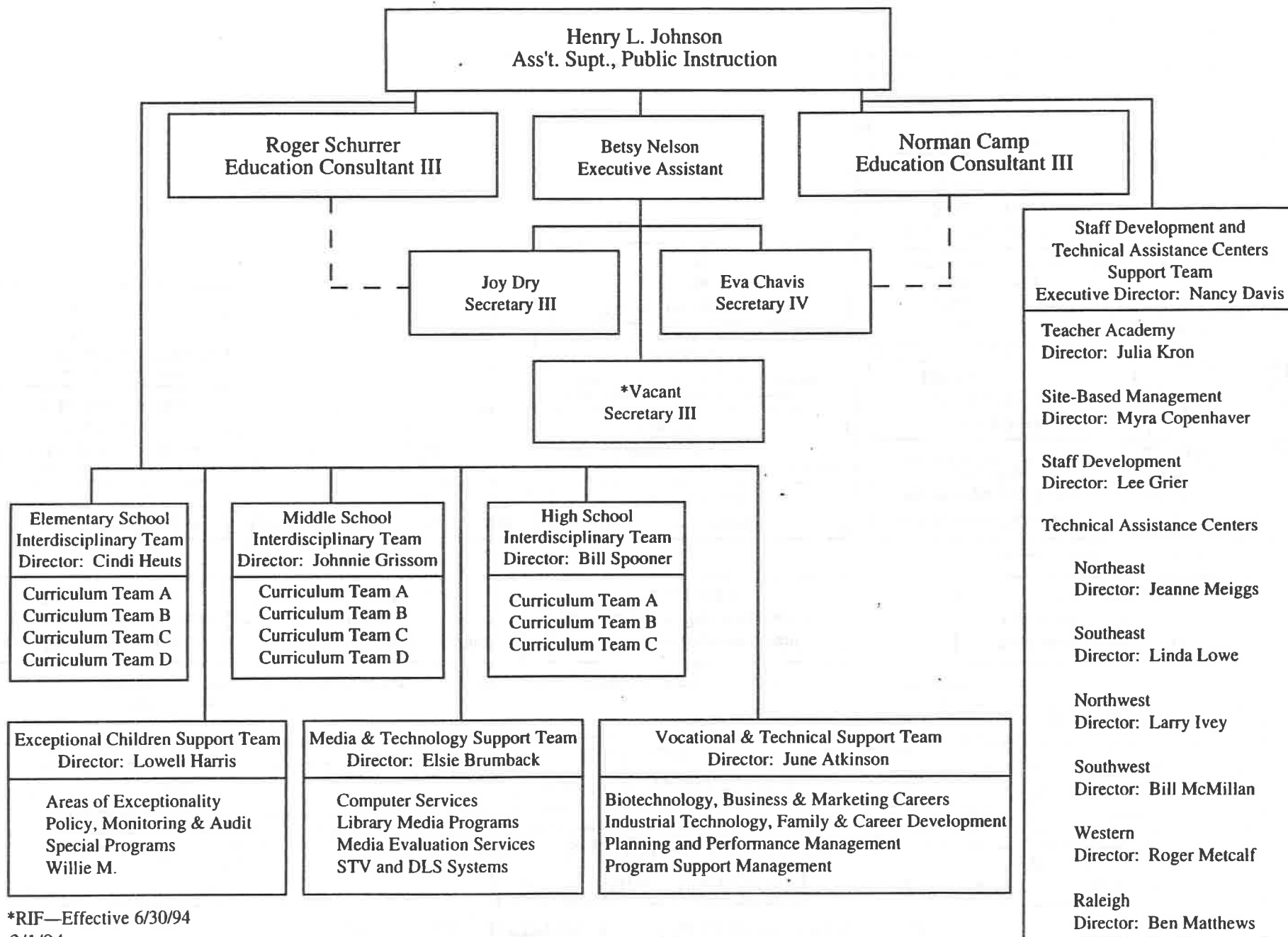
N. C. Department of Public Instruction



N. C. Department Public Instruction



INSTRUCTIONAL SERVICES



*RIF—Effective 6/30/94
3/1/94

SUPPLEMENTAL FUNDING FOR LOW WEALTH SCHOOLS

- Established by the General Assembly in 1991 to provide supplemental funding to low wealth school systems. Chapter 689, 1991 Session Laws, Section 201.2.
- The intent is to enhance instructional programs and student achievement levels in these systems.
- Low wealth is defined by the relationship between a county's ability to pay for K-12 education measured by its tax base and per capita income.
- In 1993 the legislature revised the formula for low wealth funding by giving specific weight to each of the following factors: County revenue availability per student (40%); density or dispersion of county property tax base (10%); and per capital income (50%).
- Low wealth funding can be used by local school systems for:
 - instructional positions;
 - instructional support positions;
 - teacher assistant positions;
 - clerical positions;
 - instructional supplies and equipment;
 - staff development; and
 - textbooks.
- Counties must use low wealth funds to supplement and not supplant State and local funding for public schools.
- Total Appropriations of Low Wealth funds
 - FY 1991-92 \$6,000,000
 - FY 1992-93 \$9,000,000
 - FY 1993-94 \$18,000,000
 - FY 1994-95 \$18,000,000

Low Wealth Supplemental Funding

Based on Preliminary
1992 Property Valuations

County Name		1993-94 Rank	1992-93		1993-94		Difference From 1992-93
			Allotment	Eligible?	Allotment	Eligible?	
010	Alamance County	18	\$0		\$0		\$0
020	Alexander County	53	0	Eligible	71,120	Eligible	71,120
030	Alleghany County *	33	2,567		12,918	Eligible	10,351
040	Anson County	83	101,750	Eligible	227,764	Eligible	126,014
050	Ashe County	54	0	Eligible	75,646	Eligible	75,646
060	Avery County	25	0		0		0
070	Beaufort County	49	0	Eligible	179,922	Eligible	179,922
080	Bertie County	98	104,173	Eligible	261,509	Eligible	157,336
090	Bladen County	80	113,863	Eligible	267,905	Eligible	154,042
100	Brunswick County	13	0		0		0
110	Buncombe County	20	0		0		0
120	Burke County	42	0	Eligible	215,359	Eligible	215,359
130	Cabarrus County	22	59,758	Eligible	0		(59,758)
140	Caldwell County	51	168,776	Eligible	300,803	Eligible	132,027
150	Camden County	69	12,114	Eligible	40,632	Eligible	28,518
160	Carteret County	19	0		0		0
170	Caswell County	92	96,097	Eligible	195,145	Eligible	99,048
180	Catawba County	9	0		0		0
190	Chatham County	28	0		0		0
200	Cherokee County	68	0	Eligible	80,807	Eligible	80,807
210	Chowan County	67	45,222	Eligible	95,691	Eligible	50,469
220	Clay County	58	0	Eligible	20,598	Eligible	20,598
230	Cleveland County *	36	163,606	Eligible	125,209	Eligible	(38,397)
240	Columbus County	90	278,601	Eligible	590,781	Eligible	312,180
250	Craven County	57	0	Eligible	382,024	Eligible	382,024
260	Cumberland County	50	1,154,781	Eligible	1,246,799	Eligible	92,018
270	Currituck County	15	0		0		0
280	Dare County	2	0		0		0
290	Davidson County	35	0	Eligible	182,920	Eligible	182,920
300	Davie County	21	0		0		0
310	Duplin County	88	190,579	Eligible	435,355	Eligible	244,776
320	Durham County	4	0		0		0
330	Edgecombe County	66	284,254	Eligible	285,708	Eligible	1,454
340	Forsyth County	3	0		0		0
350	Franklin County	81	133,244	Eligible	317,828	Eligible	184,584
360	Gaston County	16	249,279	Eligible	0		(249,279)
370	Gates County	76	29,072	Eligible	81,303	Eligible	52,231
380	Graham County	91	0	Eligible	36,594	Eligible	36,594
390	Granville County	71	0	Eligible	265,540	Eligible	265,540
400	Greene County	82	70,256	Eligible	135,275	Eligible	65,019

Low Wealth Supplemental Funding

Based on Preliminary
1992 Property Valuations

County Name		1993-94 Rank	1992-93		1993-94		Difference From 1992-93
			Allotment	Eligible?	Allotment	Eligible?	
410	Guilford County	7	0		0		0
420	Halifax County	86	242,262	Eligible	558,649	Eligible	316,387
430	Harnett County	93	334,321	Eligible	743,455	Eligible	409,134
440	Haywood County *	34	24,442	Eligible	74,587	Eligible	50,145
450	Henderson County	10	0		0		0
460	Hertford County	94	115,478	Eligible	259,494	Eligible	144,016
470	Hoke County	100	172,813	Eligible	423,246	Eligible	250,433
480	Hyde County	24	0		0		0
490	Iredell County	27	155,855	Eligible	0		(155,855)
500	Jackson County	23	0	Eligible	0		0
510	Johnston County	62	298,790	Eligible	519,016	Eligible	220,226
520	Jones County	85	33,917	Eligible	80,360	Eligible	46,443
530	Lee County *	31	50,959	Eligible	29,576	Eligible	(21,383)
540	Lenoir County	48	183,311	Eligible	257,847	Eligible	74,536
550	Lincoln County	37	174,429	Eligible	81,278	Eligible	(93,151)
560	Macon County	12	0		0		0
570	Madison County	77	0	Eligible	59,451	Eligible	59,451
580	Martin County	60	68,641	Eligible	160,963	Eligible	92,322
590	McDowell County	64	0	Eligible	187,195	Eligible	187,195
600	Mecklenburg County	1	0		0		0
610	Mitchell County	65	0	Eligible	66,579	Eligible	66,579
620	Montgomery County	63	0	Eligible	108,036	Eligible	108,036
630	Moore County	17	0		0		0
640	Nash County	45	0	Eligible	279,356	Eligible	279,356
650	New Hanover County	6	0		0		0
660	Northampton County	84	79,139	Eligible	192,424	Eligible	113,285
670	Onslow County	95	590,311	Eligible	922,055	Eligible	331,744
680	Orange County	8	0		0		0
690	Pamlico County	61	0	Eligible	50,787	Eligible	50,787
700	Pasquotank County	73	130,821	Eligible	254,511	Eligible	123,690
710	Pender County	59	0	Eligible	157,172	Eligible	157,172
720	Perquimans County	87	46,837	Eligible	103,219	Eligible	56,382
730	Person County	30	0		17,197	Eligible	17,197
740	Pitt County	40	222,073	Eligible	329,195	Eligible	107,122
750	Polk County	11	0		0		0
760	Randolph County	44	0	Eligible	212,534	Eligible	212,534
770	Richmond County	89	209,960	Eligible	451,170	Eligible	241,210
780	Robeson County	99	731,631	Eligible	1,609,011	Eligible	877,380
790	Rockingham County *	41	144,320	Eligible	221,913	Eligible	77,593
800	Rowan County	32	0	Eligible	168,094	Eligible	168,094

Low Wealth Supplemental Funding

Based on Preliminary
1992 Property Valuations

County Name		1993-94 Rank	1992-93		1993-94		Difference From 1992-93
			Allotment	Eligible?	Allotment	Eligible?	
810	Rutherford County	47	0	Eligible	203,269	Eligible	203,269
820	Sampson County *	72	179,997	Eligible	298,422	Eligible	118,425
830	Scotland County	78	192,194	Eligible	335,854	Eligible	143,660
840	Stanly County	46	0	Eligible	161,232	Eligible	161,232
850	Stokes County	43	0	Eligible	121,521	Eligible	121,521
860	Surry County *	39	109,436	Eligible	121,431	Eligible	11,995
870	Swain County	97	0	Eligible	61,739	Eligible	61,739
880	Transylvania County	14	0		0		0
890	Tyrrell County	74	9,691	Eligible	30,887	Eligible	21,196
900	Union County	29	199,462	Eligible	2,812	Eligible	(196,650)
910	Vance County	70	201,077	Eligible	267,808	Eligible	66,731
920	Wake County	5	0		0		0
930	Warren County	79	46,030	Eligible	144,648	Eligible	98,618
940	Washington County	96	71,871	Eligible	168,042	Eligible	96,171
950	Watauga County	26	0		0		0
960	Wayne County	75	443,339	Eligible	817,891	Eligible	374,552
970	Wilkes County	56	0	Eligible	228,350	Eligible	228,350
980	Wilson County	38	213,998	Eligible	165,414	Eligible	(48,584)
990	Yadkin County	52	64,603	Eligible	103,665	Eligible	39,062
995	Yancey County	55	0	Eligible	57,490	Eligible	57,490
Total			\$9,000,000	74	\$18,000,000	72	\$9,000,000

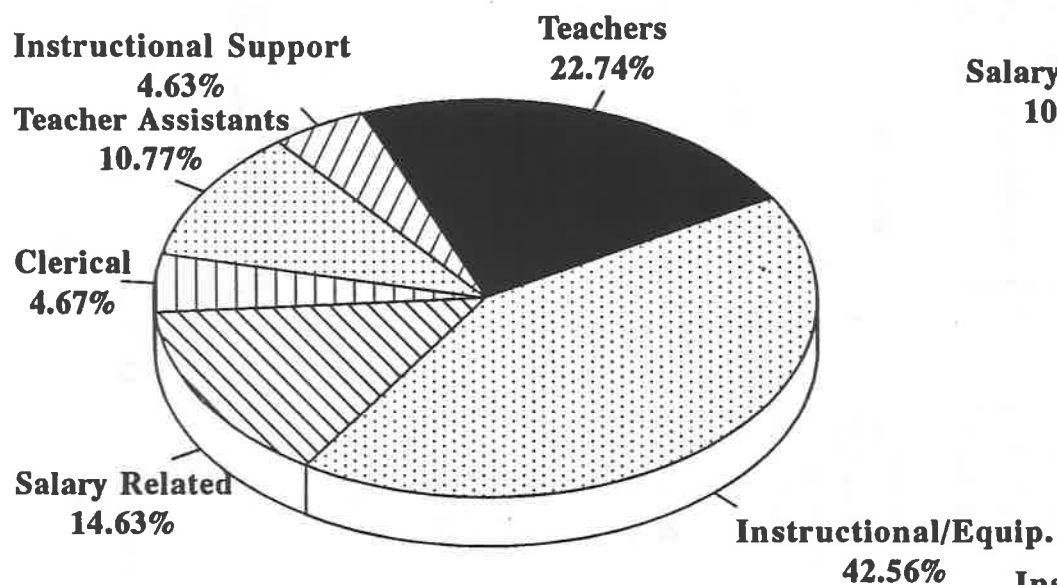
A county could be eligible for funding in 1992-93 but not funded if their "effective" county tax rate was less than the state average "effective" tax rate. A total of 44 of the eligible 74 counties had an "effective" 1992 tax rate which was above the state average "effective" tax rate.

In 1993-94 all 72 eligible counties are being funded. If a county's "effective" county tax rate was more than the state average, or if the county is contributing more than they could provide to local schools based on the Low Wealth Formula, the county receives 100% of the funding. Otherwise, the county will receive a proportional share of the calculated funding. 40 counties received 100% funding and 32 counties received a proportional share.

* Legislation held all counties which received Low Wealth Supplemental funding in 1991-92 harmless to the County's total 1991-92 funding.

A total of five (5) counties had "effective" tax rates less than the state average "effective" tax rate. Haywood and Lee required additional funding to be held harmless to their 1991-92 funding level.

LOW WEALTH SUPPLEMENTAL FUNDING REPORT ON EXPENDITURES

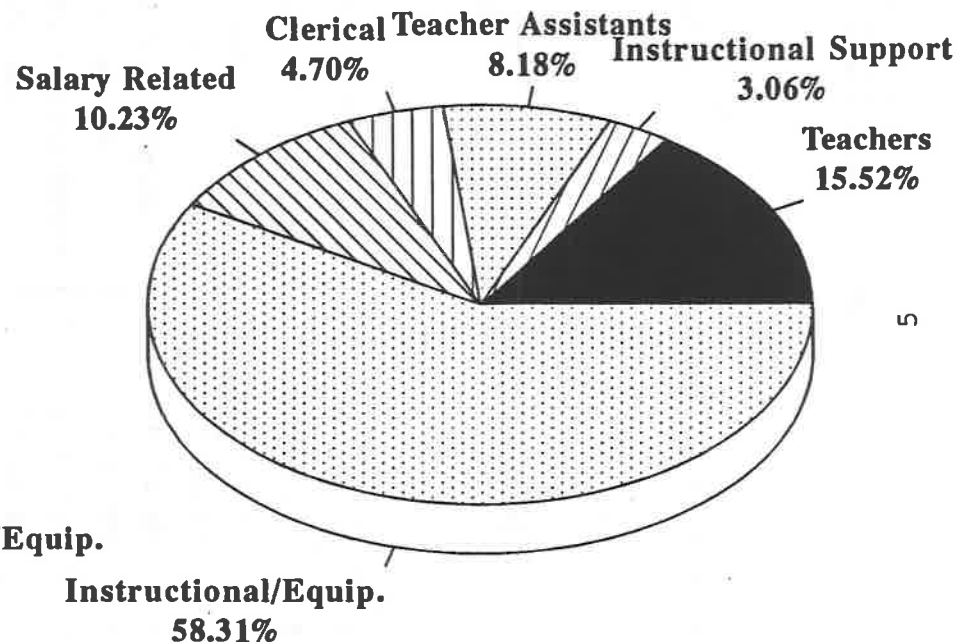


FY 1993-94

-Instructional Support includes Guidance Counselors, Library/Media Specialist, Social Workers and Health Services.

- Instructional/Equipment includes instructional supplies, computer software, textbooks (supplemental), library books and periodicals, audiovisual supplies , instructional equipment, computer equipment and workshops.

FRD 4/94



FY 91-92 Thru FY 93-94

Source: N.C. Department of Public Instruction

Low Wealth Supplemental Funding Report on Expenditures

State Summary

Total Allotment:	\$18,063,577	\$33,063,577
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Expenditure Description	FY 1993-94		FY 91/92 Thru FY 93/94	
	As of 12/31/93	% of Total	As of 12/31/93	% of Total
Teachers	\$919,559.28	22.74%	\$2,920,527	15.52%
Teacher Assistants	435,543.26	10.77%	1,539,787	8.18%
Instructional Support (Note)	187,375.04	4.63%	576,104	3.06%
Clerical Personnel	188,726.30	4.67%	884,980	4.70%
Other - Salary Related:				
Substitute Pay	62,578.21	1.55%	308,540	1.64%
Overtime Pay	1,433.59	0.04%	5,277	0.03%
Matching Benefits	<u>527,345.64</u>	<u>13.04%</u>	<u>1,611,566</u>	<u>8.56%</u>
Total Other	<u>591,357.44</u>	<u>14.63%</u>	<u>1,925,382.42</u>	<u>10.23%</u>
Instructional Supplies	505,589.64	12.50%	4,121,791	21.90%
Computer Software and Supplies	180,236.01	4.46%	1,047,042	5.56%
Textbooks (Supplemental)	2,961.03	0.07%	166,596	0.89%
Library Books and Periodicals	41,469.86	1.03%	416,282	2.21%
Audiovisual Supplies	6,459.59	0.16%	44,624	0.24%
Instructional Equipment	318,144.31	7.87%	2,273,385	12.08%
Computer Equipment	581,956.16	14.39%	2,226,357	11.83%
Workshops	83,998.71	2.08%	680,406	3.60%
Total	\$4,043,376.63	100.00%	\$18,823,263.13	100.00%

Unexpended Balance:	\$14,020,200.37	77.62%	\$14,240,313.87	43.07%
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Note: Instructional Support includes Guidance Counselors, Library/Media Specialist, Social Workers, and Health Services.

Positions Paid With Supplemental Funding

Low Wealth

Expenditure Description	FY 1991-92 FTEs	FY 1992-93 FTEs	FY 1993-94 FTEs (12/31/93)
Teachers	59.51	72.60	129.19
Instructional Support (Note)	9.97	13.60	23.36
Total	69.48	86.20	152.55

Note: Instructional Support includes Guidance Counselors, Library/Media Specialist, Social Workers, and Health Services.

North Carolina Department Of Public Instruction
 Division of School Business Services
 School Budget Section
 April 12, 1994 (C:\SMC\NTY\POSITION)

LEA Name
Alleghany County
Anson County
Bertie County
Bladen County
Cabarrus County
Kannapolis City
Caldwell County
Camden County
Caswell County
Chowan County
Cleveland County
Kings Mountain City
Shelby City
Columbus County
Whiteville City
Cumberland County
Duplin County
Edgecombe County
Franklin County
Franklinton City
Gaston County
Gates County
Greene County
Halifax County
Roanoke Rapids City
Weldon City
Harnett County
Haywood County
Hertford County
Hoke County
Iredell Statesville Schools
Johnston County
Jones County
Lee County
Lenoir County
Lincoln County
Martin County
Nash Rocky Mount Schools
Northampton County
Onslow County
Pasquotank County
Perquimans County
Pitt County
Richmond County
Robeson County
Rockingham County
Sampson County
Clinton City
Scotland County
Surry County
Elkin City
Mount Airy City
Tyrrell County
Union County
Vance County
Warren County
Washington County
Wayne County
Wilson County
Yadkin County
Total

Low Wealth — Fiscal Year 1992-93			
Allotment	Expended	Unexpended	Unexpended Percent
2,567	2,566.99	0.01	0.00%
101,750	101,675.69	74.31	0.07%
104,173	101,005.45	3,167.55	3.04%
113,863	113,863.00	0.00	0.00%
-48,225	48,223.48	1.52	0.00%
11,533	11,533.00	0.00	0.00%
168,776	168,776.00	0.00	0.00%
12,114	12,114.00	0.00	0.00%
96,097	91,028.92	5,068.08	5.27%
45,222	45,222.00	0.00	0.00%
88,838	88,838.00	0.00	0.00%
41,829	41,829.00	0.00	0.00%
34,684	34,684.00	0.00	0.00%
203,936	203,936.00	0.00	0.00%
74,665	74,665.00	0.00	0.00%
1,154,781	1,154,781.00	0.00	0.00%
190,579	190,375.68	203.32	0.11%
199,546	192,852.82	6,693.18	3.35%
105,662	96,317.18	9,344.82	8.84%
27,582	27,582.00	0.00	0.00%
247,534	247,534.00	0.00	0.00%
29,072	28,545.78	526.22	1.81%
70,256	68,219.87	2,036.13	2.90%
147,053	147,051.66	1.34	0.00%
67,349	67,349.00	0.00	0.00%
27,860	27,860.00	0.00	0.00%
334,321	334,263.46	57.54	0.02%
24,442	24,442.00	0.00	0.00%
115,478	115,250.01	227.99	0.20%
172,813	172,207.17	605.83	0.35%
155,855	152,905.38	2,949.62	1.89%
298,790	298,790.00	0.00	0.00%
33,917	33,858.69	58.31	0.17%
50,959	50,946.26	12.74	0.03%
183,311	183,302.79	8.21	0.00%
174,429	174,429.00	0.00	0.00%
68,641	68,641.00	0.00	0.00%
84,708	84,708.00	0.00	0.00%
79,139	66,816.03	12,322.97	15.57%
590,311	590,311.00	0.00	0.00%
130,821	125,623.39	5,197.61	3.97%
46,837	46,826.42	10.58	0.02%
222,073	170,996.14	51,076.86	23.00%
209,960	209,083.63	876.37	0.42%
731,631	731,631.00	0.00	0.00%
144,320	143,843.15	476.85	0.33%
127,258	127,258.00	0.00	0.00%
52,739	52,739.00	0.00	0.00%
192,194	183,651.22	8,542.78	4.44%
78,466	78,466.00	0.00	0.00%
10,396	10,396.00	0.00	0.00%
20,574	20,573.49	0.51	0.00%
9,691	9,691.00	0.00	0.00%
199,462	199,462.00	0.00	0.00%
201,077	199,745.63	1,331.37	0.66%
46,030	34,599.90	11,430.10	24.83%
71,871	71,871.00	0.00	0.00%
443,339	443,318.13	20.87	0.00%
213,998	213,082.96	915.04	0.43%
64,603	64,592.80	10.20	0.02%
\$9,000,000	\$8,876,751.17	\$123,248.83	1.37%

A total of 60 LEAs received funding.

LEA Name
Alexander County
Alleghany County
Anson County
Ashe County
Beaufort County
Washington City
Bertie County
Bladen County
Burke County
Kannapolis City
Caldwell County
Camden County
Caswell County
Cherokee County
Chowan County
Clay County
Cleveland County
Kings Mountain City
Shelby City
Columbus County
Whiteville City
New Bern Craven Schools
Cumberland County
Davidson County
Lexington City
Thomasville City
Duplin County
Edgecombe County
Franklin County
Franklinton City
Gates County
Graham County
Granville County
Greene County
Halifax County
Roanoke Rapids City
Weldon City
Harnett County
Haywood County
Hertford County
Hoke County
Johnston County
Jones County
Lee County
Lenoir County
Lincoln County
Madison County
Martin County
McDowell County
Mitchell County
Montgomery County
Nash Rocky Mount Schools
Northampton County
Onslow County
Pamlico County
Pasquotank County
Pender County
Perquimans County
Person County
Pitt County
Randolph County
Asheboro City
Richmond County
Robeson County
Rockingham County
Rowan Salisbury Schools
Rutherford County
Sampson County
Clinton City
Scotland County
Stanly County
Albemarle City
Stokes County
Surry County
Elkin City
Mount Airy City
Swain County
Tyrrell County
Union County
Vance County
Warren County
Washington County
Wayne County
Wilkes County
Wilson County
Yadkin County
Yancey County
Total

Allotment	Expended Dec. 1993	Unexpended	Unexpended Percent
\$71,371	\$625.31	\$70,745.69	99.12%
12,963	100.18	12,862.82	99.23%
228,569	48,454.81	180,114.19	78.80%
75,913	25,140.37	50,772.63	66.88%
89,033	32,056.16	56,976.84	64.00%
91,524	8,175.28	83,348.72	91.07%
262,432	137,757.18	124,674.82	47.51%
268,851	59,977.41	208,873.59	77.69%
216,119	70,067.46	146,051.54	67.58%
9,227	0.00	9,227.00	100.00%
301,865	49,184.88	252,680.12	83.71%
40,776	10,745.50	30,030.50	73.65%
195,834	71,851.18	123,982.82	63.31%
81,093	1,693.66	79,399.34	97.91%
96,029	27,013.83	69,015.17	71.87%
20,671	4,821.65	15,849.35	76.67%
69,158	10,209.32	58,948.68	85.24%
30,156	13,721.56	16,434.44	54.50%
26,336	10,104.76	16,231.24	61.63%
436,884	136,008.23	300,875.77	68.87%
155,984	47,494.91	108,489.09	69.55%
383,373	0.00	383,373.00	100.00%
1,251,203	163,145.36	1,088,057.64	86.96%
141,126	42,658.83	98,467.17	69.77%
24,598	11,139.34	13,458.66	54.71%
17,843	6,247.61	11,595.39	64.99%
436,892	89,220.48	347,671.52	79.58%
200,845	77,047.64	123,797.36	61.64%
257,649	17,316.65	240,332.35	93.28%
61,302	22,152.86	39,149.14	63.86%
81,590	41,737.13	39,852.87	48.85%
36,723	4,745.56	31,977.44	87.08%
266,478	84,879.58	181,598.42	68.15%
135,753	9,118.44	126,634.56	93.28%
333,346	90,628.38	242,717.62	72.81%
161,067	17,450.86	143,616.14	89.17%
66,209	16,479.96	49,729.04	75.11%
746,082	164,366.64	581,715.36	77.97%
74,851	0.00	74,851.00	100.00%
260,411	36,889.89	223,521.11	85.83%
424,741	261,938.61	162,802.39	38.33%
520,849	79,605.31	441,243.69	84.72%
80,644	35,730.77	44,913.23	55.69%
29,680	9,823.00	19,857.00	66.90%
258,758	60,095.05	198,662.95	76.78%
81,566	39,440.68	42,125.32	51.65%
59,661	0.00	59,661.00	100.00%
161,532	46,071.35	115,460.65	71.48%
187,856	0.00	187,856.00	100.00%
66,814	16,489.63	50,324.37	75.32%
108,418	0.00	108,418.00	100.00%
366,215	0.00	366,215.00	100.00%
193,104	123,623.48	69,480.52	35.98%
925,312	34,393.22	890,918.78	96.28%
50,966	21,607.78	29,358.22	57.60%
255,410	58,640.91	196,769.09	77.04%
157,727	5,478.69	152,248.31	96.53%
103,584	16,174.50	87,409.50	84.39%
17,258	423.35	16,834.65	97.55%
330,358	57,908.77	272,449.23	82.47%
169,582	12,496.45	157,085.55	92.63%
43,702	8,052.63	35,649.37	81.57%
452,763	136,651.41	316,111.59	69.82%
1,614,695	345,575.00	1,269,120.00	78.60%
222,697	70,544.02	152,152.98	68.32%
159,460	19,767.61	139,692.39	87.60%
203,987	39,359.34	164,627.66	80.70%
213,916	29,461.05	184,454.95	86.23%
85,560	65,499.14	20,060.86	23.45%
337,040	20,377.70	316,662.30	93.95%
123,794	20,367.46	103,426.54	83.55%
38,007	32,321.08	5,685.92	14.96%
121,951	27,349.74	94,601.26	77.57%
87,483	27,482.81	60,000.19	68.58%
11,613	4,643.24	6,969.76	60.02%
22,764	7,885.87	14,878.13	65.36%
61,957	12,088.36	49,868.64	80.49%
30,996	12,734.02	18,261.98	58.92%
2,822	0.00	2,822.00	100.00%
268,754	10,678.75	258,075.25	96.03%
145,159	11,148.37	134,010.63	92.32%
168,635	63,868.45	104,766.55	62.13%
820,780	365,268.48	455,511.52	55.50%
229,156	61,849.24	167,306.76	73.01%
165,998	55,545.61	110,452.39	66.54%
104,031	52,085.54	51,945.46	49.93%
57,693	2,401.31	55,291.69	95.84%
\$18,063,577	\$4,043,376.63	\$14,020,200.37	77.62%

North Carolina Department of Public Instruction
Division of School Business Services, School Budget Section
January 31, 1994 (C:\Lowm\121\2LWDEC93)

A total of 87 LEAs received funding.

**LOW WEALTH COUNTIES
TEACHER EXPENDITURES**

HIGH NEED COUNTIES

	Allotment	Teacher Expenditure	Percent	Average
1992	\$2,382,366	\$405,817	17%	\$18,446
1993	\$3,660,886	\$350,499	10%	\$15,932
1994	\$8,185,668	\$326,623	4%	\$14,846
TOTAL	\$15,396,962	\$1,082,939	7%	\$49,224

LOW NEED COUNTIES

	Allotment	Teacher Expenditure	Percent	Average
1992	\$909,890	\$137,623	15%	\$6,553
1993	\$1,399,132	\$407,924	29%	\$19,425
1994	\$2,951,050	\$328,457	11%	\$15,641
TOTAL	\$5,425,486	\$874,004	16%	\$41,619

*Numbers are for those counties ranked in the highest and lowest 25% of Low Wealth Counties.

**Fiscal Research Division
April, 1994**

PER PUPIL LOCAL APPROPRIATION LOW WEALTH

LEA NO.	LEA NAME	1991-92 TOTAL ADM	1991-92 Local Approp.	1991-92 Per Pupil Local Approp.	1992-93 TOTAL ADM	1992-93 Local Approp.	1992-93 Per Pupil Local Approp.
020	Alexander County	4,865	\$1,686,315	\$346.62	4,816	\$1,938,804	\$402.58
030	Alleghany County	1,557	980,151	629.51	1,533	1,048,824	684.16
040	Anson County	4,687	2,312,200	493.32	4,585	2,380,200	519.13
050	Ashe County	3,580	1,778,000	496.65	3,524	1,880,000	533.48
070	Beaufort County	7,814	4,616,879	590.85	7,873	4,888,720	620.95
080	Bertie County	4,127	1,246,888	302.13	4,085	1,400,000	342.72
090	Bladen County	5,654	3,038,020	537.32	5,576	3,285,022	589.14
120	Burke County	12,149	7,746,947	637.66	12,359	8,100,000	655.39
140	Caldwell County	11,537	6,784,906	588.10	11,410	7,019,136	615.17
150	Camden County	1,051	701,026	667.01	1,130	740,000	654.87
200	Cherokee County	3,551	1,244,399	350.44	3,480	1,542,464	443.24
210	Chowan County	2,606	1,636,406	627.94	2,619	1,626,406	621.00
220	Clay County	1,227	412,518	336.20	1,200	454,423	378.69
230	Cleveland County	15,333	6,829,354	445.40	15,399	12,266,128	796.55
240	Columbus County	10,648	4,439,164	416.90	10,650	4,601,002	432.02
250	Craven County	14,356	7,914,676	551.31	14,744	8,280,168	561.60
260	Cumberland County	44,830	28,400,439	633.51	46,611	28,400,439	609.31
290	Davidson County	21,597	11,562,476	535.37	21,827	11,320,340	518.64
310	Duplin County	7,911	2,477,729	313.20	7,978	3,230,200	404.89
330	Edgecombe County	8,153	5,824,182	714.36	8,129	5,926,698	729.08
350	Franklin County	6,012	3,247,200	540.12	6,141	3,355,690	546.44
370	Gates County	1,691	1,270,994	751.62	1,711	1,283,722	750.28
380	Graham County	1,279	320,000	250.20	1,273	330,000	259.23
390	Granville County	6,512	4,559,486	700.17	6,592	4,828,475	732.47
400	Greene County	2,799	1,001,636	357.85	2,740	1,374,896	501.79
420	Halifax County	10,627	4,283,319	403.06	10,479	4,306,623	410.98
430	Harnett County	11,796	4,095,679	347.21	12,156	6,250,698	514.21
440	Haywood County	7,131	6,020,076	844.21	7,135	6,240,425	874.62
460	Hertford County	4,242	2,292,988	540.54	4,321	2,292,988	530.66
470	Hoke County	4,995	1,391,821	278.64	5,128	1,453,257	283.40
510	Johnston County	14,797	7,440,800	502.86	14,998	7,940,800	529.46
520	Jones County	1,562	627,171	401.52	1,559	600,796	385.37
530	Lee County	7,749	5,053,000	652.08	7,833	5,569,295	711.00
540	Lenoir County	10,864	6,615,389	608.93	10,716	7,533,020	702.97
550	Lincoln County	8,673	4,240,000	488.87	8,747	4,671,565	534.08
570	Madison County	2,550	675,000	264.71	2,541	1,000,000	393.55
580	Martin County	4,949	3,551,803	717.68	4,925	3,533,393	717.44
590	McDowell County	6,248	3,168,587	507.14	6,172	3,393,455	549.81
620	Montgomery County	4,172	1,834,926	439.82	4,162	1,996,792	479.77
640	Nash County	16,788	9,042,466	538.63	17,075	9,600,000	562.23
660	Northampton County	3,812	1,443,750	378.74	3,777	1,950,156	516.32
670	Onslow County	19,122	7,255,000	379.41	19,320	8,125,000	420.55
690	Pamlico County	2,097	904,882	431.51	2,076	1,389,361	669.25
700	Pasquotank County	5,691	3,009,923	528.89	5,930	3,104,973	523.60
710	Pender County	5,124	3,108,744	606.70	5,077	3,485,774	686.58
720	Perquimans County	1,860	995,730	535.34	1,917	994,730	518.90
730	Person County	5,152	3,793,151	736.25	5,197	4,101,891	789.28
740	Pitt County	17,805	12,435,848	698.45	18,005	12,644,875	702.30
760	Randolph County	17,391	7,325,082	421.20	17,669	7,503,082	424.65
770	Richmond County	8,264	3,485,000	421.71	8,205	3,885,018	473.49
780	Robeson County	22,958	9,761,550	425.19	22,636	10,491,550	463.49
790	Rockingham County	14,151	8,031,807	567.58	14,125	8,251,649	584.19
800	Rowan County	16,684	16,581,006	993.83	16,933	13,487,851	796.54

PER PUPIL LOCAL APPROPRIATION LOW WEALTH

LEA NO.	LEA NAME	1991-92 TOTAL ADM	1991-92 Local Approp.	1991-92 Per Pupil Local Approp.	1992-93 TOTAL ADM	1992-93 Local Approp.	1992-93 Per Pupil Local Approp.
810	Rutherford County	9,821	5,875,276	598.24	9,803	6,308,859	643.56
820	Sampson County	9,339	4,123,860	441.57	9,265	4,441,200	479.35
830	Scotland County	7,294	5,616,870	770.07	7,256	5,850,150	806.25
840	Stanly County	8,844	4,808,267	543.68	8,915	4,882,878	547.71
850	Stokes County	6,410	4,625,475	721.60	6,454	4,811,336	745.48
860	Surry County	10,513	5,374,950	511.27	10,330	5,517,050	534.08
870	Swain County	1,570	464,650	295.96	1,580	2,343,361	1,483.14
890	Tyrrell County	734	544,343	741.61	737	580,004	786.98
900	Union County	16,082	7,447,065	463.07	16,604	8,242,509	496.42
910	Vance County	7,154	4,200,000	587.08	7,096	4,200,000	591.88
930	Warren County	3,015	1,510,336	500.94	3,032	1,570,750	518.06
940	Washington County	2,852	1,225,000	429.52	2,813	1,230,000	437.26
960	Wayne County	18,367	8,844,954	481.57	18,396	9,951,618	540.97
970	Wilkes County	10,024	5,108,712	509.65	9,891	5,365,234	542.44
980	Wilson County	11,819	8,982,866	760.04	11,750	8,583,381	730.50
990	Yadkin County	4,732	2,500,000	528.32	4,960	2,650,000	534.27
995	Yancey County	2,480	1,295,202	522.26	2,424	1,361,622	561.73
	Unit Totals	593,830			598,105		
	Unit Average		\$4,614,919	\$526.87		\$4,931,296	\$580.45

SUPPLEMENTAL FUNDING FOR SMALL SCHOOL SYSTEMS

- Established by the General Assembly in 1991 to provide supplemental funding to school systems with less than 3,000 average daily memberships. Counties with 3,000-4,000 average daily membership whose adjusted property tax base per student is below the state's adjusted property tax base per student are also eligible. Chapter 689, 1991 Session Laws, Sec. 201.1.
- The intent is to increase teacher allotments and provide program support.
- The formula for allocating small school funds, when fully funded, should:
 - Provide 4 to 6 classroom teachers;
 - provide additional program enhancement teachers adequate to offer the standard course of study;
 - change the duty free period to one teacher assistant per 400 ADM;
 - provide a consolidated funds allotment of at least \$150,000, excluding textbooks; and
 - allot vocational education funds for the 6th grade as well as grades 7-12.
- Counties must use low wealth funds to supplement and not supplant state and local funding for public schools.

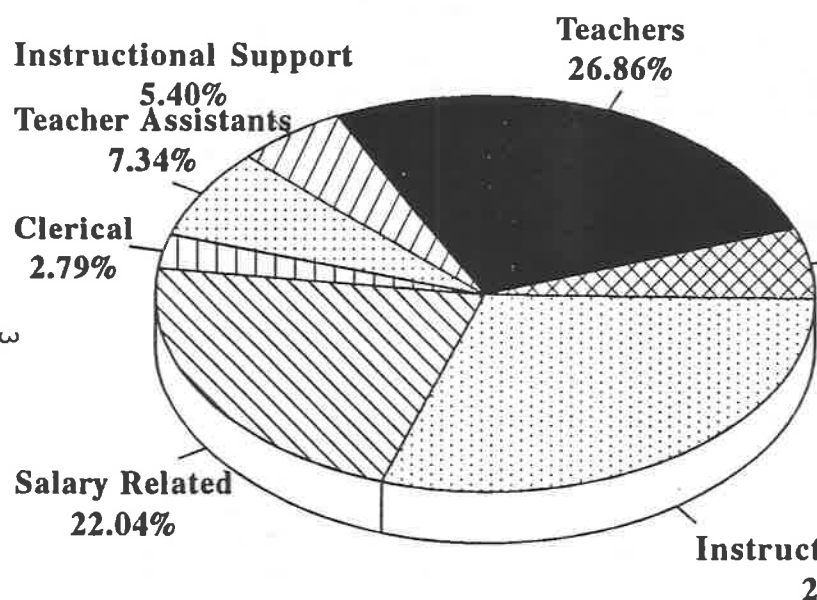
Total Appropriations of Small School Funds

FY 1991-92	\$4,000,000
FY 1992-93	\$7,000,000
FY 1993-94	\$11,000,000

Small School Supplemental Funding

LEA No.	LEA Name	1992-93 Allotment	1993-94 Allotment	Difference
030	Alleghany County	\$236,698	\$503,422	\$266,724
050	Ashe County	301,784	0	(301,784)
060	Avery County	286,160	397,240	111,080
150	Camden County	232,239	514,005	281,766
170	Caswell County	275,723	446,856	171,133
200	Cherokee County	331,877	388,494	56,617
210	Chowan County	291,900	380,731	88,831
220	Clay County	227,199	500,956	273,757
270	Currituck County	314,139	475,431	161,292
370	Gates County	241,031	479,097	238,066
380	Graham County	255,633	506,480	250,847
400	Greene County	265,839	428,271	162,432
480	Hyde County	237,132	516,905	279,773
500	Jackson County	298,781	0	(298,781)
520	Jones County	253,386	567,629	314,243
570	Madison County	271,698	385,698	114,000
610	Mitchell County	264,887	392,135	127,248
660	Northampton County	294,455	414,954	120,499
690	Pamlico County	279,650	435,335	155,685
720	Perquimans County	266,749	420,046	153,297
750	Polk County	251,545	418,534	166,989
870	Swain County	253,442	526,472	273,030
890	Tyrrell County	242,753	595,769	353,016
930	Warren County	296,016	389,405	93,389
940	Washington County	269,717	464,614	194,897
995	Yancey County	259,567	451,521	191,954
Total		\$7,000,000	\$11,000,000	\$4,000,000

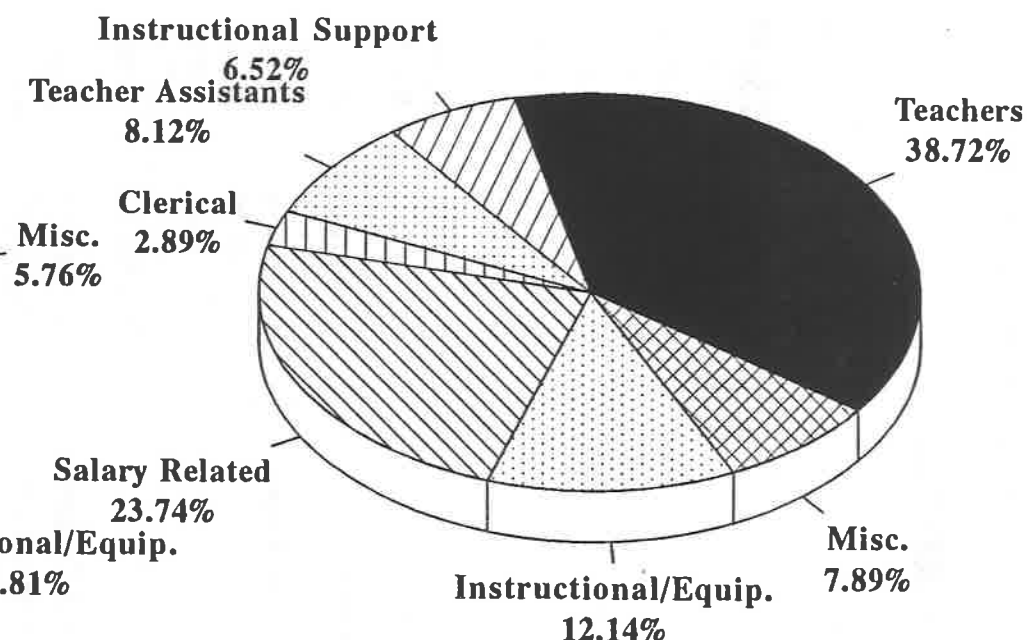
SMALL COUNTY SUPPLEMENTAL FUNDING REPORT ON EXPENDITURES



FY 1993-94

-Instructional support includes Guidance Counselors, Library/Media Specialist, Social Workers and Health Services.

- Instructional/Equipment includes Instructional supplies, computer software and supplies, textbooks, Library books and periodicals, instructional equipment, computer equipment and administration equipment.



FY 91-92 Thru FY 93-94

Small County Supplemental Funding Report on Expenditures

State Summary

Total Allotment:

\$11,731,907

\$22,731,907

Expenditure Description	FY 1993-94		FY 1991-92 Thru FY 93-94	
	As of 12/31/93	% of Total	As of 12/31/93	% of Total
Teachers	\$1,099,857.93	26.87%	\$4,423,687.64	29.56%
Teacher Assistants	300,432.48	7.34%	927,883.00	6.20%
Instructional Support (Note)	220,922.03	5.40%	744,870.31	4.98%
Clerical Personnel	114,327.54	2.79%	329,849.44	2.20%
Other - Salary Related:				
Substitute Pay	35,403.85	0.86%	156,866.70	1.05%
Overtime Pay	1,095.35	0.03%	4,347.71	0.03%
Custodians	9,853.73	0.24%	78,704.60	0.53%
Data Processing-Director/Other	9,972.00	0.24%	47,395.12	0.32%
Assistant Principals	74,178.88	1.81%	244,852.11	1.64%
Administration Salaries (Dir., Fin. Officer)	61,074.00	1.49%	97,404.11	0.65%
Technical	58,562.20	1.43%	120,141.93	0.80%
Salaries Other	47,841.26	1.18%	102,502.24	0.68%
Matching Benefits	604,516.11	14.76%	1,859,808.17	12.43%
Total Other	902,497.38	22.04%	2,712,022.69	18.13%
Administration Equipment & Supplies	83,161.77	2.03%	224,994.17	1.50%
Instructional Supplies and Materials	430,244.85	10.51%	1,456,368.69	9.73%
Computer Software and Supplies	31,191.82	0.76%	242,713.49	1.62%
Electricity/Fuel	136,707.97	3.34%	471,279.63	3.15%
Other (Transportation, Travel, Post., Workshops, Contracts, Repairs)	99,052.22	2.42%	406,234.07	2.71%
Architect Fees	0.00	0.00%	23,652.86	0.16%
Textbooks (Basic & Supplemental)	47,696.13	1.16%	191,008.37	1.28%
Library Books/Periodicals	27,462.81	0.67%	170,873.94	1.14%
Instructional Equipment	276,495.46	6.75%	1,253,769.41	8.38%
Computer Equipment	324,205.49	7.92%	1,386,633.69	9.26%
Total	\$4,094,255.88	100.00%	\$14,965,841.40	100.00%
Unexpended Balance:	\$7,637,651.12	65.10%	\$7,766,065.60	34.16%

Note: Instructional Support includes Guidance Counselors, Library/Media Specialist, Social Workers, and Health Services.

Small County Supplemental Funding

LEA Name	Fiscal Year 1992-93				Fiscal Year 1993-94			
	Allotment	Total Expended	Unexpended		Allotment	Expended Dec. 1993	Unexpended	
			Amount	Percent			Amount	Percent
Alleghany County	\$236,698	\$236,697.20	\$0.80	0.00%	\$509,433	\$184,730.27	\$324,702.73	63.74%
Ashe County *	301,784	301,784.00	0.00	0.00%	301,784	84,057.48	217,726.52	72.15%
Avery County	286,160	286,160.00	0.00	0.00%	401,983	119,538.31	282,444.69	70.26%
Camden County	232,239	232,239.00	0.00	0.00%	520,142	143,937.27	376,204.73	72.33%
Caswell County	275,723	275,683.91	39.09	0.01%	452,191	167,635.60	284,555.40	62.93%
Cherokee County	331,877	331,877.00	0.00	0.00%	393,132	85,607.09	307,524.91	78.22%
Chowan County	291,900	289,553.01	2,346.99	0.80%	385,277	162,771.71	222,505.29	57.75%
Clay County	227,199	222,543.83	4,655.17	2.05%	506,938	194,991.52	311,946.48	61.54%
Currituck County	314,139	314,139.00	0.00	0.00%	481,108	125,932.89	355,175.11	73.82%
Gates County	241,031	238,533.40	2,497.60	1.04%	484,818	196,499.03	288,318.97	59.47%
Graham County	255,633	253,463.10	2,169.90	0.85%	512,527	250,000.55	262,526.45	51.22%
Greene County	265,839	264,522.04	1,316.96	0.50%	433,385	142,213.03	291,171.97	67.19%
Hyde County	237,132	237,132.00	0.00	0.00%	523,077	154,405.90	368,671.10	70.48%
Jackson County *	298,781	286,632.22	12,148.78	4.07%	298,781	93,474.25	205,306.75	68.71%
Jones County	253,386	253,386.00	0.00	0.00%	574,407	191,351.41	383,055.59	66.69%
Madison County	271,698	268,828.88	2,869.12	1.06%	390,303	94,410.98	295,892.02	75.81%
Mitchell County	264,887	263,862.61	1,024.39	0.39%	396,817	148,611.74	248,205.26	62.55%
Northampton County	294,455	294,455.00	0.00	0.00%	419,909	120,836.34	299,072.66	71.22%
Pamlico County	279,650	279,650.00	0.00	0.00%	440,533	165,554.88	274,978.12	62.42%
Perquimans County	266,749	266,717.86	31.14	0.01%	425,062	213,555.73	211,506.27	49.76%
Polk County	251,545	211,487.51	40,057.49	15.92%	423,531	158,492.07	265,038.93	62.58%
Swain County	253,442	253,397.73	44.27	0.02%	532,758	131,057.11	401,700.89	75.40%
Tyrrell County	242,753	242,753.00	0.00	0.00%	602,883	217,385.50	385,497.50	63.94%
Warren County	296,016	277,194.59	18,821.41	6.36%	394,055	110,846.61	283,208.39	71.87%
Washington County	269,717	269,717.00	0.00	0.00%	470,161	207,359.16	262,801.84	55.90%
Yancey County	259,567	259,567.00	0.00	0.00%	456,912	228,999.45	227,912.55	49.88%
Total	\$7,000,000	\$6,911,976.89	\$88,023.11	1.26%	\$11,731,907	\$4,094,255.88	\$7,637,651.12	65.10%

A total of 26 LEAs Received Funding in 1992-93.

A total of 26 LEAs Received Funding in 1993-94.

* - Ashe County and Jackson County are held harmless in Fy 1993-94 only.

Positions Paid With Supplemental Funding

Small County

Expenditure Description	FY 1991-92	FY 1992-93	FY 1993-94
	FTEs	FTEs	FTEs (12/31/93)
Teachers	62.18	112.05	150.47
Instructional Support (Note)	5.86	19.57	23.56
Assistant Principals	7.81	5.62	5.60
Data Processing Director	0.53	0.50	0.50
General Administration - Supervisor	0.00	1.45	2.02
General Admin. - Assoc. Superint.	0.00	1.00	0.27
Finance Officer	0.00	0.00	0.57
Staff Services Coordinator	0.00	0.51	0.00
Other Salaries:	0.00	0.00	1.56
Total	76.38	140.70	184.55

Note: Instructional Support includes Guidance Counselors, Library/Media Specialist, Social Workers, and Health Services.

North Carolina Department Of Public Instruction
 Division of School Business Services
 School Budget Section
 April 12, 1994 (C:\SMCNTY\POSITION)

PER PUPIL LOCAL EXPENDITURE SMALL COUNTY

1

LEA NO.	LEA NAME	1991-92 TOTAL ADM	1991-92 Per Pupil Local Expenditure	1991-92 Per Pupil Local Expenditure	1992-93 TOTAL ADM	1992-93 Local Expense	1992-93 Per Pupil Local Expenditure
030	Alleghany County	1,557	980,151	629.51	1,533	1,048,824	684.16
050	Ashe County	3,580	1,778,000	496.65	3,524	1,880,000	533.48
060	Avery County	2,513	2,126,020	846.01	2,492	2,232,350	895.81
150	Camden County	1,051	701,026	667.01	1,130	740,000	654.87
170	Caswell County	3,458	1,338,000	386.93	3,440	1,450,000	421.51
200	Cherokee County	3,551	1,244,399	350.44	3,480	1,542,464	443.24
210	Chowan County	2,606	1,636,406	627.94	2,619	1,626,406	621.00
220	Clay County	1,227	412,518	336.20	1,200	454,423	378.69
270	Currituck County	2,540	3,599,324	1,417.06	2,709	3,024,649	1,116.52
370	Gates County	1,691	1,270,994	751.62	1,711	1,283,722	750.28
380	Graham County	1,279	320,000	250.20	1,273	330,000	259.23
400	Greene County	2,799	1,001,636	357.85	2,740	1,374,896	501.79
480	Hyde County	867	773,643	892.32	843	823,643	977.04
500	Jackson County	3,531	2,130,973	603.50	3,480	2,266,389	651.26
520	Jones County	1,562	627,171	401.52	1,559	600,796	385.37
570	Madison County	2,550	675,000	264.71	2,541	1,000,000	393.55
610	Mitchell County	2,354	1,123,807	477.40	2,358	1,124,318	476.81
660	Northampton County	3,812	1,443,750	378.74	3,777	1,950,156	516.32
690	Pamlico County	2,097	904,882	431.51	2,076	1,389,361	669.25
720	Perquimans County	1,860	995,730	535.34	1,917	994,730	518.90
750	Polk County	2,029	1,921,289	946.91	2,111	2,052,645	972.36
870	Swain County	1,570	464,650	295.96	1,580	2,343,361	1,483.14
890	Tyrrell County	734	544,343	741.61	737	580,004	786.98
930	Warren County	3,015	1,510,336	500.94	3,032	1,570,750	518.06
940	Washington County	2,852	1,225,000	429.52	2,813	1,230,000	437.26
995	Yancey County	2,480	1,295,202	522.26	2,424	1,361,622	561.73
	Unit Totals	<u>59,165</u>			<u>59,099</u>		
	Unit Average		<u>\$1,232,471</u>	<u>\$559.22</u>		<u>\$1,395,212</u>	<u>\$638.79</u>

SMALL COUNTY TEACHER EXPENDITURES

HIGH NEED COUNTIES

	Allotment	Teacher Expenditure	Percent	Average
1992	\$797,240	\$241,795	30%	\$48,359
1993	\$1,319,017	\$347,656	\$26%	69,531
1994	\$2,367,255	\$194,659	8%	\$38,932
TOTAL	\$4,483,512	\$784,110	17%	\$156,822

LOW NEED COUNTIES

	Allotment	Teacher Expenditure	Percent	Average
1992	\$641,700	\$342,231	53%	\$68,446
1992	1,387,777	\$674,917	49%	\$134,983
1993	\$1,808,110	\$265,589	15%	\$53,118
TOTAL	\$3,837,587	\$1,282,737	33%	\$256,547

*Small County need was based on low wealth county rank. Numbers are for those 5 counties ranked highest and lowest.

**Fiscal Research Division
April, 1994**

APPENDIX C

COMMITTEE INFORMATION

G.S. 120-70.80 et. seq. Creation of Committee	C-1
1993-94 Committee Budget	C-2
1993-94 Committee Agendas	C-3
Chronological Schedule of Reports	C-4

ARTICLE 12H.

Joint Legislative Education Oversight Committee.

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

The Joint Legislative Education Committee is established. The Committee consists of 16 members as follows:

- (1) Eight 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) Eight 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, except the terms of the initial members, which begin on appointment and end on the day of the convening of the 1991 General Assembly. 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. (1989 (Reg. Sess., 1990), c. 1066, s. 115.)

§ 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. (1989 (Reg. Sess., 1990), c. 1066, s. 115.)

§ 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 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 nine 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 Administrative 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. (1989 (Reg. Sess., 1990), c. 1066, s. 115.)

JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE

PROPOSED BUDGET
(1993-1994 FY)

1. Legislative Members Subsistence	<u>15,456.00</u>
\$92 x number of legislative members x 1 1/2 (Half of members using two days subsistence) x number of meetings	
2. Non-Legislative Members Subsistence	<u>-0-</u>
\$55 x number of non-legislative members x 1 1/2 (half of members using two days subsistence) x number of meetings	
3. Travel Expenses	<u>4,200.00</u>
\$37.50 x number of members x number of meetings (Average 150 miles round trip x \$.25 = \$37.50)	
4. Clerical Staff	<u>4,725.00</u>
Average of \$675 x number of meetings (\$675 = average salary with benefits for 5 day work week)	
5. Professional Staff	<u>-0-</u>
(To be used if other than legislative professional staff is employed)	
6. Special Travel and Expenses	<u>4,119.00</u>
7. Postage and Telephone	<u>250.00</u>
8. Supplies	<u>250.00</u>
9. Copying and Printing	<u>1,000.00</u>
10. Reserve	<u>30,000.00</u>
TOTAL	

Revised 9/13/93

Appropriation for 1994-95 FY is \$20,000.

JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE
WEDNESDAY, NOVEMBER 3, 1993
ROOM 421LOB - 9:30 a.m.

Welcome and Introductions: Rep. Anne C. Barnes, Co-Chair

Presiding: Co-Chair Anne C. Barnes

Reports:

1. Information Exchange (1991) Ch. 880 s.5
A joint progress report on the development of the
information exchange system including the
standardized transcript.

Dr. Gary T. Barnes - General Administration, UNC
V. Vann Langston - Director, DPI
Bob Bellamy - Acting Director, DPI
Dr. Kathryn Baker-Smith - Associate V.P., Community
Colleges
Dr. A. Hope Williams - President, N.C. Association of
Independent Colleges and Universities
2. Performance-Based Accountability Program (1989)
Ch. 778 s.8
Implementation of the School Improvement and
Accountability Act of 1989 - 1993 Amendments

Dr. Suzanne E. Triplett - Assistant State
Superintendent, DPI
Dr. Henry Johnson - Assistant State Superintendent,
DPI

Questions and Answers:

An opportunity for Committee members to ask questions
concerning the Testing and Assessment program, the Basic
Education Program and the Standard Course of Study

Dr. Suzanne E. Triplett
Dr. Henry Johnson

Huskins Bill Issues: (1991) Ch. 900 s. 82(b)
Staff Report

Committee Business:

1. Committee Charge, Calendar, Budget, Chronology of
Reports
2. Review of Education Commissions and Committees

JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE

TUESDAY, DECEMBER 14, 1993

ROOM 421LOB - 9:30 A.M.

AGENDA

Welcome: Senator Beverly M. Perdue, Co-Chair

Presiding: Senator Beverly M. Perdue

Approval of Minutes

1. **Standards and Accountability Commission - Update**
(1993) Ch. 117 as amended by Ch. 321 s.39.3
(1993) Ch. 359

Dr. E. K. Fretwell, Jr., Chairman
Dr. Samuel H. Houston, Jr., Executive Director
Standards and Accountability Commission

2. **Community Colleges - Issues Raised in the GPAC Study**
(1993) Ch. 321 s.119

President Robert W. Scott
Department of Community Colleges

3. **Educational Leadership Program Proposals - Board of Governors' Report on School Administrator Programs**
(1993) Ch. 199

Dr. Mary Wakeford
Dr. William F. Little, Sr. V.P., Academic Affairs
General Administration - The University of North Carolina

4. **Extended Services - Report on Model Plans**
(1993) Ch. 132

Dr. Johnnie M. Grissom - Department of Public Instruction

5. **Decade in Review**

Mr. Jim Johnson - Fiscal Research Division

JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE

TUESDAY, JANUARY 11, 1994

ROOM 421 LOB - 10:00 A.M.

AGENDA

Welcome: Representative Anne C. Barnes, Co-Chair
Senator Beverly M. Perdue, Co-Chair

Presiding: Representative Anne C. Barnes

Approval of Minutes

1. Special Responsibility Institutions - UNC Management
Flexibility Interim Report - G.S. 143-53.1

UNC, General Administration Staff
Mr. Jim Newlin, Fiscal Research Division Staff

2. School Improvement and Accountability Act Reports:

Student and School Performance Indicators
(1993) Ch. 321, s 144.2 (g)

Dr. Suzanne E. Triplett - DPI
Dr. Henry L. Johnson - DPI

Task Force for Site-Based Management - Update
G.S. 115C-238.7

Ms. Myra Copenhaver - Director

Waivers Report

Ms. Myra Copenhaver
Mr. Jim Johnson - Fiscal Research Division Staff

3. BEP Implementation and Benchmarks
G.S. 115C-12(9)c

Dr. Henry L. Johnson - DPI

JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE

TUESDAY, APRIL 12, 1994

ROOM 421LOB - 10:00 A.M.

AGENDA

Welcome: Senator Beverly M. Perdue, Co-Chair
Representative Anne C. Barnes, Co-Chair

Presiding: Senator Beverly M. Perdue

Approval of Minutes

1. Education Leadership Items:

- A. School Leadership Academy
Dr. Barbara Tapscott, Co-Chair Leadership Academy
Task Force
- B. Standards Board Public School Administrators
Dr. Charles Coble, Chair
- C. Supply/Demand of School Administrators
Dr. Gary Barnes, General Administration - UNC
- D. Lateral Entry for School Administrators
Dr. Jim Watts - Legislative Staff
- E. Reducing Number of Programs
Ms. Robin Johnson - Legislative Staff
- F. Principal Fellows Program - Quality Candidates
Committee
Ms. Mary Thompson - Legislative Staff

2. School Education Technology Commission
Ms. Gail Morse, Co-Chair

BREAK

3. Teacher Staff Development Items

- A. Staff Development Funds
Mr. Jim Johnson & Mr. Kenny Flowers
Fiscal Research Division

- B. Task Force on Teacher Staff Development/Teacher Academy
The Honorable Bob Etheridge - Superintendent DPI
 - C. Teacher Training Task Force
Ms. Cary Owen & Dr. Earl Daniely, Co-Chairs
 - 4. Noncertified Personnel Salaries - Implementation of average salary paid the state-allotted amount for the category.
Mr. Jim Johnson & Mr. Kenny Flowers
Fiscal Research Division
 - 5. Brief Updates:
 - A. N. C. Standards & Accountability Commission
 - B. Education Cabinet
 - E. Extended Services
- Dr. Jim Watts - Legislative Staff

JOINT LEGISLATIVE EDUCATION OVERSIGHT COMMITTEE

WEDNESDAY, APRIL 13, 1994

ROOM 421LOB - 9:30 a.m.

AGENDA

Welcome: Representative Anne C. Barnes, Co-Chair
Senator Beverly M. Perdue, Co-Chair

Presiding: Representative Anne C. Barnes

1. UNC Management Flexibility

President C. D. Spangler
Chancellors

2. UNC - Increase in Number of Credit Hours

3. UNC - Surcharge for More than 140 Hours

Dr. Gary Barnes, General Administration - UNC

4. DPI Reorganization

Superintendent Bob Etheridge - DPI

5. Low Wealth Funding and Small School System Funding
Use of Funds - Supplanting Issues

Mr. Jim Johnson - Fiscal Research Division
Mr. Kenny Flowers - Fiscal Research Division

**JOINT LEGISLATIVE EDUCATION OVERSIGHT
REPORTS
CHRONOLOGICAL SCHEDULE**



November 3, 1993

1993
December

Due date:	December 1, 1993
From:	Board of Governors
Description:	Design for programs and a competitive proposal process for school administrator programs, as per s. 1 of this bill.
Chapter:	(1993) Ch. 199 s. 6
Due date:	December 15, 1993
From:	State Board of Education
Description:	Report on model plans to (i) deliver comprehensive extended services; (ii) effectively use all fiscal resources; and (iii) maintain quality program evaluation.
Chapter:	(1993) Ch. 132, s. 1 ; G.S. 115C-238.33

1994
February

Due date:	February 1, 1994 (annually)
From:	State Board of Education
Description:	Progress of local boards in implementing the Basic Education relative to set benchmarks
Chapter:	G.S. 115C-12(9)c.
Due date:	February 1, 1994
From:	State Board of Education
Description:	Guidelines for indicators of school performance (adopted in accordance with subsection (a) of this section for use in school improvement reports
Chapter:	(1993) Ch. 321, s. 144.2 (g)
Due date:	February 15, 1994 (annually)
From:	Joint Report of SBE, BOG and SBCC
Description:	Exchange of Information : Annual report on the progress of student information sharing between higher education and public education.
Chapter:	(1992) Ch. 880, s. 6

March

Due date:	March 1, 1994
From:	Joint Committee of the Board of Governors and the State Board of Education
Description:	Findings and recommendations (including cost) concerning the establishment of the School Leadership Academy.
Chapter:	(1993) Ch. 321, s. 86(f)
Due date:	March 1, 1994
From:	Board of Governors
Description:	Supply and demand of School Administrators to determine the number of school administrators to be trained in the programs in each year of each biennium.
Chapter:	(1993) Ch. 199, s.1
Due date:	March 1, 1994 (annually)
From:	N.C. Standards Board for Public School Administration
Description:	Boards' activities during preceding year with any recommendations and findings regarding improvement of the profession of public school administration.
Chapter:	(1993) Ch. 392, s. 3
Due date:	March 1, 1994
From:	Task Force on Teacher Staff Development
Description:	Report on Teacher Academy Plan.
Chapter:	(1993) Ch. 321, s. 141(e)
Due date:	Progress report due March 15, 1994; final due May 15, 1994
From:	Commission on School Technology (newly created)
Description:	Prepare a requirements analysis and propose a plan to increase student performance in the public schools through the use of learning and instructional management technologies. The Joint Legislative Education Oversight Committee and the Joint Legislative Commission on Governmental Operations may meet jointly to consider the reports and may appoint subcommittees to jointly consider the reports.
Chapter:	(1993) Ch. 321, s. 135
Due date:	March 15, 1994
From:	State Board of Education
Description:	Report on Safe Schools Grants Program
Chapter:	(1993) Ch. 321 s. 139 (a)
Due date:	March 31, 1994
From:	State Board of Education
Description:	Results of study on lateral entry of school administrators.
Chapter:	(1993) Ch. 166, s. 2

April

Due date:	April 1, 1994 (Final Report)
From:	Teacher Training Task Force
Description:	Recommendations to be phased in over three fiscal biennia to improve the professional development of teachers.
Chapter:	(1991) Ch. 971, s.4
Due date:	April 1, 1994 (annually)
From:	Board of Governors
Description:	Progress of each constituent institution on increasing the average number of credit hours taken per term by undergraduates to 15 hours.
Chapter:	(1993) Ch. 321, s. 89(a)
Due date:	April 1, 1994
From:	Board of Governors
Description:	Recommendations for implementing 25% tuition surcharge on students who take greater than 140 degree credit hours to complete a four year baccalaureate degree or greater than 110% of the necessary credit hours to complete an officially designated five year baccalaureate degree.
Chapter:	(1993) Ch. 321, s. 89(b)
Due date:	Interim due April 15, 1994; final due Feb. 15, 1995
From:	Legislative Study Commission on Status of Education at The University of North Carolina
Description:	Study on undergraduate education, university funding issues, and university education quality issues
Chapter:	(1993) Ch. 321, s. 101.5(g)
Due date:	Interim due April 15, 1994; next Jan. 15, 1995; thereafter Jan. 15 annually until Monitoring Commission terminates
From:	State Board of Community Colleges
Description:	Community College study
Chapter:	(1993) Ch. 321, s.119(b)

May

Due date:	May 1, 1994
From:	Commission on Work Force Preparedness
Description:	Findings and recommendations for grant funds for state literacy programs
Chapter:	(1993) Ch. 526. s. 3
Due date:	May 1, 1994, and May 1, 1995
From:	State Board of Education
Description:	How funds from this section are being used (Low Wealth Small School - supplemental funding).
Chapter:	(1993) Ch. 321, s. 138 (i) , 138.1 (d)

Due date:	May 1, 1994, and May 1, 1995
From:	The Local Government Commission
Description:	Analyze budgets and expenditures of school administrative units to determine if funds from this section (Low Wealth supplemental funding) supplement and not supplant State and local funding of public schools.
Chapter:	(1993) Ch. 321, s.138 (h), 138.1(b)
Due date:	May 1, 1994
From:	Board of Governors
Description:	Impact of enrollment increase funds on faculty teaching workload at each institution.
Chapter:	(1993) Ch. 321, s.89(e)
Due date:	May 15, 1994
From:	Constituent institutions in UNC system receiving State allocation under (1991) Ch. 689, s.206.3 and (1993) Ch. 321, s. 101.2, or this act
Description:	Allocation and use of funds for UNC Educational Consortia and stated purposes.
Chapter:	(1993) Ch. 561, s. 44
Due date:	May 1, 1994
From:	Director of N.C. Area Health Education Centers in conjunction with staff of General Administration of the University of North Carolina and the N.C. Department of Community Colleges
Description:	Recommendation on methods to increase the number of physical therapists, occupational therapists, speech and language pathologists, and related paraprofessional personnel graduating from the two mentioned systems.
Chapter:	(1993) Ch. 321, s 84
Due date:	May 1, 1994 (annually)
From:	State Board of Education to Standing Education Committee
Description:	School Improvement and Accountability Act Implementation
Chapter:	(1989) Ch. 778, s. 8
Due date:	May 1, 1994 (annually)
From:	Department of Public Instruction to General Assembly
Description:	Report on class size waivers, class size exceptions, and State-funded teacher positions converted to other uses.
Chapter:	(1989) Ch. 1066, s. 113; G.S. 115C-21.1 (b); amended (1993) Ch. 321, s. 144.2(e)
Due date:	May 1, 1994
From:	State Board of Education
Description:	Report on teaching of CPR and Heimlich method.
Chapter:	(1993) Ch. 561, s. 55 (i)
Due date:	May 15, 1994
From:	Board of Governors of The University of North Carolina
Description:	Efforts to strengthen primary care in N.C. (i.e., 50% of N.C. residents at Duke and Bowman Gray go into primary care)
Chapter:	(1993) Ch. 321, s. 78(a)

Due date:	May 15, 1994
From:	Board of Governors of The University of North Carolina
Description:	Status of UNC-CH and ECU Schools of Medicine to achieve goal that 50% of graduates enter primary care.
Chapter:	(1993) Ch. 321, s. 78(b)

June

Due date:	June 15, 1994
From:	State Board of Education to Governmental Operations
Description:	Report on Outcome Based Education Program
Chapter:	(1991) Ch. 689, s. 199(a); G.S. 115C-238.15 (d)

August

Due date:	August 1, 1994
From:	State Board of Education
Description:	Qualification and certification of public school administrators, including licensing v. qualifying and certifying and changes in the statutes to clarify relationship between qualification and certification.
Chapter:	(1993) Ch. 392, s. 4

November

Due date:	November 15, 1994 (informational report)
From:	Board of Governors
Description:	Findings concerning admission for school administrator program candidates.
Chapter:	(1993) Ch. 199, s. 5(d)
Due date:	November 15, 1994 (informational report)
From:	State Board of Education
Description:	Findings concerning selection criteria and how to best assist local boards in selecting school administrators.
Chapter:	(1993) Ch. 199, s. 5(d)

1995
January

Due date:	Prior to convening of 1995 General Assembly
From:	State Board of Education
Description:	Report on National Board for Professional Teaching Standards' program for identifying highly professional teachers and the potential effect that participation of North Carolina teachers in that program will have on N.C. students academic performance.
Chapter:	(1993) Ch. 231, s. 1
Due date:	1995 Regular Report
From:	Joint Legislative Education Oversight Committee to the General Assembly
Description:	Study of entire issue of educational neglect.
Chapter:	(1993) HB 1319 (Studies Bill), s. 9.1
Due date:	January 1, 1995
From:	The Education Cabinet (created in this bill)
Description:	Strategic design for continuum of education programs.
Chapter:	(1993) Ch. 393, s. 1
Due date:	January 1, 1995
From:	Administrative Office of the Courts
Description:	Number of juveniles reported to principals in accordance with this act.
Chapter:	(1993) Ch. 369, s. 2
Due date:	January 1, 1995
From:	State Board of Education
Description:	Board shall conduct an independent evaluation to study impact of Charlotte-Mecklenberg pilot project.
Chapter:	(1993) Ch. 103, s. 1
Due date:	January 1, 1995
From:	State Board of Education
Description:	Reevaluation and any modifications of Algebra I graduation requirement, considering children with special needs.
Chapter:	(1993) Ch. 359, s. 4
Due date:	January 1, 1995
From:	Department of Public Instruction to General Assembly
Description:	Effect of 8th-10th graders taking PSAT at State Expense
Chapter:	(1989) Ch. 752, s. 77(a); G.S. 115C-174.19
Due date:	January 1, 1995
From:	Department of Public Instruction
Description:	Report on the teaching of the nation's founding and related documents in N.C. High Schools
Chapter:	(1989) Ch. 370, s.2; G.S. 115C-21.1(a)

Due date:	January 15, 1995
From:	State Board of Education
Description:	Report on Safe Schools Grant Program
Chapter:	(1993) Ch. 321, s. 139 (a)

February

Due date:	February 1, 1995
From:	FSU, NC A&T, NCCU, PSU, and WSSU to General Assembly
Description:	Guidelines for Freshman Scholars Program
Chapter:	(1993) Ch. 561, s. 46

October

Due date:	October 1, 1995 (annually)
From:	Board of Governors of The University of North Carolina
Description:	Report on monitoring data of medical school graduates at private and public schools, including i. entry of State-supported medical school graduates into primary care residencies and ii. specialty practices by a physician 5 years after graduation.
Chapter:	(1993) Ch. 321, s. 78(d)

1996
February

Due date:	February 1, 1996
From:	Board of Governors
Description:	Academic degree program review to identify programs with low productivity or priority.
Chapter:	(1993) Ch. 407, s. 1

May

Due date:	May 15, 1996
From:	Board of Governors
Description:	Success of FSU, NC A&T, NCCU, PSU, and WSSU Freshmen Scholars Program.
Chapter:	(1993) Ch. 561, s. 46

1997
February

Due date:	February 1, 1997
From:	Board of Governors
Description:	Review of research and public service activities to identify activities with low productivity or priority.
Chapter:	(1993) Ch. 407, s. 1

1998
June

Due date:	January 15, 1998
From:	State Board of Education
Description:	Report on project implementation of Project Genesis
Chapter:	(1991) Ch. 999, s. 1; G.S. 115C-238.25 (b)

DISCRETIONARY

Due date:	Quarterly report / Discretional
From:	North Carolina Education Standards and Accountability Commission
Description:	Progress on development of standards, benchmarks, and related assessments and progress in incorporating those standards into existing classrooms
Chapter:	(1993) Ch. 321 s. 39.3(d)
Due date:	Discretionary
From:	Department of Public Instruction
Description:	Abolition of 57 positions funded from General Fund (DPI reorganization)
Chapter:	(1993) Ch. 321, s. 130
Description:	"The Joint Legislative Oversight Committee may consider the current salary schedules for school administrators other than principals and assistant principals and may recommend any needed changes to those salary schedules."
Chapter:	(1993) Ch. 321, s. 132(k)
Due date:	Annual reports according to plan (date not in session law)
From:	Joint Committee on Teacher Education
Description:	Monitoring and evaluation of the effectiveness and impact of the efforts to implement the objectives of the Report of the Task Force on the Preparation of Teachers. (This report formerly went to the Joint Legislative Commission on Governmental Operations.)
Chapter:	(1993) Ch. 43, s. 1
Due date:	1994 Session of General Assembly
From:	Joint Legislative Education Oversight Committee to the General Assembly
Description:	Study methods by local boards of education to employ, train, evaluate, and dismiss noncertified employees.
Chapter:	(1993) Ch. 561, s. 57.

PREVIOUSLY DUE REPORTS WARRANTING ATTENTION

Due date:	December 1, 1992 (interim); May 1, 1993 (Final Report)
From:	State Board of Education
Description:	Report on progress to include information in G.S. 116-11(10a)a. and b. in the annual report card described in G.S. 155C-12(9)c1. (Education Information Exchange)
Chapter r:	(1991) Ch. 880, s. 5
Due date:	February 15, 1993 (annually)
From:	Joint report (Board of Governors, State Board of Education, and State Board of Community Colleges)
Description:	Progress made to develop a system to provide an exchange of information.
Chapter:	(1991) Ch. 880, s. 6
Due date:	March 1, 1993
From:	Joint Committee on College Transfer
Description:	Huskins Bill Quality Control review as it relates to community colleges and constituent institutions of The University of North Carolina, including an assessment of what constitutes college level course work.
Chapter:	(1991) Ch. 900, s. 82(b)
Due date:	March 1, 1993
From:	State Board of Community Colleges to General Assembly
Description:	Study of entire Huskins Bill issue.
Chapter:	(1991) Ch. 900, s. 82(c)
Due date:	March 31, 1993
From:	Board of Governors
Description:	Special responsibility of constituent institutions - implementation of legislation.
Chapter:	G.S. 143-53.1; (1989) Ch. 936
Due date:	May 1, 1993 (annually)
From:	State Board of Education
Description:	Implementation of the School Improvement and Accountability Act of 1989 [(1989) Ch. 778].
Chapter:	(1989) Ch. 778, s. 8
Due date:	May 1, 1993 (annually)
From:	Department of Public Instruction to General Assembly
Description:	Report on school units with class size waivers pursuant to G.S. 115C-238.3(d), with reported class size exceptions, and with State-funded teacher positions converted to other positions, dollars, or expenditures.
Chapter:	(1989) Ch. 1066, s. 113