

# **Report to Education Oversight Committee**

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Senate Bill 1005, Section 28.39 (b)  
Funds for Instructional Supplies



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Senate Bill 1005, Section 28.39 (b)  
Funds for Instructional Supplies



Pursuant to section 28.39, the funds appropriated in this act for classroom materials/instructional supplies/equipment shall be used to enable classroom teachers to purchase up to one hundred dollars (\$100) of supplies for their classroom. Local school administrative units shall report to the Department of Public Instruction (DPI) on the implementation of this section.

### **Gathering Data for report**

DPI gathered the information to complete this report by administering a survey to all the Local Education Agencies (LEAs). DPI compiled all quantitative responses and provided individual responses to question 1. Due to the volume of the combined responses and personnel constraints, DPI was unable to compile the results of the other narrative responses. If compilation of these questions is deemed necessary, DPI will obtain temporary services to help in the endeavor, if allowed by the Office of Budget and Management due to the Governor's Executive Order. All individual survey replies are available for review. A copy of the survey that was sent to the LEAs is provided in Attachment 1 (A-1).

### **Results of \$100 Instructional Supplies Survey - Quantitative Questions**

Ninety-two (92) of the one hundred and seventeen (117) LEAs responded to the survey, providing a 77% response rate. Some of the LEAs that responded to the survey did not answer all the questions. Attachment 2 (A-2) provides the results of the quantitative questions, these are questions 3a, 4, 5a, 6a and 7a.

### **Results of \$100 Instructional Supplies Survey – Non Quantitative Questions**

The responses from question 1, "How was the \$100 purchasing authority for instructional materials provided for the teachers in your LEA?", are provided in this report in Attachment 3 (A-3).

**\$ 100 Instructional Supplies for Classroom Teachers  
Survey**

Attachment 1 (A-1)

Senate Bill 1005 section 28.39.(b) requires that all LEAs report to DPI on the implementation of the \$100 Instructional Supplies funds. The intent of this survey is to solicit ideas on how policy similar to this could be affected more strategically in the future and have a greater impact.

Please confer with the appropriate individuals so that we may receive the most accurate information.

Save the completed form on your hard drive, under file name "DPI supply survey". Return the completed form as an attachment to an e-mail to David Nance at [dnance@dpi.state.nc.us](mailto:dnance@dpi.state.nc.us) or fax to 919.807.3704 by February 8<sup>th</sup>.

Thank you for your time and attention to this survey.

- 1) How was the \$100 purchasing authority for instructional materials provided for the teachers in your LEA?

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- 2) How was the program communicated to the following:  
(If appropriate, fax supporting documentation with your response, such as copies of policies.)

- a) Individual Schools

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- b) Principals

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- c) Teachers

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3a) Were you able to comply this provision within existing PRC 061 "Classroom Materials/Instructional Supplies and Equipment" to implement the program?

☐ Yes  
☐ No

3b) If not, what adjustments were made to other allocations?

Explain \_\_\_\_\_  
\_\_\_\_\_

4) What method(s) were the teachers allowed to use to spend their allocation?

☐ Purchase order  
☐ Cash reimbursement from receipts  
☐ Debit card  
☐ Other (explain) \_\_\_\_\_  
\_\_\_\_\_

5a) How would you rate the impact this program has towards student achievement in your LEA?

☐ Positive  
☐ No effect  
☐ Negative

5b) How was this result determined?

\_\_\_\_\_  
\_\_\_\_\_

6a) From the teachers' perspective, was this a positive program?

☐ Yes  
☐ No

Explain \_\_\_\_\_  
\_\_\_\_\_

6b) How was this result determined?

\_\_\_\_\_  
\_\_\_\_\_

7a) From the LEAs perspective, was this a positive program?

☐ Yes  
☐ No

Explain \_\_\_\_\_  
\_\_\_\_\_

7b) How was this result determined?

\_\_\_\_\_  
\_\_\_\_\_

## \$100 Instructional Supplies for Classroom Teachers Survey Results from the Quantitative Questions

Following are the results from the questions that provided quantitative results - 3a, 4, 5a, 6a and 7a.

92 of the 117 LEAs, or 77%, responded to the survey. Some of the LEAs that responded to the survey did not answer all of the questions.

### Results

3a) Were you able to comply this provision within existing PRC 061 "Classroom Materials/Instructional Supplies and Equipment" to implement the program?

Number of LEAs that responded - 91

55% Yes

45% No

4) What method(s) were the teachers allowed to use to spend their allocation?

Number of LEAs that responded - 90

38 LEAs used more than 1 method to spend the funds.

63% Purchase order

30% Cash reimbursement from receipts

1% Debit card

6% Other

5a) How would you rate the impact this program has towards student achievement in your LEA?

Number of LEAs that responded - 89

39% Positive

57% No effect

3% Negative

6a) From the teachers' perspective, was this a positive program?

Number of LEAs that responded - 78

68% Yes

32% No

7a) From the LEAs perspective, was this a positive program?

Number of LEAs that responded - 82

46% Yes

54% No



**\$100 Instructional Supplies for Classroom Teachers  
Survey - Responses to Question 1**

How was the \$100 purchasing authority for instructional materials provided for the teachers in your LEA?

**Alamance County – 010** All instructional materials allotments are transmitted to individual school principals who in turn allot funds within their school as they see fit to achieve school improvement goals. Principals communicate purchasing authority to teachers.

**Alexander County – 020** The teachers at each school were given an allotment to purchase instructional supplies. Allotments ranged between \$100 and \$400 per teacher at the different schools. We allocated the additional 061 funds we received to the schools

**Alleghany County – 030** Within the regular consolidated allotment and the extra funds were incorporated.

**Anson County – 040** The authority and accountability was established at each school in the system.

**Ashe County – 050** Dollars were allotted to each school by the number of certified instructional classroom teachers.

**Avery County – 060** All dollars in the Instructional Supply Allotment is allocated to the individual schools based on the Day 10 ADM of the school. Each teacher is then given an allotment to spend on their classroom via requisitions and purchase orders. The extra money allocated was divided equally between the schools based on ADM. Every classroom teacher in our system was allotted a minimum of \$100 to spend for supplies in their classroom.

**Beaufort County – 070** Individual school level by principals.

**Bertie County – 080** A purchase order was done for each teacher at each school

**Bladen County – 090** Though allotments sent to individual schools.

**Brunswick County – 100** The principals allotted at least \$100 to each classroom teacher.

**Buncombe County - 110** Given the additional PRC 061 allotment was not actually \$100/teacher, but far less than half that amount, it was only possible for Buncombe County to comply with this mandate because we were already doing this. The initial allotment has already been committed by the time this requirement was announced. In terms of strategic planning, in the future, if the General Assembly is going to mandate things such as this as late in the legislative session, sufficient funding to implement them actually needs to be appropriated. Also, the most strategically significant thing the General Assembly could do to produce a positive impact for schools in this state is to pass a budget before June 30 every year!

**Asheville City Schools – 111** This is yet another unfunded mandate. It was the consensus of school principals our district that the new state allocation (which amounted to only \$41 per teacher) be added to their schools' instructional supplies allotment on a per pupil basis. Other state PRC 061 and local funds were used to supplement the shortfall in state funding so that every teacher would have \$100 purchasing authority. (\$12,668 in state funds for 309 total classroom teachers).

**Cabarrus County – 130** \$50 directly for each teacher per state funding provided. Other \$50 by site-based funds allocated.

**Kannapolis City – 132** \$100 was allotted for each teaching position at each school which created a lump sum figure for each school. The lump sum was then given to principals with instructions to track purchases and make sure each teacher had input on at least \$100 worth of purchases.

**Caldwell County – 140** \$52 approximately from Special State Allocation. \$48 from other funds (above and beyond any previous allocation).

**Carteret County – 160** Funds allocated to schools and schools made sure \$100 was available to each teacher.

**Caswell County – 170** Each principal have purchasing authority at school wide staff meeting, teachers voted on method of purchasing all had to send purchase orders thru the finance department.

**Catawba County – 180** The additional funds (\$52,055) allocated by DPI were distributed to all schools on an ADM basis. This provided an additional \$48 per teacher. Each school was then to make sure that all teachers had input into the purchase of at least \$100 of instructional materials. Each teacher was to verify this by signature.

**Hickory City – 181** Every teacher was given an opportunity to spend \$100.

**Newton/Conover City – 182** See attached memo and reimbursement form.

**Cherokee – 200** The LEA gave the schools the responsibility for determining this.

**Chowan County – 210** Each teacher may submit reimbursement request up to \$100 with itemized receipts attached. Regular accounting procedures are followed. A request should be submitted to the school office once a cumulative expenditure has reached \$100 and no later than the last working day of the school year. The individual schools verify that reimbursement requests are completed appropriately and that expenditures are allowable. The school also develops and maintains a method of verifying which teachers have submitted reimbursement requests. Reimbursement requests are submitted to the central office and separate checks are issued to individual teachers as they meet the requirements.

**Clay County - 220** Each teacher was allotted \$100.

**Cleveland County – 230** Allotment made to individual schools based on the number of classroom teachers. Based on the vote of the teachers, funds could be combined for specific grade level, or subject areas, thereby enabling greater purchasing power. If teachers indicated they did not want to combine their funds, \$100 reimbursement is available to each of them.

**Shelby City – 232** At the local school level through PRC 061 and the additional allotment.

**Columbus County – 240** Used special funds provided by legislative action and took the balance from PRC 061 to provide \$100 per teacher.

**Whiteville – 241** To Principals and school improvement teams

**Craven County – 250** The additional funds were allotted to individual schools based on the number of state and local teachers. Prior to distributing the allotments, schools were surveyed on how they allocated existing resources to teachers;

**Cumberland County – 260** Checks were written to the schools for each teacher. Teachers submitted receipts and an in-house form indicating \$100 was spent on instructional supplies.

**Currituck County – 270** Prior to the legislation being enacted we had already granted teachers purchasing authority in excess of \$100 in the normal budgetary process.

**Davidson – 290** Allotment given to each school who in turn allows for teacher input

**Lexington City Schools – 291** Through input from teachers via school leadership teams, documented by principals.

**Thomasville City – 292** Each school was given their state instructional supply money based on ADM and they also received a local allotment of \$8,000 per school. No request for \$100 or less was refused for any teacher.

**Davie County – 300** Funds were allotted to each school based on ADM in the same manner the funds were allotted to the LEA

**Duplin County – 320** Funds are allotted to the individual schools from various sources on an ADM or other formula basis. Except for the testing allotment included in PRC 061, 100% of PRC 061 funds are allotted on an ADM basis. Principals were informed of the legislative intent as defined by the memo from Hank Hurd earlier in the year. They were told to insure that all teachers would have decision making authority for the \$100. Purchases followed the same procedures already established for Duplin County Schools, including P & C requirements, encumbrances, and pre-auditing.

**Durham County – 320** We allocated the less than \$50 per teacher appropriated by the General Assembly to each LEA directly to our schools in the state instructional supply categorical allotment. We implemented a coding structure that would enable them to track the expenditures if they chose to do so. This coding structure would also allow

them to designate other funds (local, federal, etc.) as expenditures designed for direct classroom purchases by the teacher.

**Gaston County – 360** PRC 061 funds were allotted to individual schools based on school's ADM. Principals allotted to teachers.

**Gates County – 370** LEA granted this authority directly to each teacher

**Graham County – 380** Teachers have historically received \$200-\$400 each for the purchase of instructional materials.

**Granville County – 390** We provided a separate allotment to each school with a list of their teachers times \$100 each.

**Greene County – 400** LEA gave the schools the responsibility for determining this. Funds were included in the allocation given to each teacher.

**Guilford County – 410** See attached copy of November 30, 2001 memo to principals from Sharon Ozment, CFO, regarding "\$100 Instructional Supply/Material/Equipment Allocation Adjustments". Note that the memo indicates recipients of GCS" Start cards (pre-paid debit cards for the purchase of classroom supplies) were excluded from the \$100 allotment adjustments as these teachers have already received \$200 (for teachers relocated due to variances in actual versus projected 10<sup>th</sup> day enrollment numbers) and/or \$400 (for new classroom teachers) to spend at their discretion. A copy of the GCS' START Card brochure is also attached for your information/reference.

**Halifax County – 420** Included as part of the funds allotted to schools, based upon relative school size (ADM), not on number of teacher positions/funding sources.

**Roanoke Rapids – 421** Teachers filled out requisitions for their materials. They were then approved by the principal and ordered.

**Harnett County – 430** Each school principal allocated to teachers \$100 to purchase supplies and materials.

**Haywood County – 440** Principals sent a memo to each teacher asking them to request special materials/supplies needed for the school year. Principals used other funding sources to comply with this Senate Bill due to the lateness of the notification.

Teachers request materials and supplies based upon ADM and special needs then the School Improvement Team allocates the resources at a minimum of \$100.00 per teacher.

**Hertford County – 460** The central office allocated funds to the schools for each of their teachers. The majority of the schools opted for each teacher to purchase \$100 instructional supplies. A few grade levels pooled their funds to make a group purchase. The teachers were given the option to make their purchases and submit their receipts for reimbursement. They had to hold their receipts until their purchases were complete and submit as one reimbursement request. If a grade level pooled their \$100, they signed an agreement stating what the money would be used for. This way each teacher would

understand how their \$100 was used. Problem encountered: What happens to the money that a teacher does not use?

**Hyde County – 480** Each teacher was authorized to spend \$100 for instructional materials through school allotments via purchase orders.

**Iredell - Statesville – 490** All schools allocate funds within the instructional allotment to the individual teachers at their schools. This has always exceeded the \$100 as passed in legislation.

**Jackson County – 500** Each school receives an allotment. Historically, our schools have allotted \$100 - \$200 to each teacher for instructional materials.

**Johnston County – 510** The LEA provided additional funds to the State allotment to provide an additional \$100 to each classroom teacher. Teachers were allowed to issue purchase orders for the \$100 or be reimbursed at the school level for receipts of items purchased.

**Lee County – 530** Teachers were allowed to complete a PO to order materials; teachers were allowed to complete requisitions for reimbursement from receipts; teachers were allowed to pool resources with other teachers to make larger purchases as a grade level or as a team.

**Lenoir County Schools – 540** Teachers were given purchase orders to use as well as purchase from receipts.

**Lincoln County – 550** Through previously adopted allotments to individual schools and by allocation of additional funding received this year for this purpose.

**Macon County – 560** Principals were directed to give information to teachers allowing them to submit purchase orders for instructional supplies.

**Martin County – 580** Through state 061 allotments and local instructional supply allotments.

**McDowell County – 590** All State instructional supply money was given directly to the schools.

**Charlotte Mecklenburg – 600** The LEA provided \$60 of new state and local funds to each school for each teacher as defined by our Human Resources department as a classroom teacher as of 11/01/01. The schools had to provide \$40 for each teacher from funds that were already allocated to them which they get following the 20<sup>th</sup> day headcount. This reduced the funds the schools had to operate during the school year- copier costs, general instructional materials provided to grades and departments, etc.

**Montgomery County – 620** Each teacher in the system is provided at least \$200 to spend in their classroom. They choose what they want. Additional money is supplied also to each teacher from other funds.

**Moore County – 630** Via principal at the school level.

**Nash County – 640** Principals were called together in a principals' meeting and told about the mandate.

**New Hanover County – 650** Funds were distributed to each school's general fund based on the number of teaching positions allocated. Teachers were then reimbursed based on receipts.

**Northampton County – 660** Teachers submitted purchase orders to the school principal for \$100.00 or more for instructional supplies.

**Onslow County – 670** An additional allotment of funds was made to each school in addition to the original allotment.

**Chapel Hill-Carrboro – 681** All supply funds (state and local) were distributed to each school with directions to ensure that each classroom teacher had at least \$100 over which they had discretion regarding how it was spent.

**Pamlico County – 690** The principals and bookkeepers in each school worked with the teachers to implement this program; purchases made through purchase orders.

**Pasquotank County – 700** At each school location the principal allowed each teacher the opportunity to purchase up to a minimum of one hundred dollars of materials for their classroom. The school keeps track of the ordering allowances for their teachers.

**Pender County – 710** Money was given to principals to give to the teachers.

**Perquimans County – 720** We used the state instructional allotment and funds from the teachers' area of instruction.

**Person County – 730** Majority of our schools got teacher input into supplies/materials for classrooms, meeting the intent of the law. We have since given every teacher \$50 to spend in their classroom.

**Pitt County – 740** See attached memo.

**Asheboro City – 761** Purchasing authority was provided through warehouse orders, purchase orders, and direct reimbursement.

**Rockingham County – 790** When we received the additional allotment from the state, we sent out a memo to the principals explaining their increase and the requirement of the new law. We also told them that as part of their internal audit, we will be asking to see how they met the requirements of the law. It was then each school's responsibility to carry out the mandate the best they could.

**Rowan County – 800** The appropriate amounts were transferred to each school by a check which was then disbursed by each principal as purchases were made.

**Rutherford County – 810** Allotment was made as part of their regular per pupil instructional supplies allotment. Allotment was based on \$47.30 per student.

**Scotland County – 830** Allotments were given to schools based on ADM. The additional funds were also allotted to schools on a per teacher basis. The schools then implemented their site-based plans for purchasing the instructional supplies for their school.

**Stokes County – 850** A memo from the superintendent and the school business officer informed each principal, SIT chairperson, and school treasurer. Individual schools submitted purchase orders to the administrative office.

**Surry County – 860** Our schools receive ADM allocations for use in purchasing instructional materials. This has always been our normal procedure.

**Elkin City – 861** Allocations for state, federal, and local monies for instructional supplies, materials, and equipment are given to the individual schools each year. Each school allocates to each individual classroom teacher a minimum of \$250.00 to a maximum dollar amount that is determined by the principal.

**Mount Airy City – 862** All supply/material funds, state and local, were provided as a part of the individual school budgets. We provided a \$1,000 base for each school and an additional \$46 per student. This resulted in a per teacher amount of \$577 at Tharrington, \$582 at Jones, \$557 at Mount Airy Middle School, and \$492 at Mount Airy High School.

**Swain County – 870** Funds were provided through PRC 061 - Additional funding was provided out of other program areas so that all teachers (federal, state, and local) received the \$100.

**Transylvania County – 880** Divided equally among all Transylvania County Teachers.

**Tyrrell county – 890** Our schools are site-based managed. The district provides a block grant to the individual schools and communicates requirements. Each school budgeted well over \$100 for each classroom teacher out of its block grant. The individual schools are responsible for ensuring that each teacher receives at least the \$100 and they track the expenditures.

**Union County – 900** It was included in each school's allocation for State Instructional Supplies. See attached memorandum and allotment sheet.

**Vance County – 910** Allocated directly to each school.

**Wake County – 920** See attached memorandum to LEA Superintendents and Finance Officers dated October 11, 2001 from Hank Hurd.

**Washington County – 940** The planning allotment for instructional materials represents a combination of funds from state, federal, and local programs. The finance officer determines the amount of a schools allotment by applying an allotment formula

consisting of a (1) \$100 per teacher allotment; (2) base allotment, with the (3) remaining balance prorated based on the school's ADM.

**Watauga County – 950** Every teacher had the discretion to purchase at least \$100 in classroom materials.

**Wayne County – 960** Each principal allowed staff members input into the budget process. The majority allotted a dollar amount from the original budget to each teacher to spend as he/she saw fit for classroom instruction. This movement has been consistent since Site Based Management was instituted many years ago in Wayne County Public Schools.

**Wilkes County – 970** Allocated to schools. Schools use part of original PRC 061 allocations to meet \$100.

**Wilson County – 980** We appropriated the funds to each individual school on the ADM basis.

**Yadkin County – 990** It was included in the school's instructional supplies allotment based on the number of teachers paid from state funds. We used a use code for the 100 per teacher part of the allotment.

**Yancey County – 995** All schools were allotted instructional monies at the beginning of the school year prior to receiving the "special supply allotment. From those resources all teachers were given at least a \$100 allocation. Teachers additionally benefited from the "special" supply allocation that allotment was divided among the schools on an ADM basis. Although that amount was not \$100 per teacher, it was in addition to the amount teachers had been given previously. Each school determined how the "special" allotment would be used, i.e reimburse teachers, order paper for the school, etc. with the expenditure being handled at the school level. Each school will finally be reimbursed up to its allocated amount based on submitting documentation to the Finance Officer supporting its disbursement.