

State Board of Education

North Carolina Department of Public Instruction

Report to Education Oversight Committee

Senate Bill 1005, Section 28.6 (b) and 28.6 (h)
Supplemental Funding in Low-Wealth
Counties

Senate Bill 1005, Section 28.7 (b) and 28.7 (f)
Small School System Supplemental Funding

Supplemental Funding Low-Wealth Counties

Senate Bill 1005, Sections 28.6 (b) and 28.6 (h)

This report presents the materials required by legislation in Senate Bill 1005, Sections 28.6 (b) and 28.6 (h) and Senate Bill 1005, Sections 28.7 (b) and 28.7 (f).

Use of Funds for Supplemental Funding

Pursuant to section 28.6 (b), Local Boards of Education are encouraged to use at least twenty-five percent (25%) of the Low-Wealth County funds to improve the academic performance of children performing at Level I or II on either reading or mathematics end of grade tests in grades 3-8 and children performing at Level I or II on the writing tests in grades 4 and 7.

Section 28.6 (h) Non-Supplant Requirement – A county in which a LEA receives Low-Wealth funds shall use the funds to supplement local current expense funds and shall not supplant local current expense funds. The State Board of Education shall make a finding that a county has used these funds to supplant local current expense funds in the prior year, or the year for which the most recent data are available, if:

The current expense appropriation per student of the county for the current year is less than ninety-five percent (95%) of the average of the local current expense appropriation per student for the three prior fiscal years.

Gathering Data for report

The Department of Public Instruction (DPI) gathered the information to complete this report by analyzing current available data through the Uniform Education Reporting System (UERS) files. The available data at DPI only provides categorical use of funds at the Local Education Agency level. DPI is in the process of requesting the detail, from the Local Education Agencies (LEA), of how these funds were targeted and used to implement specific improvement strategies.

Results of Use of Funds for Supplemental Funding

Attachment 1 (A-1) details the State level expenditures by category for the Low-Wealth Counties funds, expenditure reports by LEA are available upon request. A review of the LEA level data shows that the majority of LEAs are meeting the 25% expectation. DPI will provide the analysis of how these funds were targeted to implement specific improvement strategies of each local school administrative unit and its schools by May 31, 2002.

Results of Non-Supplant Requirement

Attachment 3 (A-3) details the local appropriation and the minimum local appropriation. There is no evidence of a LEA supplanting.

Senate Bill 1005, Sections 28.7 (f)

Small School System Supplemental Funding

Pursuant to Section 28.7 (f), Local Boards of Education are encouraged to use at least twenty percent (20%) of the Small School System funds to improve the academic performance of children performing at Level I or II on either reading or mathematics end of grade tests in grades 3-8 and children performing at Level I or II on the writing tests in grades 4 and 7.

Section 28.7 (b) Non-Supplant Requirement – A county in which a LEA receives Small School System funds shall use the funds to supplement local current expense funds and shall not supplant local current expense funds. The State Board of Education shall make a finding that a county has used these funds to supplant local current expense funds in the prior year, or the year for which the most recent data are available, if:

The current expense appropriation per student of the county for the current year is less than ninety-five percent (95%) of the average of the local current expense appropriation per student for the three prior fiscal years.

Gathering Data for Report

The Department of Public Instruction (DPI) gathered the information to complete this report by analyzing current available data through the Uniform Education Reporting System (UERS) files. The available data at DPI provides categorical use of funds at the Local Education Agency level. DPI is in the process of requesting, from the LEAs, the detail of how these funds were targeted and used to implement specific improvement strategies of each local school administrative unit and its schools.

Results of Use of Funds for Supplemental Funding

Attachment 2 (A-2) details the State level expenditures by category for the Small School System funds, expenditure reports by LEA are available upon request. A review of the LEA level data shows that the majority of LEAs are meeting the 20% expectation. DPI will provide the analysis of how these funds were targeted to implement specific improvement strategies of each local school administrative unit and its schools by May 31, 2002.

Results of Non-Supplant Requirement

Attachment 3 (A-3) details the local appropriation and the minimum local appropriation. There is no evidence of a LEA supplanting.

Low-Wealth Counties Supplemental Funding (031)

Report on Expenditures

Total Allotment: \$85,106,017.00

| Expenditure Description | FY 2001 YTD | |
|--------------------------------------|---|----------------------|
| | As of June 30, 2001 Including Installments | % of Total Allotment |
| Salary | | |
| Teacher | \$24,848,699.72 | 29.20% |
| Teacher Assistant | \$10,078,083.91 | 11.84% |
| Tutor | \$529,690.13 | 0.62% |
| Clerical Personnel | \$9,300,701.77 | 10.93% |
| Salary - Other Assignments | \$1,852,629.20 | 2.18% |
| Total Salary: | \$46,609,804.73 | 54.77% |
| Other - Salary Related | | |
| Substitute Pay | \$783,148.59 | 0.92% |
| Supplementary Pay | \$4,622,485.38 | 5.43% |
| Overtime Pay | \$68,284.19 | 0.08% |
| Matching Benefits | \$11,454,852.74 | 13.46% |
| Salary - Other Assignments | \$167,170.56 | 0.20% |
| Total Other - Salary Related: | \$17,095,941.46 | 20.09% |
| Non-Salary | | |
| Instructional Supplies | \$8,008,597.82 | 9.41% |
| Computer Software & Supplies | \$1,171,798.86 | 1.38% |
| Textbooks | \$481,924.26 | 0.57% |
| Library Books & Periodicals | \$942,528.62 | 1.11% |
| Audiovisual Supplies & Materials | \$300,725.31 | 0.35% |
| Equipment | \$2,065,723.18 | 2.43% |
| Computer Equipment | \$5,338,902.30 | 6.27% |
| Noncap Equipment/Computer Hardware | \$1,601,524.68 | 1.88% |
| Workshops | \$1,336,962.08 | 1.57% |
| Contracted Services | \$100,482.29 | 0.12% |
| Total Non-Salary: | \$21,349,169.40 | 25.09% |
| GRAND TOTAL: | \$85,054,915.59 | 99.94% |
| UNEXPENDED: | \$51,101.41 | 0.06% |

SB 1005, Section 28.6(b) Local boards of education are encouraged to use at least twenty-five percent (25%) of the funds received to improve the academic performance of children who are performing at Level I or II on either reading or mathematics end-of-grade tests in grades 3-8 and children who are performing at Level I or II on the writing tests in grades 4 and 7. A review of DPI's data shows that a majority of schools are meeting this expectation.

Small School Supplemental Funding (019)

Report on Expenditures

Total Allotment: \$27,956,443.00

| Expenditure Description | FY 2001 YTD | |
|--------------------------------------|---|-------------------------|
| | As of June 30, 2001 Including Installments | % of Total Allotment |
| Salary | | |
| Classified Principal/Headmaster | \$15,971.05 | 0.06% |
| Assistant Principal | \$528,098.15 | 1.89% |
| Other Administrative Assignments | \$134,095.94 | 0.48% |
| Teacher | \$7,407,730.19 | 26.50% |
| Instructional Support | \$435,943.83 | 1.56% |
| Teacher Assistant | \$2,147,463.91 | 7.68% |
| Tutor | \$150,060.23 | 0.54% |
| Clerical Personnel | \$1,584,868.60 | 5.67% |
| Salary - Other Assignments | \$3,188,217.84 | 11.40% |
| Total Salary: | \$15,592,449.74 | 55.77% |
| Other - Salary Related | | |
| Substitute Pay | \$390,928.05 | 1.40% |
| Supplementary Pay | \$404,433.27 | 1.45% |
| Longevity Pay | \$305.68 | 0.00% |
| Bonus Pay | \$30,147.71 | 0.11% |
| Overtime Pay | \$26,738.13 | 0.10% |
| Mentor Pay | \$5,225.00 | 0.02% |
| Matching Benefits | \$3,800,960.64 | 13.60% |
| Salary - Other Assignments | \$800,533.78 | 2.86% |
| Total Other - Salary Related: | \$5,459,272.26 | 19.53% |
| Non-Salary | | |
| Instructional Supplies | \$902,101.85 | 3.23% |
| Computer Software & Supplies | \$393,403.03 | 1.41% |
| Textbooks | \$75,335.23 | 0.27% |
| Library Books & Periodicals | \$85,305.67 | 0.31% |
| Audiovisual Supplies & Materials | \$11,363.26 | 0.04% |
| Equipment | \$546,256.01 | 1.95% |
| Computer Equipment | \$1,050,407.84 | 3.76% |
| Noncap Equipment/Computer Hardware | \$205,231.70 | 0.73% |
| Workshops | \$332,159.34 | 1.19% |
| Contracted Services | \$2,099,594.40 | 7.51% |
| Supplies & Materials | \$219,508.30 | 0.79% |
| Pupil Transportation | \$16,381.33 | 0.06% |
| Travel | \$22,932.66 | 0.08% |
| Other | \$929,085.25 | 3.32% |
| Total Non-Salary: | \$6,889,065.87 | 24.64% |
| GRAND TOTAL: | \$27,940,787.87 | 99.94% |
| UNEXPENDED: | \$15,655.13 | 0.06% |

SB 1005, Section 28.7(f) Local boards of education are encouraged to use at least twenty-five percent (20%) of the funds received to improve the academic performance of children who are performing at Level I or II on either reading or mathematics end-of-grade tests in grades 3-8 and children who are performing at Level I or II on the writing tests in grades 4 and 7. A review of DPI's data shows that a majority of schools are meeting this expectation.

Note: Expenditure reports by LEA are available upon request.
Information Analysis and Support Group
Division of School Business



Public Schools of North Carolina

North Carolina Department of Public Instruction

Calculation of Non-Supplant Regulation for Low Wealth/Small County Supplemental Funding FY 2001-02

| No. | LEA | FY 99-00 ADM | 2000 Local Appropriation To Schools | Local Appropriation Per ADM | Minimum Local Appropriation Per ADM @ 95% of Average | Evidence of Supplanting? |
|-----|----------------|--------------|---|--------------------------------|---|-----------------------------|
| 010 | Alamance Co. | 20,310 | \$19,520,879 | \$961.15 | \$869.92 | No |
| 020 | Alexander Co. | 5,378 | 3,700,000 | 687.99 | 526.27 | No |
| 030 | Alleghany Co. | 1,480 | 1,235,000 | 834.46 | 689.18 | No |
| 040 | Anson Co. | 4,526 | 3,053,145 | 674.58 | 607.46 | No |
| 050 | Ashe Co. | 3,269 | 2,900,000 | 887.12 | 619.76 | No |
| 060 | Avery Co. | 2,556 | 2,480,966 | 970.64 | 905.61 | No |
| 070 | Beaufort Co. | 7,455 | 6,993,117 | 938.04 | 813.27 | No |
| 080 | Bertie Co. | 3,902 | 1,708,544 | 437.86 | 403.35 | No |
| 090 | Bladen Co. | 5,820 | 4,446,061 | 763.93 | 692.14 | No |
| 100 | Brunswick Co. | 10,041 | 16,241,040 | 1,617.47 | 1,298.76 | No |
| 110 | Buncombe Co. | 29,414 | 37,765,972 | 1,283.95 | 1,126.56 | No |
| 120 | Burke Co. | 14,610 | 10,953,100 | 749.70 | 691.73 | No |
| 130 | Cabarrus Co. | 21,612 | 22,658,376 | 1,048.42 | 757.24 | No |
| 140 | Caldwell Co. | 12,385 | 10,761,907 | 868.95 | 745.91 | No |
| 150 | Camden Co. | 1,325 | 828,973 | 625.64 | 616.98 | No |
| 160 | Carteret Co. | 8,621 | 16,346,268 | 1,896.10 | 1,108.85 | No |
| 170 | Caswell Co. | 3,512 | 1,983,879 | 564.89 | 476.15 | No |
| 180 | Catawba Co. | 23,219 | 23,142,562 | 996.71 | 881.10 | No |
| 190 | Chatham Co. | 7,274 | 11,023,941 | 1,515.53 | 1,248.72 | No |
| 200 | Cherokee Co. | 3,567 | 2,477,433 | 694.54 | 504.06 | No |
| 210 | Chowan Co. | 2,582 | 2,629,725 | 1,018.48 | 822.94 | No |
| 220 | Clay Co. | 1,287 | 659,030 | 512.07 | 400.27 | No |
| 230 | Cleveland Co. | 17,186 | 14,312,594 | 832.81 | 787.44 | No |
| 240 | Columbus Co. | 10,238 | 6,123,900 | 598.15 | 526.93 | No |
| 250 | Craven Co. | 14,779 | 11,777,147 | 796.88 | 663.81 | No |
| 260 | Cumberland Co. | 51,413 | 50,983,742 | 991.65 | 742.49 | No |
| 270 | Currituck Co. | 3,213 | 5,260,010 | 1,637.10 | 1,443.08 | No |
| 280 | Dare Co. | 4,536 | 8,683,887 | 1,914.44 | 1,580.68 | No |
| 290 | Davidson Co. | 24,352 | 21,574,903 | 885.96 | 811.97 | No |
| 300 | Davie Co. | 5,517 | 5,677,100 | 1,029.02 | 895.04 | No |
| 310 | Duplin Co. | 8,568 | 4,814,554 | 561.92 | 468.71 | No |
| 320 | Durham Co. | 30,121 | 63,840,956 | 2,119.48 | 1,829.59 | No |
| 330 | Edgecombe Co. | 7,831 | 5,904,755 | 754.02 | 662.50 | No |
| 340 | Forsyth Co. | 44,446 | 73,685,713 | 1,657.87 | 1,562.65 | No |
| 350 | Franklin Co. | 7,455 | 6,300,000 | 845.07 | 675.99 | No |
| 360 | Gaston Co. | 30,581 | 27,219,393 | 890.08 | 759.02 | No |
| 370 | Gates Co. | 2,116 | 1,643,000 | 776.47 | 762.38 | No |
| 380 | Graham Co. | 1,252 | 454,843 | 363.29 | 322.10 | No |
| 390 | Granville Co. | 7,934 | 7,018,640 | 884.63 | 732.43 | No |
| 400 | Greene Co. | 2,895 | 1,676,069 | 578.95 | 513.99 | No |
| 410 | Guilford Co. | 62,354 | 103,898,121 | 1,666.26 | 1,452.80 | No |
| 420 | Halifax Co. | 10,515 | 7,871,198 | 748.57 | 664.20 | No |
| 430 | Harnett Co. | 16,025 | 9,119,336 | 569.07 | 422.09 | No |
| 440 | Haywood Co. | 7,654 | 8,743,777 | 1,142.38 | 972.41 | No |


Public Schools of North Carolina
North Carolina Department of Public Instruction
Calculation of Non-Supplant Regulation for Low Wealth/Small County Supplemental Funding FY 2001-02

| No. | LEA | FY 99-00 ADM | 2000 Local Appropriation To Schools | Local Appropriation Per ADM | Minimum Local Appropriation Per ADM @ 95% of Average | Evidence of Supplanting? |
|-----|------------------|--------------|---|--------------------------------|---|-----------------------------|
| 450 | Henderson Co. | 11,484 | 12,809,455 | 1,115.42 | 897.44 | No |
| 460 | Hertford Co. | 4,147 | 2,958,413 | 713.39 | 635.15 | No |
| 470 | Hoke Co. | 6,370 | 2,630,534 | 412.96 | 354.08 | No |
| 480 | Hyde Co. | 781 | 1,062,664 | 1,360.65 | 1,189.99 | No |
| 490 | Iredell Co. | 20,767 | 21,614,301 | 1,040.80 | 892.05 | No |
| 500 | Jackson Co. | 3,749 | 4,004,554 | 1,068.17 | 796.87 | No |
| 510 | Johnston Co. | 20,087 | 20,900,000 | 1,040.47 | 764.46 | No |
| 520 | Jones Co. | 1,569 | 765,528 | 487.91 | 439.35 | No |
| 530 | Lee Co. | 8,867 | 8,343,108 | 940.92 | 808.53 | No |
| 540 | Lenoir Co. | 10,576 | 8,606,108 | 813.74 | 719.57 | No |
| 550 | Lincoln Co. | 10,622 | 7,937,591 | 747.28 | 622.97 | No |
| 560 | Macon Co. | 4,004 | 4,013,035 | 1,002.26 | 785.64 | No |
| 570 | Madison Co. | 2,651 | 1,550,000 | 584.69 | 544.99 | No |
| 580 | Martin Co. | 4,991 | 4,793,921 | 960.51 | 862.06 | No |
| 590 | McDowell Co. | 6,500 | 4,844,880 | 745.37 | 653.91 | No |
| 600 | Mecklenburg Co. | 101,501 | 207,454,000 | 2,043.86 | 1,636.03 | No |
| 610 | Mitchell Co. | 2,416 | 1,314,403 | 544.04 | 511.42 | No |
| 620 | Montgomery Co. | 4,362 | 3,874,632 | 888.27 | 612.02 | No |
| 630 | Moore Co. | 11,182 | 14,096,941 | 1,260.68 | 995.10 | No |
| 640 | Nash Co. | 18,828 | 18,706,647 | 993.55 | 866.28 | No |
| 650 | New Hanover Co. | 21,503 | 39,474,481 | 1,835.77 | 1,352.15 | No |
| 660 | Northampton Co. | 3,825 | 2,503,000 | 654.38 | 605.42 | No |
| 670 | Onslow Co. | 21,478 | 14,675,000 | 683.26 | 558.75 | No |
| 680 | Orange Co. | 15,490 | 44,530,987 | 2,874.82 | 2,272.11 | No |
| 690 | Pamlico Co. | 2,146 | 1,502,200 | 700.00 | 563.45 | No |
| 700 | Pasquotank Co. | 6,258 | 5,492,422 | 877.66 | 740.23 | No |
| 710 | Pender Co. | 6,576 | 6,820,981 | 1,037.25 | 718.61 | No |
| 720 | Perquimans Co. | 1,895 | 1,307,012 | 689.72 | 589.54 | No |
| 730 | Person Co. | 5,888 | 5,965,409 | 1,013.15 | 861.77 | No |
| 740 | Pitt Co. | 20,151 | 18,837,249 | 934.80 | 783.49 | No |
| 750 | Polk Co. | 2,301 | 2,995,270 | 1,301.73 | 1,172.37 | No |
| 760 | Randolph Co. | 21,045 | 14,566,888 | 692.18 | 644.69 | No |
| 770 | Richmond Co. | 8,358 | 4,800,000 | 574.30 | 502.84 | No |
| 780 | Robeson Co. | 24,115 | 11,266,605 | 467.20 | 446.98 | No |
| 790 | Rockingham Co. | 14,731 | 12,531,614 | 850.70 | 749.05 | No |
| 800 | Rowan Co. | 21,025 | 22,128,719 | 1,052.50 | 777.02 | No |
| 810 | Rutherford Co. | 10,135 | 8,216,799 | 810.73 | 694.46 | No |
| 820 | Sampson Co. | 10,312 | 7,049,666 | 683.64 | 618.66 | No |
| 830 | Scotland Co. | 7,085 | 7,535,901 | 1,063.64 | 910.42 | No |
| 840 | Stanly Co. | 10,362 | 8,232,705 | 794.51 | 718.02 | No |
| 850 | Stokes Co. | 7,238 | 7,336,844 | 1,013.66 | 827.49 | No |
| 860 | Surry Co. | 11,541 | 12,014,299 | 1,041.01 | 886.13 | No |
| 870 | Swain Co. | 1,708 | 544,223 | 318.63 | 286.63 | No |
| 880 | Transylvania Co. | 4,124 | 4,818,085 | 1,168.30 | 995.42 | No |


Public Schools of North Carolina
North Carolina Department of Public Instruction
Calculation of Non-Supplant Regulation for Low Wealth/Small County Supplemental Funding FY 2001-02

| No. | LEA | FY 99-00 ADM | 2000 Local Appropriation To Schools | Local Appropriation Per ADM | Minimum Local Appropriation Per ADM @ 95% of Average | Evidence of Supplanting? |
|-------------|----------------|------------------|---|--------------------------------|---|-----------------------------|
| 890 | Tyrrell Co. | 792 | 582,852 | 735.92 | 695.83 | No |
| 900 | Union Co. | 21,616 | 18,574,763 | 859.31 | 762.93 | No |
| 910 | Vance Co. | 8,047 | 7,254,002 | 901.45 | 740.26 | No |
| 920 | Wake Co. | 97,065 | 147,233,842 | 1,516.86 | 1,232.56 | No |
| 930 | Warren Co. | 3,334 | 2,000,000 | 599.88 | 557.46 | No |
| 940 | Washington Co. | 2,504 | 1,368,000 | 546.33 | 462.87 | No |
| 950 | Watauga Co. | 4,826 | 5,650,011 | 1,170.74 | 935.49 | No |
| 960 | Wayne Co. | 19,692 | 13,086,215 | 664.54 | 611.60 | No |
| 970 | Wilkes Co. | 10,179 | 8,815,500 | 866.05 | 725.38 | No |
| 980 | Wilson Co. | 12,554 | 13,656,526 | 1,087.82 | 903.15 | No |
| 990 | Yadkin Co. | 5,838 | 4,700,000 | 805.07 | 637.10 | No |
| 995 | Yancey Co. | 2,553 | 1,736,450 | 680.16 | 603.97 | No |
| Unit Totals | | <u>1,268,870</u> | <u>\$1,492,178,791</u> | <u>\$ 1,175.99</u> | <u>\$ 977.12</u> | |

